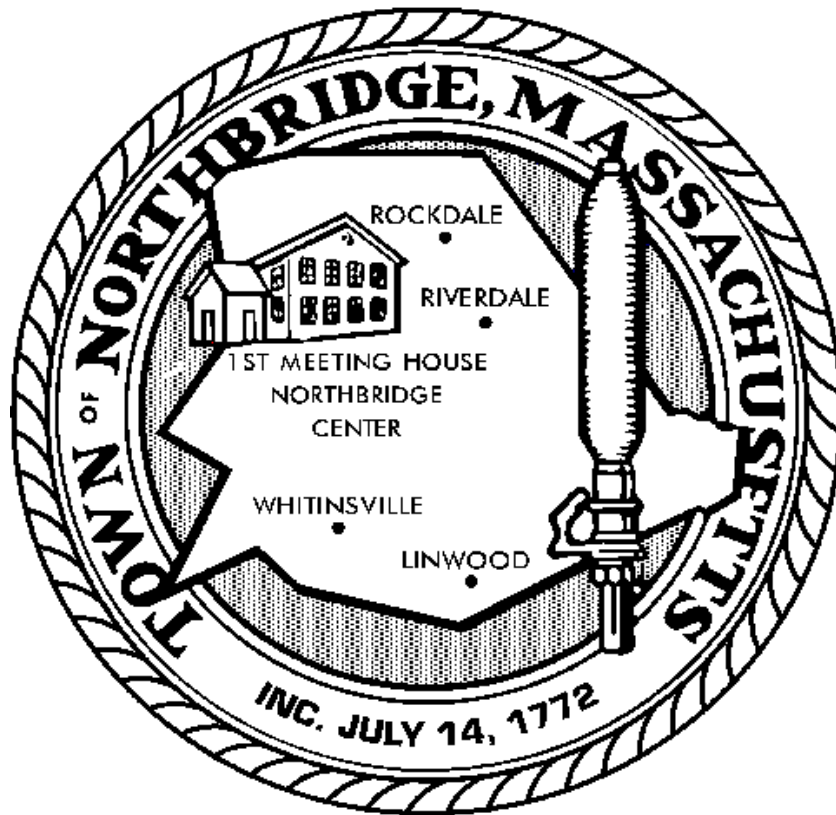


TOWN OF NORTHBRIDGE, MASSACHUSETTS
COMMUNITY PRESERVATION COMMITTEE



COMMUNITY PRESERVATION PLAN

April 05, 2021

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INTRODUCTION

The Town of Northbridge Community Preservation Committee is pleased to present the 2021 NORTHBRIDGE COMMUNITY PRESERVATION PLAN. This Plan describes the process for administering the Community Preservation Act (CPA) and offers guidance on how CPA Funds may be utilized in the Town of Northbridge.

The Plan presents a description of the Community Preservation Act as it applies to Northbridge, includes procedures by which the CPA is administered, identifies CPA funding goals, outlines the process for eligible projects, and funding projects.

The Northbridge Community Preservation Committee (CPC) is an appointed local body charged with overseeing the town's CPA funds and making annual allocation and spending recommendations at Town Meeting.

This Plan shall serve as a guidance document for Applicants seeking project funding through the CPA. The Committee acknowledges the Plan is to be reviewed annually and may be modified in response to changing goals within the CPA over time.

The Committee wishes to thank Northbridge residents, local officials, municipal staff, and the various town boards/committees/commissions for their assistance and input in the development of this 2021 Community Preservation Plan.

For additional information on the Community Preservation Act and how it is being applied in municipalities across the Commonwealth, please visit the Community Preservation Coalition website at <https://www.communitypreservation.org/>

For information on Northbridge's Community Preservation Act, please visit the town's website at <https://www.northbridgemass.org/community-preservation-committee>

Question/comments regarding the Northridge Community Preservation Act may be directed to the Committee at CPC@northbridgemass.org

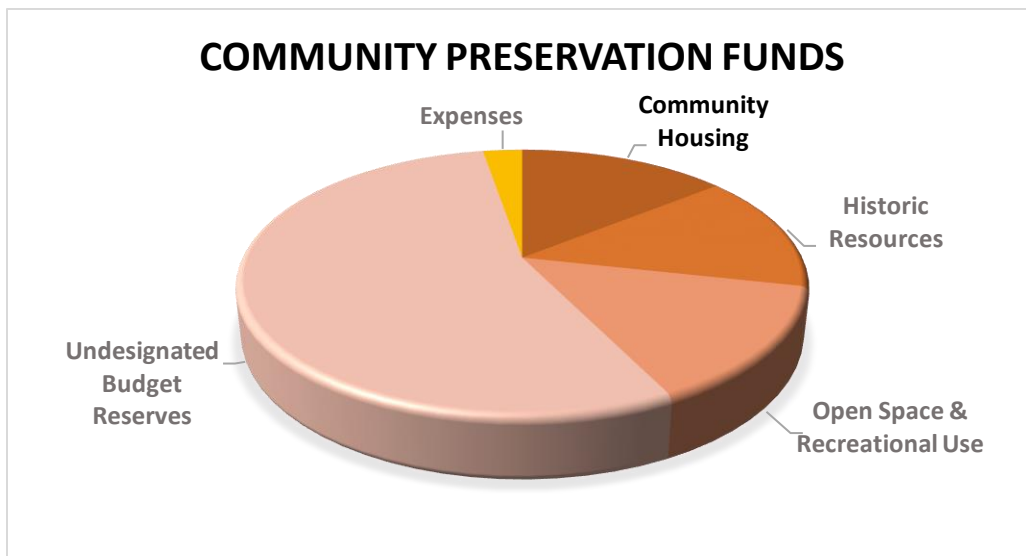
COMMUNITY PRESERVATION ACT IN NORTHBRIDGE

The Community Preservation Act (the CPA) was signed into law M.G.L. c. 44B, in September 2000, allowing cities & towns to create a Community Preservation Fund. The CPA also created a statewide Community Preservation Trust Fund administered by the Department of Revenue, which provides matching funds (% match each year) to communities that have adopted the CPA.

