COMMUNITY HOUSING, OPEN SPACE, AND RECREATION PROJECTS

APPLICATION DEADLINE FOR NOVEMBER 2020 TOWN MEETING CONSIDERATION: APRIL 15, 2020 @ 3:00 P.M.

FALMOUTH COMMUNITY PRESERVATION FUND

FY 2019 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. Historic Preservation applications must also include Attachment C, “Supplemental Information for Historic Preservation Projects.” Historic Preservation applicants are encouraged to review the attached Preservation Restriction policy. 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 D.

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 CPA revenues. The CPC cannot commit anticipated revenues.

4. CPA proposals shall not include:
   a. The request for 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 initiatives
   c. The request of funds for maintenance or upkeep of land or buildings.

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. CPFund 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 (March 24, 2016 as amended July 24, 2016) available on the CPFund 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.

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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:

- Acquire, Create, Preserve, and Support Community Housing
- Acquire, Create, and Preserve Open Space (plus Rehabilitate and Restore Open Space if the Open Space was acquired with CPA funds)
- Acquire, Create, and Preserve, Rehabilitate, or Restore Land for Recreational Use
- Acquire, Preserve, Rehabilitate, and Restore Historic Resources
  - 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, http://www.falmouthmass.us, listed under Departments. For information about Falmouth CPFund revenues, budget, distribution of funds and projects funded since 2005, see the CPFund website at www.cpfundfalmouth.org.

TOWN OF FALMOUTH GOALS

The CPC will evaluate all eligible CPFund 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 http://falmouthmass.us.

References to additional plans related to specific CPA categories are provided below:

- Community Housing
  - Local Comprehensive Plan - Affordable Housing and LCP Housing Element, Spring 2015 (Link on the Planning Department webpage under Departments at http://falmouthmass.us)
- **Open Space/Recreation**
  - Local Comprehensive Plan - Open Space and Recreation, Coastal Resources and Wetlands, Wildlife, and Plant Habitat
  - Town of Falmouth Open Space and Recreation Plan

- **Historic Resources**
  - Local Comprehensive Plan - Historic Preservation and Community Character
  - Falmouth Historic Districts Guidelines (Link on the Historic Districts Commission webpage under Departments at http://falmouthmass.us)
  - Town of Falmouth Historic Preservation Plan (Link on the Historical Commission webpage under Departments at http://falmouthmass.us)
  - Secretary of Interior’s Standards for the Treatment of Historic Structures

- **Additional Town-Wide Plans**
  - The Board of Selectmen’s Five Year Strategic Plan (Link on the Board of Selectmen webpage under Departments at http://www.falmouthmass.us)
FUNDING APPLICATION
FOR
COMMUNITY PRESERVATION FUNDING

BEGINS ON THE FOLLOWING 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 April 15, 2020 at 3:00 p.m.

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<td>Name of Applicant/Sponsoring Organization:</td>
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<td>Mailing Address:</td>
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<td>Name of Proposal/Project:</td>
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<td>Project Location/Street Address (if applicable):</td>
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<td>Project Representative/Contact Name and Title:</td>
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<td>Mailing Address:</td>
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<tr>
<th>Cost of Project-this app. only</th>
<th>CPA Funds</th>
<th>Cost Share – Private</th>
<th>Cost Share– Other Public</th>
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**CPA Category** (You must check at least one category, but may identify additional categories if applicable)

- [ ] Open Space
- [ ] Recreation
- [ ] Historic Preservation
- [ ] 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. Previous CPA Project Funding:** Has this project or a closely related project previously received CPA funding? If yes, explain.

2. **Project Goals:** What are the goals of the proposed project? First, explain the relationship of those goals to those of the Community Preservation Act (CPA). Second, explain how the project supports the goals outlined in the Local Comprehensive Plan (LCP) and other relevant Town plans [See Page 3 – CPA and Town of Falmouth Goals].

