



Groton Community Preservation Plan 2011



Surrenden Farm

Prepared by the
Groton Community Preservation Committee

Groton Community Preservation Plan 2011
Version Date: October 18, 2011

Contents subject to change without prior notice. Additional details pending.

Prepared by:

Groton Community Preservation Committee
Town Hall
Main St.
Groton, MA 01450

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The Legend Corporation, Groton, MA 01450

October 18, 2011

To the Citizens of the Town of Groton, Mass.:

As members of the Groton Community Preservation Committee (CPC), it gives us great pleasure to present to the Town the 2011 edition of the Community Preservation Plan (CPP) of Groton, Mass. Section 5 (b) (1) of the Massachusetts Community Preservation Act (CPA) requires the creation of CPC to study the needs, possibilities, and resources of the town as to community preservation, and monitor proposals approved by Town Meeting.

At the spring 2004 Town Meeting, the Groton Community Preservation Research Committee recommended that for the first few years of the CPA's implementation, the goals and objectives established by numerous existing planning documents for the Town be used to inspire Town boards, committees, organizations, etc. to create community-preservation projects that would meet one or more of the previously mentioned goals and objectives. At that Town Meeting, it was proposed that a Community Preservation Plan (CPP) should be the means of organizing and developing CPA proposal-preparation guidelines and procedures.

An updated CPP is submitted to the Town each year the CPA is in place. The CPP submitted herewith is Groton's latest CPP. Public hearings will be scheduled each year to enable the Town's citizens to participate in the development of each new CPP.

We encourage Groton's citizens and others to review the schedule for 2011 and use the submission form included in the CPP to begin to develop proposals in accordance with the procedures herein set forth. This CPP has been placed on the Town of Groton website.

We look forward to working with the Town in developing projects under the CPP and in facilitating projects that are important and useful for Groton's citizens.

Comments, questions, and suggestions regarding the CPP can be sent to: Groton Community Preservation Committee (CPC), Town Hall, Main St., Groton, MA 01450, and/or to Kathy Miller (CPC admin assistant) at kmiller@townofgroton.org or CommunityPreservation@townofgroton.org.

In closing we wish to acknowledge the retirement of Jon Straus and to extend thanks for his diligent, selfless efforts as a Parks Commission appointee on behalf of the CPC and Groton; and to welcome the newest member, Laurie Smigelski as his replacement.

Respectfully,

The Community Preservation Committee:



Robert DeGroot - Historical Commission Appointee – Chair



Bruce H. Easom - Conservation Commission Appointee – Vice Chair and Treasurer



Richard Hewitt - Member at Large - Clerk



Daniel C. Emerson - Housing Authority Appointee



Carolyn Perkins - Planning Board Appointee



Laurie Smigelski – Parks Commission Appointee –



Michael E. Roberts - Member at Large

2011 Plan Changes

- Update dates and release date.
- Update Table of Contents.
- Major revision of all sections.

Table of Contents

1. The Community Preservation Committee (CPC)	7
1.1 Origin of CPC	7
1.2 Initial Membership - Terms of service	7
1.3 Ongoing Membership - Term of service	7
1.4 Contacting CPC	7
2. Introduction to Community Preservation Act (CPA)	8
2.1 CPA Summary	8
2.2 CPP Key Principles	9
2.2.1 Key Town Documents	9
2.2.1.1 Town Master plan : http://townofgroton.org/main?cmd=town-plan	9
2.2.1.2 Open Space and Recreation (tbd)	9
2.2.1.3 Community Housing Plan (tbd)	9
2.2.1.4 1988 Historic Preservation Plan (tbd)	9
2.2.2 Securing CPP Copies	9
2.3 CPA Project Examples	9
2.3.1 Surrenden Farm – 2006	9
2.3.2 Sawtell School (Chicopee School #7) - 2006	10
2.3.3 Old Burial Ground Footstones – 2009	10
2.3.4 Groton Grange Hall - 2009	11
3. Groton – Brief History	12
4. CPA Allowable Spending Chart	13
5. CPA Application Process	14
5.1 Synopsis	14
5.2 Process Overview	14
5.3 Ten Step Process	15
5.3.1 Step 1- Submit Two Page Project Summary	15
5.3.2 Step 2 - CPC Review of Summary - Meeting	15
5.3.3 Step 3 - Submit Complete Draft Application by Deadline	15
5.3.4 Step 4 - CPC Public Hearing /Feedback to Draft Applications	15
5.3.5 Step 5 - Submit Final Application by Deadline	16
5.3.6 Step 6 - CPC Review	16
5.3.7 Step 7 - Applicant Notification	16
5.3.8 Step 8 - CPC Project Recommendations	16
5.3.9 Step 9 - Town Meeting Vote	16
5.3.10 Step 10 - Contracts	16
5.4 2011 CPP Schedule	17
5.5 Proposal Evaluation Criteria	17
5.5.1 Basic Criteria	17
5.5.2 Added Value Criteria	18
6. Required Project Summary	19
7. Filling out Application	19
7.1 Instructions	19
7.2 CPA Project Application Form – Example	21
8. CPA Project Application Form	23
9. Objectives Code List for use with CPA Application	25
10. CPC Response Sheet	27
10.1 Primary Qualifications	27
10.2 Additional Qualifications	27
11. Use of CPA Funds - General Guidelines	28
11.1 Procurement Law and Selection of Vendor	28
11.2 Payment of Vendor Invoices	29
11.3 CPA Administration Fund Disbursement Policy	30
11.3.1 CPA Admin. Fund Provision	30
11.3.2 Purpose of Policy	30
11.3.3 Policy	30

List of Figures

Figure 1: CPA Funding Distribution (from CPI)	8
Figure 2: Surrenden Farm	9
Figure 3: Sawtell School House	10
Figure 4: Old Burial Ground Footstones	10
Figure 5: Groton Grange Hall	11
Figure 6: CPA Allowable Spending Chart	13

1. THE COMMUNITY PRESERVATION COMMITTEE (CPC)

The CPC is responsible for the general oversight of the Groton Community Preservation Act (CPA) funds and the selection and recommendation of Groton CPA proposals. The CPC created and updates this Community Preservation Plan (CPP) and monitors the execution of projects based on town approved proposals.

1.1 Origin of CPC

The charter for the CPC was created via town meeting on October 25, 2004. The CPC became effective upon the passage of the CPA by popular vote in Groton on November 2, 2004.

The CPA requires the creation of a seven member CPC which provides two citizen-at-large seats and must include representatives from the following Groton town boards:

- Conservation Commission
- Historical Commission
- Housing Authority
- Park Commission
- Planning Board

1.2 Initial Membership - Terms of service

The following table lists in alphabetical order the members commissioned, current position, representation, and date of term expiration.