The statute gives cities & towns the right to place a surcharge of up to 3% of the real estate tax levy, on real property. As of November 2020, 186 cities & towns in Massachusetts have adopted the Community Preservation Act.

Locally, Northbridge voters approved the Community Preservation Act, at the November 2017 General Election (Ballot Question); adopting a 1% surcharge on all real estate property tax bills with two exemptions: 1.) residential property owned and occupied by persons who qualifies for low-income housing or low- or moderate-income seniors & 2.) first \$100,000 of taxable value of all residential real property.

Proceeds from the Community Preservation Act, or CPA Funds as its commonly referred to, is collected and deposited into special municipal accounts identified for Community Housing; Historic Resources; Open Space & Recreation Use; Expenses, and Budget Reserves.



CPA funds may be used to acquire, create and preserve OPEN SPACE; acquire, rehabilitate and preserve HISTORIC RESOURCES; acquire, create, preserve and support COMMUNITY HOUSING; acquire, create, rehabilitate and preserve land for RECREATIONAL USE; and rehabilitate open space and community housing that is acquired or created with CPA funds.

COMMUNITY PRESERVATION COMMITTEE: FORMATION AND RESPONSIBILITIES

With the passage of the Community Preservation Act (2017 SATM, Art. #28) and May 15, 2018 General Election (Ballot Question #2), the town adopted a Community Preservation Committee bylaw at the 2018 FATM (Art. #5) creating a Community Preservation Committee (§4-322) to administer the CPA program in accordance with MGL CH 4B.

§4-322 [Community Preservation Committee], describes the Committee composition, length of terms, outlines responsibilities of the Committee, and establishes procedures for CPA allocation and recommendations on spending.

Consistent with the terms of CPA and provisions adopted in 2018, the Community Preservation Committee (CPC) was formed to administer the CPA. The Committee consists of nine (9) members, including three (3) at-large members and six (6) others selected to represent the Conservation Commission, Historic Commission, Planning Board, Playground & Recreation Commission, Housing Authority, and School Committee. Each of the six committees choose a voting member to represent them on the CPC, while the three at-large members are chosen by the Board of Selectmen.

The Northbridge Community Preservation Committee consists of the following members:

- ❖ Glenn King, Chair (Member at-large)
- ❖ Harry Berkowitz, Vice Chair (Member at-large)
- ❖ John O'Brien, Clerk (Housing Authority)
- ❖ Barbara McNamee (Conservation Commission)
- ❖ Leonard Smith (Historic Commission)
- ❖ Rainer Forst (Planning Board)
- ❖ Michael Proto (Playground & Recreation Commission)
- ❖ Brian Paulhus (School Committee)
- ❖ Vacant (Member at-large)

R. Gary Bechtholdt II, Northbridge Town Planner currently serves as the CPA Administrator.

The Northbridge Community Preservation Committee meets the first Monday of each month at 6:30 PM in the Northbridge Memorial Town Hall, unless posted otherwise. All meeting agendas are filed with the Office of the Town Clerk and posted online a minimum of 48-hours in advance.

CPA FUNDING REQUIREMENTS

Each fiscal year Northbridge must, at a minimum, spend or reserve a minimum of 10% of its annual CPA funds for each of the CPA's three (3) target areas: COMMUNITY HOUSING; HISTORIC RESOURCES; OPEN SPACE (& RECREATIONAL USE). Up to 5% of the annual CPA funds may be used for administrative expenses of the Community Preservation Committee. The remaining funds (up to 65%) may be appropriated for CPA projects in any category or transferred to an undesignated Budget Reserve account for the balance of the fiscal year. CPA funds that remain unappropriated at the end of the fiscal year are deposited in the CPA Undesignated Funds Balance for use in future years.

Provided below is a table showing fiscal year allocation of the three (3) target areas and budgeted reserve; including local property tax surcharge and the State CPA Trust Fund contributions:

Fiscal Year (FY)	Community Housing	Historic Resources	Open Space & Recreation	Budget Reserve	Expenses	Local Property Tax Surcharge	State CPA Trust Fund
FY 2019	\$14,000.00	\$14,000.00	\$14,000.00	\$99,700.00		\$141,770.00	\$0.00
FY 2020	\$16,230.00	\$16,230.00	\$16,230.00	\$105,498.00	\$8,115.00	\$163,327.00	\$34,479.00
FY 2021	\$19,147.00	\$19,147.00	\$19,147.00	\$124,454.00	\$9,573.00	\$172,183.00	\$46,841.00
FY 2022	\$23,800.00	\$23,800.00	\$23,800.00	\$154,700.00	\$11,900.00	TBD	TBD
Est. Total:	\$73,177.00	\$73,177.00	\$73,177.00	\$484,352.00			

The estimated annual revenues are the total of the amount to be collected in the upcoming fiscal year under the local surcharge and the State matching funds for the prior fiscal year.

A recommendation by the Committee and an appropriation by Town Meeting vote are both required to spend any CPA Funds for community preservation purposes. Appropriations from the CPA Fund, except in the cases of bonding and eminent domain (land acquisition) proceedings under CPA (the latter of which is very rare), are made by a simple majority vote. Borrowing monies and eminent domain proceedings for CPA purposes require a two-thirds (2/3) majority vote of Town Meeting.

Town Meeting may approve, reduce, or reject any amount of spending appropriation recommended by the Committee. At the Committee's recommendation, Town Meeting may also decide to set aside all or part of the annual CPA Fund revenues for later spending by allocating revenues to a reserve, for one or more community preservation targeted categories.

Town Meeting may not, however, increase any recommended appropriation or reservation. In addition, Town Meeting may not appropriate or reserve any CPA fund monies on its own initiative, without a prior favorable recommendation by the Committee.

GIFTS TO COMMUNITY PRESERVATION FUND

The Town of Northbridge can accept monetary gifts to the Community Preservation Fund. Gifts can be designated for specific purposes consistent with the four statutory categories (open space, community housing, historic preservation, and recreation). Gifts may be made in a variety of forms, including cash and securities. Gifts to the Town of Northbridge are tax-deductible to the full extent allowed under the Internal Revenue Code. For more information please contact the Committee Chair (cpc@northbridgemass.org).

