



Groton Community Preservation Plan 2014-2015



Boutwell House 2014

Prepared by the
Groton Community Preservation Committee

Released October 8, 2014

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

Prepared by:

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

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Town Sign – unk.

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CPA Project Photos 2011 – courtesy of Carolyn Perkins

Thanks to all and any anonymous contributors whose contributions are unintentionally unaccredited.

Document format and layout contributed by:
The Legend Corporation, Groton, MA 01450

October 8, 2014

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 2014-2015 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 2014-15 and use project summary form and then as appropriate, the detailed Project Application proposal form included in the CPP, to submit a proposal. These are intended to help develop proposals in accordance with the procedures within this CPP and with the CPA. This CPP has been placed on the Town of Groton website. The CPP contains a copy of the scoring sheet used by the CPC to evaluate proposals, determine priority and thence precedence; a tool needed when insufficient funds exist for eligible projects.

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.

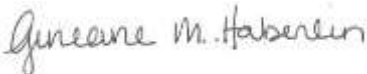
Comments, questions, and suggestions regarding the CPP can be sent to: Groton Community Preservation Committee (CPC), Town Hall, 173 Main St., Groton, MA 01450, and/or Regina Beausoleil (CPC assistant) rbeausoleil@townofgroton.org; or CommunityPreservation@townofgroton.org.

Respectfully,

The Community Preservation Committee:



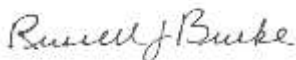
Bruce H. Eason - Conservation Commission Appointee – Chair and Treasurer



Gineane Haberlin - Member at Large – Vice Chair



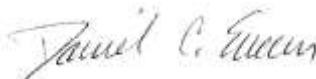
Matt Frary Parks Commission Appointee – Clerk



Russell Burke - Planning Board Appointee



Robert DeGroot - Historical Commission Appointee



Daniel C. Emerson - Housing Authority Appointee



Richard Hewitt - Member at Large

2014-15 Plan Changes

- New cover photo
- Update CPC member roles, dates, and release date
- Rearrange sections as needed
- Update Table of Contents
- Re-insert Town Accountant information regarding estimated project cost and related requests for quotes
- Add scoring sheet

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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
Russell Burke	Groton Planning Board	2016
Robert DeGroot	Historical Commission	2016
Bruce Easom (Chair and Treasurer)	Conservation Commission	2016
Dan Emerson	Housing Authority	2015
Matt Frary (Clerk)	Parks Commission	2015
Gineane Haberlin (Vice Chair)	Member at Large	2017
Richard Hewitt	Member at Large	2017

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, 173 Main Street, 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 set aside for use in support 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, and/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.

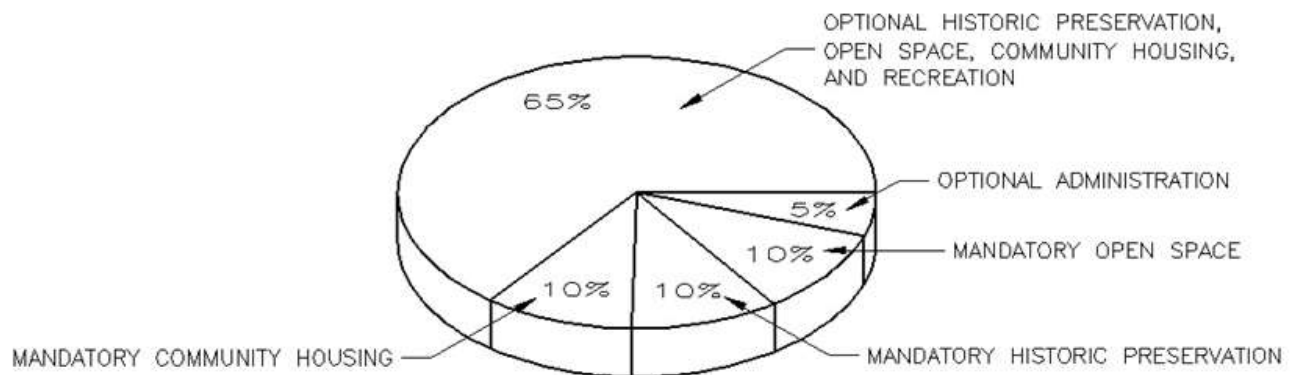


Figure 1: CPA Funding Distribution (from CPI)

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 the 2011 Groton Master Plan and the 2012 Groton Open Space and Recreation Plan.