Member	Representing	Term Expires
Robert DeGroot (Chair)	Historical Commission	2013
Bruce Easom (Vice Chair, Treasurer)	Conservation Commission	2013
Dan Emerson	Housing Authority	2012
Richard Hewitt (Secretary)	Member at Large	2014
Carolyn Perkins	Groton Planning Board	2013
Mike Roberts	Citizen at Large	2014
Laurie Smigelski	Parks Commission	2012

1.3 Ongoing Membership - Term of service

All members commissioned after the original committee serve for three years, unless otherwise unable to fulfill a term.

1.4 Contacting CPC

To contact the CPC via:

Mail: CPC, Town Hall, Groton, MA 01450

Email: CommunityPreservation@townofgroton.org

Phone: 978 448-1140

2. INTRODUCTION TO COMMUNITY PRESERVATION ACT (CPA)

This section provides a general description of the Community Preservation Act (CPA), how it works, and a brief history of Groton.

2.1 CPA Summary

The Community Preservation Act (CPA) is enabling legislation designed to help communities plan ahead for sustainable growth and raise funds to achieve their goals. CPA allows towns and cities that accept its provisions to levy a community-wide real estate property tax surcharge of up to 3 percent for the purpose of creating a local Community Preservation Fund and qualifying for state matching funds. The CPA surcharge is calculated based one's real estate property tax and not based on assessed valuation. The Fund may only be used to acquire, create and preserve open space and land for recreational uses, to acquire and preserve historic buildings and landscapes, and to create, preserve and support affordable housing. The state will provide matching funds to communities approving CPA.

Enacted as MGL Ch. 44B in 2000, the community preservation act permits cities and towns accepting its provisions to establish a restricted fund from which monies can only be appropriated for a) the acquisition, creation and preservation of open space; b) the acquisition, preservation, rehabilitation, and restoration of historic resources; and c) the acquisition, creation and preservation of land for recreational use; d) the creation, preservation and support of community housing; and e) the rehabilitation and restoration of open space, land for recreational use and community housing that is acquired or created using monies from the fund. Acceptance requires town meeting or city council approval, together with referendum approval by majority vote. The local program is funded by a local surcharge up to 3 percent on real property tax bills and matching dollars from the state generated from registry of deeds fees. (See DOR IGR 00-209 as amended by IGR 01-207 and IGR 02-208)

A minimum of 10% of the annual revenues of the fund must be used for each of the three core community concerns, and up to 5% may be used for administrative expenses of the Community Preservation Committee. The remaining funds can be allocated for any combination of the allowed uses, or for land for recreational use. This gives each community the opportunity to determine its priorities, plan for its future, and have the funds to make those plans happen.

See **Figure 1** for illustration of the CPA fund distribution requirements.

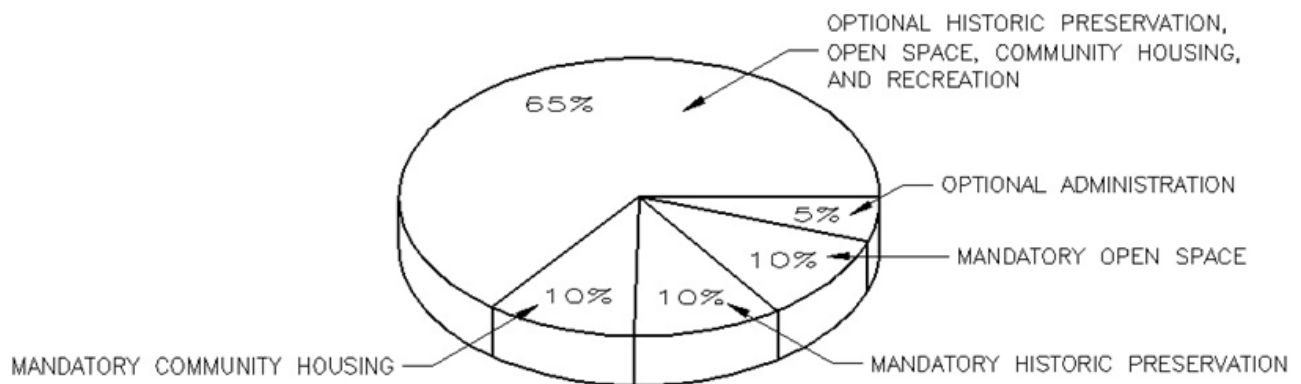


Figure 1: CPA Funding Distribution (from CPI)

2.2 CPP Key Principles

To work toward the CPA goals as appropriate in Groton, the CCP is based in large part on the key principals of four strategic planning documents; the 2020 Master Plan, The Open Space and Recreation Plan, the Community Housing Plan and the 1988 Historic Preservation Plan.

2.2.1 Key Town Documents.

The key town planning documents can be found at <http://www.townofgroton.org>.

It is important to refer to these documents when developing an application. An application should reference relevant sections of these documents.

See the following hyperlinks to locate documents (if links do not work, contact CPC).

2.2.1.1 Town Master plan : <http://townofgroton.org/main?cmd=town-plan>

2.2.1.2 Open Space and Recreation (tbd)

2.2.1.3 Community Housing Plan (tbd)

2.2.1.4 1988 Historic Preservation Plan (tbd)

2.2.2 Securing CPP Copies

The 2011 CPP is available as an Adobe Acrobat PDF file on the Town web site at <http://www.townofgroton.org/main?cmd=get-townbody&id=148> (aka www.townofgroton.org > Town > Directory > Community Preservation Committee. Click “Groton CPP...” on left hand side of web page).

Copies should be available at the library. If copies are unavailable or you have questions concerning the CPA, the Groton CPP, and/or the CPC, contact the CPC. See **Section 1.4**.

This Plan is subject to change. Suggestions are welcome on improving and clarifying the Plan. Please submit suggested corrections, improvements, deletions to: CPP Suggestions, care of the CPC (see Section 1.4).

2.3 CPA Project Examples

Many CPA projects have been approved, and most completed, since the passing of the CPA in Groton. These include the following:

2.3.1 Surrenden Farm – 2006



Figure 2: Surrenden Farm

In 2006, the Town approved the use of \$5,600,000.00 in CPA funds to help preserve and protect approximately 360 acres of land known as Surrenden Farm, see **Figure 2**, immediately adjacent to Groton School. This is a key parcel for conservation because of its extensive frontage on the Nashua River and its proximity to other large blocks of conserved land, including the Oxbow National Wildlife Refuge, Nissitissit River Wildlife Management Area, and the Groton Town Forest. The Town's contribution was part of the approximately \$20 million required to complete the purchase. The Town's portion was financed by a multi-year bond which the Town is repaying over time with CPA funds.