PUBLIC INVOLVEMENT & INPUT

All residents are encouraged and welcome to attend Committee's meetings; times and locations of these meetings are posted at Northbridge Memorial Town Hall and on Northbridge's website, <https://www.northbridgemass.org/>

Written comments or questions are also welcome and may be submitted via email to cpc@northbridgemass.org or directed to the Community Preservation Committee, c/o Northbridge Community Preservation Committee, Northbridge Memorial Town Hall, 7 Main Street Whitinsville, MA. 01588.

The Northbridge Community Preservation Committee has a municipal webpage dedicated to CPA; which include meeting agendas, meeting minutes and various resource documents. <https://www.northbridgemass.org/community-preservation-committee>

HOW CPA FUNDS MAY BE USED

Community Preservation Act funds must be used for public community preservation purposes that benefit the public. The following guidelines summarize these public purposes. As detailed by the CPA, funds may be spent to undertake the following primary community preservation purposes:

- The acquisition, creation, and preservation of open space. Open space, as defined by the CPA, “shall include, but not be limited to, land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh... water marshes and other wetlands, ... river, stream, lake and pond frontage, ... lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use.”
- The acquisition, creation, preservation, and support of community housing. The CPA defines community housing as, “low-and moderate- income housing for individuals and families, including low-or moderate-income senior housing.” The term “support” includes expenditures such as development of a Housing Needs Assessment for the town, hiring a Housing Coordinator, or creating a rental assistance program for income-eligible residents.
- The acquisition, preservation, rehabilitation, and restoration of historic resources. The CPA recognizes historic resources as, including “a building, structure, vessel, or real property that is listed or eligible for listing on the State register of historic places or has been determined by the local historic preservation commission to be significant in the history, archeology, architecture, or culture of a city or town.” For CPA purposes, the local historic preservation commission is the Town of Northbridge Historic Commission.
- The acquisition, creation, preservation and rehabilitation of land for recreational use. The CPA defines recreational use as, “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. ‘Recreational use’ shall not include horse or dog racing or the use of land for a stadium, gymnasium, or similar structure.”

Community Preservation Act funds may also be used for the following purposes:

- ✓ The “rehabilitation or restoration of open space and community housing that is acquired or created” using CPA monies.
- ✓ Revenues “set aside” for “later spending.”
- ✓ Annual “administrative and operating expenses” of the Committee, not to exceed 5% of the Fund’s estimated annual revenues.
- ✓ Annual principal and interest payments, preparation, issuance, and marketing costs for bonds or notes for borrowings for community preservation purposes.
- ✓ Damages payable to property owners for real estate interests taken by the Town by eminent domain for community preservation purposes.
- ✓ “Local share for state and federal grants” for allowable community preservation purposes.
- ✓ Property acquisition-related expenses including appraisal costs, expenses for title searches, and closing fees.

Community Preservation Act funds MAY NOT be spent for the following purposes:

- As a replacement or substitute for operating funds. The CPA is a supplementary funding source intended to increase available resources for community preservation acquisitions and initiatives.
- Payment for routine maintenance, defined as, “the upkeep of any real or personal property.”
- Gymnasiums, stadiums, or any similar structure.
- Projects without a public purpose or public benefit.

The chart provided below (offered by the Community Preservation Coalition), is intended to guide both the CPC and potential Applicants on allowable use of CPA funds to determine project eligibility:

DETERMINING PROJECT ELIGIBILITY				
It's all about the VERBS!				
	OPEN SPACE	HISTORICAL	RECREATION	HOUSING
Acquire	Yes	Yes	Yes	Yes
Create	Yes	-	Yes	Yes
Preserve	Yes	Yes	Yes	Yes
Support	-	-	-	Yes
Rehabilitate &/or Restore	Yes – if acquired or created with CPA Funds	Yes	Yes	Yes – if acquired or created with CPA Funds

Acquire -to obtain property interest by gift, purchase, devise, grant, rental, rental purchase, lease or otherwise. Only includes eminent domain takings as provided by G.L. c. 44B.

Create -to bring into being or cause to exist.

Preserve -to protect personal or real property from injury harm or destruction.

Support -to provided 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.

Rehabilitate &/or Restore -to 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.

While the Northbridge Community Preservation Plan establishes Goals for the types of projects that may receive CPA funding, the CPA legislation defines the types of projects that are eligible to receive funding. Projects seeking CPA funding that do not fit within one or more of the allowable uses cannot be considered by the Committee.

If you have a project idea, be sure to acquaint yourself with CPA and its funding requirements by first visiting the Community Preservation Coalition's webpage (communitypreservation.org).

The Community Preservation Coalition is a group of nonprofit organizations created to assist municipalities in the adoption of the Community Preservation Act, the implementation of CPA, as well as, provide for State-level advocacy to promote and sustain the Community Preservation Act program. The Coalition site offers an overview on CPA, includes a database of CPA funded projects, News & Announcements, and Technical Assistance offered to community members such as Northbridge.

Projects deemed eligible for CPA funding are invited and encouraged to submit full project applications and present their project to the Community Preservation Committee (public meeting) in advance of the application submittal timeline. The CPC shall make funding recommendations on projects for approval at Town Meeting, as required per the CPA statute.

NORTHBRIDGE COMMUNITY PRESERVATION ACT GOALS

The Northbridge Community Preservation Plan is intended to assist the Community Preservation Committee, its residents, and applicants in utilizing CPA funds as a tool to help achieve Northbridge's community preservation goals.

The Northbridge Community Preservation Goals are detailed on pages 13-19 of this Plan.

COMMUNITY HOUSING

The CPA statute defines “community housing” as housing for low- and moderate-income individuals and families, including senior housing. Low-income housing is for households whose annual income is less than 80% of the area-wide median income. Moderate-income housing is for households whose annual income is less than 100% of the area-wide median income. The area-wide median income is determined annually by the U.S. Department of Housing & Urban Development (HUD).

Northbridge’s (Worcester MSA, Worcester HMFA -Census Area Designation) estimated Area-Wide Median Income for a family of four is \$98,200, a moderate income limit for property owned & occupied by a senior 60 or older of \$68,740 (household size of one) and of \$78,560 (household size of two) -see table(s) below for other income limits.

