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FY23 Funding Cycle APPLICATION INSTRUCTIONS

Welcome to the FY23 Community Preservation Act (CPA) application. We are looking forward to hearing your ideas for CPA projects and working with you along the way. Should you have any questions during the application process – including help with translation – please contact Roberta Cameron, the Community Preservation Act Manager. The CPA Manager can be reached at rcameron@somervillema.gov. Additional resources can be found at: www.somervillema.gov/cpa under the *Apply for CPA Funding* tab.

This packet contains instructions for completing the application process for the historic resources and open space/recreational land categories. The Somerville Affordable Housing Trust manages a separate application process for affordable housing project requests, as the housing arm of the Community Preservation Committee. You can learn more about the Trust on their website at: <https://www.somervillema.gov/departments/affordable-housing-trust-fund>. The Trust has a separate packet that includes all of the application materials for affordable housing projects.

Sign up for CPA News at www.somervillema.gov/cpa to receive updates on the FY23 deadlines.

The application packet includes:	Page
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2. Eligibility and Comparative Evaluation Criteria	7
3. Application Forms and Prompts	16

A separate document, the *FY23 Application Supplement*, contains sample agreements and restrictions.

FY2023 Timeline/ Key Dates	
June 24	Intent forms due by 12:30 pm.
May 27 th - July 29 th	(For Historic Preservation Projects) Schedule advisory review with the Historical Preservation Committee
August 1	Eligibility Determination Forms due by 4:30 PM
October 5	Submit Full Applications by 4:30 pm
November 16	Present application to CPC (Additional presentation meeting may be scheduled if needed)
October-November	CPC Reviews applications and collects public input
December 21	CPC evaluates applications and deliberates on grant recommendations.
January, 2023	CPC submits recommendations to Mayor for submittal to City Council; Council votes on CPC recommendations
Winter/ Spring 2023	Grant Agreements Executed

SECTION 1: APPLICATION INSTRUCTIONS AND REVIEW PROCESS

In this section you will find instructions for the CPA application process for open space/outdoor recreation and historic preservation projects. If you have questions or would like to see examples of past applications, you can visit www.somervillema.gov/cpa or contact the CPA Manager at rcameron@somervillema.gov

Can I apply for a CPA Grant?

- CPA can pay for projects that fit into the categories shown on the following chart. (A more detailed description of these categories is provided in Section 2.)
- Projects must provide a clear public benefit. Eligible applicants may include City of Somerville, organizations, other government entities, or private individuals.

Table 1, CPA Program Areas Summary				
	Open Space	Outdoor Recreation	Historic Resources	Community Housing
Acquisition				Contact Somerville Affordable Housing Trust
Creation				
Preservation				
Support				
Rehabilitation/ Restoration				

Step 1: Prepare

- Visit the City's Community Preservation Act website to learn more about the CPA and the CPC, and download application materials: www.somervillema.gov/CPA. All applications must be submitted following the instructions in this packet.
- Read the entire FY23 Application Instruction Packet and the FY23 Community Preservation Plan and review relevant City planning documents such as [SomerVision](#). Review of the CPA legislation MGL Ch. 44B is recommended.
- All proposed projects must be eligible for CPA funding according to the requirements set forth in the statute before further consideration can be given. Please contact the CPA Manager if you have questions about your project's eligibility.

New applicants are strongly encouraged to contact the CPA Manager with questions prior to beginning the application process. rcameron@somervillema.gov

Step 2: Identify Eligible Applicant/Submit Intent Form

At least one of the applicants or co-applicants for each project requesting CPA funding must fall into one of three categories:

- City of Somerville department or division
- Organization registered and in good standing in the Commonwealth of Massachusetts

- Individual or other organization proposing a CPA eligible project on property they own themselves

If you are interested in applying for CPA funding but do not fall into one of these categories, you will need to apply with a co-applicant that fits into one of these categories who will be able to manage the project finances. The Community Preservation Committee (CPC) requires all community members proposing a project on public land have the property owner as a co-applicant.

All applicants who are not City of Somerville departments or divisions should submit Intent Forms, which are due by 12:30 PM June 24, 2022. Intent Forms are used by CPA staff to ensure that applicants receive the coordination needed to meet all application requirements.

- Community organizations submitting proposals involving City-owned land or structures are required to submit an intent form by June 24 to establish a co-applicant relationship with the relevant City department for their project. The relevant City department will review your application. If the department opts to sign on as a co-applicant, they will work with you to develop the idea further, and submit it at a future funding round. The department may connect you with an existing effort on the property, or may decline to sign on as a co-applicant. Only applications that the City elects to join as a co-applicant can proceed to the project eligibility determination phase.
- Applicants for projects that do not involve City-owned land or assets who have not submitted Intent Forms by June 24 may still participate in the FY23 funding round, but they may not be able to receive CPA staff support to ensure that the applications are complete. Incomplete applications will not be considered by the CPC.

Step 3: Submit Eligibility Determination Form

Eligibility Determination Forms are due by 4:30 PM August 1, 2022. The form will be used to determine whether a project meets the minimum eligibility requirements described in Section 3. Forms are reviewed by staff to determine eligibility, and applicants will be notified in writing of the outcome of the eligibility determination. Applicants whose projects are deemed eligible for CPA funding will be invited to submit a **Full Application**.

The CPC will review project eligibility forms at its August meeting (scheduled for August 24) and will inform applicants as to whether their proposed project is eligible for CPA funding in the week following that meeting. The CPC reserves the right to notify applicants about their proposal's eligibility for CPA funding after the deadlines established above in the event the decision requires a legal opinion to definitively determine eligibility.

Please contact the CPA Manager with questions about the application forms and process. The CPA Manager will hold office hours by appointment the week of September 12 to review draft applications and provide guidance to applicants. Contact rcameron@somervillema.gov with questions or to schedule an appointment.

Step 4: Full Applications

Full applications are due by 4:30 PM October 5, 2022. Use the Submission Requirements Checklist to ensure all required materials are included in your application. Incomplete applications may be rejected. Please contact the CPA Manager by September 16 if you have questions about completing the application requirements.

