

TOWN OF BELMONT  
**COMMUNITY PRESERVATION PLAN**

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COMMUNITY PRESERVATION COMMITTEE:

Margaret Velie (Chair) - Conservation Commission  
Elizabeth Dionne (Vice Chair) – Select Board Appointee  
Floyd Carman (Clerk) – Select Board Appointee  
Roy Epstein - Board of Parks Commissioners  
David Kane - Recreation Commission  
Stephen Pinkerton - Planning Board  
Lisa Harrington - Historic District Commission  
Gloria Leipzig - Housing Authority  
Andrés Rojas – Select Board Appointee



Citizens of the Town of Belmont,

We are excited to present Belmont's Community Preservation Plan. The Plan contains information about the Community Preservation Act (CPA), which the Town adopted at the State Election held on November 2, 2010. The goal of the Plan is to provide a summary of the Town's resources and needs, define the goals and objectives of the Community Preservation Committee, and outline the CPA funding application process.

The Town of Belmont is privileged to have many important community assets. Preserved open space areas contain a scenic beauty that predates the Town itself. Historic resources provide a glimpse into Belmont's past, a way of measuring our progress throughout the years, and perhaps an insight as to where the Town is headed. Recreational land provides a safe place to enjoy community-based activities and games, thereby strengthening the health and well-being of its residents. Community housing allows a greater range of people to benefit from all aspects of Belmont, people who would otherwise not have the opportunity to contribute to the future of the Town.

In the following Community Preservation Plan, Belmont residents will find more information on the Community Preservation Act, potential areas of focus for future CPA projects, the requirements for CPA funding eligibility, and the funding application process. A revised Plan is likely to be presented to the Town every year to reflect new CPA projects and updated annual financial statements. Public hearings will be scheduled each year to solicit feedback from residents who wish to participate in the development of each new Plan.

We invite you to submit any comments or suggestions for the Plan to:

**Community Preservation Committee  
PO Box 56  
Belmont, MA 02478**

Respectfully submitted,

The Community Preservation Committee

# THE COMMUNITY PRESERVATION ACT IN BELMONT

## ***What is the Community Preservation Act?***

The Community Preservation Act (CPA) allows participating cities and towns to reserve dedicated funds for the purpose of expanding certain community assets: open space/recreational land, historic resources, and community housing. The acquisition, creation and preservation of these community assets is financed through the Community Preservation Fund, which is comprised of revenues collected from a property tax surcharge of up to 3% and annual distributions from the Massachusetts Community Preservation Trust Fund.

## ***When did Belmont adopt the CPA?***

51% of the citizens of Belmont voted to approve the Community Preservation Act at the State Election held on November 2, 2010. As per the original ballot question, a surcharge of 1.5% was added to the annual real estate tax levy beginning in FY 2012.

## ***What is the average taxpayer cost?***

In FY 2019, the annual surcharge averaged \$190.80 per Belmont single family household. Residential and mixed - use properties in Belmont receive an automatic exemption for up to \$100,000 off of the residential property value. Residents who qualify as having low/moderate income can receive a full CPA surcharge exemption. More information regarding the low/moderate income CPA exemption can be found through the Assessors' Office (617-993-2630) or by visiting their page on the Town's website at [www.belmont-ma.gov](http://www.belmont-ma.gov).

## ***What other revenue sources contribute to Belmont's CPA fund?***

The Massachusetts Community Preservation Trust Fund was established to provide an additional source of revenue for communities that chose to adopt the CPA. The state uses multiple rounds of distribution to determine how much each participating community will receive from the Community Preservation Trust Fund. Each community is eligible to receive no less than 5%, but no more than 100%, of the total surcharge assessed the previous year.

The State match, originally 100% of CPA funds collected by municipalities during the previous fiscal year, has declined since 2006 as additional communities have adopted the statute and joined the funding pool, and as registry fees which feed the State fund have suffered.

Fiscal Year	Local Surcharge	State Match Percentage	State Match	Distribution Date
2012	\$ 868,072.00	26.83%	\$ 232,884.00	10/15/2012
2013*	\$ 900,751.00	52.23%	\$ 470,418.00	11/15/2013
2014*	\$ 926,790.00	31.47%	\$ 291,615.00	11/14/2014
2015*	\$ 972,449.00	23.48%	\$ 228,337.00	11/19/2015
2016	\$ 1,066,743.00	20.58%	\$ 219,502.00	12/1/2016
2017	\$ 1,121,268.00	16.94%	\$ 189,960.00	11/15/2017
2018	\$ 1,160,346.62	18.78%	\$ 217,934.00	11/16/2018
2019	\$ 1,228,356.92	-	-	NA

\* The state match included a transfer of funds from the State Budget Surplus.

The State match for FY 2019 is projected at 12%. The FY 2019 State match is expected to be calculated and disbursed to all participating municipalities in the fall of 2020.

The annual contribution to the Belmont CPA Fund balance is calculated as local surcharge in the prior fiscal year plus the State match in the current fiscal year.

