

**CITY OF SOMERVILLE, MASSACHUSETTS**  
**SOMERVILLE AFFORDABLE HOUSING TRUST FUND**  
*JOSEPH A. CURTATONE*  
*MAYOR*

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Martin Polignone  
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January 19, 2017

**CPA FUNDING OPPORTUNITY FOR PROGRAMS RELATED TO HOUSING UNITS**

**CPA Background**

In November 2012, Somerville voters overwhelmingly approved a 1.5% Community Preservation Act (CPA) surcharge on net property taxes. The Somerville Community Preservation Committee subsequently voted to empower the Somerville Affordable Housing Trust Fund, which has 25 years of experience preserving, creating, and supporting affordable housing in Somerville, to serve as the housing arm of the Committee. Since Fiscal Year 2015 (July 1, 2014-June 30, 2015), the Trust has been administering CPA funds designated for community housing purposes.

**Programs and CPA Eligibility**

This funding opportunity is designated for programs that either create affordable housing units or provide rental assistance or other financial assistance to income eligible households for the purpose of making housing affordable.

CPA funds can serve individuals and households up to 100% AMI. Eligible uses are:

- *Acquisition* – to obtain property interest by gift, purchase, devise, grant, rental, rental purchase, lease or otherwise. Eminent domain takings only as provided by G.L. c.44B.
- *Creation* - to bring into being, cause to exist.
- *Preservation* – to protect personal or real property from injury, harm or destruction.
- *Rehabilitation and Restoration* - if acquired or created with CPA funds. Capital improvements to comply with federal, state or local building or access codes or federal standards for rehabilitation of historic purposes.
- *Support* – to provide grants, loans, rental assistance, security deposits, interest-rate write downs or other forms of assistance directly to individuals and families eligible for community housing or to an entity that owns, operates or manages such housing for the purpose of making housing affordable. **Please note that the CPA funds cannot be used for rent arrearages, utility payments, moving costs, or case management.**

**Criteria and Priorities**

In addition to meeting the proper AMI level and project use, the following priorities apply:

- preserve or increase the supply of affordable housing in Somerville;
- help low -to -moderate households gain access to or retain housing.

The following criteria apply:

- the program will provide a measurable impact;
- the applicants have a demonstrated capacity to carry out the program for which they seek funding;
- the applicants demonstrate an ability to continue a program beyond the funding period;
- applications from non-profits are preferable. If two non-profits propose similar programs, Trustees will analyze the need within the community (is the need great enough to support the work of two agencies) and preference will be given to agencies based in Somerville.

**Additional Information and Application Deadline**

Please provide direct responses to each question within this application form.

**Responses are due electronically by noon on Tuesday, February 21, 2017 and respondents should also submit 10 printed copies (collated), by mail or hand-delivery, postmarked on or before February 21, 2017.**

The electronic copy should be sent by email to Heidi Burbidge at [hburbridge@somervillema.gov](mailto:hburbridge@somervillema.gov).

The printed copies should be sent or delivered to: City of Somerville Housing Division  
City Hall Annex, attn: Heidi Burbidge  
50 Evergreen Avenue, Somerville, MA 02145

If you have any questions, please do not hesitate to contact Heidi Burbidge at 617-625-6600 x2587 or via email at the email address listed above.

**Chart 1**  
**COMMUNITY PRESERVATION FUND ALLOWABLE SPENDING PURPOSES (G.L. c. 44B, § 5)**

	OPEN SPACE	HISTORIC RESOURCES	RECREATIONAL LAND	COMMUNITY HOUSING
<b>DEFINITIONS</b> (G.L. c. 44B, § 2)	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	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	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 <u>not</u> include horse or dog racing or the use of land for a stadium, gymnasium or similar structure.	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
<b>ACQUISITION</b> Obtain property interest by gift, purchase, devise, grant, rental, purchase, lease or otherwise. Only includes eminent domain taking as provided by G.L. c. 44B	Yes	Yes	Yes	Yes
<b>CREATION</b> To bring into being or cause to exist. <i>Seideman v. City of Newton</i> , 452 Mass. 472 (2008)	Yes	X	Yes	Yes
<b>PRESERVATION</b> Protect personal or real property from injury, harm or destruction	Yes	Yes	Yes	Yes
<b>SUPPORT</b> 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	X	X	X	Yes, includes funding for community's affordable housing trust
<b>REHABILITATION AND RESTORATION</b> 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 CP funds	Yes	Yes	Yes if acquired or created with CP funds

**Program Application for CPA Funds**

1. Agency Name and Address: \_\_\_\_\_

\_\_\_\_\_

2. Non-profit designation (if applicable): \_\_\_\_\_

3. Contact name, phone number and email address for program manager: \_\_\_\_\_

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4. Name of proposed Program: \_\_\_\_\_

\_\_\_\_\_

5. Amount of request (CPA): \_\_\_\_\_

\_\_\_\_\_

6. Note which eligible use category the proposed program fits (see pgs. 1-2): \_\_\_\_\_

\_\_\_\_\_

7. Describe proposed activity (please attach additional pages as needed): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

8. Timeframe for performance: \_\_\_\_\_

9. If it is a new program, estimated time to set up program: \_\_\_\_\_

\_\_\_\_\_

10. Describe the need within the community for the type of program proposed and note any other agencies that may be addressing it (to the extent applicant is aware) and how this program is different:

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11. Provide the income level of targeted beneficiary/beneficiaries:

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12. Description of who the program will benefit (veteran population, homeless, etc. and please note the extent to which beneficiaries are Somerville residents):

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13. Estimated number of individuals or households to be served: \_\_\_\_\_

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14. Describe how program outcomes will be measured and tracked: \_\_\_\_\_

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15. Please attach a complete program Budget and include the status of all funding source (note any funds pending or already received) and all sources and uses by amount.

16. Describe whether the proposed activity will be carried out with or without any other funding from the Trust: \_\_\_\_\_

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17. Experience and capacity of the agency and staff – please describe staff available to work on the project (and note if staff need to be hired) and describe any similar successful programs and how they relate to other programmatic activities: \_\_\_\_\_

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18. Note if applicant has previously been funded by the Trust and, if yes, a concise summary of the number of residents served in the prior fiscal year and the impact of the program:

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19. Explain how the proposed activities/project addresses a need and/or strategy in City of Somerville's 5 Year Consolidated Plan (Can be viewed online at [www.somervillema.gov](http://www.somervillema.gov)).

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20. Explain how the proposed activities/project addresses a Goal or Action Step in the SomerVision Comprehensive Plan (Can be viewed online at [www.somervillema.gov](http://www.somervillema.gov)).

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