2.3.2 Sawtell School (Chicopee School #7) - 2006



Figure 3: Sawtell School House

In 2006 the Town voted to approve the use of \$18,500.00 in CPA funds for preservation of the Chicopee School #7 (aka Sawtell School). See **Figure 3**. This school is listed on the National Register of Historic Places and is one of the last remaining original school houses in Groton. With private donations and volunteer labor, the Sawtell School Association used the CPA funds to successfully complete desperately needed preservation work on the school house. As a result, this school house can now safely accommodate tours of area groups and visitors.

2.3.3 Old Burial Ground Footstones – 2009



Figure 4: Old Burial Ground Footstones

In 2009 the Town approved the use of \$2,850.00 in CPA funds to restore 29 broken headstones to their proper place in the Old Burying Ground near Town Center. See **Figure 4**. Over time, these stones had been broken away from their original foundations leaving the graves without proper markings. With these headstones now correctly set, we can now accurately determine the legacy of those who made Groton their final resting place.

2.3.4 Groton Grange Hall - 2009



Figure 5: Groton Grange Hall

In 2009 the town approved the use of \$137,000.00 in CPA funds to undertake a critically important preservation project at Groton Grange Hall, see **Figure 5**. The Groton Grange Hall was originally constructed around 1890. The Groton chapter is the oldest functioning Grange in the Commonwealth, and its building has been an integral part of Groton's town fabric for nearly a century now. This project, now near completion, will allow the Grange to continue to make its facilities available for Town use for many years to come.

3. GROTON – BRIEF HISTORY

The Native peoples who lived in what is now Groton left behind buried traces of their sites and actions. These traces are archaeological sites. These sites range from villages to rock shelters, seasonal camps, fishing stations, tool-making or tool-resharpening spots, hunting blinds, quarries, and bedrock grinding bowls. There are known examples of the last two within town boundaries. Systematic survey would undoubtedly turn up many more sites.

Groton had its precarious beginnings when John Tinker followed Indian Trails from the Bay area and settled near the mouth of Nod Brook on the Nashua to set up his trading post to do business with the Nashaway Indians. The area was known as Petapawag, an Indian name for swampy land. Adventurous families soon followed, on foot or on horseback, and found it a good place for the necessary farming and fishing.

In 1655, this trading post evolved into a formal settlement called The Plantation of Groton, which encompassed all of what is now Groton and Ayer, nearly all of Pepperell and Shirley, a large part of Dunstable and Littleton, as well as smaller parts of Harvard, Westford, Nashua, NH, and Hollis, NH. It was named in honor of one of the original Selectmen, Dean Winthrop, who was born in Groton, Suffolk County, England.

In 1676, during the King Philip's War, Indians attacked the town and burned down all but four garrison houses. The surviving residents fled to Concord and other safe havens and returned two years later to rebuild the town.

As Groton's population grew so did many supporting industries including a soapstone quarry, a large hop-growing industry, a brick factory, a saw mill, a grist mill, and a pewter mill which produced tea pots, plates, cups, and buttons.

West Groton lies within a "V" formed by the Nashua and the Squannacook rivers. The old red brick Groton Leatherboard factory still stands on the Squannacook River as an example of the late industrial period of a New England mill village. West Groton has its own post office, fire station, and water department.

In the past, other areas of Groton were designated as east, south, and north, but only West Groton's name survived. The Lost Lake area was created at the turn of the century through damming nearby streams and flooding an existing field. It was popular as a summer resort for city residents and today both permanent and summer residents live there.

The remains of Groton's historic past are found throughout the town; as standing historic structures and as the remains of features related to these structures (archaeological sites).

For additional online information regarding Groton, go to www.townofgroton.org.

4. CPA ALLOWABLE SPENDING CHART

The CPA Allowable Spending chart shown in **Figure 6** was created by the Community Preservation Coalition as a guide to help communities determine whether an proposed project was likely to meet the minimum Mass Department of Revenue (DOR) CPA requirements.

Use the chart to help determine whether a proposal is appropriate for CPA funding.

COMMUNITY PRESERVATION FUND ALLOWABLE SPENDING PURPOSES

	OPEN SPACE	HISTORIC RESOURCES	RECREATIONAL LAND	COMMUNITY HOUSING
DEFINITION	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 or real property listed or eligible for listing 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
ACQUIRE	Yes	Yes	Yes	Yes (effective 12/5/2006)
CREATE	Yes	No	Yes	Yes
PRESERVE Means protect from injury, harm or destruction, not maintenance	Yes	Yes	Yes	Yes
SUPPORT	No	No	No	Yes, includes funding for community's affordable housing trust
REHABILITATE/RESTORE Means remodel, reconstruct or repair (extraordinary, not maintenance) to make property functional for intended use, including improvements to comply with federal, state or local building or access codes or with federal standards for rehabilitation of historic properties	Yes if acquired or created with CP funds	Yes	Yes if acquired or created with CP funds	Yes if acquired or created with CP funds

Figure 6: CPA Allowable Spending Chart

5. CPA APPLICATION PROCESS

The CPA Application process is designed to help an applicant identify and explain how a proposed CPA funded project meets one or more of the planning objectives presented in the preceding sections of this plan.

5.1 Synopsis

- A complete application must be provided to CPC using the format provided in the CPP. Applicants will receive written feedback from all CPC members, absent CPC members must provide written feedback to CPC for the comments to be considered
- Applicants will be asked to meet with CPC a minimum of two (2) times; summary meeting and public meeting. (See **Section 5.3.**)

5.2 Process Overview

Applicants are strongly encouraged/urged to review all parts of this plan thoroughly, and to contact the CPC (Kathy Miller), and the Community Preservation Coalition (<http://www.communitypreservation.org/ContactUs.cfm>) with any questions, concerns, doubts regarding whether a proposal qualifies for possible CPA funding.

