

APPENDIX 6



TOWN OF WESTON COMMUNITY PRESERVATION COMMITTEE Guidelines for Project Submission

1. Consult the attached Department of Revenue Allowable Spending Purposes chart to determine if your project is eligible for CPA funding. You may also wish to consult the Community Preservation Coalition website at www.communitypreservation.org and/or the Town's website at <http://www.weston.org/434/Community-Preservation-Committee>. If you have questions about eligibility, please contact CPC Administrator Tracey Lembo at lembo.t@westonmass.org or 781-786-5074.
2. Seek the support of the relevant Town body for your proposal. For open space projects, consult with the Conservation Commission. For historic resource projects, consult with the Historical Commission. For recreation projects, consult with the Recreation Commission. For community housing projects, consult with the Housing Trust. *Please note that in order to be eligible for CPA funding, a historic resource which is not listed on the state register of historic places **must** be determined by the Historical Commission to be significant in Weston's history, archeology, architecture or culture.*
3. Complete the **Project Application Summary Form** along with a narrative addressing each applicable question/category included in the **Project Application** and submit electronically to: lembo.t@westonmass.org or in hard copy to:
Community Preservation Committee
Town of Weston
P.O. Box 378
Weston, MA 02493
Attn: Tracey Lembo, CPC Administrator

The deadline for submission of proposals for consideration at November 2018 Town Meeting is **WEDNESDAY, SEPTEMBER 12, 2018 by 5 P.M.** In order to allow adequate time for consideration of each proposal, **applications received after this time will be considered for the following Town Meeting** (i.e., applications received after 5 p.m. on September 12, 2018 will be considered for May 2019 Town Meeting). In rare circumstances in which the applicant demonstrates in writing to the CPC the extraordinary circumstances which prevented the timely submission of an application and the applicant demonstrates that a significant opportunity for the Town would be lost should the project be deferred to the following Town Meeting, the CPC may, at its discretion, extend the application deadline.

Since the CPC may approve requests for CPC administrative funds without a Town Meeting vote, proponents seeking CPC administrative funds to evaluate a potential future CPA Fund request (e.g., appraisal or feasibility study fees) may do so at any time, i.e., it is not necessary to comply with the submission deadline, and proponents need only complete the **Project Application Summary Form**.

4. At the invitation of the CPC, present your proposal at one or more CPC meetings and also at a public informational hearing that is advertised in compliance with Town By-Laws. The CPC will submit its recommendations for funding at the Special Town Meeting in November. The CPC is an advisory group only; projects must be approved by Town Meeting vote.

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

	OPEN SPACE	HISTORIC RESOURCES	RECREATIONAL LAND	COMMUNITY HOUSING
DEFINITIONS (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
ACQUISITION Obtain property interest by gift, purchase, devise, grant, rental, 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	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				Yes, includes funding for community's affordable housing trust
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 CP funds	Yes	Yes	Yes if acquired or created with CP funds

Source: Department of Revenue (DOR) 10-5-2012 conference, "Recent Developments in Municipal Law," Workshop B - Local Finances

General Criteria

Review of Proposals for CPA Funding

The CPC is charged with reviewing all projects proposed for CPA funding and for making recommendations to Town Meeting. In order to be considered eligible for review, a proposal must, at a minimum, meet the statutory requirements of the CPA. If the project meets the minimum requirements, the following factors will influence the relative prioritization of proposed CPA projects, positively or negatively (as indicated):

- ***Depth and Breadth of Impacts on Town (+)***. Breadth of impact refers to the number of residents expected to benefit from the project. Depth of impact refers to the relative importance of a project to the town, regardless of the breadth of direct impact.
- ***Likelihood of Success (+)***. Likelihood of success will be directly affected by factors such as a project's degree of difficulty, the demonstrated abilities and experience of project proponents, and the likelihood of sufficient support by the town as needed. For multi-phase projects, likelihood of success will be evaluated on a phase-by-phase basis, as each phase is presented to the CPC for approval, and over the life of the entire project.
- ***Availability of Other Funding Sources (+/-)***. Project proponents are encouraged to consider and pursue other funding sources, including external grant opportunities, and should be prepared to describe their efforts to obtain such other funding and/or the reasons why such efforts were not successful or undertaken.
- ***Suitability of Funding from Municipal, School, or State Budgets (-)***. The more suitable and ordinary it would be to fund a particular project from a non-CPC budget, the more consideration should be given to whether limited CPC funds should be used, given their narrower focus and underlying purposes.
- ***Funding of Other Projects from Same CPC "Bucket" (-)***. Though there is no requirement that all CPC "buckets" be funded equally, the CPC should be cognizant of overconcentration of resources in any one category. For multi-phase projects and projects funded with debt, the aggregate amount of funding over the duration of the debt service should be taken into account (with or without the interest component of debt).
- ***Initial Intention of CPA Funds for Certain Projects (+)***. The Old Library, Josiah Smith Tavern, and Case Estates were three key reasons the town's CPA fund was established in the first place, so these projects remain key priorities for funding. (Nonetheless, while priorities, these projects would also be taken into account in assessing potential overconcentration of resources in a specific category as described above.)