2.2.1 Key Town Documents

The key town planning documents are the Groton Master Plan and Open Space and Recreation Plan:

- For the 2011 Groton Master Plan, use the web address:

<http://townofgroton.org/Town/TownDepartments/LandUseDepartment/MasterPlan.aspx>

- For 2012 Groton Open Space and Recreation Plan (within the plan, see Section 8 and 9) use the web address :
- To see the OSRP, please see the Groton Town Conservation Commission (Cons Comm.) link
(<http://www.townofgroton.org/Town/BoardsCommittees/ConservationCommission.aspx>).
On the right side of the Cons Comm. page, under *Conservation Commission Documents*, click *Document*, and click *2012 Groton Open Space and Recreation Plan*.

2.2.2 Securing CPP Copies

The 2014-15 CPP is available as a word file on the Town web site at <http://townofgroton.org/Town/BoardsCommittees/CommunityPreservationCommittee.aspx> (aka www.townofgroton.org > Town > Boards & Committees > Community Preservation Committee. Click “Groton CPP...” on right hand side of web page).

Hard 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

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.



Figure 2: Surrenden Farm

2.3.2 Sawtell School (Chicopee School #7) – 2006

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.



Figure 3: Sawtell School House

2.3.3 Old Burial Ground Footstones – 2009

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.



Figure 4: Old Burial Ground Footstones

2.3.4 Groton Grange Hall – 2009

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. This project, now completed, will allow the Grange to continue to make its facilities available for Town use for many years to come.



Figure 5: Groton Grange Hall

2.3.5 Boutwell House - 2013

Gov. George S Boutwell built the Boutwell House (see **Figure 6**) in 1851, the year he was elected governor. He lived there until his death in 1905.

His daughter, Georgianna Boutwell, the principal founder of the Groton Historical Society as well as the Groton Woman's Club, died in 1933 and bequeathed the family home to the society in her will.

In 2010, Boutwell house suffered two very serious water pipe failures which flooded portions of the museum's exhibition and work areas. The Board of Directors brought in several new members, wrote a long-range plan and applied for grants. These resulted in both a Community Preservation Act grant for \$176,525 which was unanimously approved at Groton Town Meeting in April 2013, and a Cultural Facilities Fund grant for \$79,000 awarded in November 2012 from the Massachusetts Cultural Council. Both of these grants were for physical renovations such as new wiring and plumbing, plaster replacement, a fire suppression system, and a new furnace.



Figure 6: Boutwell House

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 7: CPA Allowable Spending Chart**

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.

See **Figure 7** (also found at <http://www.communitypreservation.org/content/chart-allowable-uses>) to help determine whether a proposal is appropriate for CPA funding.

Projects are only eligible for CPA funding if they fit in a **green** box below.

	Open Space	Historic	Recreation	Housing
Acquire	Yes	Yes	Yes	Yes
Create	Yes	No	Yes	Yes
Preserve	Yes	Yes	Yes	Yes
Support	No	No	No	Yes
Rehabilitate and/or Restore	Yes, if acquired or created with CPA funds	Yes	Yes (new 7/8/2012)	Yes, if acquired or created with CPA funds

Chart adapted from "Community Preservation Fund Budgeting and Finance Issues", Massachusetts Department of Revenue, October 2005. It has been updated to reflect changes made by the 2012 CPA legislation.

Figure 7: CPA Allowable Spending Chart

5. OBJECTIVES CODE LIST FOR USE WITH CPA APPLICATION

The Objectives Code is derived from two town plans, the 2011 Groton Master Plan (MP) and the 2012 Groton Open Space and Recreation Plan (OSRP).

The MP is the basis for the Historic Preservation and Community Housing sections summarized below. Use subsection numbers for the code . e.g. use “5.1.1” for a proposal to reuse Prescott School).

Please see the 2011 Groton Master Plan in the Groton Town website for full details of the MP sections. Use the web address:

<http://townofgroton.org/Town/TownDepartments/LandUseDepartment/MasterPlan.aspx>

5.1 Historic Preservation

See the following subsections.