- All forms must be entirely filled, and all narrative questions must be answered in detail.
- Required attachments must be submitted as a single PDF via email to rcameron@somervillema.gov. Alternatively, applicants may submit a USB drive or one unbound paper copy of the Full Application and attachments to

Community Preservation Act Manager
c/o Office of Strategic Planning and Community Development
City of Somerville
93 Highland Ave.
Somerville, MA 02143

- A clearly defined scope of work is required.
- Applicants must obtain at least two (2) and preferably three (3) professionally prepared estimates on vendor letterhead for project costs. If two estimates are not available, an explanation of why two estimates are not being submitted is required, and a “ballpark” cost estimate should be provided instead, with a detailed explanation of how the budget was derived.
- CPA funding requests should include all foreseeable expenses as well as a contingency where applicable, to ensure that projects can be completed with the amount of the grant. Only expenses directly associated with an eligible CPA activity and not covered under an existing funding source may be included in a project budget.

Application Tips/Recommendations:

- Familiarize yourself with the Evaluation Criteria shown in Section 2, as well as the CPA Plan and other relevant City Plans. Reflect the stated CPC and City goals in your narrative responses.
- Graphics such as maps, photos, visual aids, and other supplemental information are encouraged.
- If available, provide documentation of assessments, public meetings, surveys, petitions, letters of support, etc., demonstrating how the project goals were established, why the project is a priority, and/or how the project benefits the community.

Step 5: CPC Evaluation of Applications & Public Comment

1. **Application review.** The CPC will review all project applications and evaluate them against the priorities established in its Community Preservation Plan. The CPC may request additional information from the applicant during this process and may request that the applicant attend a CPC meeting in addition to the public comment session to respond to questions in person.
2. **Public comment session.** The CPC will also hold at least one session to gather public feedback on proposed projects. Applicants will be informed of the details of the meeting in advance and

will be invited to give a brief presentation to the public on their proposed project and to respond to questions from the CPC. Visual aids such as PowerPoint presentations are recommended but not required, and may be submitted in advance to the CPA Manager. The meeting is tentatively scheduled for **November 16**.

3. **Notification.** The CPC will notify applicants after it votes about which projects to recommend to the City Council for funding. The CPC will strive to notify applicants by the end of January, but the timeline will depend on the number and complexity of project proposals received.

4. **Recommendation.** The CPC may recommend:

- a. A project as proposed by the applicant
- b. A modified version of the project (the project as proposed by the applicant with acceptable conditions voted on by the CPC)
- c. Partial funding or funding for only a portion or phase of the proposed project.

The CPC reserves the right to attach conditions, such as preservation restrictions or accessibility requirements, to its recommendations and to include any specifications the CPC deems appropriate to ensure CPA compliance and project performance. The CPA Manager will share the funding recommendation of the CPC with the applicant to ensure that the conditions are acceptable. Any substantial changes requested to the funding recommendation will need to be approved by the CPC.

Step 6: Mayoral Submission and City Council Vote

The CPC will share its recommendations with the Mayor, who will then submit them to the City Council. Projects must receive approval from the City Council to receive funding from Somerville's Community Preservation Act Fund. The Council has the authority to approve a CPC-recommended project, approve the project at a reduced funding level, or reject the project. Should the Council vote to reduce 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 Council, as established in the [Somerville Community Preservation Committee Ordinance](#). The Council cannot appropriate CPA funds or increase the amount of funding for a project without prior CPC recommendation.

Step 7: Grant Agreement, Disbursement, and Monitoring of Funds

Non-City Organizations:

The CPC, acting through the City, will execute a grant agreement with each non-City organization that is awarded CPA funds ("Grantee"). The grant agreement will govern the use and disbursement of the funds. Details will be tailored to each project but will include the Standard CPA Grant Agreement General Conditions and additional attachments shown in the Application Supplement. Please review the sample forms and preservation or conservation restriction if applicable, as funds will not be disbursed without an executed Grant Agreement that includes all of the required attachments.

The City's CPA Manager will monitor project progress and compliance and will coordinate disbursement of CPA Funds according to the CPA Funds Disbursement Guidelines, also included in the Application Supplement. The City can establish a phased disbursement system with the Grantee to forward-fund

project phases with the exception of the final 10% of the project funds, which will be released upon completion of the project.

City Departments:

The CPC will execute a Memorandum of Agreement (MOA) with each City department that is awarded CPA funds. Identifying the project description, scope, budget, and project manager, the MOA will govern Departments' use of the funds.

Important: Additional Application Guidelines

Please review the following guidelines that apply to the CPA program. Contact the CPA Manager with any questions.

1. The CPC encourages projects that combine two or more of the CPA focus areas (blended projects). Applicants with blended projects that include a community housing component must apply to the Trust for funding for the community housing component and use the process outlined herein to apply for funding for the historic/open space portion of their project.
2. If submitting multiple applications, the application should indicate a priority ranking of the projects. Especially in the case of larger projects, applicants should also indicate whether their project can be broken into phases, requesting a smaller portion of funds over multiple years.
3. **Off-Cycle Applications:** Under extraordinary circumstances, the CPC may vote to accept applications that require consideration outside of the normal funding cycle due to market opportunities or external deadlines. Applicants who believe their circumstances call for such unusual action should email the Community Preservation Act Manager, with a description of their proposed project and why it merits emergency funding. This will be shared with the CPC Chair who will determine if the project will be invited to apply for off-cycle funding.
4. All property acquired with CPA funds must be perpetually preserved for the purpose for which it was acquired, using a Preservation Restriction, Conservation Restriction, or Affordability Restriction. These restrictions will be recorded at the Registry of Deeds.
5. It is the practice of the CPC to require all applicants who receive funding for historic preservation or open space/recreation to place the property under a permanent deed restriction, if one does not already exist, as a condition of receiving CPA funding. Where projects entail property that is privately-owned an access agreement or easement may be required to ensure that the public can enjoy the improvements that have been funded. Funds will not be distributed until a grant recipient has executed any required restrictions, and obtained assents from entities that hold mortgages on the property. For more information, review the [Community Preservation Coalition's article on permanent restrictions](#).
6. The state's procurement laws may apply to your project, so it is important to review the [Community Preservation Coalition's article on procurement and CPA projects](#).
7. All application materials will be posted on the City's CPA website for public review.