   If the proposed project is a Recreation Project, explain how the project is consistent with the Town of Falmouth VueWorks Program Report and Priority List.

3. **Community Need and Public Benefit:** Why is this project needed? Is it consistent with goals of the CPA and other town-wide plans? How does it benefit the public? (See definition of Public Benefit in Guidelines for CPFund Proposal Submissions). 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.)

4. **Success Factors:** How will the success of this project be measured? Be as specific as possible.

5. **Credentials:** How will the experience of the applicant(s) contribute to the successful implementation of this project?

6. **Experience with Community Preservation Funded Projects:**

   Has the applicant received CP funding for past projects? ______________________________________

   If yes, please name the project: ___________________________________________________________

   If yes, are all projects complete and closed out? ____________________________________________

   If there are open projects, please identify by project name and provide current implementation status and expected completion date: __________________________________________________________
7. **Implementation: Project Manager Contact Information**

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<th>Project Manager &amp; Title:</th>
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8. **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?**

9. **Additional Information** (not required but recommended, if applicable)

   A. **Site Documentation:** Attach documentation that you have control over the site, such as a Purchase and Sale Agreement, option or deed.

   B. **Project Documentation:** Attach any applicable engineering plans, architectural drawings, site plans, any other renderings, relevant studies or material.

   C. **Other Information:** Any additional information that might benefit the CPC in consideration of this project.

10. **Coordination of Effort by Municipal Departments, Boards, Committees, and/or Commissions** - complete all four parts of the following section for each department you identify:

   A. Identify by name any 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 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.

Name of department/board/committee/commission: ______________________________________
Signature of director or department head or board/committee/commission chairperson:

____________________________________________
Title: ________________________________________________________________________
Date: _____________________________________

**NOTE to all applicants of municipal projects:**
Prior to submission of a CP Fund Application for a municipal project, applicants must go before the Board of
Selectmen at an open meeting to seek approval for an allocation of CPA funding. **The positive vote of the BOS 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 nine items listed in the Narrative section of this application?
- [ ] Have you provided one unbound original and eleven bound copies of the completed application?
- [ ] Have you submitted one electronic version of the completed application to Community Preservation Office (cpfund@falmouthmass.us)?
- [ ] 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?

£ Have you read and do you understand the Payment Policy- Process for Reimbursement for CP Fund Projects included as Attachment C?
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 an accurate and detailed estimate from potential consultant(s), construction companies, and suppliers. At least one estimate on contractor letterhead is required. However, the CPC 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

<table>
<thead>
<tr>
<th>Total Project Cost</th>
<th>CPA Funds Requested</th>
<th>Cost Share – Private Funds</th>
<th>Cost Share - Other Public Funds</th>
<th>Cost Share - Other Investment or</th>
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### 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.

<table>
<thead>
<tr>
<th>Funding Source</th>
<th>Item: Project Component</th>
<th>Amount</th>
<th>Type (grant, loan, in-kind, etc.)</th>
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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.)

<table>
<thead>
<tr>
<th>Category</th>
<th>CPA Funds</th>
<th>Other Funds (Cost Share)</th>
<th>Total</th>
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</thead>
<tbody>
<tr>
<td>Personnel</td>
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<tr>
<td>Materials/Equipment</td>
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<tr>
<td>Construction</td>
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<tr>
<td>Professional Contractual: Consultant, Legal, Engineering, Appraiser, etc.</td>
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<tr>
<td>CPA Funding Sign/Plaque (permanent)</td>
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<tr>
<td>Historic Preservation Restriction, if applicable *</td>
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<tr>
<td>Other (Describe)</td>
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<tr>
<td>TOTAL</td>
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* Insert a cost allowance to develop and record Preservation Restriction. 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. A recent estimate is defined as a written estimate presented 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 you feel 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.
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.)

<table>
<thead>
<tr>
<th>ITEM</th>
<th>AMOUNT REQUESTED</th>
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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