### ***What is the current balance of Belmont's CPA Funds?***

<b>Revenue (FY2012-19)</b>	<b>Total</b>
Local Surcharge	\$ 8,091,069
State Match	1,910,650
Subsequent Year Collection - Surcharge	61,068
Interest and Misc. Fees	140,453
<b>Total Collection</b>	<b>\$ 10,203,240</b>
<b>Expenses (FY12-FY19)</b>	
Project Spending	\$ (5,436,578)
Remaining Appropriated Project Funding	(2,244,534)
Admin Expenses (see spending guidelines)	(173,474)
<b>Total Expenses</b>	<b>\$ (7,854,586)</b>
<b>Appropriations (FY20)</b>	
FY20 Projects	\$ (1,992,975)
FY20 Admin. Budget (see spending guidelines)	(55,000)
<b>Total Proposed Appropriations (FY20)</b>	<b>\$ (2,047,975)</b>
<b>Summary</b>	
Collections	\$ 10,203,240
Expenses	(7,854,586)
Proposed Appropriations	(2,047,975)
<b>Total Estimated CPA Fund Balance (7-1-18)</b>	<b>\$ 300,679</b>

	FY	FY	FY	FY	FY	FY	FY
<b>Admin Fees</b>	<b>2014A</b>	<b>2015 A</b>	<b>2016 A</b>	<b>2017 A</b>	<b>2018 A</b>	<b>2019 A</b>	<b>2020</b>
Admin Salary	\$ 8,917	\$ 11,412	\$ 10,092	\$ 11,584	\$ 8,236	\$ 4,795	\$ 11,000
Procurement Training	450	1,265	-	-	-	-	-
Open Space Land and Housing Inventory Project	30,000	-	-	-	-	-	-
CPA Coalition Dues	3,000	3,500	3,500	3,500	4,350	4,350	4,350
Deed Restriction - Homer House	-	-	4,266	-	-	-	-
Town Hall Railings and Retaining Wall Study					5,050	-	-
McLean Barn Stabilization Study					15,000	-	-
Belmont Police Station						21,000	-
Misc. Office Supplies	154		363				
<b>Total Admin Spending</b>	<b>\$ 42,521</b>	<b>\$ 16,177</b>	<b>\$ 18,220</b>	<b>\$ 15,084</b>	<b>\$ 32,636</b>	<b>\$ 30,145</b>	<b>\$ 15,350</b>
Original Appropriated Admin Budgets	\$ 58,000	\$ 56,498	\$ 56,200	\$ 50,650	\$ 55,000	\$ 55,000	\$ 55,000
Administrative Turnback	\$ 15,479	\$ 40,321	\$ 37,980	\$ 35,566	\$ 22,364	\$ 24,855	\$ -

Each year the Community Preservation Committee (CPC) requests Town Meeting to approve the annual CPA budget, which consists of projected revenues and expenses. The projected revenue is based on conservative estimates of the Town’s projected CPA collection for the following fiscal year, including the projected State match as described in the previous section of this document. Although the true CPA collection is not determined until the end of the following fiscal year, the annual appropriation is considered part of the working CPA Fund Balance once it has been approved by Town Meeting.

***What are the spending guidelines for CPA funds?***

For each fiscal year, the community must spend or reserve at least 10% of the annual revenues in the fund for each of the following resources: Open Space/Recreational Land, Historic Resources, and Community Housing. Up to 5% of the annual revenue can be used for administrative and operating expenses associated with the Community Preservation Committee. Administrative funds cannot exceed 5% of the annual CPA revenue and do not roll over to the subsequent fiscal year administrative budget. The remaining revenue is considered undesignated, and can be used towards any of the three community asset categories. From time to time, the CPC may recommend that town meeting reserve CPA funds to cover the cost of anticipated projects.

***What is the Community Preservation Committee?***

The Community Preservation Committee (CPC) was formed to evaluate the community preservation needs of Belmont and make recommendations to Town Meeting as part of the annual budget process. Sponsors of community projects must receive approval from both the CPC and Town Meeting in order to receive funding for their particular community preservation

purposes. The CPC consists of nine members, comprised of representatives from the Conservation Commission, Historic District Commission, Planning Board, Board of Parks Commissioners in Belmont, Recreation Commission, the Housing Authority and three members appointed by the Select Board.

The current members of the Community Preservation Committee are as follows:

Margaret Velie (Chair) - Conservation Commission  
Elizabeth Dionne (Vice Chair) – Select Board Appointee  
Floyd Carman (Clerk) – Select Board Appointee  
Roy Epstein - Board of Parks Commissioners  
David Kane - Recreation Commission  
Stephen Pinkerton - Planning Board  
Lisa Harrington - Historic District Commission  
Gloria Leipzig - Housing Authority  
Andrés Rojas – Select Board Appointee

### ***What is the goal of the Community Preservation Committee?***

The Community Preservation Committee strives to help Belmont preserve the Town’s precious assets through CPA funding. The CPA fund is a powerful resource that can be used to maintain the character of Belmont, but doing so requires active members of the community to sponsor CPA-eligible projects. With this in mind, the Community Preservation Committee encourages Belmont residents to spearhead their own community-based projects that uphold the integrity of our community.