The overall process includes the following:

1. Proposed projects (proposals) require approval by the CPC to be submitted for town meeting.
2. Proposals are evaluated based upon the goals and objectives of the documents identified in **Section 2.2.1.**
3. Proposals must conform with the guidelines outlined in the CPP.
4. Proposal approval is contingent in part by an acceptable management plan.
5. Proposals may require approval and/or management by a Town Board or Commission.
6. Proposals are scored/evaluated via response sheets (see **Section 10**) derived from the goals and objectives described in the CPP. A clearly defined proposal by an applicant with strong record of successful projects, that includes multiple funding sources, that qualifies for funding via affordable housing, open space, historic preservation, and recreation categories, may expect a very positive response.
7. Approved proposals will be reviewed by Board of Selectmen and Finance Committee Prior to Town Meeting.
8. The application process has ten (10) steps summarized as follows:
 - Step 1: Applicant presents project summary document to CPC
 - Step 2: CPC provides feedback to this summary document in writing, by specified meeting date
 - Step 3: Draft application submitted by applicant to CPC for review
 - Step 4: Public Hearing scheduled for CPC and public to provide oral and written feedback on drafts
 - Step 5: Final applications received by specified date.
 - Step 6: CPC reviews and votes on application for recommendation to Town Meeting
 - Step 7: CPC will notify each applicant of the results of this review via email.
 - Step 8: CPC formally recommends approved projects via warrant article.
 - Step 9: Town Meeting vote

- Step 10: Contracts established between Town and approved projects.

5.3 Ten Step Process

See the following.

5.3.1 Step 1- Submit Two Page Project Summary

Applicants are required to submit a two-page Project summary. The purpose of the summary is to help ensure a proposed project meets CPA minimum requirements before the proponents invest significant time and resources; such time and resources are often needed to complete the research and documentation required for a complete application (application plus all supporting documentation, letters of support, etc.).

The summary should include:

- Name and contact information of proponent
- A brief summary and description of the proposed project, how it conforms to the CPA allowable spending chart, (see **Section 4**), estimated time line of project, and estimated cost.

5.3.2 Step 2 - CPC Review of Summary - Meeting

The CPC will review the summary and hold a meeting with an applicant to provide oral and written feedback on the Project Summary. The intent of this meeting is to help the applicant determine whether they should proceed further with the proposal process, whether to move forward with submitting a more formal Complete Draft Application.

5.3.3 Step 3 - Submit Complete Draft Application by Deadline

Applicants are required to submit a completed draft application to the CPC via mail or in person. Applications must be received by the CPC administrator Kathy Miller (or care of Groton CPC) at Groton Town Hall by the posted date. This draft provides the main opportunity applicants will have for oral and written feedback prior to the final application deadline.

Applicants with additional questions or concerns they would like discussed by the CPC are welcome to contact the CPC administrator to schedule time on the CPC Agenda during normally scheduled meetings.

Applicants should obtain professionally prepared quotes for project costs whenever possible. If such quotes are not available, detailed cost estimates may be used, provided the basis of the estimates is fully explained.

Total fund amount requested in an application should allow for all possible expenses and contingencies related to a project, such as publicity expenses (e.g. publication of notices, advertisements, posters).

5.3.4 Step 4 - CPC Public Hearing /Feedback to Draft Applications

The CPC will review and provide oral and written feedback to applicants who submitted draft applications for **Step 3**, at a public hearing scheduled and announced in advance by the CPC. The purpose of the hearing is to provide objective opinions, insight, and feedback to the applicant to assist them in refining their specific application as needed for a final application. This is the legislatively required public hearing.

5.3.5 Step 5 - Submit Final Application by Deadline

Applicants submit final revised (if needed) applications to the CPC. These applications can be delivered via mail or in person to the CPC administrator Kathy Miller at Town Hall (care of the CPC). All applications need to be received by the posted Final Application deadline to be considered for final review by the CPC. No revisions to applications will be accepted by the Groton CPC after this date.

5.3.6 Step 6 - CPC Review

The CPC will review each eligible application in accordance with the goals of this Groton Community Preservation Plan and the Community Preservation Act. Those goals are outlined later in this document.

Each application will be reviewed according to the Goals Feedback and Evaluation Feedback forms described in **Section 10**.

5.3.7 Step 7 - Applicant Notification

The CPC will notify each project applicant as to whether or not the CPC will recommend their application, submit it as a Proposal, to Town Meeting. This will be done shortly after the application review meeting.

5.3.8 Step 8 - CPC Project Recommendations

- For an application that qualifies for submission to town meeting, as determined by the scoring process, the CPC will prepare a warrant article that allows an application to become a proposal to be voted on at Town Meeting.
- The CPC requests that applicants include a description of their project suitable for use as a Town Meeting warrant article. This 'warrant article' text may be included in the application cover letter.
- The CPC may recommend a proposal as proposed by the applicant or it may recommend partial funding or funding for only a portion or phase of the proposal.
- The CPC's recommendations to the Town meeting may include detailed project scopes, conditions and other specifications the CPC deems appropriate to ensure CPA compliance and project performance.

5.3.9 Step 9 - Town Meeting Vote

The CPC will present its recommendations to Town Meeting for discussion and vote. The Town Meeting has the final authority to award funds from Groton's CPA fund and:

- Simple majority vote is required to approve funding.
- Two-thirds vote is required for borrowing against future CPA town generated revenues.

5.3.10 Step 10 - Contracts

Before project work begins or funds are disbursed, a contract will be negotiated and signed between the Town (Board of Selectman) and awardees, except for those contracts involving approved transfer of funds (such as to the Conservation Commission and Groton Housing Trust), and those involving private entities where a Memorandum of Understanding (MOU) exists between the CPC and private entity.

Approved projects may require a formal contract which must be signed by the Board of Selectmen. For appropriations awarded to either the Conservation Fund or the local Affordable Housing Trust, the need for formal signed agreement will be dependent on whether a simple, unconditional, funds transfer is requested (no agreement); or funds are requested for a specific purpose (agreement required). The decision rests with the CPC whether to recommend simple transfer of funds or to require that these entities tie requests for funds to a specific purpose.

For small projects this may be a one-page document. For larger projects it may be longer. The contract language may include the following topics:

- Reporting requirements
- Accounting requirements
- Penalties for contract non-performance
- Deed restrictions
- Fund disbursement schedules
- Project milestones
- Deliverables
- Bid requirements
- Timelines

See **Section 11** Use of CPA Funds - General Guidelines for additional information.

5.4 2011 CPP Schedule

- 2011 Community Preservation Plan released by: October 18, 2011
- Submission of one or two page Required Project Summary (RPS): Nov. 4, 2011
- Feedback regarding RPS: November 22, 2011
- Deadline for Complete Draft Proposals (CDP) submitted to CPC by 4 PM January 17, 2012
- Public Hearing to discuss feedback on CDPs: February 7, 2012
- Deadline for Final Proposal (no further changes accepted) February 21, 2012
- Final Vote - Deliver Recommendations for Town Warrant by: March 6, 2012
- Vote at Spring Town Meeting April 23, 2012

5.5 Proposal Evaluation Criteria

See the following for description of the items the CPC uses to review and evaluate a proposal to determine whether to move the proposal forward, to submit it for Town vote.