2020 CPA AFFORDABLE HOUSING INCOME LIMITS

Moderate income is 100% of HUD's Area-Wide Income Figure

Income limits for property owned & occupied by senior 60 or older

	(Household Size)							
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)
NORTHBRIDGE	\$68,740.00	\$78,560.00	\$88,380.00	\$98,200.00	\$106,056.00	\$113,912.00	\$121,768.00	\$129,624.00

Please Note: Due to the definition of Low Income Housing in the CPA Statute, these Low Income Limits are slightly different from HUD's Low Income figures.

Low Income is 80% of HUD's Area-Wide Median Income Figure

Low Income limits per households (non-senior)

	(Household Size)							
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)
NORTHBRIDGE	\$54,992.00	\$62,848.00	\$70,704.00	\$78,560.00	\$84,845.00	\$91,130.00	\$97,414.00	\$103,699.00

Please Note: Due to the definition of Low Income Housing in the CPA Statute, these Low Income Limits are slightly different from HUD's Low Income figures.

CPA funds can be used for housing units serving households of 80%-100% of the area median income even though they will not count towards Northbridge’s 10% (SHI -Subsidized Housing Inventory). At present 468, or 7.4% of Northbridge Housing Units are classified as affordable or “subsidized housing” by the State’s Department of Housing and Community Development (DHCD) for purposes of Community Preservation Program and Plan. *[Note: This data is derived from information provided to the Department of Housing and Community Development and is subject to change as new information is obtained and use restrictions expire.]*

The Northbridge Housing Authority, a public housing agency provides affordable housing for elderly and disabled persons of low income. As a state public housing authority, they receive direct funding from the Department of Housing & Community Development.

The Northbridge Housing Authority owns and manages three (3) properties in town: Colonial Drive (36 one-bedroom units); Lake Street (40 one & two-bedroom units) and Sutton Street (8-units of Ch. 689 Housing), totaling 84-units. In addition, there are a number of owner-occupied housing units and properties that may qualify for CPA funds.

A minimum of 10% of the annual CPA revenues must be spent or reserved for the acquisition, creation, preservation, rehabilitation, and support of community housing.

CPA funding for COMMUNITY HOUSING may be utilized to assist in:

- *The acquisition, creation, preservation, and support of community housing. The CPA defines community housing as, “low-and moderate- income housing for individuals and families, including low-or moderate-income senior housing.” The term “support” includes expenditures such as development of a Housing Needs Assessment for the town, hiring a Housing Coordinator, or creating a rental assistance program for income-eligible residents.*

COMMUNITY HOUSING GOALS

- ❖ Analyze town’s Affordable Housing Needs/Create a Housing Production Plan;
- ❖ Establish a Local Affordable Housing Trust/Create a Rental Assistance Program to income-eligible residents;
- ❖ Support opportunities to create affordable rental & homeownership housing throughout town;
- ❖ Preserve threatened affordable housing resources;
- ❖ Encourage housing designs that preserve & reflect the historic character of Northbridge’s villages; and
- ❖ Acquire, create, preserve and support community housing and rehabilitate or restore community housing that is acquired under the CPA. Give preference to the reuse of existing buildings and to the construction of new buildings on previously developed sites.

HISTORIC RESOURCES

The CPA statute defines “historic resources” as a building, structure, vessel, real property, document or artifact that is listed on the State Register of Historic Places or has been determined by the local historic preservation commission to be significant in the history, archaeology, architecture, or culture of a city or town.

Historic resources must meet one of the following two (2) criteria prior to being considered for CPA funding:

1 -the historic resource must be listed on the Massachusetts State Register of Historic Places

or

2 -it must be determined by the local historical commission that the historic resource is locally significant.

If the proposed CPA project has not met one of these two criteria, IT IS NOT ELIGIBLE FOR CPA FUNDING.

Northbridge, made up of five (5) villages (Linwood, Rockdale, Riverdale, Whitinsville, & Northbridge Center) was incorporated as a town in July 14, 1772. Located in historic Blackstone River Valley, Northbridge played a major role in early industrial development in American. In December 2014, Northbridge (Whitinsville) was included in the “Blackstone River Valley National Historical Park”, the 402nd park in the United States National Parks System. The National Park designation includes five (5) sites within Rhode Island and Massachusetts.

A local historic district, “Whitinsville -Downtown Crossroads” was adopted in October 2019, which includes twelve (12) properties that reflect the growth of a paternalistic mill village from the early beginnings of the American Industrial Revolution, when a largely agricultural community was transformed into an industrial mill village planned and developed by the Whitin family. In total, Northbridge has 483 sites, buildings or structures listed on the Massachusetts State Register.

The State Register of Historic Places lists buildings, structures, objects, and sites within Northbridge that have received local, state or national designations based on their historical or archaeological significance. The State Register of Historic Place is published once a year by the Massachusetts Historical Commission (MHC). A Massachusetts document repository is available online at [MassGIS Data: MHC Historic Inventory](#), as well as via the MHC’s Massachusetts Cultural Resource Information System ([MACRIS](#)) web-portal.

A minimum of 10% of the annual CPA revenues must be spent or reserved for the acquisition, preservation, and restoration of historic resources.

CPA funding for HISTORIC RESOURCES may be utilized to assist in:

- *The acquisition, preservation, rehabilitation, and restoration of historic resources. The CPA recognizes historic resources as, “a building, structure, vessel, or real property that is listed or eligible for listing on the State register of historic places or has been determined by the local historic preservation commission to be significant in the history, archeology, architecture, or culture of a city or town.” For CPA purposes, the local historic preservation commission is the Town of Northbridge Historic Commission.*

HISTORIC RESOURCES GOALS

- ❖ Protect, preserve & restore threatened properties of particular historical, architectural, archaeological, or cultural significance and
- ❖ Preserve rural/historic character of Northbridge, including residential and non-residential buildings, barns, outbuildings, burial grounds, markers, monuments, stonewalls, fields, historic landscapes, & scenic vistas.

Applicants are encouraged to review available resources prior to submission of an application under historic resources. See also “Qualifying Historic Projects for CPA Funding” flowchart prepared by the Community Preservation Coalition included in the Appendix attached hereto. Projects using CPA funds on historic resources must adhere to the U.S. Secretary of Interior’s Standards for the Treatment of Historic Properties (-see Appendix).