SECTION 2: ELIGIBILITY AND COMPARATIVE EVALUATION CRITERIA

Eligibility is defined by M.G.L. c. 44 and other applicable state laws. Comparative Criteria are developed by the Somerville CPC. Please refer to the 2023 Community Preservation Plan Update for a description of Somerville's CPA priorities.

- Projects will be recommended for funding following an evaluation of the merits of both the proposal and its proposed costs. When there are multiple project proposals submitted in the same funding cycle, projects will be compared with one another to determine which projects, if any, will earn CPC recommendation. All recommendations and actual awards are subject to the availability of CPA funds and approval by the City Council.
- Proposals that address more than one CPA eligible purpose; leverage additional funding, involve collaboration of more than one agency, organizations, board or committee; or otherwise show a comprehensive, community centered, multidisciplinary approach, will be given highest consideration.
- Applications that present a thorough description of the project with as many details as possible, have significant support from other community organizations or City Boards/Committees, and present a comprehensive, well described and reasonable budget will have the greatest likelihood of success. Budget requests must be thorough because there will not be an opportunity to change the budget amount after the CPC makes its funding recommendation. Substantive coordination between the Applicant and any City departments, other public entities, or stakeholders who may be involved in the implementation of the project will help to ensure a complete application.
- When a proposal meets the statutory eligibility requirements, the CPC may rate projects using the criteria outlined in Table 1. The final decision of the CPC on a project is based on the vote of the committee, and such rating criteria are a guide for the committee in its decision making:
- Additional criteria will be taken into consideration on a case-by-case basis, including project feasibility/readiness to proceed, lifetime cost or environmental impact, and the amount of funding requested relative to the CPA funds available.

Related Planning Documents:

- FY23 Community Preservation Plan
- [SomerVision](#)
- [Open Space and Recreation Plan \(2016-2023\)](#)
- [Somerville Climate Forward Plan](#)
- [Urban Forest Management Plan](#)
- [Municipal Building Master Plan](#)
- [Somerville Housing Needs Assessment 2021](#)

TABLE 1: Community Preservation Act Funding Allowable Uses

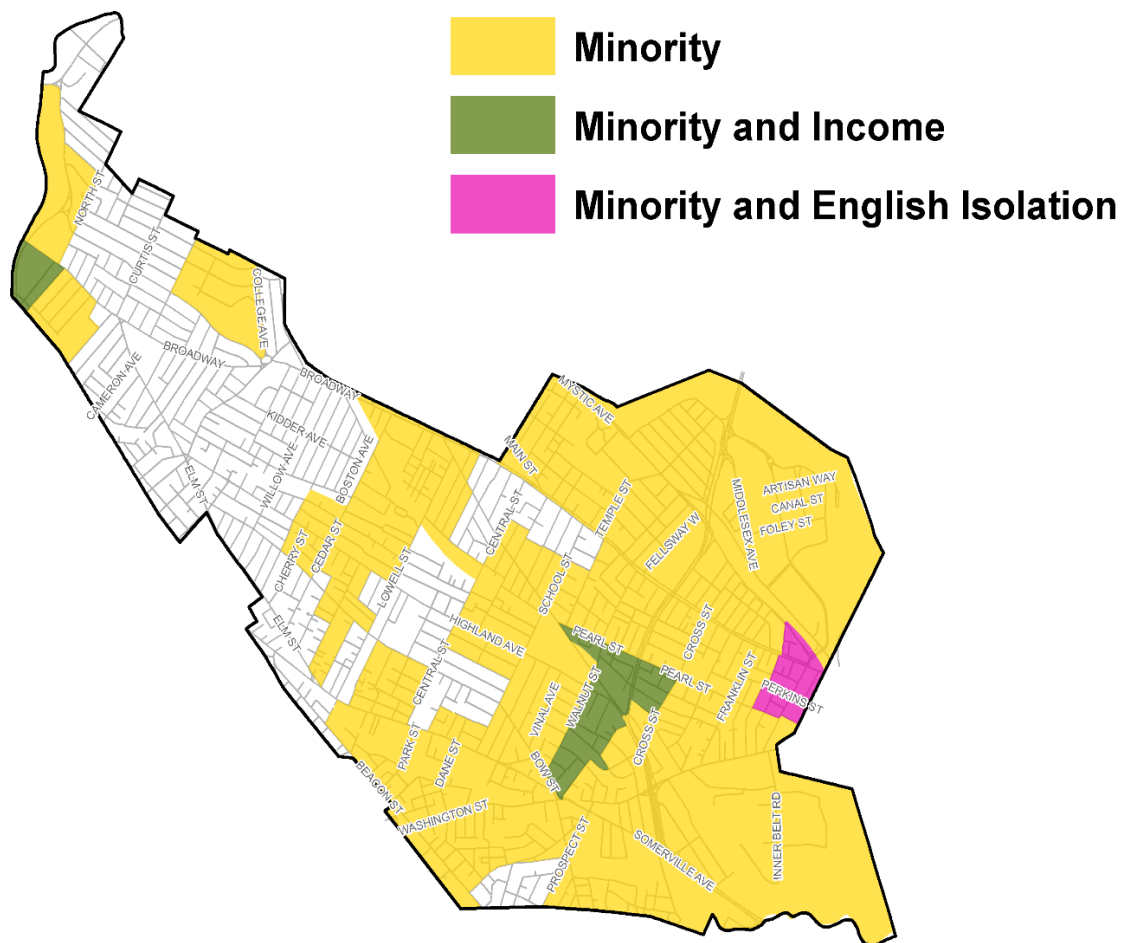
	OPEN SPACE	OUTDOOR RECREATION	HISTORIC RESOURCES	COMMUNITY HOUSING
	Land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and salt water marshes and other wetlands, ocean, river, stream, lake and pond frontage, 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 local historic preservation 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. <i>Seideman v. City of Newton</i> , 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	YES, if acquired or created with CPA funds	YES	YES	Yes, if acquired or created with CPA funds