5.5.1 Basic Criteria

The following criteria are the basic elements used to evaluate a given proposal:

- Submitted in timely fashion to the CPC using the project application form
- Eligible for the CPA funding according to the requirements described in the CPA legislation
- Is consistent with the Groton Master Plan, Open Space and Recreation Plan, 1988 Historic Preservation Plan and Community Housing Plan or parts therein
- Contains a detailed Management plan and itemized project scope, describing items and estimating cost. (the exception is money approved for the Conservation Commission Fund or the Affordable Housing Trust)
- Has multiple funding sources, leverages additional public and /or private funds. If none included, then describes what actions were taken to seek public and/or private funds, such as what grant programs were explored, what groups in Town were approached for

donations, what state programs were investigated to provide matching funds or reimbursement

- Receives endorsement by other municipal boards and/or departments, and as applicable has the approval of the Historical Commission
- Establishes that applicant has site control of the project, written consent of the property owner, or, in the case of municipal property, approval of the Board of Selectmen.

5.5.2 Added Value Criteria

The following criteria increase the odds a proposal will receive support by the CPC and possibly at Town Meeting:

- Demonstrates an understanding of the balance among the three parts of sustainability, economic benefit, respect for the environment and maintenance of community character
- Applicant has a history of managing successful projects or can demonstrate their ability and competency to manage the project
- Serves more than one CPA purpose or serves multiple goals of the Groton Master plan, or demonstrate why it would not be feasible to do so
- Acquires/conserves/protects/preserves/restores/reuses resources, buildings, history threatened by inappropriate development, damage, decay, loss, etc.
- Serves a currently underserved population
- Preserves the essential character of the Town
- Produces an advantageous cost/benefit value for the Town.

6. REQUIRED PROJECT SUMMARY

The required project summary will help the CPC and applicant determine whether a new proposal meets basic CPA requirements before the applicant invests considerable time and effort filling out a complete and detailed application. The following procedure is suggested for writing a one to two page Project Summary:

- Please review the chart of allowed CPA projects (see **Section 4**) to determine if the proposed proposal/application may fit within the guidelines
- Check with CPC administrator to review previous CPA projects
- Write up a one to two page summary that includes proponent's name (if a group or organization, provide name of group and the name-address-phone/email of main contact person), brief description of the project and what CPA category(ies) it fits.

Any questions, contact the CPC. See **Section 1.4**.

7. FILLING OUT APPLICATION

Please review the instructions before filling out the application (see **Section 8**). An accurate complete application expedites the review and approval process.

Use additional paper as needed to answer questions.

Section 7.2 provides a sample application. Any questions, please contact the CPC (see **Section 1.4**).

7.1 Instructions

9. Detach application form from the CPP in **Section 8** (or copy the application form).
10. Fill out items 1 through 8 as indicated.
11. For item 9, if applicable to the project, please provide names, addresses and contact numbers for project architects, contractors, and/or consultants.
12. For item 10, site control. If applicable, check the appropriate type of agreement. As appropriate, list in line 19 whether a copy of deed, purchase and sale agreement, option agreement and/or other relevant document that establishes applicants site control; or property owner's written consent to application and proposed project, is included with the application.
13. For item 11.a & b, if applicable, contact the town assessor for the details required.
14. For item 12 & 13, if applicable, certain land use and property use projects require permits and approvals. Contact the CPC for assistance in determining whether a proposal could involve such permissions.
15. For item 14, it's suggested that professional estimators/appraisers be used to determine realistic cost of a project, sources of funding, immediate and long term expenses, as well as possible annual income, annual expense, and possible net gain or loss. If a professional estimator is not used, please provide detailed line by line cost estimate with full explanation and supporting documentation (price quotes, sales slips, etc.). Use additional pages as needed.
16. For item 15, please refer to **Section 9** and use any and all codes that may apply.
17. For item 16 & 17, fill out as indicated.
18. For item 18, please describe proposed project in detail including, as applicable, information such as:
 - How it benefits Groton and is consistent with **Section 4** criteria.
 - Additional details as may be useful for code items listed in Item 15.

- Include an outline of the steps involved in the project and proposed timelines for each step, and indicate what funds will be needed at which step in the project. Additional pages may be used as needed.
 - Explain project oversight plan and procedures for identifying and resolving problems.
 - What system will be used to assure CPC that schedule will be met and costs contained.
19. For item 19, as applicable, list any additional actions or steps required to complete the project that impact feasibility, such as:
- Environmental assessments
 - Zoning or other permits and approvals
 - Agreements on terms regarding conservation, affordability, or historic preservation restrictions subordination agreements, and/or
20. For item 20, list supporting documents as applicable, appropriate, and available for the application such as:
- Letters of support and/or recommendations from town boards and committees (e.g. Selectmen, Fincom, Planning Board, Water Department, School Dept., etc.).
 - USGS Map of site
 - Assessors map of project site
 - When possible, photographs of site: land, building, structure, et al.
 - Recorded plans of land
 - Natural resource limitations (floodplains, wetlands, etc.)
 - Zoning (district, dimensional and use regulations as applied to land)
 - Inspection reports
 - 21 E Reports and other environmental assessment reports
 - Architectural plans and specifications for new construction and/or rehabilitation
 - Site plans and specifications
 - Maps, renderings
 - Historic inventory sheet
 - Existing conditions
21. For item 21, please provide other information potentially useful for the CPC in considering the project.
22. For item 22, please describe management plan for project; who will manage/oversee project, ensure target dates are met, and deliverables delivered, provide evidence work is completed and meets specifications. Add, attach additional pages as needed.
23. For item 23, please sign the application. If applicable, space is provided for additional signatories.
24. Submit one complete application, with requested attachments, to CPC as noted in **Section 5.3**. Please mail to (or drop off) at:
Proposals, Groton CPC, Town Hall, Groton, Ma 01450.
Any questions, contact CPC, see **Section 1.4**.

7.2 CPA Project Application Form – Example

[CPC Use Only: Date Received: Feb. 1, 20xx By: CPC member or Admin Asst.

CPC number #2012-01 (sample)]

Please print clearly and answer all questions, use “N/A” if not applicable.