OPEN SPACE

The CPA statute defines “open space” as 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.”

The Town of Northbridge is a community with a diversity of natural resources and open space, located within the Blackstone River Watershed (which stretches from its headwaters in Worcester, MA to Pawtucket, RI). Northbridge shares its public water supply with neighboring Sutton. Water is provided by Whitinsville Water Company, a private public utility regulated by the Massachusetts Department of Environmental Protection (MassDEP). The public drinking water supply originates from two (2) groundwater sources: the Whittin Wellfield (Carr Street, Northbridge) and the Sutton Wellfield (Mendon Road, Sutton).

The town is currently updating its Open Space & Recreation Plan (OSRP); the plan shall reflect Northbridge’s continued commitment to protecting, maintaining and expanding its open space, natural resources and recreational opportunities. Since 2000, Northbridge has experienced a significant increase in residential growth and development, straining its open space and natural resources. The OSRP update shall identify and help facilitate the preservation and protection of Northbridge’s natural landscapes and identify priority land for habitat and water resource protection.

It is important to note, a permanent deed restriction is required for all real property interests acquired under CPA for “open space”. This restriction must be filed as a separate instrument, such as a Conservation Restriction (CR) or Agricultural Preservation Restriction (APR).

A Conservation Restriction (CR) is a legal agreement that prevents development and other activities on important natural & recreational resources like drinking water supplies, agricultural lands, wildlife habitat, and hiking trails. Although not as common, a CR can also be placed on active recreational land such as recreational fields & parks. A CR is a legal document, approved by the state’s Executive Office of Energy and Environmental Affairs and filed at the Registry of Deeds, which details exactly what activities can & cannot take place on the parcel of land in question. *[Community Preservation Coalition -July 2012].*

A minimum of 10% of the annual CPA revenues must be spent or reserved for the acquisition, creation, preservation, and restoration of open space (& recreational use).

CPA funding for OPEN SPACE may be utilized to assist in:

- The acquisition, creation, and preservation of open space. Open space, as defined by the CPA, “shall include, but not be limited to, land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh... water marshes and other wetlands, ... river, stream, lake and pond frontage, ... lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use.”

OPEN SPACE GOALS

- ❖ Protect, preserve & provide for open space, wildlife habitat, water resource protection, and significant scenic viewsheds;
- ❖ Support parcels of agricultural land;
- ❖ Protect environmentally sensitive areas through acquisition & conservation restriction; and
- ❖ Develop strategies to better manage open space (& recreational amenities).

Provide for a high quality, diversified open space system that preserves and enhances significant environmental resources and features to protect threatened species, preserve habitat, agricultural lands, and protect water resources.

RECREATIONAL USE

The CPA statute defines “recreational use” as active or passive use including, 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. “Recreational use” shall not include horse or dog racing or the use for a stadium, gymnasium or similar structure.

Northbridge has over 100 acres of Department of Conservation & Recreation land, Upton State Forest and a number of town-owned parcels offering passive recreation, town has eight (8) town facilities for active recreation (playgrounds & playfields). Many of these town recreational amenities may be undersized/inadequate, lack proper drainage/irrigation, in need of repair, and do not meet ADA -American Disabilities Act or MAAB -Massachusetts Architectural Access Board requirement standards.

A minimum of 10% of the annual CPA revenues must be spent or reserved for the acquisition, creation, preservation, and restoration of recreational use (& open space).

CPA funding for RECREATIONAL USE may be utilized to assist in:

- The acquisition, creation, and preservation of land for recreational use. Recreational use as defined by CPA, is “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.

RECREATIONAL USE GOALS

- ❖ Comply with ADA & MAAB requirements and standards;
- ❖ Improve trailhead parking & access to open space and recreational assets in Northbridge;
- ❖ Create additional active recreational amenities, such as a large municipal park, playgrounds, multi-use fields, tennis courts, walking paths, X-country course, dog park;
- ❖ Improve existing ballfields, courts, playgrounds, & canoe/kayak access;
- ❖ Acquire land for additional athletic fields and/or passive recreation opportunities throughout town; and
- ❖ Create/Establish a town-wide trail system (including trailhead signage & trail markings).

Note: CPA Funds CANNOT be used for maintenance, for artificial turf or to supplant current municipal spending.

CPA FUNDING APPLICATION PROCESS

The Northbridge Community Preservation Committee (CPC) is responsible for reviewing projects proposed for Community Preservation Act funding. The CPC shall sponsor all CPA related warrant articles and make formal recommendations at Town Meeting. In order to be considered eligible for review by the CPC, a project must at a minimum, meet the statutory requirements of the CPA.

If a submitted project is deemed to be eligible for consideration by the Community Preservation Committee, it will be evaluated in relation to the CPA Selection Criteria and Consideration Guidelines of the Community Preservation Plan.

Recommendation for funding will be based on how well the project meet criteria, based on need and overall budget.

The CPC may also give consideration to the urgency of a project, especially to those projects whose successful implementation is constrained by scheduling factors not in the control of the applicant. In special situations, such as the imminent placing of land on the market or an indication of an intention to do so, the CPC may consider an application outside of the normal schedule of project solicitations. The CPC may consider late applications only after a 2/3 vote of the Committee to accept the later application.

The application process for requesting Community Preservation funding is 2-fold; Applicants must first submit a Pre-application to the CPC to determine project eligibility, followed by a Project Application to the CPC for funding requests of eligible projects. The project eligibility process introduces potential projects to the CPC, to determine eligibility and allows the CPC to offer some initial guidance. If the CPC determines a potential project is eligible a Project Funding Application may then be submitted to the Community Preservation Committee.

Each application must be submitted to the Community Preservation Committee using the application(s) as a coversheet. Applicants shall submit ten (10) copies and one (1) electronic file (pdf) of all project material to the Northbridge Community Preservation Committee, 7 Main Street, Whitinsville, MA 01588 (cpc@northbridgemass.org). Please be sure to include any maps, diagrams, and/or photographs that pertain to your project.