5.1.1 Pursue adaptive reuse of historic properties

- Provide flexibility in zoning to encourage the reuse and restoration of historic buildings, particularly for housing
- 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.

5.1.2 Protect cultural and historic resources

- Continue to pursue a central facility to store and exhibit historic artifacts and create a database that identifies Groton archival resources and their locations
- Continue the Groton Historical Commissions’ effort to complete a comprehensive inventory of cultural and historic resources, including areas, structures, buildings, objects and historic landscapes
- Develop a comprehensive database of historic resources that includes historic districts, National Register properties, and inventoried properties, and integrate the database with Groton’s Geographic Information System (GIS)
- Increase the effectiveness of the scenic roads review.

5.1.3 Develop economic and education strategies that capitalize on historic and archeological resources

- Make information on Groton’s cultural and historic character, buildings, districts, cemeteries and other heritage treasures widely available to residents and visitors in attractive and easily understood formats
- Make Groton’s informational and education materials on historic resource available online
- Continue to identify eligible building and districts for listing on the National Register of Historic Places, and pursue designation.

5.2 Community Housing

5.2.1 Encourage diversity of housing types for range of income levels and ages

- Provide housing for people with disabilities.
- Use CPA funds to address broader range of affordable housing needs, even if the CPA assisted units do not qualify for Chapter 40b requirements.

5.2.2 Improve municipal facilities and infrastructure, considering energy conservation, technology and ADA compliance

- Pursue development of a central archival facility to store and manage municipal records and a central index to track and access the records.

5.3 Open Space and Recreation Projects

For Open Space and Recreation Projects Sections, see the *2012 Groton Open Space and Recreation Plan* (OSRP). Section 8 and Section 9.

For code, use OSRP and subsections, e.g. “OSRP 9.1.1” for a proposal that promotes the preservation of ground water resources.

To see the OSRP, please use the Groton Town Conservation Commission (Cons Comm.) web link <http://www.townofgroton.org/Town/BoardsCommittees/ConservationCommission.aspx>.

On the right side of the Cons Comm. page, under *Conservation Commission Documents*, click *Document*, and click *2012 Groton Open Space and Recreation Plan*.

6. 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 user of funds (such as to the Cons. Comm. or Groton Housing Trust), 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:

6.1 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 \$2,000, leading you to follow the rules for the first bulleted item below (costs less than \$5,000). 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 \$5,000 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 processes for each cost level are noted below:

- For vendor costs totaling less than \$5,000, 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 \$5,000 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.

6.2 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.*

6.3 CPA Administration Fund Disbursement Policy

See the following subsections.

6.3.1 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.

6.3.2 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, former Town of Groton Accountant Valerie Jenkins, and former 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.

6.3.3 Policy

Administrative Fund money may be used as listed under **Section 6.3.1** 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 \geq 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.

7. 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.

7.1 Synopsis

- A project summary and eventually a complete application must be provided to CPC using the format provided in the CPP. Proponents will receive written feedback from all CPC members, absent CPC members must provide written feedback to CPC for the comments to be considered
- Proponents will be asked to meet with CPC a minimum of two (2) times: summary meeting and public meeting. (See **Section 7.3.**)

7.2 Process Overview

Proponents are strongly encouraged/urged to review all parts of this plan thoroughly, and to contact the CPC, and the Community Preservation Coalition (<http://townofgroton.org/Town/BoardsCommittees/CommunityPreservationCommittee.aspx>) with any questions, concerns, doubts regarding whether a proposal qualifies for possible CPA funding (recommend viewing <http://communitypreservation.org/content/chart-allowable-uses>).

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 12**) 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 (maximum of two page) 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.

7.3 Ten Step Process

A computer is required to fill out the forms and submit a proposal in electronic format. If a proponent does not have access to a computer, contact the CPC administrative assistant. See the following.

7.3.1 Step 1- Submit Two Page Project Summary

Proponents 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 the significant time and resources often needed to complete the research and documentation required for a complete application (application plus all supporting documentation, letters of support, etc.).

The summary (for recommended template, see **Section 8**) 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.

7.3.2 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 proponent determine whether they should proceed further with the proposal process, whether to submit a more formal and complete draft Project Application.

7.3.3 Step 3 - Submit Complete Draft Application by Deadline

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

Proponents 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.