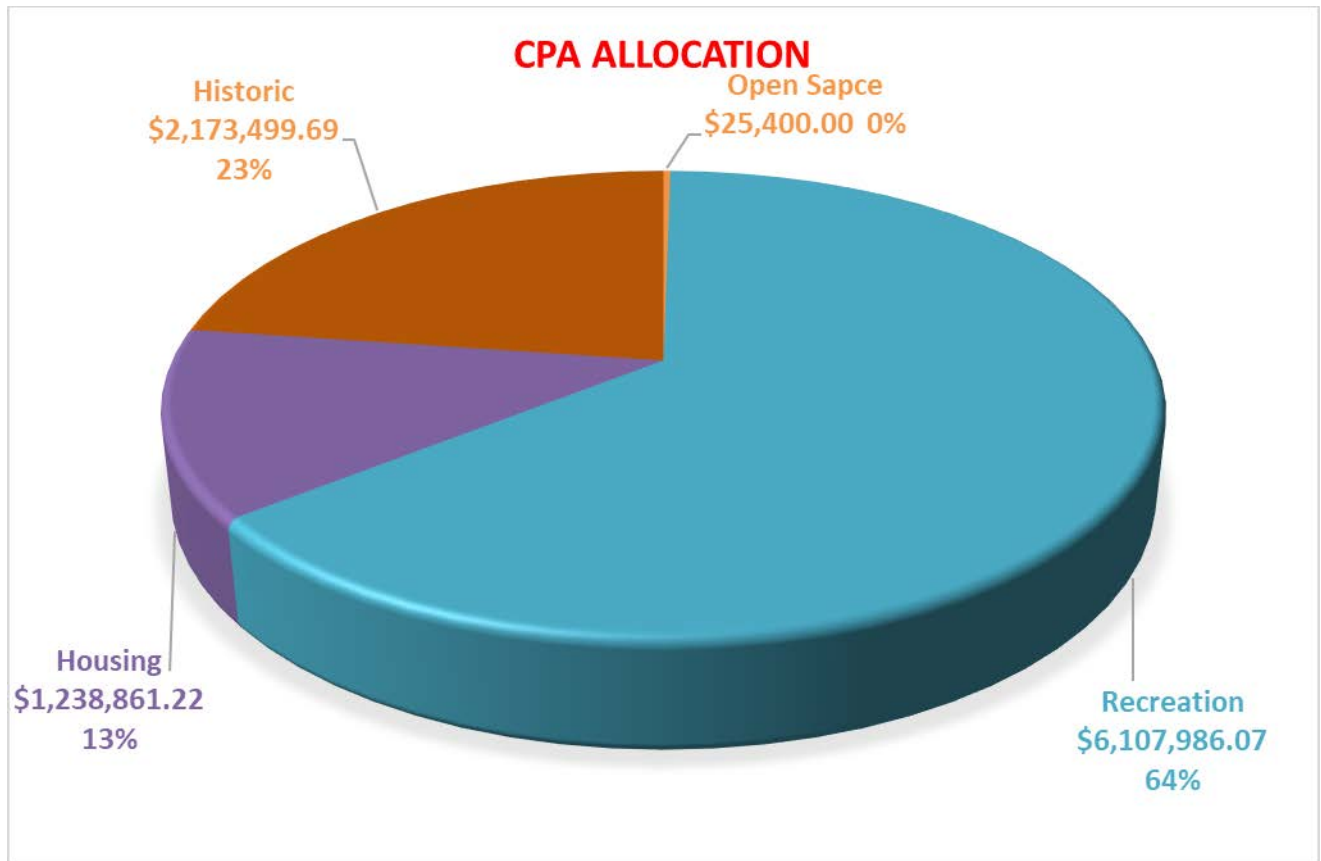
### ***What guidelines will determine a project’s eligibility for CPA funds?***

In determining which projects should receive CPA funding, the CPC will give preference to projects that meet one or more of the following criteria:

- Preserve or utilize currently owned Town Assets.
- Preserve the essential character of the Town as described in the Comprehensive Plan.
- Demonstrate consistency with other current and widely scrutinized planning documents that have been adopted by the Town of Belmont.
- Receive endorsement from other municipal boards or departments.
- Save resources that would otherwise be threatened.
- Benefit a currently under-served population.
- Serve more than one CPA purpose (especially those that link open space/ recreation and community housing).
- Demonstrate practicality and feasibility (especially those that can be expeditiously implemented within budget).
- Produce an advantageous cost/benefit value.
- Leverage additional public and/or private funds.
- Provide long-term contributions to the Town.