All applicants will be expected to present their project at a CPC meeting to review and answer questions about their proposal during the pre-application and application process. The CPC will review all project funding applications and schedule a public meeting(s) to discuss each proposal with the applicant(s). These discussions may lead to the need for proposal revisions, etc.

APPLICATION REVIEW

The CPC shall review all applications and make all decisions during open public meetings. Applicants will be informed of the meetings and are required to attend. For each application step, applicants should be prepared to clearly state their project goals, timeline, funding request, additional funding resources, and how the project fits with other community goals as may be defined in existing planning documents or ongoing local initiatives.

Step 1 -applications will be reviewed for:

- a. Compatibility with CPA legislation & Community Preservation Plan
- b. Completeness of the information presented
- c. Impact of project to local community

Step 2 -applications will be reviewed for:

- a. Whether the CPA funds serve as a catalyst for leveraging other funding sources;
- b. Breadth of impact on the lives of the residents of Northbridge;
- c. Long term benefits to the town;
- d. Long term costs to the town, if action is not taken;
- e. Urgency of the project; &
- f. Any other factors that may be relevant to a specific project

Following Step 2 review, the Committee will recommend projects to Town Meeting for funding. The final decision to fund or not fund a project recommended by the CPC shall be decided by the voters of Town Meeting.

Non-municipal project applicants whose projects are funded by Town Meeting will be expected to enter into a contract with the Town of Northbridge that will govern the project scope, timeline, deliverables, payment amount and timing, insurance, and other special conditions as may be required. The Committee may withhold some or all funds until applicable permits and approvals are in place. The Committee may also require performance or completion bonds and may withhold funds for non-performance.

Depending on the eligibility and strength of applications, the Committee may recommend partial funding, full funding or choose to not recommend an application.

Projects that serve more than one purpose of the CPA will be viewed more favorably than those that do not. Projects that can demonstrate that they have been developed through a

participatory process in which the public has had the opportunity to provide input will be viewed more favorably than those that have not had public input.

Applicants should demonstrate the relevant experience of their team. All applicants must demonstrate that they have the staff and other resources necessary to see the proposed project successfully through to completion.

APPLICATION REQUIREMENTS (1 original, 9 prints & a digital format/PDF shall be submitted)

1. CPA Application Cover Page -complete form.
2. Brief Project Summary -introduce the project with a brief summary which notes the category, goals, project scope, and budget. The summary should be 1 to 2 paragraphs in length and suitable for distribution to other Boards and Committees as a reasonable depiction of the overall project.
3. Map -indicate the location of the project using a town-based GIS or Assessor Map. Include additional maps as may be 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 process needed for approval. Summarize the goals of the project and how they will be measured.
5. General Evaluation Criteria & Consideration Guidelines -please include responses as to how your project (where applicable) addresses the issues raised in the General Evaluation Criteria & Consideration Guidelines for your project category.
6. Budget -outline the total budget for the project and how CPA funds will be spent. Break the project down by year expenditure. Describe all funding sources. Where applicable, describe how much of the proposed CPA funding should be ascribed to each of the four CPA purposes. Make sure to consider any administrative expenses required to complete the project (appraisals, environmental assessments, bidding requirements, copying, legal notices, etc.) and explain how they have been accounted for in the 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 -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.
8. Timeline -describe the major milestones and when the anticipated completion date is. Include an estimate of when CPA funds requested will be needed.
9. Architectural Plans, Drawings, Site Plans, Photographs -provide as appropriate.
10. Letters of Support -are welcome from the public or appropriate organizations.

Note: If the CPC recommends the project, additional documentation may be required such as verification of ownership, plans, title certification, purchase and sale agreements, and zoning compliance information. To be recommended for CPA funding by the CPC, project budgets shall be fully vetted, with proof of appropriate procurement being satisfied, when applicable.

During the Project Application review process, the CPC may conduct a site visit and discuss its recommendation with the Board of Selectmen and Finance Committee before preparing a warrant article for Town Meeting consideration. The CPC must vote to recommend a proposal before placing articles on the warrant for Town Meeting consideration. Each project must be approved at Town Meeting.

For Historic Resource Projects Only -Applicants should be prepared to provide a copy of the Historic Resource Inventory Form for the property with the application submittal. Further the Committee strongly encourages all Historic Resources applicants to have a Historic Structure Report completed before requesting any CPA funds for restoration or rehabilitation projects. The Committee may require the completion of a Historic Structure Report prior to the use of any CPA funding at historic sites and may recommend the reallocation of some or all of the requested funds for this purpose. See Appendix J for additional information on Historic Structure Reports and Affidavit Signatory Page.

For Land Acquisition Projects -Applicants for the acquisition of real property or real property interests in any of the four (4) funding categories should be aware that a permanent deed restriction is required if all or a portion of the land is purchased with CPA funds as specified in Section 12(a) of the Community Preservation Act (see Appendix F). The type of restriction required will vary depending on the funding category and may require the review of the State or other government entity. Applicants should identify the holder of the restriction as early in the process as possible and be prepared to submit a draft restriction as part of their CPA funding review.

While the Committee understands that land acquisition projects can be difficult to coordinate with a review schedule, it is important that the CPC have adequate time to consider application(s). All decisions on the use and ownership of the land should be made before an application is submitted.

Informal inquiries are always welcomed and should be directed through the Committee Chair (cpc@northbridgemass.org), who will present inquiries to the Committee during a posting public meeting of the CPC.

I. GENERAL EVALUATION CRITERIA -applications will be evaluated according to the following criteria:

- a. Project eligibility for CPA funding under the CPA legislation;
- b. Project consistency with town-wide planning efforts and local initiatives;
- c. Project support by relevant town boards, committees, community groups and local organizations;
- d. Extent to which the project preserves, protects or enhances existing town-owned open space, recreation, historic, and/or housing assets;
- e. Extent to which the project serves multiple or underserved populations and/or is open to the public;
- f. Whether or not the project fulfills more than one purpose of the CPA legislation: housing, historic preservation, open space or recreation;
- g. Whether or not applicant has site control or written consent by property owner to submit an application;
- h. Demonstrated financial need;
- i. Whether or not there will be multiple sources of funding for the project, including leveraging of other public and/or private funding;
- j. Feasibility of the project plan and whether or not the most reasonable approach for implementing the project has been selected;
- k. Urgency of the project, the flexibility of the schedule and the impact of any delay in initiating the project;
- l. Inclusion of an appropriate permanent deed restriction, preservation restriction, or conservation restriction;
- m. Extent to which the applicant has successfully implemented projects of similar type and scale or otherwise demonstrated the ability and competency to implement such a project; and
- n. Administrative and financial management capabilities of the applicant. Applicants which may have previously received CPA funds should be prepared to demonstrate that they are in good standing with all paperwork and project conditions or requirements of a previous funding allocation. Applicants should be prepared to provide a status report on any open projects which includes information on expenditures, key project milestones, and the anticipated project completion date.