Proponents are strongly advised to seek letters of support from all the committees, boards, and organizations that may improve the odds of a project achieving sufficient support by the CPC and at the appropriate town meeting.

Proponents 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. See **Section 6** for information regarding number of quotes for given size project.

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, etc).

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

The CPC will review and provide oral and written feedback to Proponents 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 proponent to assist them in refining their specific application as needed for a final application. This is the legislatively required public hearing.

7.3.5 Step 5 - Submit Final Application by Deadline

Proponents submit final revised (if needed) applications to the CPC. These applications can be delivered via mail or in person to the CPC administrator, Regina Beausoleil, 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.

7.3.6 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 form described in **Section 12**.

7.3.7 Step 7 - Proponent Notification

The CPC will notify each project proponent 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.

7.3.8 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 Proponents 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 proponent 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.

7.3.9 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.

7.3.10 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 6** Use of CPA Funds - General Guidelines for additional information.

7.4 2014 -15 CPP Schedule

NOTE: The normal CPA application cycle runs from October to the Annual Town Meeting in April. There is an out-of-cycle application process that can be used to consider applications with unusual circumstances. For more details contact the CPC administrative assistant.

- 2013-2014 Community Preservation Plan released by: **October 6, 2014**
- Submission of one or two page Required Project Summary (RPS): **October 27, 2014**
- Feedback regarding RPS: **November 18, 2014**
- Deadline for Complete Draft Proposals (CDP) submitted to CPC by: 4 PM on **January 12, 2015**
- Prepare written feedback to be provided to Proponents – **February 10, 2015**
- Public Hearing to discuss feedback on CDPs: **February 24, 2015**
- Deadline for Final Proposal (no further changes accepted) by 4 PM on: **March 26, 2015**
- Final Vote - Deliver Recommendations for Town Warrant by: **March 24, 2015**
- Vote at Spring Town Meeting: **April 21, 2015.**

7.5 Proposal Evaluation Criteria

See the following for description of the items the CPC uses to review and evaluate a proposal to determine whether to recommend the proposal, to submit it for Town vote. Also see **Section 12.**

7.5.1 Basic Criteria

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

- Submitted in timely fashion to the CPC. First the two page Project Summary (see **Section 9**), and if acceptable, then the Project Application form (see **Section 11**)
- Eligible for the CPA funding according to the requirements described in the CPA legislation
- Is consistent with the 2011 Groton Master Plan and 2012 Groton Open Space and Recreation Plan. See **Section 2.2.1.**
- Project Application contains appropriately 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 Groton Historical Commission
- Establishes that proponent 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.

7.5.2 Added Value Criteria

The following criteria increase the odds a proposal will receive support by the CPC and possibly at Town Meeting. Also see **Section 12**.

- Proponent 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 and/or the Open Space and Recreation 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.

8. PROJECT SUMMARY (REQUIRED)

The required project summary will help the CPC and proponent determine whether a new proposal meets basic CPA requirements before the proponent 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**.

8.1 CPA Project Summary Form – Example

[CPC Use Only: Date Received: mm/dd/2014 By: CPC member or Admin Asst.

CPC number #2015-01 (sample)]

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

1. Applicant Name: Last Doe First John
and Organization(s) (if appropriate) N/A
2. Submission Date: Nov. 10, 20xx Organization (if appropriate) N/A
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. Project Location/Address: Station Ave
7. Project Name: Main St. Historic Preservation-Affordable Housing Proposal
8. Community Preservation Plan Objectives - use codes from **Section 5** to indicate all that apply: 5.2, 1, 5.4.1, 5.4.2,
9. Project basic description: 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.
Etc.
10. Applicant Signature: John Doe Date mm. dd., 20xx
Co-Applicant Signature _____ Date _____
Co-Applicant Signature _____ Date _____

10. FILLING OUT PROJECT APPLICATION

Following acceptance/approval by the CPC of the Project Summary (see **Section 9**), please review the following instructions before filling out the Project Application (see **Section 11**). An accurate complete application expedites the review and approval process.

Use additional paper as needed to answer questions.

Section 10.2 provides a sample Project Application. Any questions, please contact the CPC (see **Section 1.4**).