Financing

Generally, projects (or phases of multi-phase projects) will be (a) funded with CPA cash, where the relevant amount is less than \$1 million and such cash is available, or (b) funded with debt, where the relevant amount is greater than \$2 million. In assessing the appropriateness of this general guideline for a particular project (or phase), as well as assessing the appropriate funding where the relevant amount is between \$1 million and \$2 million, the following factors will be taken into account:

- **Interest Rate Levels.** The lower interest rates are, the more attractive debt should be, and vice versa. Interest rate levels should be assessed relative to the debt maturity period available for the particular project.
- **Current and Expected Availability and Other Uses of Cash.** If CPA cash is already constrained or is expected to be constrained due to other cash expenditures, debt will be more attractive. Conversely, where cash is plentiful and not accounted for by other expected uses in the near future, debt will be less attractive, and the CPC should be cautious to minimize perceptions that it is accumulating too much cash.
- **Expected Debt Service Payments Relative to CPA Surcharge Revenues.** Debt should never be accumulated to the extent that debt service payments in any future year might reasonably be expected to approach or exceed the CPA surcharge revenues for such year (presuming the CPA surcharge remains in effect). For additional prudence, expected debt service payments in any future year should not generally exceed one half of expected CPA surcharge revenues for such year.
- **Anticipated Support for Project (or Debt Financing) Relative to Perceived Importance.** Generally, debt financing requires a two-thirds vote at town meeting, while cash financing only requires a majority vote. For projects that the CPC deems particularly important, cash financing could be more attractive to the extent there is doubt about the project (or debt financing for such project) receiving the necessary two-thirds vote. Conversely, to the extent a project is expected to receive support well in excess of two-thirds, debt financing should be more attractive, even where other considerations might suggest cash financing.

Category Specific Criteria

Open Space proposals that address as many of the following objectives as possible will receive preference:

1. Preserve land included on *Appendix A: Lands of Open Space Interest* in the 2017 Weston OSRP
2. Allow for opportunities for partnership projects with other conservation organizations or with affordable housing, recreation, historical, or other relevant interests
3. Enhance Open Space Protection
 - Protect or preserve important wildlife and plant habitats, including areas that:
 - are of local significance for biodiversity;
 - contain a variety of habitats, with a diversity of geologic features, soil types, and vegetation types;
 - contain a habitat type that is not common in Weston or the nearby area; or
 - preserve habitat for threatened or endangered species of plants or animals
 - Protect or enhance wildlife corridors, promote connectivity of habitat, or prevent fragmentation of habitat
 - Preserve surface water bodies, including wetlands, streams, ponds, vernal pools, seeps, and riparian zones
4. Enhance Passive Recreation and Education

- Provide opportunities for passive recreation and environmental education
- Provide passive recreation opportunities for users with accessibility concerns
- Protect existing trails, provide connections with existing trails or pedestrian routes, or otherwise allow for expansion of the town's trail/pedestrian route network

5. Enhance Rural Character of Weston

- Preserve the semi-rural character of Weston
- Preserve scenic views or view corridors
- Protect land along scenic roads
- Allow for sustainable agricultural and forestry practices
- Protect important historical, geological, archeological or local landmark features

Recreation proposals that address as many of the following objectives as possible will receive preference:

1. Maintain, steward, restore, and/or create recreational spaces, including but not limited to:
 - Acquisition, creation and/or development of new recreation spaces and facilities as necessary and appropriate to meet the changing needs of the Town's population
 - Upgrades to existing and future recreation spaces and facilities as necessary and appropriate to enhance safety, accessibility, or ease of use
2. Promote the use of Recreational Facilities, including but not limited to
 - Enhancing access to Recreation facilities for users with mobility, sight, hearing and other impairments
 - Enhancing Recreational facilities in order to accommodate the needs of residents of all ages
3. Improve access to and connectivity among open spaces and Recreational facilities, including but not limited to:
 - Development of safer pedestrian / bicycling routes and initiatives
 - Improved off-road biking opportunities

Historic resource proposals that address as many of the following criteria as possible will receive preference:

1. Protect, preserve, enhance, restore and/or rehabilitate historic, cultural, architectural or archaeological resources of significance, especially those that are threatened.
2. Protect, preserve, enhance, restore and/or rehabilitate Town-owned properties, features or resources of historical significance.
3. Protect, preserve, enhance, restore and/or rehabilitate the historical function of a property or site.
4. Demonstrate the ability to provide permanent protection for maintaining the historic resource in order to be a public good.