II. **CONSIDERATION GUIDELINES** -CPC shall consider the following when reviewing applications:

- a. Preservation of a resource or opportunity that would otherwise be lost;
- b. Involvement of two or more of the categories designated for funding under the CPA; Preference for substantial projects that would have a significant long-term benefit to the community;
- c. Involvement of multiple sources of funding, including leveraging other public/private funds;
- d. Creation of incentives for other public/private projects and/or collaborations to occur;
- e. Demonstration that the proposal is feasible and the most reasonable plan to implement the project; and
- f. Provisions for a dedicated source of funding for on-going maintenance, if applicable.

The General Evaluation Criteria and Consideration Guidelines shall be applied in combination with the specific goals outlined in the Plan, including the following:

COMMUNITY HOUSING proposals that address as many of the following criteria as possible shall receive preference:

- ☐ Contributes to the towns 10% affordability
- ☐ Provides housing in harmony with design and scale of surrounding neighborhoods
- ☐ Intermingles affordable and market rate housing
- ☐ Ensures long-term affordability
- ☐ Promotes use of existing buildings or construction on previously developed or town-owned sites
- ☐ Converts market rate to affordable units

HISTORIC RESOURCES proposals that address as many of the following criteria as possible shall receive preference:

- ☐ Protects, preserves, enhances, restores, and/or rehabilitates historic, cultural, architectural or archeological resources or significance, especially if threatened
- ☐ Protects, preserves, enhances, restores, and/or rehabilitates town-owned properties, features or resources of historical significance
- ☐ Protects, preserves, enhances, restores, and/or rehabilitates the historical function of a property or site
- ☐ Demonstrates a public benefit
- ☐ Demonstrates ability to provide permanent protection for maintaining the historic resource

OPEN SPACE proposals that address as many of the following criteria as possible shall receive preference:

- ☐ Permanently protects important wildlife habitat, including areas that are of local significance for biodiversity; contain a variety of habitats, with a diversity of geologic features and types of vegetation; contains a habitat type that is in danger; or preserves a habitat for threatened/endangered species of plant/animal
- ☐ Preserves Northbridge's rural and agricultural character
- ☐ Provides opportunities for passive recreation and environmental education
- ☐ Protects or enhances wildlife corridors, promotes connectivity of habitat or prevents fragmentation of habitats
- ☐ Provides connections with existing trails or potential trail linkages
- ☐ Preserves scenic vistas;
- ☐ Borders a Scenic Road
- ☐ Protects drinking water supply area
- ☐ Provides flood control/storage
- ☐ Preserves important surface water bodies, including wetlands, vernal pools or riparian zones

RECREATIONAL USE proposals that address as many of the following criteria as possible shall receive preference:

- ☐ Supports multiple recreation use
- ☐ Serves a significant number of residents
- ☐ Expands the range of recreational opportunities available to Northbridge residents of all ages
- ☐ Jointly benefits Conservation Commission and Playground & Recreation Commission initiatives by promoting passive recreation, such as hiking, biking, cross-country skiing, and hunting & fishing, safely balancing the needs of all recreational activities on town-owned property
- ☐ Maximizes the utility of land already owned by Northbridge

TIMELINE FOR COMMUNITY PRESERVATION PROJECT APPLICATIONS

The Community Preservation Committee invites municipal departments, community organizations and individuals to submit applications for CPA funding on an annual basis. For each fiscal year, *the Committee shall solicit calls for pre-application during the months of August and September with Project Applications for CPA funding requests due by October 01*; where, warrant articles may be prepared for consideration for the Spring Annual Town Meeting (May).

First time applicants are advised to attend a public informational meeting hosted by the Community Preservation Committee. The first of which shall be held on the second Monday of September, in advance of the Committee's official solicitation for CPA projects for the following fiscal year.

To be recommended for CPA funding by the CPC, project budgets must be fully vetted, with proof appropriate procurement being satisfied, when applicable. Reference made to Office of Inspector General letter dated July 2018 & Procurement Charts (-see Appendix).

Because of the unpredictability of CPA projects involving the purchase of land or historic buildings, the CPC may accept applications on an on-going basis as needed. However, CPC recommendation and Town Meeting vote are still required to allocate CPC funds.

Special circumstances may arise that make it infeasible to adhere to the application submission timelines. For example, a priority open space property may unexpectedly come on the market just past the application due date or an historic resource requires immediate attention. In these instances, the Committee may allow for special situations to consider an application outside the normal schedule outlined in this Plan. See Appendix for Special Application Process.

LEVERAGING OF CPA FUNDS

CPA funds may be used as matching monies for state and federal grant programs that require a local match. CPA funds may also be used as matching or seed monies to acquire grants from private organizations or individuals. Projects may use other funds to supplement CPA and those that leverage additional funds from sources other than CPA will be viewed more favorably than those that do not.

The CPA legislation allows communities to leverage their CPA revenue by borrowing for eligible projects and using future CPA revenue to pay the resulting debt service. As such, Applicants may apply for funding beyond the amount of revenue currently available. Bonded projects require approval of 2/3 majority vote at Town Meeting.

Projects proposing leveraging future CPA funds are encouraged to meet with the Community Preservation Committee as soon as possible to vet the project, review budgets, shared costs, terms, and other financials with the CPC, as well as, the Town Treasurer/Collector and Accountant on the proposed borrowing.

The Community Preservation Committee (CPC) looks forward to working with members of the community in the review of projects (small & large), aimed to enhance our town through the utilization of Community Preservation Funds.

