



## 2023-24 Application Instructions Packet for Tisbury Community Preservation Act Funding

Applicants should take note that the Community Preservation Committee relies strongly on the expertise of the Tisbury Historical Commission, Conservation Commission, Planning Board, Affordable Housing Committee, and Department of Public Works in determining the appropriateness of funding applications in each of the respective categories. All applicants are **strongly encouraged** to seek the support of these commissions as part of their CPA funding application.

Whenever possible, applicants should schedule any required meetings or project reviews with outside commissions as early in the CPA funding application process as possible. In some cases, projects may need approval from these boards to continue to move forward with their projects. For example, an historic resources project would need the William Street Historic District Commission's approval to move forward; a project involving a waterway or beach would need the Conservation Commission's approval to move forward.

Further, it is the Community Preservation Committee's policy that all projects approved at Annual Town Meeting have **three years to be completed**. If the project is not completed within this three year time frame, the project risks cancellation and forfeiture of the appropriation. **The start date of the three year project period begins on July 1 of the Town's new fiscal year, following the project's approval at the Annual Town Meeting.**

## APPLICATION PROCESS

The Tisbury Community Preservation Committee invites proposals for CPA funding. The CPC is responsible for reviewing all applications and making recommendations as to which applications should be funded. The CPC expects to bring its recommendations to the 2024 Annual Town Meeting.

### ELIGIBILITY APPLICATION PROCESS

- 1) Attending the annual CPC public hearing meeting is highly advised. The 2023 hearing will be held on Monday, September 11, 2023, beginning at 5:00 p.m at the Tisbury Senior Center. Please check the Town website for agenda and further information.
- 2) **Ten** hard copies of the Eligibility Application are due by 12:00 noon, on Friday, September 22, 2023 to the Community Preservation Committee, Tisbury Town Hall, 51 Spring Street, Tisbury, MA. **A pdf copy of all application materials is also required** and should be emailed to [tisburycpc@gmail.com](mailto:tisburycpc@gmail.com).
- 3) During the determination of eligibility process, each application is reviewed by the CPC and staff to determine its CPA eligibility.
- 4) Applicants deemed eligible will be notified and may continue to the Final Application Process.
- 5) **Please note this is a ONE PAGE application for Project Eligibility.**

### FINAL APPLICATION PROCESS

- 1) If your project is deemed eligible, you may continue with the Final Application Process. Submit ten unbound copies of the completed Final Application and all supporting materials by 12:00 noon on Friday, October 13, 2023 to the Community Preservation Committee, Tisbury Town Hall, 51 Spring Street, Tisbury, MA. **A pdf copy of all application materials is also required** and should be emailed to [tisburycpc@gmail.com](mailto:tisburycpc@gmail.com).
- 2) Work with the Community Preservation Committee through the review process. This process includes the following steps:
  - A. CPC reviews all final proposals.
  - B. Interviews are held with applicants to review the proposals and address any questions. Where appropriate, a site visit will be scheduled.
  - C. Notification is sent to applicants of the recommended funding decisions. The CPC may also ask for additional information at this time.
  - D. The CPC provides the project funding recommendations to Town Meeting. Final recommendations will be in the form of one or more warrant articles to be voted on at Town Meeting.
  - E. Please note that the CPC recommendation may be modified at any time prior to Town Meeting. The CPC can alter or withdraw its Town Meeting Warrant Article(s) as additional information becomes available or as the scope of the project changes.
- 3) Attend public hearings on the proposed warrant article(s) prior to the 2024 Annual Town Meeting.
- 4) The CPC strongly recommends that by the time of Town Meeting, all projects which have represented to the CPC that there will be matching funds have commitments for such funds from other private and/or public funding sources.
- 5) It is **mandatory** that the applicant **Attend Town Meeting** which will determine whether to accept, reduce or reject the CPC recommendations.

## GENERAL GUIDELINES FOR SUBMISSION

The following guidelines should be used in preparing an application for CPA funding. Applicants are advised to read the Eligibility Guidelines thoroughly and address all of the submission requirements and selection criteria.