Table 2: Comparative Evaluation Criteria

Rubric	Excellent = 3 pts	Good = 2 pts	Satisfactory = 1 pts	Poor = 0 pts
Narrative				
Complete application	All answers are provided and all required documentation provided	One or more questions is inadequately addressed.	Some questions have not been answered and/or some documents missing.	Multiple documents or questions missing (application may be rejected)
Alignment with planning goals and objectives	Strong alignment with specific Somervision, OSRP, or CPA goals and priorities	General alignment with Somervision, OSRP, or CPC goals and priorities	Alignment with Somervision, OSRP, or CPC goals and priorities is weak	There is no alignment with Somervision, OSRP, or CPC goals and priorities
Support of outside groups, relevant city boards, and public	Multiple letters of support, positive public comment, and project planning involved broad public process	Multiple letters of support and positive public comment but reflects limited public input	At least one letter of support. Public comments are mixed but on balance supportive	No letter(s) of support. More public comments opposing the project
Project type	Project clearly restores, preserves or repairs existing resources	New development project		
Benefit to the City	Strong, immediate benefit to the city that improves quality of life, tax base	Benefit likely to be realized in the future	Benefit may not be realized by many people	The argument for benefit is not convincing
Equitable social impact (See EJ Map)	Project located in an Environmental Justice neighborhood and addresses a gap in resources available to less advantaged communities	Project is located in an Environmental Justice neighborhood	Project is not located in an Environmental Justice Neighborhood but will directly benefit disadvantaged communities	Project is not located in an Environmental Justice Neighborhood and does not benefit disadvantaged communities
Budget/Scope				
Due Diligence	Applicant has done exceptional due diligence to obtain estimates and provide a detailed explanation of the budget, scope, and timeline	Due diligence is clear and documentation is adequate	Due diligence information provided is not clear or is lacking detail	Budget funds are not backed up by any credible detail or due diligence is not documented
Project Feasibility	The applicant demonstrates capacity, and has obtained the approvals, funding, or other resources so that with CPA funding the project is ready to proceed	Resources, funding, and approvals are likely to be put in place after or as a result of CPC funding commitment	It is not clear whether the applicant will be able to obtain the resources and approvals needed to complete the project	It appears unlikely that the applicant has the resources or will be able to obtain the funding and approvals necessary to complete the project
Coordination	Where applicable, application shows substantive coordination and planning involving City departments or other entities that will have involvement in the execution of the project	Applicant notifies all City departments or other entities that will have involvement in the project but does not show evidence of coordination	Applicant identifies applicable City departments or entities that will have involvement in the project but does not communicate with them	Applicant does not identify applicable City departments or entities that will have involvement in the project
Non-burden to the city	The project will very likely have no burden on the city	There may be limited burden to the city	Risk of burden to the city	Considerable burden to city

Rubric	Excellent = 3 pts	Good = 2 pts	Satisfactory = 1 pts	Poor = 0 pts
Sources of funding	CPA fills a partial funding gap or provides a local funding match that would not otherwise be available, enabling a project which leverages funds from other sources	CPA funds enable a project for which other funding sources are not available	CPA funds contribute toward a project for which other sources of funds are available and which utilizes funds from at least one other source	CPA is the sole source of funding for a project for which other sources of funds may be available
Other: Additional criteria will be taken into consideration on a case-by-case basis.				

Massachusetts 2020 Environmental Justice Populations



"Environmental Justice Neighborhoods" are defined as neighborhoods that meet one or more of the following criteria: (1) the annual median household income is not more than 65 percent of the statewide annual median household income; (2) minorities comprise 40 percent or more of the population; (3) 25 percent or more of households lack English language proficiency, or (4) minorities comprise 25 percent or more of the population and the annual median household income of the City in which the neighborhood is located does not exceed 50 percent of the statewide annual median income.

Projects Proposed on Public Property

Proposing Community Projects on Public Property

The Community Preservation Committee requires that the City of Somerville is a co-applicant on all projects proposed on City property, including schoolyards and City leased property such as the Community Path. A representative from the relevant City department must sign onto the project's Eligibility Determination Form to confirm the City is a co-applicant.

It is up to the discretion of the relevant City department to agree to be a co-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 and planning documents such as SomerVision and the Open Space and Recreation Plan, connections with already planned work, funding availability, and staff availability to serve as project partners. Please contact the relevant department as early in your idea generation process as possible. At a minimum, applicants must submit an *Intent Form*. For FY23, these forms are due **June 24 at 12:30 p.m.** Sign up for CPA News at www.somervillema.gov/cpa to receive updates on the FY23 deadlines.

The Community Preservation Committee also requires the relevant state institution sign on as an applicant for any projects on state land. If you are considering proposing a project on state owned land, please contact the relevant authority. For example, for Community Path proposals the relevant state entity is the MBTA. A letter from the relevant governmental body confirming they are a co-applicant on the project must be submitted along with the Eligibility Determination Form. If you have a question about who owns the land or need assistance in contacting the relevant state officials, please contact the CPA Manager at rcameron@somervillema.gov or 617-625-6600 x2539.

Procurement Requirements for All Projects on Public Property

The Community Preservation Act requires that 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.

Accessibility Requirements for All Projects Intended for Public Use

Under the Americans with Disabilities Act (ADA), the City is required to operate all of its activities, services and programs so that, “when viewed in their entirety, they are readily accessible to and usable by qualified individuals with disabilities.”