CPA FUNDING AWARD PROCESS

Following the conclusion of Town Meeting, each successful applicant will receive an award letter from the Community Preservation Committee confirming its funding award. The letter will be accompanied by either a Memorandum of Understanding (town projects), outlining the agreed upon scope of the project, or a Grant Agreement (non-town projects), outlining the agreed upon scope of the project, any conditions and terms of the funding. Grant Agreements must be signed and returned to the Town of Northbridge before project start. Applicant shall meet with the CPC to review project scope, timelines, milestones and CPA funding disbursement process.

The Community Preservation Committee shall issue award letters for projects approved at Town Meeting with information on the funding amount, funding conditions, project modifications (if any), CPC Admin contact information, and guidelines for project execution. Projects receiving CPA funding shall credit this source of funding in promotional materials and where appropriate at the project location.

Except for town-sponsored projects, a Grant Agreement prepared by the CPC must be signed by the applicant (Awardee) after the project has been approved at Town Meeting and before CPA funds are to be disbursed.

Applicants must recognize the CPA as a funding sources for their project. This recognition should appear on any materials involving the project, such as press releases, brochures, etc. In order for Northbridge residents to see the results of their tax funding, a CPA sign shall be displayed on the property on a case-by-case basis, as determined by the CPC. Signage indicating CPA support shall be made available through the CPC.

PROJECT IMPLEMENTATION

Each project recipient is expected to implement the approved project work in accordance with the Grant Agreement or Memorandum of Understanding. Any material changes to the project from what was represented at Town Meeting shall require prior approval from the CPC to ensure that such changes are CPA eligible expenditures and within the scope of the project as approved by Town Meeting. Any appropriated CPA project funds not expended at the completion of the approved work will be returned to the CPA account from where they were appropriated. Unless there is a compelling and documented reason, projects receiving CPA funds must be completed within 24 months following Town Meeting approval. The CPC may recommend at a subsequent Town Meeting the rescission of any authorized CPA funds remaining unexpended or undocumented after 12 months.

AVAILABILITY OF AWARDED CPA FUNDS

Funds for approved CPA projects will be available following Town Meeting, subject to satisfying any conditions or procedures established by the CPC. Invoices for work completed or CPA funds allocated for approved projects shall be submitted to the CPC together with a Project Status Report form prepared according to the Request for Funds Guidelines (-see Appendix).

DISBURSEMENT AND USE OF CPA FUNDS

CPA funds are public funds raised from dedicated Northbridge revenues and from State subsidies. Projects financed with CPA funds must comply with all applicable State and municipal requirements, which requires special procedures for the selection of products, services, consultants, etc. Contracts for goods and services must be awarded to the lowest qualified bidder, which may be someone other than who assisted the applicant with a project application. Project purchases cannot be split or manipulated to avoid State procurement laws.

The CPC will provide successful applicants with a memo describing the completed award process, which adheres to the guidelines of the Massachusetts Procurement Law.

In general, funds may be spent only on items listed on the submitted budget in the application. All changes to budgets must receive prior approval by the CPC. Funding from the CPC may not be used to replace or free up for any other use, alternate funds or revenue sources.

In certain situations, funds may not be disbursed until there is an appropriate deed restriction or the Department of Revenue, the Department of Conservation & Recreation, the Massachusetts Historical Commission, or the Department of Housing & Community Development (as appropriate) must be satisfied with the status of the restriction.

Projects for which 50% (or other fraction) of costs will be paid from awarded CPA funds will be reimbursed on the basis of 50% (or other fraction) of actual expenditures up to the amount of the total CPA grant, and as may be detailed in project milestones reviewed and approved by the CPC.

CPA funding for project involving properties of artifacts which are owned by nonprofit organizations is conditioned on the public benefit received from the completed work. The sale or gift of these properties or artifacts within five (5) years from the date of the award letter shall require the reimbursement of the entire amount awarded unless the CPC waives this requirement in part or in its entirety.

Funds are to be administered and disbursed by the Town of Northbridge according to municipal disbursement procedures.

Applicants should note Chapter 30B of the Massachusetts General Laws, the Uniform Procurement Act, establishes uniform procedures for local governments to use when contracting for supplies, services, and real property.

Project oversight, monitoring and financial control are the responsibility of the Community Preservation Committee or its designee. When the project is completed, any and all unused funds shall be returned to the Northbridge Community Preservation Fund. The CPC, from time to time may request project status updates from CPA fund recipients. The purpose of such updates is to track the progress of funded projects, aid the CPC in refining the Community Preservation Plan and identify issues that may assist future applicants.

For construction projects, CPA funding recipients may be asked to instruct their general liability insurer to add the Town of Northbridge as an additional insured as related to the specific CPA funded project, and to require all contractors of the project do the same. Proof of coverage must be submitted for the CPC files prior to first request for reimbursement.

REQUESTING AWARDED FUNDS

Invoices for work completed or for funds allocated for approved projects shall be submitted and signed by the applicant, accompanied by a Request for Funds form submitted to the Community Preservation Committee for review and processing.

Each Request for Funds form must include an updated project status report, original invoices, receipts and canceled checks. Payments will be made directly to the applicant unless the applicant is a Town of Northbridge department.

If an invoice has already been paid and requesting reimbursement, include copy of the cancelled check attached to the invoice.

If payment is for contracted services, a copy of the fully executed contract shall accompany the request for payment. Additionally, the CPC shall require a detailed report of billable hours, if applicable. State law prohibits reimbursement for sales tax; invoices shall identify and appropriately reflect this.

The CPC may appoint the CPA Administrator or authorize the CPC Chair to process certain payments. Requests for funds above \$10,000 are to be voted on by the Community Preservation Committee. See Appendix M -Request for Funds form.

ACKNOWLEDGEMENTS

In addition to reviewing the resources and documents available from the Community Preservation Coalition, the Northbridge Community Preservation Committee would like to acknowledge the following municipal plans and application forms reviewed in the preparation of this Plan: Agawam, Belchertown, Canton, Concord, Easton, Gloucester, Grafton, Great Barrington, Hamilton, Lenox, Lexington, Manchester, Mashpee, Mendon, Northampton, Shutesbury, Somerset, Upton, Wellesley, West Boylston, and West Tisbury, MA.