**How much CPA funding has been appropriated to each asset category?**

Fiscal Year	Open Space	Recreation	Housing	Historic	Total
2014	\$ -	\$ 425,993.63	\$ 128,161.22	\$ 296,370.50	\$ 850,525.35
2015	\$ -	\$ 1,932,555.54	\$ 165,000.00	\$ 251,005.85	\$ 2,348,561.39
2016	\$ -	\$ 295,000.00	\$ 522,500.00	\$ 171,023.24	\$ 988,523.24
2017	\$ -	\$ 578,350.00	\$ -	\$ 240,000.00	\$ 818,350.00
2018	\$ -	\$ 986,000.00	\$ 173,200.00	\$ 24,125.00	\$ 1,183,325.00
2019	\$ -	\$ 810,086.90	\$ 250,000.00	\$ 278,000.00	\$ 1,338,086.90
2020	\$ 25,400.00	\$ 1,054,600.00		\$ 912,975.10	\$ 1,992,975.10
	<b>\$ 25,400.00</b>	<b>\$ 6,082,586.07</b>	<b>\$ 1,238,861.22</b>	<b>\$ 2,173,499.69</b>	<b>\$ 9,520,346.98</b>





# Open Space

## **Overview**

While Belmont is known as the “Town of Homes”, open space has played a significant role in the formation of the Town’s character and its “green” aesthetics. The various examples of open space in Belmont act as a safeguard against the level of urbanization seen in Cambridge, Watertown, and other adjacent municipalities. Open space helps to prevent Belmont from becoming too densely populated and is therefore a major contributor to the enduring small-town feel of the community. Preserving open space also helps protect wetlands, streams, floodplains, and wildlife habitats.

## **Resources**

According to the Comprehensive Plan, approximately 20% of the Town of Belmont is comprised of open space and 2/3 of Belmont’s open space is publicly-accessible. Some of the larger areas of public accessible open space in Belmont include:

- Beaver Brook Reservation (72 acres)
- Habitat Education Center and Wildlife Sanctuary (88 acres)
- Rock Meadow (70 acres)
- Lone Tree Hill (106 acres)
- Alewife Brook Reservation (43 acres)

## **Needs and Goals**

The goal for open space includes protection, through acquisition or Conservation Restriction, of lands with high environmental value, high scenic character, and/or historic significance, as well as lands which allow for the enhancement of passive recreation opportunities. According to the Open Space and Recreation Plan, the opportunities to expand the town’s inventory of open space are very limited due to the fact that the town’s land resources have been almost totally developed. As open space acts as a critical offset to the effects of urbanization, the loss of open space in Belmont would:

1. significantly decrease areas of scenic beauty and recreation now enjoyed by the public,
2. create a potential for increased ground or surface water pollution,
3. create a potential for increased flooding,
4. diminish plant diversity and wildlife habitat areas, and
5. decrease available land for passive recreation.

Considering the significant role open space plays in our community, one of the goals of the CPC is to use the Community Preservation Funds to positively affect all aspects of open space in Belmont. From large conservation lands to smaller vistas, open space has helped to define Belmont throughout the years. By taking advantage of available CPA funds, it is hoped that open space will continue to shape the character of our Town.

### ***Possible Areas of Focus***

The following is an initial, unapproved list of potential projects for CPA funds. These are not listed in any particular order or preference at this point.

- **Land acquisition** – A fund to be used to acquire properties or Conservation Restrictions on properties for open space and conservation purposes in Belmont, subject to availability of purchase. Priorities are as follows:
  - Land that is undeveloped or open space land.
  - Land containing natural resources, including: surface water bodies, wetlands, vernal pools and riparian zones or other lands subject to the Wetlands Protection Act; lands of habitat or wildlife significance; lands with geologic features.
  - Land adjacent to existing open space or conservation lands – to promote connectivity of habitat; protect or enhance wildlife, water, and human corridors; and provide a buffer for existing open space.
  - Land connecting open space and conservation lands (e.g. bike trails, pedestrian paths).
  - Land that provides flood control or water storage, especially land bordering Belmont’s ponds, rivers and streams and their watersheds; such lands could also provide pollution control.
  - Land that has historic significance, is scenic, provides scenic vistas, protects the character of the Town or meets the Town’s recreation needs.
  - Pocket parks in densely settled areas of town, where they are currently scarce.
  - Other land listed in the Open Space and Recreation plan.
  
- **Other:**
  - Preserve existing public open space, conservation lands, historic lands and active and passive recreation lands.
  - Evaluate and develop plans for preserving Belmont’s ponds, rivers and streams and their watersheds (Atkins, Beaver Brook, Clematis, Little River, Wellington and Winn Brook), including pollution prevention measures and invasive control of their banks. These watercourses are important for surface water protections, flood projection, wildlife corridors, as well as for aesthetic value. Possibly consider “day lighting” portions of streams.
  - Create Long Term Master Plans for the preservation of town-owned conservation lands, parks and other open space including Rock Meadow and the wetlands at the Lexington border.
  - Establish a “Conservation Fund” under Chapter 40, Section 8C to allow the Conservation Commission to fund preliminary work/due diligence on potential CPA projects. Work could include background research, surveys, wetlands delineations, appraisals, or other activities to advance CPA open space purchases.
  - Use a portion of annual funds for invasive removals to preserve town-owned open space.