Any project intended for the public’s use that is built on City property, any project built with City funds, or any project where the City is a co-applicant must comply with state and federal building codes regulating access for individuals with disabilities including the 2010 ADA Standards for Accessible Designs (28 CFR §35) by the United States Department of Justice, and the Massachusetts Architectural Access Board (MAAB) Regulations (See 521 C.M.R.), or the latest promulgated state and/or federal regulations. The resulting construction must meet all ADA/MAAB requirements and must provide equal access to individuals with disabilities.

Any construction, reconstruction, remodeling, alteration, or change of use of a building or facility that is open to the public will likely trigger this compliance obligation. Further, all new construction must fully comply. The City and the State’s building inspectors must and will enforce the MAAB regulations which are outlined in a “specialized” section of the Massachusetts Building Code (see 780 C.M.R.).

Application of the ADA Standards is not required where it would be “technically infeasible.” Technical infeasibility is defined as having “little likelihood of being accomplished because existing structural conditions would require removing or altering a load-bearing member which is an essential part of the structural frame; or because other existing physical or site constraints prohibit modification or addition of elements, spaces, or features which are in full and strict compliance with the minimum requirements for new construction and which are necessary to provide accessibility.” If compliance is technically infeasible, the alteration must provide accessibility to the maximum extent feasible.

Please confer with your design professional or architect on whether to seek a variance from the MAAB for technical reasons. There is no procedure for seeking variances under the ADA. However, ADA Title II has some exemptions for inaccessible buildings constructed before the law went into effect (i.e., for historic resource projects). For questions or additional information, please contact the CPA Manager at rcameron@somervillema.gov.

Historic Preservation Project Eligibility Requirements

Eligible Historic Assets

The Community Preservation Act defines a historic resource as “a building, structure, vessel, real property, document or artifact that is listed on the state register of historic places or has been determined by the local historic preservation commission to be significant in the history, archeology, architecture or culture of a city or town.” If you are unsure whether your property is on the State Register of Historic Places, please see the [Massachusetts Cultural Resource Information System](#); 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 Somerville Historic Preservation Commission (HPC) for a determination of significance.

Private homes that are in Local Historic Districts may be eligible to apply for funding through the City of Somerville Office of Strategic Planning and Community Development, Planning Division’s Local Historic District Property Owner’s Small Grants Fund.

To receive a determination of significance from the HPC, complete all sections of the FY23 [Eligibility Determination Form](#) and submit to the CPA Manager at rcameron@somervillema.gov. The CPA Manager will review the form for completeness and forward it to the City’s historic preservation staff. You do not need to receive a determination of significance prior to CPC review of your Eligibility Determination Form; however the CPC cannot recommend funding without confirming that the project addresses an eligible historic resource.

If your building is not already a designated historic site or has never been surveyed, you will likely be asked by the HPC to submit “explanation of significance.” HPC Guidelines for determining historic significance may be found here. If you need to identify a preservation professional to assist you, you can find contact information for experts at www.preservationmass.org/preservation-directory.

Compliance with the U.S. Secretary of the Interiors Standards for Rehabilitation

The CPA legislation requires that all CPA historic resources projects comply with the [U.S. Secretary of the Interior’s Standards for Rehabilitation](#). Applicants are required to meet with the HPC for an advisory review prior to submitting their full applications to ensure that the proposed scope of historic preservation improvements is in compliance with the Secretary of Interior Standards and is eligible for CPA funding.

It is strongly recommended that a condition assessment be obtained from a professional with historic preservation expertise before seeking funding for a historic rehabilitation project. Contractors proposed for historic resource projects should have experience completing preservation projects using these standards. This experience should be detailed in the narrative section of your application.

Guidelines for a Determination of Historic Significance

For Historic Resource Projects Funded through the Community Preservation Act

Adopted August 19, 2014

To be determined eligible for Community Preservation Act (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 Somerville by the Historic Preservation Commission (HPC). The CPA defines a historic resource as a building, structure, vessel, real property, document or artifact. The HPC has established two processes and sets of guidelines for making significance determinations: one for buildings and structures, which have traditionally been under the purview of the HPC, and one for vessels, real property, documents, and artifacts.

Buildings and Structures

Process: Staff will recommend a significance determination to the HPC using the guidelines below, and the HPC will vote on a final determination.

Guidelines: The HPC will determine the significance for buildings and structures based on: 1) construction date; 2) cultural or historic association; 3) architectural/design quality; and 4) integrity.

1. Date of Construction

The historic resource must be at least 50 years old.

2. Cultural or Historic Association

The historic resource must either:

- a. Be the site of an important historic event;
- b. Be identified with a person or group of persons who have impacted the community; or
- c. Exemplify the cultural, economic, industrial, social, or political heritage of the City. This type of association is often related to historic integrity; refer to item 4.

3. Architectural/Design Quality

The historic resource must either:

- a. Embody distinctive characteristics of a type, period, or method of construction;
- b. Represent the work of a master craftsman, architect, or builder;
- c. Possess high artistic values;
- d. Represent a distinguishable entity whose components may lack individual distinction; or
- e. Represent an established or familiar visible feature of the neighborhood or City due to its singular characteristics or landscape.

4. Integrity

The National Park Service defines historic integrity as the ability for a historic resource to convey significance. A historic resource should possess sufficient integrity to convey, represent, or contain the values and qualities for which it is judged significant.

Vessels*, Real property**, Documents, and Artifacts

**The Community Preservation Coalition has stated that, in the context of the CPA, a vessel refers to a ship or large boat.*

***The CPA legislation defines real property as "land, buildings, appurtenant structures and fixtures attached to buildings or land, including, where applicable, real property interests."*

Process: The HPC recommends that applicants submit an "Explanation of Significance" written by a professional in the field associated with the resource type and a brief statement of the professional's credentials and/or expertise. Staff will review this explanation, and the extent to which it satisfies the guidelines below, and recommend a significance determination to the HPC. The HPC will then vote on a final determination.

Guidelines: The HPC recommends the explanation of significance address: 1) level of completeness; 2) the historic scope that is conveyed through the object or record; and 3) integrity.

1. Level of Completeness

Typically, this pertains to completeness of records, but can also apply to other resources if they are composed of multiple pieces or materials.

