



Applying for Somerville CPA Funds: what you need to know

FY18

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 grid of streets and a body of water in the background.

CPA Overview

What is the Community Preservation Act?

Massachusetts law that 172 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%
Flexible	NA	20%
Administrative (max)	5%	5%

How much is available?

Total FY18 project funding available=
\$3,555,571

Open Space & Recreation
\$297,673

Historic Resources
\$297,673

Affordable Housing
\$1,179,522

New Flexible
\$396,898

Emergency Project Reserve
\$673,805

Land Acquisition Earmark
\$710,000

FY17 Roll over
\$352,030

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?

FY18 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
- Support for Somerville's diversity, including support for immigrants regardless of their status

FY18 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

FY18 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

FY18 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

FY18 Community Preservation Plan Priorities

Historic Resources:

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

An aerial photograph of a city, likely San Francisco, showing a river winding through the urban landscape and hills in the background. The image is faded and serves as a background for the text.

CPA Application Process

FY18 Application Timeline

Step	Timeline/Deadline
1 Applicants attend pre-application workshop	August 10, 2017 at 7:00pm or August 15, 2017 at 9:30am
2a Applicants submit eligibility determination forms	September 20, 2017 by 5pm
2b CPC responds to eligibility determination forms	September 29, 2017 by 5pm
3 Applicants submit funding applications	December 7, 2017 by 7pm
4 CPC evaluates applications & gathers public input	December 2017 – March 2018 (subject to change)
5 Applicants present projects at community meeting	January 16 and January 24, 2016 at 7:00pm (subject to change)
6 CPC submits recommendations to Mayor for submittal to Board of Aldermen; Board votes on CPC recommendations	March – April 2018 (subject to change)
7 CPC issues award letters	April – May 2018 (subject to change)
8 Grant agreements executed	Spring & Summer 2018 (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
- Campaign contribution 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 Proposal

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

- **Campaign contribution disclosure:** New form required for all projects requesting more than \$50,000 per City's "Pay to Play" ordinance
- **Budget for your permanent CPA dedication sign:** Construction projects need to include the cost of the required CPA acknowledgement sign in the budget.
- **Measures of Success:** These are required!

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 including City as additionally insured
- 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.****



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

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.