### ***Specific Selection Criteria***

In order to receive CPA funding, an open space project should acquire, create or preserve:

- Land that is undeveloped.
- Land that is considered open space.
- Land containing natural resources, including: surface water bodies, wetlands, vernal pools and riparian zones, other lands subject to the Wetlands Protection Act.
- Land of habitat or wildlife significance.
- Land with geologic features.
- Land adjacent to existing open space or conservation lands that may promote connectivity of habitat; protect or enhance wildlife, water, and human corridors; provide a buffer for existing open space.
- Land connecting open space and conservation lands such as bike trails or pedestrian paths.
- Land that provides flood control or water storage, especially land bordering Belmont's ponds, rivers and streams and their watersheds.
- Land that could provide pollution control.
- Land that has historic significance, is scenic, provides scenic vistas, protects the character of the Town, or that meets the Town's recreation needs.
- Land that creates pocket parks in densely settled areas of the Town, especially where they are currently scarce.
- Land that is listed in the Open Space and Recreation Plan.

### ***Funded Projects***

Rock Meadow Habitat Preservation: Control of Non-native & Invasive vegetation.

### ***Administrative Projects***

In order to have a better understanding of the Town of Belmont's open space and community housing resources and needs, the Conservation Commission and the Belmont Housing Trust jointly sponsored the use of Community Preservation Act administrative funds in FY 2014 to engage the services of a qualified Land Use Planner. Vanasse Hangen Brustlin, Inc, the selected Land Use Planner performed the following:

- 1). Studied the needs, possibilities and resources of the Town of Belmont with respect to Open Space and Community Housing;
- 2). Developed a sample inventory form and evaluation matrix;
- 3) Created a system for ranking properties in the Town of Belmont to enable the CPC to prioritize town funds when protecting Open Space or developing Community Housing.

## Recreational Land

### ***Overview***

Recreational land plays a significant role in making Belmont a desirable town for prospective residents and a comfortable place for current residents. Parks and fields provide a venue for numerous community-based programs to thrive. They encourage people to be actively engaged in their community, and recreational land continually succeeds in fostering meaningful social connections in Belmont.

### ***Resources***

Some examples of recreational land in Belmont include:

- Town Field
- Pequossette Playground
- Grove Street Field
- Washington Street Playground
- Underwood Pool and Playground (potential project)
- Belmont Elementary Schools
- Belmont High School multi-purpose field and athletic facilities
- Payson Park (potential project)

### ***Needs and Goals***

The increase in Belmont's school population has put a strain on the existing recreational facilities. According to enrollment records maintained by Belmont Public Schools, school enrollment increased by 1,767 students or 63% between 1990 and 2018. In order to accommodate this increase, existing recreational facilities require extensive improvements. Creating additional playground and updating current playgrounds (e.g., to bring them into ADA compliance) and recreational space would also significantly help Belmont to address the needs of its expanding population.

### ***Possible Areas of Focus***

The following is an initial, unapproved list of potential projects for CPA funds. These are not listed in any particular order or preference at this point. With the significant depletion of field space and overuse created by the construction of the High School for the next three years a focus need to be on maintaining and possible replacements of fields.

- Purchase open space to use as hybrid recreational space providing passive and active recreation opportunities.
- Preserve Belmont's parks, playgrounds and recreational areas.
- Create new walking and biking paths; link them into a regional and town-wide network, and increase public use and access.

- Improve elderly and disability access to recreational land.
- Increase or designate more pathways from neighborhoods to commercial village centers and schools and to inter-town trails both to the East and West.
- Increase or designate more pathways from neighborhoods to commercial village centers and schools while increasing awareness of safety and neighborhood and community history along the paths.
- Commission or Committee support: Applicants will present their project to the recreation commission to gain support.

**Specific Selection Criteria**

In order to receive CPA funding, a recreational land project should acquire or preserve:

- Land that has historic significance, enhanced scenery, ecological contribution, or additional recreation sites for Belmont residents.
- Land that is contiguous to recreation site and/or structure.
- Land that may offer protection to wildlife within the recreation site.
- Land that connects the recreation site to open space.
- Land that enhances the public spaces surrounding a recreation site and/or structure.
- Land that provides flood control and/or water storage at a recreation site and/or structure.
- Land that acts as a natural buffer to a recreation site and/or structure.

**Funded Projects**

FY14 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Irrigation Improvements at Rock Meadow Community Gardens	\$ 10,000	\$ 9,024	\$ 976	\$ -	100.00%	CLOSED
Joey's Park Rehabilitation	\$ 100,000	\$ 100,000	\$ -	\$ -	100.00%	CLOSED
Landscape Plan for Intergenerational Walking Path at Clay Pit Pond	\$ 20,000	\$ 18,970	\$ 1,030	\$ -	100.00%	CLOSED
Underwood Park (Plan & Design)	\$ 298,000	\$ 298,000	\$ -	\$ -	100.00%	CLOSED
<b>TOTAL</b>	<b>\$ 428,000</b>	<b>\$ 425,994</b>	<b>\$ 2,006</b>	<b>\$ -</b>	<b>100.00%</b>	

FY15 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Daniel Butler School Playground Project (Phase II)	\$ 66,524	\$ 64,488	\$ 2,036	\$ -	100.00%	CLOSED
JV Field Irrigation Upgrade	\$ 8,700	\$ 8,700	\$ -	\$ -	100.00%	CLOSED
Underwood Pool	\$ 2,000,000	\$ 2,000,000	\$ -	\$ -	100.00%	CLOSED
Winn Brook Field Renovation	\$ 100,000	\$ 96,374	\$ 3,626	\$ -	100.00%	CLOSED
<b>TOTAL</b>	<b>\$ 2,175,224</b>	<b>\$ 2,169,562</b>	<b>\$ 5,662</b>	<b>\$ -</b>	<b>100.00%</b>	