2. Historic Scope

The resource must convey the scope of history with which it is associated. The scope of history represented may be identified by the cultural association or design quality. The resource may:

- a. Illustrate the site of an important historic event;
- b. Identify a person or group of persons who have impacted the community;
- c. Exemplify the cultural, economic, industrial, social, or political heritage of the City;
- d. Embody distinctive characteristics of a type, period, or method of creation;
- e. Represent the work of a master craftsman, artist, etc.
- f. Possess high artistic values; or
- g. Be used to inform an area of scholarship.

3. Integrity

The National Park Service defines historic integrity as the ability for a historic resource to convey significance. A historic resource should possess sufficient integrity to convey, represent, or contain the values and qualities for which it is judged significant.

For records, the Society of American Archivists defines integrity as the principle that a body of records resulting from the same activity must be preserved as a group, without division, separation, or addition, to protect the evidential and informational value that can be discerned from its context.

SECTION 3: APPLICATION FORMS AND PROMPTS

Following are all of the forms that applicants need to submit as part of their FY23 application for Community Preservation Act Funds. The forms are provided in this packet to assist applicants in the preparation of their materials, however all application forms should be submitted using the electronic format using the following links:

[FY23 CPA Intent Form](#)

[FY23 CPA Eligibility Determination Form](#) and Signature Page (Page 21 of this packet)

[FY23 CPA Full Application](#) and Budget Supplementary Form (Page 25 of this packet)

Signature pages and attachments must be submitted electronically via email to rcameron@somervillema.gov or via a USB drive. All attachments should be assembled and submitted as a single PDF file.

Alternatively, attachments may be submitted via a single unbound paper copy. Applicants may use the online forms and submit attachments via paper, or they may fill out the printed forms and submit these in hard copy together with attachments.

USB drives or hard copy applications may be mailed or delivered to:

Community Preservation Act Manager
c/o Office of Strategic Planning and Community Development
City of Somerville
93 Highland Ave.
Somerville, MA 02114

Should you have any questions during the application process, including if you need language support, please contact Roberta Cameron, the Community Preservation Act Manager. The CPA Manager can be reached at rcameron@somervillema.gov. Please contact the CPA Manager by September 16 with questions about completing the FY23 Full Application.

FY23 CPA Funding Cycle

Intent Form for Non-City of Somerville Applicants and Community Proposed Projects on City Land

All applicants who are non-City of Somerville Departments or Divisions should submit this form which will be used administratively to coordinate staff support and approvals that may be needed to complete the application process. The CPA Manager will work with applicants to identify the support that may be needed for an application, such as to schedule an advisory review with the Historic Preservation Commission, to match projects with an appropriate City department if they entail City of Somerville property, or to coordinate a feasibility study, conditions assessment, or similar analysis. The CPC may elect to fund such analyses or feasibility studies, or they may be carried out independently by the applicant. To be paid for with CPA funds, studies must support potential CPA-eligible projects and must be approved by the CPC.

- All Historic Preservation projects require advisory review by the Historic Preservation Commission.
- A conditions assessment may be needed to facilitate a sufficiently detailed project scope and accurate estimates from qualified contractors.
- The Somerville Community Preservation Committee requires the property owner of public lands be a co-applicant on all projects for Community Preservation Act (CPA) funding. To propose an idea for a CPA funded project on City of Somerville owned land, submit this form to the CPA Manager. The Manager will help match you with the appropriate City department who may opt to sign on as a co-applicant, work with you to develop the idea further for a future funding round, connect you with an existing effort on the property, or decline to sign on as a co-applicant.
- This form can also be used to request a feasibility study be conducted for your proposed project idea- both for projects on City land and for land that is privately owned. The City does not need to be a co-applicant on feasibility study projects. Feasibility studies are used to determine the likelihood of a project's success, strategies for increasing the likelihood of success, and to clarify alignment with Community Preservation Committee guidelines and goals. If selected, the CPA Manager will make arrangements for the study to be conducted. Feasibility studies may include public processes to determine the acceptability of the project to the community, surveys, costing, and technical advice from relevant experts on strategies to ensure the success of the project.

Non-City Applicants who do not submit an Intent Form by June 24 may still participate in the FY23 funding round, but will not be eligible for CPA funded studies or to partner with the City for projects entailing City-owned property.

CPA INTENT FORM

Submit the [Intent Form](#) using the link provided by 12:30 PM on Friday, June 24.

PROJECT NAME: _____

PROJECT LOCATION: _____

PROPERTY OWNER: _____

APPLICANT(S) NAME / ORGANIZATION: _____

CONTACT PERSON: _____

MAILING ADDRESS: _____

PHONE: _____

EMAIL: _____

Please indicate (X) all categories that apply to this project (at least one). For more detailed information on these categories, refer to the "Community Preservation Act Funding Allowable Uses" chart in Section 2 of the Application Instructions.

Interested in collaborating with local artist on your project?

Yes _____ No _____

Not Sure _____

	Open Space	Outdoor Recreation	Historic Resources	Community Housing (blended projects only)
Acquisition				
Creation				
Preservation				
Support				
Rehabilitation/ Restoration				

PROJECT SUMMARY (Please provide a brief description of the proposed project):

PROJECT STATUS: (What community need will the proposed project address and what level of planning has already been undertaken to inform the proposed project, including stakeholders engaged to date?):

QUESTIONS AND BARRIERS TO IMPLEMENTATION (What questions do you think still need to be answered to help the Community Preservation Committee assess the merits of this project? What barriers to implementation do you anticipate for the project and how can these be overcome?):

CPA ELIGIBILITY DETERMINATION FORM

Submit the [Eligibility Determination Form](#) using the link provided by 4:30 PM on Monday, August 1.

PROJECT NAME: _____

PROJECT LOCATION: _____

APPLICANT(S) NAME / ORGANIZATION: _____

CONTACT PERSON: _____

MAILING ADDRESS: _____

PHONE: _____ EMAIL: _____

Approximate amount of funds to be requested _____

(Please provide "ballpark" estimate – Contractor/vendor estimates not required at this stage.)