1. Applicant Name or Organization: Last Doe First John
2. Submission Date: Nov. 10, 20xx
3. Applicant Address: St. Main St City/ State: Groton, MA ZIP: 01450
4. Ph. #979-555-1212 Email: username@mailserver.com
5. CPA Purpose. Check all that apply:
Community Housing ☒ (Affordable Housing ☒) Historic Preservation ☒
Open Space ☐ Recreation ☐
6. Town Committee or boards participating: Hist. Dist, GHA, Con.Comm, AFP, etc.
7. Project Location/Address: Station Ave
8. Project Name: Main St. Historic Preservation-Affordable Housing Proposal
9. Additional Responsible Parties (If applicable):

Role	Name	Address	Ph. (w) (cell)	Email
Property/Site Owner	GHA	Groton	xxx-xxx-xxxx	
Project Manager	Wise Managers	Nirvana		
Lead Architect	Richardson Inspired			
Project Contractor	Experienced Builders inc.	End of rainbow.		
Project Consultants				
Other:				
Other				

10. As appropriate, indicate if proposal requires P&S agreement ☐ Deed ☒
Option agreement ☐ Other-describe: _____
11. a) Assessor info. (map/ block/ lot id.(s)): map xx, blk nnnnn b.) Tax classification type: Tbd
12. Permits required: Zoning: xxx Historic Preservation xxx Other _____
13. Historic Commission Approval signoff (if applicable): Chair person Date: June 22, 20xx
14. Funding: a.) Requested from CPC: \$250,000.00 b.) Committed from other source: \$50,000.00
c.) Annual anticipated total income: \$500.00 d.) Annual anticipated total expense: \$ 100.00
d.) Anticipated net income (loss): \$400.00 e.) Estimator name/company: Best Guess LLC
15. Community Preservation Plan Objectives -use codes from **Section. 9** to indicate all that apply: HR 1, HR2, HR 3, CH1, Ch2
16. Project Timelines: Proposed Start Date: July. 1, 20xx Projected Complete Date: Dec. xx, 20xx
17. Estimated Delivery Date of Completion Report to CPC: Dec xx, 20xx

CPA Application Form (Side two) (example)

18. Project description and explanation (attach additional sheets as needed): Adaptive reuse of historic building to increase affordable housing and preserve historic structure. Groton residents will be given preference. Nonprofit housing group contract, etc. etc. etc.

19. Feasibility: Supply feasibility research info. (evidence of successful similar projects elsewhere, cost analysis etc.)

20. List of attachments Photos of existing building; deeds; letters of support from Selectman, Fincom, Hist. dist., GHA, etc; plot plan; etc.

21. Additional Information: N/A

22. Management Plan: Wise Manager as project manager, will maintain regular contact with CPC liaison, will coordinate vendors, ensure deadlines are met, products and services delivered as required, invoices are properly verified and signed before delivery to CPC for final approval and subsequent payment

23. Applicant Signature: John Doe Date Nov. xx., 20xx

Co-Applicant Signature _____ Date _____

Co-Applicant Signature _____ Date _____

8. CPA PROJECT APPLICATION FORM

[CPC Use Only: Date Received _____ By: _____
Assigned CPC #2012 - _____]

May be copied. Please print clearly, answer all questions, use "N/A" if not applicable. Use additional paper as needed.

1. Applicant Name: Last _____ First _____ 2. Submission Date: _____

3. Applicant Address: St. _____ City/ State: _____ ZIP: _____ :

4. Ph. # _____ Email: _____

5. CPA Purpose. Check all that apply:

Community Housing _____ (Affordable Housing: _____) Historic Preservation: _____ Open Space: _____
Recreation _____

6. Town Committee or boards participating: _____

7. Project Location/Address: _____

8. Project Name: _____

9. Additional Responsible Parties (If applicable):

Role (specify)	Name	Address	Ph. (w) (cell)	Email
Property/Site Owner				
Project Manager				
Lead Architect				
Project Contractor				
Project Consultants				
Other:				
Other				

10. As appropriate, indicate if proposal requires P&S agreement ____ Deed ____

Option agreement Other-describe: _____

Assessor info. (map/ block/ lot id.(s)): _____ b.) Tax classification type: _____

12. Permits required: Zoning: _____ Historic Preservation: _____ Other : _____

13. Historic Commission Approval signoff (when required): _____ Date: _____

14. Funding: a.) Requested from CPC: \$ _____ b.) Committed from other sources: \$ _____

c.) Annual anticipated total income : \$ _____ d.) Annual anticipated total expense: \$ _____

d.) Anticipated net income (loss): \$ _____ e.) Estimator name/company: _____

15. CCP Objectives -use codes from **Section 9** to indicate all that apply:

16. Project Timelines: Proposed Start Date: _____ Projected Complete Date: _____

17. Estimated Delivery Date of Completion Report to CPC: _____

8. CPA Project Application Form (Side two)

18. Project description and explanation (attach additional sheets as needed): _____

19. Feasibility: _____

20. List of attachments: _____

21. Additional Information: _____

22. Management Plan: _____

23. Applicant Signature: _____ Date: _____

Co Applicant Signature: _____ Date: _____

Co Applicant Signature: _____ Date: _____

9. OBJECTIVES CODE LIST FOR USE WITH CPA APPLICATION

Open Space/Recreation	Code Description
	<p>OSR 1 Goal: Ensure that Groton's agricultural, forested, and recreational open spaces are protected, enhanced, and expanded for present and future generations..</p> <p>Recommendations:</p> <ul style="list-style-type: none"> • Continue to develop and maintain a comprehensive open space inventory database that will identify and assess all of the town's open space parcels and associated resource value • Protect priority open space parcels • Pursue development of a town-wide trail system • Continue to fund land protection with CPA revenue and the Conservation Fun
	<p>OSR 2 Goal: Improve management of open space and recreation parcels.</p> <p>Recommendations:</p> <ul style="list-style-type: none"> • Develop management strategies and individual management plans for the town's conservation lands. • Conduct educational outreach on the benefits of sustainable forestry management.
	<p>OSR 3 Goal: Expand and revitalize Groton's recreational resources, including parks, athletic fields, greenways, and waterways</p> <p>Recommendations:</p> <ul style="list-style-type: none"> • Develop management strategies and individual management plans for the town's conservation lands. • Conduct educational outreach on the benefits of sustainable forestry management.
	<p>OSR 4 Goal: Enable and support the creation and maintenance of community gardens for public use</p> <p>Recommendations:</p> <ul style="list-style-type: none"> • Review Groton's Town-owned properties, both developed and undeveloped, for suitability as community gardens.