10.1 Instructions

1. Detach application form from the CPP in **Section 11** (or copy the application form).
2. Fill out items 1 through 8 as indicated.
3. For item 9, if applicable to the project, please provide names, addresses and contact numbers for project architects, contractors, and/or consultants.
4. 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 Proponents site control; or property owner's written consent to application and proposed project, is included with the application.
5. For item 11.a & b, if applicable, contact the town assessor for the details required.
6. 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.
7. 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.
8. For item 15, please refer to **Section 5** and use any and all codes that may apply.
9. For item 16 & 17, fill out as indicated.
10. 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.
11. 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, historic preservation restrictions subordination agreements, etc.

12. 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 at 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
13. For item 21, please provide other information potentially useful for the CPC in considering the project.
14. 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.
15. For item 23, please sign the application. If applicable, space is provided for additional signatories.
16. Submit one PDF (electronic version), and one hardcopy of the complete application, with requested attachments, to the CPC as noted in **Section 7.3**. Please mail to (or drop off) at: Proposals, Groton CPC, Town Hall, 173 Main Street, Groton, MA 01450. Any questions, contact the CPC, see **Section 1.4**.

10.2 CPA Project Application Form – Example

[CPC Use Only: Date Received: mm/dd/20xx By: CPC member or Admin Asst.

CPC number #2015-01 (sample)]

Use word processor to fill out form. Answer all questions, use "N/A" if not applicable.

1. Applicant Name and Organization: Last Doe First John
and Organization(s) (if appropriate) _____

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	La La Land		
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 5** to indicate all that apply: :
5.2. 1, 5.4.1, 5.4.2,

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

10 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 _____

11. CPA PROJECT APPLICATION FORM

[CPC Use Only: Date Received _____ By: _____
Assigned CPC #2015 - _____]

Use word processor to fill out form. Answer all questions, use "N/A" if not applicable.

1. Applicant Name and Organization: Last _____ First _____
Organization(s) (if appropriate) _____

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 5** to indicate all that apply: _____

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

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

12. CPC RESPONSE SHEET

The following is a layout 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 #2015 - _____

12.1 Primary Qualifications

12.1.1 Two-Page summary Eligibility

Eligibility: The following questions must be answered “Yes” to evaluate the proposals eligibility for final approval:

1. Project Summary was submitted using the “Summary Project Form” _____
2. Project Summary was received by deadline date. _____
3. Project fits CPA Allowable Spending Chart criteria (see Figure 7 CPA Allowable Spending Chart) . _____

12.1.2 CPA Project Application Eligibility

1. Project Application (Application) was submitted using the “CPA Project Application Form” . _____
2. Application was received by deadline date. _____
3. Project fits CPA Allowable Spending Chart criteria (see Figure 7 CPA Allowable Spending Chart) . _____
4. If a Historic Preservation project, has written approval from Groton Historical Commission. _____
5. The proponent has site control or the written consent of the property owner to submit an application. _____
6. A detailed management plan includes schedule, key milestones, project manager, list of consultants. _____
7. Application includes at least two professionally prepared quotes. _____

12.2 Scoring

Each major criterion will be rated on a scale of 1-5 (1=lowest and 5=highest).

12.2.1 Function:

1. Meets goals and objectives laid out in current Master Plan and Open Space and Recreation Plan 1 = Project not included in a Town plan. 5 = Project explicitly called out in a Town plan. _____
2. Multiple funding Sources: 1 = No non-Groton CPA funding, 3 = 25% non-Groton CPA funding, 5 = 50 % or more non-Groton CPA funding. _____

12.2.2 Value:

Subjective and time dependent criteria

1. Overall application quality. _____
2. Degree of urgency. 1 = no rush- can do it at any time 3 = the sooner the better, 5 = Once-in a generation opportunity. _____
3. Community support. 1 = none, 3 = only individuals or organizations, 5 = Broad and strong community support. _____
4. Ease of execution. 1 = complicated, e.g. major construction project, 5 = easy e.g. research documentation only. _____
5. Level of risk. 1= Strong probability of issues related to Geology, legal situation, susceptible to scope creep or environmental issues or the like, 3 = average, 5 = Research Report, engineering study, or other paperwork project. _____
6. Applicant active in process participation. 1 missed appointments, unresponsive to Liaison or CPC concerns, 3 = attended at least one or more meetings, responded to concerns. 5 = proactive, communicative, quick response to issues, effective. _____

Total Score = Function + Value = _____