

Somerville CPA



Applying for Somerville CPA Funds: what you need to know

FY17

Historic Resources & Open Space/Recreation Land

An aerial photograph of a coastal town, likely in the Philippines, showing a prominent hill with a large building on top, surrounded by a dense residential area and a body of water in the background.

CPA Overview

What is the Community Preservation Act?

Massachusetts law that 161 municipalities have adopted to create a fund for grantmaking:



Primary sources of funding:

Surcharge on real estate
property tax (1.5%)

State match

City appropriation

Allowable Projects

	Community Housing	Historic Preservation	Open Space	Outdoor Recreation
Acquire	✓	✓	✓	✓
Create	✓	X	✓	✓
Preserve	✓	✓	✓	✓
Support	✓ includes funding for affordable housing trust	X	X	X
Rehabilitate and/or Restore	✓ if acquired or created with CPA funds	✓	✓ if acquired or created with CPA funds	✓

****Cannot pay for maintenance or replace current spending****

Allocation of Funding

CPA Category	State Minimum	Somerville Minimum Allocations
Open Space & Recreation	10%	15%
Historic Preservation	10%	15%
Affordable Housing	10%	45%
Administrative (max)	5%	5%

How much is available?

Total FY17 project funding available=
\$2,624,333

Open Space & Recreation
\$365,325

Historic Resources
\$365,325

Affordable Housing
\$1,095,977

New Undesignated
\$512,645

FY16 Roll over
\$188,828

How are funding decisions made?

- Funding recommendations to Board of Aldermen made by 9 member Community Preservation Committee (5 positions designated from relevant commissions, 4 at-large); Aldermen give final approval
- Guided by annual Community Preservation Plan
- Annual application process (emergency funding possible)
- Affordable Housing Trust Fund makes grants for housing projects

What does the CPC look for?

- Is the project eligible for CPA funding?
- Does the project involve all the necessary groups?
- Will the project benefit Somerville residents?
- How well does the project match Community Preservation Plan priorities?
- Is this project a good use of public resources?

FY17 Community Preservation Plan Priorities

Projects that are consistent with the community's values:

- Improve accessibility for all members of the community
- Incorporate sustainable practices and design
- Receive endorsement from other Somerville boards, commissions, departments or community groups or from city, state, or federal officials
- Are consistent with the goals and priorities established in other current planning documents
- Address two or more of the CPA focus areas

FY17 Community Preservation Plan Priorities

Projects that use CPA funding strategically:

- Leverage other funds or in-kind contributions and/or implement cost-saving measures
- Address long-standing or urgent needs in the community
- Take advantage of exceptional, time-sensitive opportunities
- Could serve as catalysts for transformative change

FY17 Community Preservation Plan Priorities

Open Space & Recreation Land:

- Support the acquisition of land for and creation of new publically accessible open space and recreation land
- Expand access to and use of the Mystic River and Alewife Brook corridors
- Improve the health of the wetlands and shores of the City's water resources
- Rehabilitate and restore existing recreational land according to need
- Expand urban agriculture opportunities

FY17 Community Preservation Plan Priorities

Community Housing:

- Provide affordability in perpetuity as required by the Community Preservation Act
- Preserve expiring-use units
- Support mixed-use and transit-oriented development
- Prevent homelessness and/or provide housing units or other support for homeless and formerly homeless households

FY17 Community Preservation Plan Priorities

Historic Resources:

- Priorities being developed through the creation of Somerville's first Historic Preservation Plan

An aerial, grayscale photograph of a city, likely Istanbul, showing a large body of water (the Bosphorus) and a prominent bridge (the Bosphorus Bridge) crossing it. The city's buildings and streets are visible on the surrounding land.

CPA Application Process

FY17 Application Timeline

Step	Timeline/Deadline
1 Applicants attend pre-application workshop	August 25, 2016 at 6:00pm or August 30, 2016 at 9:00am
2a Applicants submit eligibility determination forms	September 21, 2016 by 5pm
2b CPC responds to eligibility determination forms	October 7, 2016 by 5pm
3 Applicants submit funding applications	December 5, 2016 by 5pm
4 CPC evaluates applications & gathers public input	December 2016 – March 2017 (subject to change)
5 Applicants present projects at community meeting	January 11 and January 24, 2016 at 7:00pm
6 CPC submits recommendations to Mayor for submittal to Board of Aldermen; Board votes on CPC recommendations	March – April 2017 (subject to change)
7 CPC issues award letters	April – May 2017 (subject to change)
8 Grant agreements executed	Spring & summer 2017 (subject to change)

Step 1: Eligibility Determination Form

Key things you need to have in place:

- Ability to receive funds (ie 501c3, property owner)
- Permission from owner on private property or owner co-applicant on public property
- Determination of historic significance
 - Local Historic District
 - National register
 - Seek determination from Historic Preservation Commission

Step 2: Full application

What you need to submit:

- Completed narrative
- Completed budget
- Maps and photos
- Documentation of ownership
- Certificates of good standing/501c3 certification
- Letters of support
- Applicable reports
- Conflict of interest disclosure

Step 2: Full application

What you need to submit:

Historic projects

- Documentation of historic significance
- Condition report

Construction

- Renderings, site plans, engineering plans, design and bidding plans, and specifications

Funding Conditions

From the Community Preservation Act legislation:

- Historic resources projects must comply with the US Secretary of the Interior's Standards for Rehabilitation.
- If CPA funds are used for acquisition, the property must be perpetually preserved for the use for which it was acquired. Restriction must be held by third party.
- Projects on public property must follow state procurement laws.

Funding Conditions

Common from the Community Preservation Committee:

- Preservation restrictions for historic resources projects
- Robust community process for design projects
- Funds not released until all necessary permits, etc. obtained
- Public access agreements
- Others possible



What's new this year?

Changes to the EDF

If you've applied for CPA funds in the past, be particularly aware of these changes:

- The EDF is now two pages- make sure to answer the new question about community need and project planning
- If you are a community member applying for a project on public property, the CPC is asking for the City to sign on as a co-applicant at the EDF phase

Changes to the Proposal

If you've applied for CPA funds in the past, be particularly aware of these new questions:

- **Financial:** How will the project be affected if it does not receive CPA funds or does not receive the full amount requested?
- **Project Management:** Describe any permits, approvals, MAAB variance requests, or restrictions that are required for the project to go forward and the status for each.
- **Project Management:** Note if the applicant has previously received CPA funds and if so, a concise summary of the impact of the previous CPA project.
- **Accessibility:** Describe any permits, approvals, MAAB variance requests, or restrictions that are required for the project to go forward and the status for each.

Changes to the Proposal

If you've applied for CPA funds in the past, be particularly aware of these new questions:

New section: Measuring Success

- What are the goals of this project?
- How will the success of this project be measured?

How do you measure success?

What are the changes, that when you see them, you will know you achieved what you wanted?

- Increased use of the space?
- New types of users?
- New use/programming possible?
- Life of resource extended?
- Increased awareness/appreciation?

**How would you be able to measure these changes?
If you already have measures in place, use those!**

Tools for Measuring Success

- **Community Development:**

1. <http://www.jchs.harvard.edu/sites/jchs.harvard.edu/files/w07-5.pdf>
2. <http://ctb.ku.edu/en/table-of-contents/evaluate/evaluate-community-initiatives/measure-success/main>

- **Urban Farms & Gardens:**

1. <https://farmingconcrete.org/barn/data-collection-toolkit/>



CPA Grant Agreements

Necessary Documentation

To complete the grant agreement you will need:

- Certificate of Authority (LLC or Corporation)
- Evidence of insurance
- Certificate of good standing
- Agree to comply with CPC conditions

Funding disbursements

CPA grantees have two options:

1. Reimbursement
2. Phased disbursement schedule

****For phased disbursement, the final 10% is not available until all project work is completed and the final report is submitted.****

Funding disbursements

City funded projects:

- Department finance admin/clerk will receive access to project line in MUNIS.
- Project funds stay within the CPA fund.
- All requisitions and invoices approved by CPA Manager in addition to departmental approvals.



CPA Reporting

CPA Reporting

Reports due on schedule set by grantee and include:

1. Description of work completed
2. Progress on measures of success
3. Lessons learned
4. Expenditures
5. Deliverables for next phase
6. Anticipated expenditures
7. Invoices
8. Photos

CPA Reporting

City departments submit annual report including:

1. Description of work completed
2. Progress on measures of success
3. Lessons learned
4. Photos

Financial reporting managed through the MUNIS requisition and invoice approvals project

Receiving funds

Tips for grantees to expedite process:

1. Make sure all documentation is complete and deviations from plan described.
2. Alert the CPA Manager if addresses or names have changed for where the check should be mailed.
3. Let the CPA Manager know when you are starting to prepare the invoice, so the funds can be requisitioned.

Change happens

What do I do if the budget/scope/timeline changes?

Discuss with CPA Manager:

Significant changes (ie need to change how funds are used) require approval by the CPC and possibly additional approvals by the Board of Aldermen.

Smaller changes (ie deliverable shifts to a later time period) can be documented within the reporting process.