Comm. Housing Objectives	Code Description
	<p>CH 1 Goal: Encourage a diversity of housing types for a range of income levels and ages.</p> <p>Recommendations:</p> <ul style="list-style-type: none"> • Provide housing for people with disabilities • Encourage the production of more rental housing, both affordable and market rate, for a broad range of people. • Use CPA funds to address a broader range of affordable housing needs, even if the CPA-assisted units do not qualify for the Chapter 40B Subsidized Housing Inventory • Promote racial, ethnic, and cultural diversity
	<p>CH 2 Goal: Encourage and promote new housing developments that create a sense of place, promote social interaction, and a sense of community</p> <p>Recommendations:</p> <ul style="list-style-type: none"> • Consider additional zoning techniques to promote neighborhood developments that meet the town's social, economic, and aesthetic objectives

	<p>CH 3 Goal: Encourage a greater variety of architectural design and diversity of housing types.</p> <p>Recommendations:</p> <ul style="list-style-type: none"> • Encourage construction of “green” energy efficient homes. • Consider a "large-house review" bylaw to institute for design review of single-family homes exceeding a certain size threshold • Provide meaningful alternatives to demolition of older single-family homes
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Historic Resources	Code Description
	<p>HR 1. Goal: Pursue adaptive reuse of historic properties.</p> <p>Recommendations:</p> <ul style="list-style-type: none"> • Require projects that affect Town-owned historic structures to adhere to the Secretary of the Interior’s Standards for Historic Preservation. • Continue to seek funding for reuse and preservation of Town-owned historic resources • Identify appropriate reuse options for Town-owned historic structures through collaborative problem-solving between the GHC and other town boards and departments
	<p>HR 2. Protect Groton’s cultural and historic resources.</p> <p>Recommendations:</p> <ul style="list-style-type: none"> • Review Groton’s existing preservation bylaws for opportunities to strengthen and expand resource protection. • Develop historic design guidelines. • Work with residents to identify and create additional local historic districts • Consider Architectural Preservation Districts for some areas of Groton. • Encourage collaboration between Groton’s preservation groups. • Work with regional, state, and national preservation groups on local preservation issues. • Continue to pursue a central facility to store and exhibit Groton’s historic artifacts and create a database that identifies Groton’s archival resources and their locations. • Continue the Groton Historical Commission’s efforts to complete a comprehensive inventory of Groton’s cultural and historic resources, including areas, structures, buildings, objects, and historic landscapes. • Develop a comprehensive database of historic resources that includes local historic districts, National Register properties, and inventoried properties, and integrate the database with the Groton’s Geographic Information • Provide efficient public access to historic resources information.
	<p>HR. 3. Goal: Develop economic and education strategies that capitalize on Groton’s historic and archaeological resources.</p> <p>Recommendations:</p> <ul style="list-style-type: none"> • Make information on Groton’s cultural and historic character, buildings, districts, cemeteries, and other heritage treasures widely available to residents and visitors in formats that are attractive and easily understood. • Make Groton’s informational and educational materials on historic resources available online. • Continue to identify eligible buildings and districts for listing on the National Register of Historic Places and pursue designation

10. CPC RESPONSE SHEET

The following is a sample of the response sheet used by each CPC member during the evaluation of each application to assist in the application selection decision process.

Date _____ Name _____

Application Number #2012 - _____

10.1 Primary Qualifications

1. Application submitted to the CPC using the application form: Yes___ No___ if not, why? _____
2. Eligible for the CPA funding according to the requirements described in the CPA legislation: Yes___ No___ if not, why? _____
3. Application proposed project consistent with the Groton Master Plan, Open Space and Recreation Plan, 1988 Historic Preservation Plan and Community Housing Plan and/or parts therein: Yes___ No___, if not, why? _____
4. Application includes appropriately detailed Management plan and itemized project scope, describing items and estimating cost. (exception is money approved for the Conservation Commission Fund or the Affordable Housing Trust): Yes___ No___, if not, why? _____
5. Application proposed project is leveraged by additional public and /or private funds, or provides evidence actions were taken to pursue public and/or private funds: Yes___ No___, if not, why? _____
6. Application has endorsement by other municipal boards, or departments, as applicable (including approval of Historical Commission. Yes___ No___ if not, why? _____
7. Applicant has site control of the project, written consent of the property owner, or in the case of municipal property, approval of the Board of Selectmen: Yes___ No___ if not, why? _____

10.2 Additional Qualifications

Additional favorable factors for an application (note those that apply):

1. Produces significant cost/benefit value to the Town: How? _____
2. Is especially respectful of the environment. How? _____
3. Preserves a significant aspect of the Town: Explain _____
4. Applicant has strong history of managing successful projects or otherwise has evidence of high competency to manage project. Examples _____
5. Serves more than one CPA purpose and/or multiple goals of the Groton Master plan Those are _____
6. Saves resource(s) that would otherwise be threatened. Explain _____
7. Serves a currently underserved population : The Underserved population is _____

11. USE OF CPA FUNDS - GENERAL GUIDELINES

(Including content supplied and/or reviewed by Groton Town Accountant)

It is important to understand that CPA funding is not a grant. Funds will not be paid over to you or your group for future expenditure.*

The Town can only pay the person, company, or organization that delivers goods or services (“the vendor”).*

*Except for those contracts (or payments) involving an approved transfer of funds (such as to the Cons. Comm.), and those involving non-town entities (N-TE) where a Memorandum of Understanding (MOU) exists between the CPC and N-TE. The MOU stipulates the arrangement. (Contact the CPC for a template of an MOU.)

From the Town’s legal and financial standpoint, the process of releasing CPA funds consists of two major steps: selecting a vendor, and paying for goods or services. While the CPC may itself add additional steps to the process, we are only concerned herein with State Finance Law. Please bear in mind the following:

11.1 Procurement Law and Selection of Vendor:

The criteria for vendor selection are based on the dollar level of estimated cost. Please keep in mind that the cost levels listed below do not necessarily refer to the cost of a single item. The aggregate *total cost may apply*.

- For example, a single computer may cost \$2000, leading you to follow the rules for the first bulleted item below (costs less than \$5000). However, if you are purchasing 10 computers from a single vendor, either together or over several months as part of a single project purchase, you must abide by the rules for costs between \$5000 and \$24,999. Similarly, all costs that can reasonably be considered as part of the acquisition must be considered as part of the total cost when determining which cost rules to follow. For example, a computer server may cost \$4000, but labor estimated at \$1500 is required to install the system and train the users. If you plan to use a single vendor for both hardware and professional services, the total aggregate cost of the purchase will exceed \$5000. In general, it is inappropriate to “split” purchases solely to defeat procurement law.

Contracts for some types of *services* may not be subject to State procurement regulations, but are likely to be subject to Town of Groton regulations, for example, a majority vote of the organization that has been given authorization to expend the funds. If you are in any doubt about any procurement requirements please consult with:

- Procurement Officer in the Selectman’s Office or
- The Town Accountant.