5. Preference to resources that reside within a Weston Historic Area or Local District, on a State or National Historic Register, or eligible for placement on such registers, or on the Weston Historical Commission's Cultural Resource Inventory.
6. Demonstrate a public benefit, including such things as visibility from the street, or public access.
7. Support the adaptive reuse of historic properties that meet the Secretary of Interior Standards for such reuse.

Community Housing proposals that address as many of the following criteria as possible will receive preference:

- 1) Creation of Affordable Housing units in Weston with preference to projects that align with Housing Production goals based on Priority Needs identified in the Weston Housing Production Plan dated November 2015, and approved by Massachusetts's Department of Housing and Community Development (DHCD).

Types of Units	Target Populations	Annual Goals	5-Year Goals
Rental Housing	Seniors (40%)	8	40
	Families (60%)	12	60
	Disabled (10% of all new units created) – handicapped accessible and /or with services	(2)	(10)
Total		20	100

- 2) Contribute to the overall housing production goals by creating units that will meet requirements to be eligible for inclusion on the Department of Housing and Community Development's Subsidized Housing Inventory (SHI) under G.L. c. 40B; including requirements for Affirmative Marketing.
- 3) Housing that includes partnership with conservation, recreation and/or historic preservation.
- 4) Proposals that aim to preserve existing deed restricted units through rehabilitation and restoration.
- 5) Creation of Affordable Housing using cost-effective design and planning techniques.
- 6) Creation of Affordable Housing through partnerships with community non-profits organizations.
- 7) Creation of Affordable Housing through multiple sources of funding where practicable.
- 8) Housing should be, in so far as practicable, harmonious in design, scale, setting and materials with surrounding community.

TOWN OF WESTON COMMUNITY PRESERVATION COMMITTEE
Project Submission Form – FY19
Summary Form

Submission Date:

Project Name:

Project Address:

Brief Project Description:

Contact Person:

Contact Title:

Contact Phone #:

Contact Email Address:

Contact Mailing Address:

Sponsoring Organization (e.g., Conservation Commission):

Eligibility - Only activities designated in “Yes” boxes, below, are eligible uses of CPA Funds. Please mark the box, or boxes, that apply:

	Open Space	Historic Resources	Recreational Land	Community Housing
Acquire	Yes	Yes	Yes	Yes
Create	Yes	No	Yes	Yes
Preserve	Yes	Yes	Yes	Yes
Support	No	No	No	Yes
Rehabilitate and/or Restore	Yes, if acquired or created with CPA funds	Yes	Yes	Yes, if acquired or created with CPA funds

Projected Cost (Please add information for additional fiscal years as necessary):

Fiscal Year	Total Project Cost	CPC Funds Requested	Other Funding Sources (amount and source)
2018 (prior yr.)			
2019			
2020			
2021			
Total:			

TOWN OF WESTON COMMUNITY PRESERVATION COMMITTEE
Project Submission Form – FY19
Application

Please address the following questions/categories using additional sheets as necessary.

- 1. Goals/Community Need:** What are the goals of the proposed project? Who will benefit and why? Does the project address needs identified in existing Town plans?
- 2. Project Timeline:** Describe project milestones and when they will be completed.
- 3. Community Support:** Describe the nature and level of support for and/or opposition to this project. In particular, describe which Town Boards/Committees/Departments or community organizations you have consulted/collaborated with.
- 4. Budget:** Provide a line item budget and an explanation of how the budget was prepared. Include back up documentation including any proposals for services, professional cost estimates, etc. For community housing development projects, provide a phased sources and uses of funds.
- 5. Other Funding Sources:** In addition to CPA Funds, what other funding sources are available, committed, or under consideration? Include commitment letters, and describe any other attempts to secure public or private funding for this project.
- 6. Implementation:** Identify the person/persons responsible for project implementation and describe his/her/their relevant experience.
- 7. Comparable Projects:** List and describe any comparable projects.
- 8. Operations/Maintenance:** If the project is revenue generating, provide a 5 year operating budget. If the project will not generate revenue but ongoing maintenance will be required, provide a 5 year budget with funding sources identified. (CPA funds cannot be used for maintenance). Identify the person(s)/entity responsible for operations/maintenance.
- 9. Multiple Projects:** Sponsors with multiple proposals should prioritize them.
- 10. Provide Supporting Documentation as Applicable:**
 - a. Evidence of Site Control (e.g., purchase and sale agreement);**
 - b. Feasibility Studies;**
 - c. Letters of Support;**
 - d. Maps;**
 - e. Statistics; and**
 - f. Other Relevant Information.**