1. Applicants must meet all filing deadlines. The Eligibility Application for Funding for the fiscal year beginning July 1, 2024 must be received by 12:00 noon on Friday, September 22, 2023 to be considered for the Final Application process. If the project is eligible for CPA funding, the applicant will be notified and the Final Application for Funding for the fiscal year beginning July 1, 2024 must be received by 12:00 noon on Friday, October 13, 2023 to be considered for recommendation at the 2024 Annual Town Meeting.
2. The application must be kept **unbound** – *no application or support materials will be accepted in any form of binding including 3-ring binders. All material must be photocopier-ready. All pages should be numbered. Each copy should be paper clipped.* A pdf copy of all application materials is also required and should be emailed to [tisburyipc@gmail.com](mailto:tisburyipc@gmail.com).
3. Each application for project funding must be submitted using the Town of Tisbury Community Preservation Committee Final Application form as a cover sheet. Additional pages should be added as necessary. **Please note, however, that the completed application, SHOULD NOT EXCEED SIX PAGES IN LENGTH.** Supporting materials, such as letters of support, proof of non-profit status, surveys, assessments, maps, can be included as attachments.
4. The Final Application requires both a BRIEF project summary and a fuller, more detailed, narrative. The brief summary is one paragraph in length that explains project need, goals, scope and budget. The narrative should expand on the summary to provide a detailed description of the project including a summary of goals and how they will be achieved, a detailed description of project steps, and a developed budget. The use of maps, visual aids and supporting supplemental information is encouraged.
5. **Applicants should obtain professionally prepared quotes and receive bids for project costs, and obtain more than one of each.** Since a project's approval and start date is not for approximately eight months, please consider **INFLATION** in your cost projections. These should be submitted with the final application. Detailed cost estimates may be used provided the basis of the estimates is fully explained. The budget should also include any administrative expenses (appraisals, copying, closing costs, registering the deed, legal notices, etc.) associated with the project. Such expenses may account for up to 10% of the total budget. If a funded project is underbid and cannot move forward, the CPC may recommend the project be withdrawn.
6. If the funding application is part of a multi-year project, the applicant should include the total project cost and how it will be distributed over each fiscal year period. Fiscal years should align with the Town's working calendar, running from July to June. Keep in mind the CPC's policy that projects awarded CPA funding at Annual Town Meeting have three years to complete the project, beginning on July 1 of the year the project was approved at the Annual Town Meeting, or the project risks cancellation and may be forfeited.
7. For applicants with multiple applications, PRIORITIZE YOUR PROJECTS.
8. **Prior to submitting any applications for CPA funding, applicants should review the CPC section of the Town of Tisbury website, [www.tisburyma.gov](http://www.tisburyma.gov), that includes the State CPA legislation, as well as additional information about the CPA and the Community Preservation Committee. Please keep in mind that there are legal limitations on the use of CPA funds.** The CPC can be reached through its administrator, Heidi Dietterich, [tisburyipc@gmail.com](mailto:tisburyipc@gmail.com).