FY16 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Pequossette Tennis Courts Rehabilitation and Restoration	\$ 295,000	\$ 210,047	\$ 84,953	\$ -	100.00%	CLOSED
<b>TOTAL</b>	<b>\$ 295,000</b>	<b>\$ 210,047</b>	<b>\$ 84,953</b>	<b>\$ -</b>	<b>100.00%</b>	

FY17 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Construction of Intergenerational Walking Path at Clay Pit Pond	\$ 228,350	\$ 228,350	\$ -	\$ -	100.00%	Open
PQ Playground Revitalization (Phase I)	\$ 25,000	\$ 25,000	\$ -	\$ -	100.00%	CLOSED
Winn Brook Tennis Courts	\$ 325,000	\$ 268,000	\$ 57,000	\$ -	100.00%	CLOSED
<b>TOTAL</b>	<b>\$ 578,350</b>	<b>\$ 521,350</b>	<b>\$ 57,000</b>	<b>\$ -</b>	<b>100.00%</b>	

FY18 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Grove Street Tennis Courts	\$ 336,000	\$ 322,857	\$ 13,143	\$ -	100.00%	CLOSED
Grove Street Park Intergenerational Walking Path Construction Sit	\$ 35,000	\$ 35,000	\$ -	\$ -	100.00%	CLOSED
PQ Playground Revitalization Project Phase 2	\$ 615,000	\$ 602,056	\$ -	\$ 12,944	97.90%	Open
<b>TOTAL</b>	<b>\$ 986,000</b>	<b>\$ 959,913</b>	<b>\$ 13,143</b>	<b>\$ 12,944</b>	<b>98.67%</b>	

FY19 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Town Field Playground Restoration	\$ 25,000.00	\$ -	\$ -	\$ -	100.00%	Open
Architectural Drawings for Music Bandstand at Payson Park	\$ 5,000.00	\$ -	\$ -	\$ 5,000.00	0.00%	Open
Construction of Grove Street Park Intergenerational Walking Path	\$ 780,087.00	\$ 67,000.00	\$ -	\$ 713,087.00	8.59%	Open
<b>Total</b>	<b>\$ 810,087.00</b>	<b>\$ 67,000.00</b>	<b>\$ -</b>	<b>\$ 718,087.00</b>	<b>8.27%</b>	

FY20 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Community Path Phase 1b (Brighton Street to Clark Street Bridge) I	\$1,000,000.00	\$ -	\$ -	\$ -	0.00%	Open
Town Field Playground Restoration	\$ 60,000.00	\$ -	\$ -	\$ -	0.00%	Open
Clay Pit Pond Preservation and Restoration of Vegetation	\$ 20,000.00	\$ -	\$ -	\$ -	0.00%	Open
	\$ -					
<b>Total</b>	<b>\$1,080,000.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>0.00%</b>	

▪ Detailed project descriptions and expense summaries for all Town Meeting approved projects can be found on the CPC webpage on the Town of Belmont website:

<http://www.belmont-ma.gov/community-preservation-committee>

## Historic Resources

### Overview

Belmont has maintained its small-town charm, despite its close proximity to larger cities. One significant contributor to this enduring Town characteristic is the preservation of its historic buildings and landmarks. Belmont is known as the “Town of Homes”, and the numerous historic buildings bring a unique appearance to each residential neighborhood. This helps to create an attractive and welcoming community, and each historic building acts as a functioning monument to a small piece of Belmont’s larger history.

### Resources

There are many historic houses within the community. The Pleasant Street Historic District contains approximately 100 structures adjacent to Belmont Center, including historic homes as well as public buildings.

The inventory of Belmont's Historic Resources is currently incomplete. However, Town Meeting approved the allocation of \$115,000 of FY 2014 CPA funds for the Comprehensive Cultural Resources Survey of Belmont. The goal of the project is to create an inventory of landmark buildings, open spaces, and historic patterns throughout the Town. Along with being an important decision-making tool for future resource protection and development, the Survey will also be used to update the CPA Plan with notable examples of Belmont's Historic Resources.

### ***Needs and Goals***

The increasing energy costs for aging buildings, combined with the substantial expenses associated with historic renovations, create financial challenges for Belmont. According to the Comprehensive Plan, areas with historic properties appreciate in value at an annual rate that is 50% higher than in areas lacking the presence of historic properties. However, the Town's operating budget is not equipped to address all of the mounting needs of Belmont's historic resources. With this in mind, the CPC hopes that CPA funds will be used to shoulder the burden of historic renovation costs in order to:

1. broaden preservation and protection of Belmont's historic buildings and
2. preserve, rehabilitate, and/or adaptively re-use Belmont's historic public buildings and places.

### ***Possible Areas of Focus***

The following is an initial, unapproved list of potential projects for CPA funds. These are not listed in any particular order or preference at this point.