Interested in collaborating with local artist on your project?

Yes _____ No _____

Please indicate (X) all categories that apply to this project (at least one). For more detailed information on these categories, refer to the "Community Preservation Act Funding Allowable Uses" chart in Section 2 of the Application Instructions.

	Open Space	Outdoor Recreation	Historic Resources	Community Housing (blended projects only)
Acquisition				
Creation				
Preservation				
Support				
Rehabilitation/ Restoration				

PROPERTY OWNERSHIP:

Legal Property Owner of Record (if applicable): _____

Is the owner the applicant? Yes _____ No _____

If No, does the applicant have site control or written consent of the property owner to submit an application? City of Somerville must be co-applicant on all projects on City property.

Yes _____ (Attach documentation: owner's signature as co-applicant or letter of consent)

No _____ (Project will be deemed ineligible for this applicant)

PERMANENT PROTECTION:

Is the property currently protected under a deed restriction, Article 97, or other form of permanent protection? Yes _____ No _____ If yes, please attach documentation.

FOR HISTORIC RESOURCES PROJECTS:

Is the resource in a Local Historic District and/or listed on the State Register of Historic Places? (you can check designation at mhc-macris.net) Yes _____ No _____

If no, has the Somerville Historic Preservation Commission made a determination that the resource is significant? Yes _____ No _____ If yes, please attach vote of HPC.

PROJECT SUMMARY (Please provide a brief description of the proposed project):

PROJECT STATUS: (What community need is this trying to address and what level of planning has already been undertaken to inform the proposed project, including stakeholders engaged to date?):

ACKNOWLEDGEMENT OF GRANT AGREEMENT REQUIREMENTS AND CONDITIONS

The FY23 Application Supplement provides sample forms and specifications which will be required of all projects which receive CPA grants before funds will be disbursed. Please complete the following checklist to acknowledge that you have reviewed this material and consent to sign these forms and agree to CPA conditions if your grant is approved.

CPA Grant Agreement

- ☐ Grant Agreement General Conditions
- ☐ Disbursement Guidelines
- ☐ ADA Compliance Acknowledgement

City of Somerville Standard Contract Forms

(Note that if an applicant is an individual, some of the contract forms listed below will not apply.)

- ☐ General Grant Agreement
- ☐ Certificate of Authority
- ☐ Evidence of Insurance
- ☐ Certificate of Good Standing (Massachusetts and Somerville)
- ☐ Side Guard Ordinance Acknowledgement
- ☐ Grant/Trust Disclosure Form
- ☐ Tax Exempt Form
- ☐ Campaign Contribution Disclosure
- ☐ Somerville Living Wage Ordinance Acknowledgement

Sample Restrictions

- ☐ Preservation Restriction
- ☐ Conservation Restriction
- ☐ Public Access Agreement



KATJANA BALLANTYNE,
MAYOR

**CITY OF SOMERVILLE, MASSACHUSETTS
COMMUNITY PRESERVATION COMMITTEE**



**FY23 FUNDING CYCLE
ELIGIBILITY DETERMINATION SIGNATURE PAGE**

PROJECT NAME: _____

APPLICANT (print name and title): _____

APPLICANT (Signature): _____

CO-APPLICANT (print name and title): _____

CO-APPLICANT (Signature): _____

If applicant or co-applicant is a City department or division, identify the PROJECT MANAGER
(print name, title, and department):

CPA FULL APPLICATION FORM

Submit the [Full Application Form](#) using the link provided by 4:30 PM on Wednesday, October 5.

1. PROJECT INFORMATION

PROJECT NAME: _____

PROJECT LOCATION: _____

CPA CATEGORY: Please Indicate all categories that apply to this project

Open Space/Recreation _____ Historic Preservation _____ Community Housing _____

CPA FUNDING REQUEST: _____ TOTAL BUDGET FOR PROJECT: _____

2. APPLICANT INFORMATION

APPLICANT(S) NAME / ORGANIZATION: _____

CO-APPLICANT(S) NAME / ORGANIZATION: _____

CONTACT PERSON: _____

MAILING ADDRESS: _____

PHONE: _____ EMAIL: _____

3. Narrative Prompts

Please respond thoroughly to each of the questions below. It is recommended that you draft your responses to the narrative prompts and then copy them into the form when you are ready to submit it. (Each "bullet" below represents a field on the form.)

1. Project Description

- Description: Describe the project, including the project location and the property involved.
- Purpose: Why is this project needed? How does it preserve and enhance the character of Somerville? How does the project benefit the public? What population(s) will it serve? Has there been a public process, capital improvement plan, or site evaluation to document the needs or goals for this project? Is there community support for the project?
- CPA Objectives: How does the project meet the general and category-specific priorities outlined in the Community Preservation Plan, including how the project incorporates sustainable practices and design?

2. Financial

- Project Scope: Provide a detailed description of the tasks that will be carried out using CPA funds. If the project has multiple funding sources, describe the tasks that will be carried out with non-CPA funds as well.
- Cost Estimate: How was the total CPA funding request determined? Please attach documentation, including CPA Budget form and any cost estimates obtained from vendors. Please attach a completed Budget Summary Form.
- Funding Sources: Describe all additional funding and/or in-kind contributions, donations, or volunteer labor that will contribute to completion of the project. Describe other grants to which you have the intention of applying to supplement CPA funds, as well as any

unsuccessful attempts to secure outside funding. Also describe any cost-saving measures to be implemented.

- Anticipated Future Funding: How will the project be affected if it does not receive funding from the CPA or other anticipated funding sources in this annual funding round? Can the project be delayed, reduced in scale or phased over multiple years? Do you anticipate that the project will require CPA funding over multiple years? If so, please provide a ballpark estimate of the funding needed to complete the entire project. (The CPC does not commit to funding projects over multiple years. If multiple years of funding is necessary, the applicant will need to submit a new application for funding each year).