## FINAL APPLICATION REQUIREMENTS AND ATTACHMENTS - CHECKLIST

SUBMIT 10 COPIES OF THE APPLICATION AND ATTACHMENTS

SUBMIT ONE PDF OF THE COMPLETE APPLICATION AND EMAIL TO TISBURYCPC@GMAIL.COM

THE APPLICATION SHOULD NOT EXCEED SIX PAGES AND SHOULD BE UNBOUND

1. Final Application Cover Sheet
2. Brief Project Summary – Introduce the project with a BRIEF summary which notes the category, goals, project scope, and budget at the start of each application packet. This summary should be a maximum of one paragraph in length and be suitable for distribution to other Boards and Commissions as a reasonable depiction of the overall project.
3. Map - Indicate the location of the project, Town Assessor's Map and Parcel number. Include additional maps as helpful including aerial, zoning, vegetation, and abutting buildings.
4. Narrative – Expand on the information presented in the project summary and provide a complete description of the project and its proposed use relative to the CPA. Describe what agency or organization will be responsible, what kind of community support has been given to the project, and why Town Meeting should support it. Include an implementation plan describing the steps or phases for completion and the processes needed for approval. Summarize the goals of the project and how they will be measured.
5. CPC's Selection Criteria – Address the issues raised in the 'Eligibility Guidelines' on the website.
6. Budget – Outline the total budget for the project and how CPA funds will be spent. Break the project down by year of expenditure. Describe all funding sources. Make sure to consider any administrative expenses required to complete the project (appraisals, environmental assessments, bidding requirements, copying, legal notices, etc.), **as well as INFLATION**, and explain how they have been accounted for in this budget. This is particularly necessary for construction and land acquisition projects and can include up to 10% of the budget.  
Please Note: Non Profit Organizations should also include a current financial statement.
7. Feasibility, Bids and Quotes – Summarize and attach any feasibility reports that may have been prepared. Explain all further actions that will be required for completion of the project such as zoning, environmental assessment, permits, restrictions, agreements or other potential impediments to implementation. If procurement regulations and/or bidding processes are a part of the project, be sure to include this in the project timeline. At least two professionally prepared quotes and bids for project costs should be submitted with the final application. Detailed cost estimates may be used provided the basis of the estimates is fully explained. For procurement and/or bidding processes regulations, links to this information can be found on the [tisburyma.gov/cpc](http://tisburyma.gov/cpc) website.
8. Statement of Sustainability – If the project incorporates sustainable design features, explain how they will reduce impacts on the environment including, but not limited to, reducing energy consumption, enhancing energy and water conservation, and the use of recyclable materials.
9. Timeline – Describe the major milestones and when the project will be completed. Include an estimate of when the CPA funds requested will be needed.
10. Architectural plans, site plans, photographs, if appropriate.
11. Letters of Support are welcome from the public or other appropriate organizations.

***Note: If the CPC recommends the project, additional documentation may be required such as verification of ownership, plans, title verification, purchase and sale agreements and zoning compliance information. Further, if the project is unable to go forward within the 3 year project timeline due to underfunding, procurement issues, or management issues, the Tisbury CPA will request that the funding be withdrawn and the project re-evaluate and reapply for CPA funding.***

## **Addendum Project Implementation Procedures**

All projects must be executed in accordance with Massachusetts State Law, General Laws, Chapter 44 B, Community Preservation Act.

Each project is assigned a CPC liaison who coordinates with the Community Preservation Committee on matters related to project implementation. The range of duties performed by CPC liaisons may include: invoice review/approval, written project update requests, attendance at site visits (except as limited by law on construction projects), and general communication with the project manager and CPC. All project monitoring procedures shall be conducted in coordination with the CPC Administrator.

Invoices shall be reviewed and authorized for payment by the recipient's project manager before submission to the CPC for payment. The CPC Administrator and the appointed liaison will review and verify all information before invoices are processed for payment.

Written project updates shall be required on a periodic basis. In general, written project updates will be required every six months for construction/preservation projects and affordable housing program funds. Similarly, site visits will be conducted on a basis to be determined by the CPC.

Upon project completion, the CPC requests a written statement from the recipient's project manager certifying that the purpose of the appropriation was completed, including the amount of CPA unspent funds which will be returned to the appropriate CPA fund balance.

If any funds remain upon project completion, the CPC shall notify the Town Accountant that the appropriation purpose has been completed. As stated in the Department of Revenue's Informational Guideline Release No. 00-209, "The unspent and unencumbered balance of an appropriation for a particular acquisition or initiative should be closed to the Community Preservation Fund financing source from which the appropriation was funded."

For community preservation initiatives involving the acquisition of real property, all relevant deed reference information must be submitted to the CPC for inclusion in the project file.

For community preservation initiatives involving the restoration or rehabilitation of historic resources, appropriate preservation restrictions must be obtained prior to funding.

### **Special Conditions:**

Efforts shall be made to acknowledge CPA funding in publicity releases and in any written publicity about this project. A sign about the CPA grant shall be posted while the work is taking place, and will be affixed to the project, once the project has been completed. (Provided by the CPC.)

Upon approval of the project, the project start date will be the beginning of the Town's fiscal year, July 1, following approval of the project at Annual Town Meeting. Funds will be available for three years from July 1, 2024, upon submission of all required documentation.