- Upgrade vault spaces to adequately address environment controls to achieve "archival" quality.
- Renovate and expand the Municipal Light building.

### ***Specific Selection Criteria***

In order to receive CPA funding, an historic project should:

- Identify, document, protect, preserve, restore and/or rehabilitate historic resources such as:
  - historic structures,
  - historic districts,
  - historic sites,
  - historic landscapes,
  - historic objects.
- Support the adaptive reuse of historic properties.
- Fall within the Belmont Historic District, appear on a State or National Historic Register or qualify for placement on such registers.
- Demonstrate a public benefit.
- Protect a threatened or vulnerable historic resource through acquisition or a preservation restriction.
- Contribute to the long-term maintenance and sustainability of an historic resource.

**Funded Projects**

<b>FY14 Projects</b>	<b>Appropriated</b>	<b>Expenses</b>	<b>Turnback</b>	<b>Remaining</b>	<b>Spending</b>	<b>Status</b>
(Town Hall) Concord Avenue Door Remediation	\$ 72,000	\$ 71,871	\$ 130	\$ -	100.00%	CLOSED
Building Survey and Investigation of the William Flagg Homer House	\$ 10,000	\$ 9,500	\$ 500	\$ -	100.00%	CLOSED
Comprehensive Cultural Resources Survey	\$ 115,000	\$ 115,000	\$ -	\$ -	100.00%	CLOSED
Preserving and Digitizing Belmont's Vital Records	\$ 100,000	\$ 86,604	\$ 13,396	\$ -	100.00%	CLOSED
<b>TOTAL</b>	<b>\$ 297,000</b>	<b>\$ 282,975</b>	<b>\$ 14,025</b>	<b>\$ -</b>	<b>100.00%</b>	
<b>FY15 Projects</b>	<b>Appropriated</b>	<b>Expenses</b>	<b>Turnback</b>	<b>Remaining</b>	<b>Spending</b>	<b>Status</b>
Belmont Community Moving Image Archive	\$ 12,000	\$ 11,964	\$ 36	\$ -	100.00%	CLOSED
<b>TOTAL</b>	<b>\$ 12,000</b>	<b>\$ 11,964</b>	<b>\$ 36</b>	<b>\$ -</b>	<b>100.00%</b>	
<b>FY16 Projects</b>	<b>Appropriated</b>	<b>Expenses</b>	<b>Turnback</b>	<b>Remaining</b>	<b>Spending</b>	<b>Status</b>
Belmont Veterans Memorial Project	\$ 60,000	\$ 26,800	\$ 33,200	\$ -	100.00%	CLOSED
Digitization of Belmont Newspapers (1890-1923)	\$ 17,923	\$ 17,105	\$ 818	\$ -	100.00%	CLOSED
1853 Homer House Rehabilitation and Restoration	\$ 100,000	\$ 96,571	\$ -	\$ 3,430	96.57%	Open
Wellington Station Exterior Restoration and Rehabilitation	\$ 26,300	\$ 26,300	\$ -	\$ -	100.00%	CLOSED
<b>TOTAL</b>	<b>\$ 204,223</b>	<b>\$ 166,776</b>	<b>\$ 34,018</b>	<b>\$ 3,430</b>	<b>97.99%</b>	
<b>FY17 Projects</b>	<b>Appropriated</b>	<b>Expenses</b>	<b>Turnback</b>	<b>Remaining</b>	<b>Spending</b>	<b>Status</b>
Preserving Belmont's Original Vital Records	\$ 80,000	\$ 5,000	\$ -	\$ 75,000	6.25%	Open
Digitizing Belmont's Town Meeting Records	\$ 85,000	\$ 37,827	\$ -	\$ 47,173	44.50%	Open
Town Hall Exterior Railings Improvements	\$ 75,000	\$ -	\$ 75,000	\$ -	100.00%	Closed
<b>TOTAL</b>	<b>\$ 240,000</b>	<b>\$ 42,827</b>	<b>\$ 75,000</b>	<b>\$ 122,173</b>	<b>25.96%</b>	
<b>FY18 Projects</b>	<b>Appropriated</b>	<b>Expenses</b>	<b>Turnback</b>	<b>Remaining</b>	<b>Spending</b>	<b>Status</b>
Belmont Headquarters Sons of Italy - Historical Artifacts Preservation	\$ 24,125	\$ 24,066	\$ 59	\$ -	100.00%	CLOSED
<b>TOTAL</b>	<b>\$ 24,125</b>	<b>\$ 24,066</b>	<b>\$ 59</b>	<b>\$ -</b>	<b>100.00%</b>	
<b>FY19 Projects</b>	<b>Appropriated</b>	<b>Expenses</b>	<b>Turnback</b>	<b>Remaining</b>	<b>Spending</b>	<b>Status</b>
Belmont Veterans Memorial Restoration and Enhancement	\$ 103,000.00	\$ -	\$ -	\$ -	100.00%	Open
McLean Barn Conditions Study and Stabilization	\$ 175,000.00	\$ 25,000.00	\$ -	\$ 150,000.00	14.29%	Open
<b>Total</b>	<b>\$ 278,000.00</b>	<b>\$ 25,000.00</b>	<b>\$ -</b>	<b>\$ 150,000.00</b>	<b>8.99%</b>	
<b>FY20 Projects</b>	<b>Appropriated</b>	<b>Expenses</b>	<b>Turnback</b>	<b>Remaining</b>	<b>Spending</b>	<b>Status</b>
Belmont Police Station	\$ 787,575.10	\$ -	\$ -	\$ -	0.00%	Open
Town Hall Complex Slate Roofs	\$ 100,000.00	\$ -	\$ -	\$ -	0.00%	Open
<b>Total</b>	<b>\$ 887,575.10</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>0.00%</b>	