3. Project Management

- Applicant Description: Describe the applicant. Are they public, private non-profit, private for-profit, an individual, a partnership, or another type of entity? What is their history and background? Provide any additional relevant information. Demonstrate that the applicant has successfully completed projects of similar type and scale or has the ability to complete the project as proposed. Note if the applicant has previously received CPA funds and if so, a concise summary of the impact of the previous CPA project.
- Project Coordination: Identify and describe the roles of all known participants, including the project manager. If a community organization is applying with a government entity as a co-applicant, describe how the two organizations will work together, how finances will be managed, and how the work will be continued after the conclusion of CPA funding. Describe any ongoing maintenance and programming required and who will be responsible for it.
- Timeline: When will the project ideally begin, and how long do you anticipate it will take to complete? Please indicate if a specific timeline is required either for the commitment of funds or for completion of the project.

4. Feasibility and Compliance

- Project Feasibility: List and explain all further actions or steps that will be 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, subordinated agreements, and any known or potential barriers or impediments to project implementation. Describe the status for any approvals or variances that have been identified. Describe any other known or potential barriers to the successful on-time commencement and completion of the project.
- Compliance with Standards: Describe how the project will comply with [Americans with Disabilities Act](#)/MAAB regulations, and for historic preservation projects, how the project will comply with the [U.S. Secretary of the Interior's Standards for Rehabilitation](#), as required by the CPA Legislation. Describe how the applicant will ensure compliance with these standards as the project is ongoing. Has the project been subject to an Advisory Review by the local Historical Preservation Commission and received all their required approvals? (Attach letter of approval.)
- Required Restrictions/Public Access: Please identify any existing deed restrictions and the parties who hold these restrictions. If a Conservation Restriction (CR) or Preservation Restriction (PR) will be required, identify the entity who will hold the restriction. If the project entails a privately-owned asset, describe how the public can enjoy the proposed CPA-funded improvements. If historic preservation, are the improvements visible to the street? Can the public currently enter the building or property? Can public use be expanded or ensured? Note, a public access agreement may be required as a condition of a grant.

4. Submission Requirements Checklist

All attachments should be assembled into one PDF which should be emailed to rcameron@somervillema.gov or delivered via USB drive. Alternatively, applicants may submit attachments via one unbound paper copy. Please check (✓) each item included in your submission, which should include the applicable items in the order listed below. Items with asterisk (*) are required for all applications.

GENERAL:

- ☐ * Budget Summary Form
- ☐ * Itemized budget of all project costs, including the proposed funding source for each cost (use Itemized Budget Template)
- ☐ * Three written quotes for project costs. If quotes cannot be secured, detailed cost estimates may be used with a thorough explanation of how the estimates were derived.
- ☐ Proof of secured funding (e.g., commitment letters or bank statements), if applicable. If providing bank statements, please redact identifying information such as account numbers, as your application is a public record under the MA Public Records Law.
- ☐ Project timeline: a project schedule showing all major milestones (i.e., study, design, environmental, permitting, construction, etc.), including receipt of other funding sources

VISUAL:

- ☐ Map of the property location showing all features pertinent to the project, including current or future rapid transit stations
- ☐ * Photos of the project site (not more than 4 views per site); include digital copies

OWNERSHIP/OPERATION:

- ☐ Documentation of site control or written consent of the property owner to undertake the project, if the owner is not the applicant
- ☐ City is applicant or has signed on as a co-applicant for community projects proposed on City land.
- ☐ 501(c)(3) certification, if operating as a non-profit
- ☐ Purchase and sale agreement or copy of current recorded deed, and/or condominium documents if applicable
- ☐ Documentation of any existing permanent protection that has been applied to the property

COMMUNITY SUPPORT (RECOMMENDED):

- ☐ Letters of support from residents, community groups, other City boards, commissions, or departments, or from City, state, or federal officials
- ☐ Documentation/summary of any previous community meetings or other public engagement pertaining to the project

HISTORIC RESOURCES PROJECTS:

- ☐ * Letter of Approval from the Historic Preservation Commission
- ☐ * Documentation that the project is listed on the State Register of Historic Places or a written determination from the Somerville Historic Preservation Commission that the resource is significant in the history, archeology, architecture, or culture of Somerville
- ☐ Photos documenting the condition of the property or asset
- ☐ Report or condition assessment by a qualified professional describing the current condition of the property, if available

PLANS AND REPORTS (IF AVAILABLE; SUBMIT DIGITAL COPIES ONLY)

- ☐ Renderings, site plans, engineering plans, design and bidding plans, specifications, and any MAAB variance requests
- ☐ Applicable reports (e.g., 21E, appraisals, historic structure report, survey plans, feasibility studies)

CITY OF SOMERVILLE, MASSACHUSETTS
FY23 CPA FUNDING CYCLE BUDGET SUMMARY FORM

PROJECT NAME: _____

APPLICANT: _____

SUMMARY OF PROJECT COSTS								
<i>In addition to this form please include a complete itemized budget of all project expenses, including the proposed funding source for each expense, in your submission.</i>								
PROPOSED SOURCE		EXPENSES						
		STUDY	SOFT COSTS (1)	ACQUISITION	CONSTRUCTION (2)	CONTINGENCY (3)	SIGN (4)	TOTAL
1	Somerville CPA						\$125	
2								
3								
4								
5								
TOTAL PROJECT COSTS								

(1) Soft costs include design, professional services, permitting fees, closing costs, legal, etc.
 (2) Construction includes new construction, preservation, rehabilitation, restoration work, and/or accessibility related expenses.
 (3) A 15% contingency is strongly recommended for all construction projects.
 (4) Budget needs to include cost of permanent CPA dedication sign if requesting construction funds. Provide estimate or use \$125 as default cost.

EXPLANATION OF FUNDING SOURCES			
<i>Please explain the 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 attach documentation from the funding source (e.g., commitment letter, bank statement).</i>			
	SOURCE	SECURED? (YES/NO)	STATUS OF FUNDING SOURCE
1			
2			
3			
4			
5			