Detailed process for each cost level are noted below:

- For vendor costs totaling less than \$5000, please use “sound business practice”. In general this means that you should at least be certain that the vendor you prefer to use is reasonable in his cost estimate. You can do this, for example, by seeking verbal quotes from three vendors; or using internet or other searches for advertised pricing. There is no need, under procurement law, to document “sound business practice” but many people choose to do so in order to justify the final choice (to the Town Accountant, for example, should she choose to ask). There is a Quote Procurement Form (attached) developed by the Selectmen’s Office that can be used to record the details of the estimates you research. Additional forms can be obtained from that Office or from the Accounting Office.
- For estimated costs between \$5000 and \$24,999, you **MUST** seek three written quotes. Please be consistent in the information you give vendors in order for them to provide quotes.

Although you are not strictly required to choose the vendor who provides the lowest quote, you should have a defensible reason for choosing your vendor in circumstances where you will choose a more expensive alternative – past performance of a vendor (good or bad) is an allowable deciding factor; as is timing of services to be provided. Other reasons may also be acceptable. If you are in doubt, please consult the Procurement Officer, Mark Haddad. Remember that you **MUST** have documentation of all quotes received (including “no-bids”). You may do this yourself by completing the Quote Procurement Form noted above; however, the Accounting Office strongly recommends vendor quotes, signed and dated. The original Quote Procurement Form or the original responses to RFQs must be sent to the Accounting Office. We cannot pay the subsequent bills without proof of this due process.

- For estimated costs that will exceed \$25,000 ALL aspects of Ch. 30B, State Procurement Law must be followed. Copies of the Law are available from the Procurement Officer or the Accountant. The individual or entity who has requested CPA funds is responsible to complete this process. The Accounting Office cannot do this for the funded entity, as we will be auditing the process of awarding contracts and spending funds. The CPC cannot do this for you because they will be overseeing the release of periodic or final payment. The Procurement Officer will provide advice and assistance, but does not perform the details of the bid process. Please consult with him as early as possible for major bidding projects.

11.2 Payment of Vendor Invoices

Payment of invoices is governed by State finance law. This can be frustrating for all involved but the rules cannot be circumvented. In general, invoices may be paid only when the service is completed or the goods have been received. In some cases periodic payments are permitted but this is usually in connection with specific allowable contract language that forms part of formal bid awards for costs exceeding \$25,000. In no instance will “down-payments” or “advances” be processed for payment. Please be sure your vendor understands this.

Properly processed and signed invoices will be paid on the next subsequent warrant. Warrants are every two weeks. Accounting can give you a list of the check issuance dates and the deadlines for the office to receive paperwork in order meet a particular issuance date. “C.O.D” type payments are not permitted. In addition, the town does not pay finance charges, and, as you will see below, the signature cycle can take some time. Incomplete invoices will need to be sent back through the CPC to the originating entity; this can add weeks to the payment process. While this puts the vendor in a difficult position, we cannot legally pay incomplete, unsigned invoices. Please be sure your vendor understands this.

Please do not pay a vendor yourself and expect to be reimbursed. State finance laws apply to reimbursements as well; if the vendor’s charges were inappropriate; we cannot reimburse. Even if the charges were correct, a fair amount of proof of *your* payment, including all the required signatures noted above, will be needed. As noted above, the Town does not pay finance charges. The Town also does not pay sales tax. Please avoid catching yourself in a situation where you may be out-of-pocket with no recourse.

Properly processed and signed invoices include at least the following:

- Complete vendor information, including full name, address, tax identification number and a phone number where the vendor can be reached if questions arise. (If we do not already have the vendor in our system, we may require additional forms from the vendor, prior to the first payment.)
- Description and amount of charges, properly dated for the period services were rendered.
- Enough information from the entity overseeing the project for the CPC and Accounting to understand *which CPC-funded project the invoice applies to.*

11.3 CPA Administration Fund Disbursement Policy

See the following subsections.

11.3.1 CPA Admin. Fund Provision

The Community Preservation Act (CPA) mandates that up to 5% of each town's annual CPA funding be set aside in a designated CPA Administrative Fund account for use in supporting the various administrative efforts of the Community Preservation Committee (CPC). The CPA and Community Preservation Coalition define, but do not confine the use of Admin Fund monies for the following:

1. Committee Costs. Up to 5% of the annual CPA funds may be spent on the operation and administration costs of the Community Preservation Committee. For example, overhead such as stationary, telephone calls, and transportation to sites may be included within this 5% administrative allowance. In addition, the Committee may use its allowance for legal fees, or technical reviews for its decision-making purposes.
2. Incidental Project Costs. CPA funds may be used for site surveys, environmental assessments, historic or housing consultants, architectural and engineering fees, permit processing fees, construction consultants, financing consultants, legal and accounting fees, and similar costs associated with and incidental to the development of a CPA project. Such expenditures should be made from the appropriation for the particular project and, as project costs, they do not constitute operation or administration expenses of the committee subject to the 5% limitation.

11.3.2 Purpose of Policy

The Groton CPC has elected to develop and implement a written policy designed to eliminate the extraneous use of CPC Administrative fund monies. This policy is based on comments provided by:

Gary A. Blau, Tax Counsel, Bureau of Municipal Finance Law PO Box 9569

Boston, MA 02114-9569 617-626-2400

blau@dor.state.ma.us

Attorney Blau provided comments to a series of questions related to the use of Admin Fund money made by Selectman Peter Cunningham, Town of Groton Accountant Valerie Jenkins, and Interim Administrative Officer Jeff Ritter. While these comments address specific questions, they also provide sound basis for this policy as they specifically interpret the CPA around the use of Administrative Funds.

11.3.3 Policy

Administrative Fund money may be used as listed under **Section 11.3.1** for "Committee Costs", and "Incidental Project Costs" with prior majority vote by the Groton CPC.

The Administrative Fund may not be used to fund incidental project costs neglected in an initial funding recommendation previously approved at Town Meeting unless the person/group requesting funds has made a written request to the CPC **PRIOR** to the costs in question being paid. Further, the a majority of all CPC members (majority ≥ 4 members) must approve this request by vote at a normally scheduled CPC meeting. Without this approval, the CPC is under no obligation to reimburse the person/group making the request.

The CPC **WILL NOT** reimburse incidental, unanticipated, or unplanned project expenses from the Administrative Fund, or any fund, IF those costs have already been paid by the person/group making the request. There will be **NO EXCEPTIONS** to this policy.