▪ Detailed project descriptions and expense summaries for all Town Meeting approved projects can be found on the CPC webpage on the Town of Belmont website:

<http://www.belmont-ma.gov/community-preservation-committee>



## ***Administrative Projects***

### **Town Hall Railings**

The May 2016 Town Meeting approved a CPA project to restore the Town Hall railings. After overgrown shrubs were removed below the railings, it became apparent that the retaining wall on which the railings is in poor condition. The CPC funded a study to assess the metal railings and retaining wall.

### **McLean Barn**

The CPC funded \$15,000 in 2018 for a conditions assessment and stabilization study to develop a scope of work and cost estimates for the McLean Barn Stabilization Project.

### **Belmont Police Station**

The CPC funded the Belmont Police Station \$21,000 in FY19 for conditions assessments and the restoration design. This project requires compliance with the Secretary of the Interior Standards.

Deed Restriction – Homer House

## **Community Housing**

### ***Overview***

With higher than average property values and rental rates, low and moderate income residents face serious financial obstacles that affordable housing can help overcome. By helping those who are struggling to keep afloat during difficult economic times, Belmont recognizes that citizens from all levels of income make up the fabric of our Town and values their ongoing contributions to our community's identity. Additionally, the needs of Belmont's elderly and disabled should never be overlooked.

### ***Resources***

Belmont has 262 units of affordable state subsidized public housing developed by the Belmont Housing Authority (BHA) between 1949 and 1988. This inventory includes Belmont Village, a 100-unit development of two- and three-bedroom apartments for families. There are also two developments of one-bedroom apartments for the elderly and disabled.

Affirmative Investments was selected by the Select Board on the recommendation of the Belmont Housing Trust which sponsored the development of the section of the McLean property designated for affordable housing. In 2009 Affirmative Investments completed the Waverley Woods Apartments on Trapelo Road, an affordable rental development consisting of 40 apartments ranging from one-to-four bedroom townhouses and apartments. Waverley Woods has received multiple awards for being a socially responsible housing development, as well as for its "green" construction.

(<http://www.davissquarearchitects.com/project/waverley-woods-belmont-ma>)

**Needs and Goals**

The 2018 Belmont Housing Production Plan confirms the need for affordable housing. Almost 25% of Belmont households are eligible for affordable housing yet only 6.7% of Belmont’s houses are affordable, including the apartments at the Royal Belmont and the Bradford (coming on line in 2019). Additional community housing needs to be created and CPA funds can be used in a variety of creative ways, including evaluating sites for development (assessing financial feasibility, environmental work, etc.) as well as leveraging state and private funds to increase the number of affordable units. The affordable housing that is available faces the impact of increased energy prices, deferred maintenance costs, and lead paint hazards. As financial assistance from the state has decreased over the years, the Belmont Housing Authority’s budget is strained from operational and routine maintenance costs alone. The CPA fund can be used as an additional resource for the Town to address these mounting issues that affect our elderly, disabled, and low and moderate income residents.

**Possible Areas of Focus**

Work with the Belmont Housing Trust and Belmont Housing Authority to assist with the creation of affordable and/or community housing.

**Specific Selection Criteria**

In order to receive CPA funding, a community housing project should:

- Preserve existing affordable housing by meeting one or more capital need(s) of a property.
- Assist in predevelopment and development activities (including site analysis design, financing and construction) of new affordable housing, especially
  - multi-family rental sites,
  - independent and assisted living opportunities for seniors
  - homeownership programs with limited equity,
  - single-room occupancy programs for individuals with special needs.

**Funded Projects**

FY15 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
(Belmont Village) Electrical Upgrade Interior Wiring	\$ 165,000	\$ 165,000	\$ -	\$ -	100.00%	CLOSED
First Time Homebuyer Assistance	\$ 375,000	\$ -	\$ 375,000	\$ -	100.00%	CLOSED
<b>TOTAL</b>	<b>\$ 540,000</b>	<b>\$ 165,000</b>	<b>\$ 375,000</b>	<b>\$ -</b>	<b>100.00%</b>	
FY16 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Electrical Upgrade	\$ 522,500	\$ 522,500	\$ -	\$ -	100.00%	CLOSED
<b>TOTAL</b>	<b>\$ 522,500</b>	<b>\$ 522,500</b>	<b>\$ -</b>	<b>\$ -</b>	<b>100.00%</b>	

FY17 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
N/A	\$ -	\$ -	\$ -	\$ -	0.00%	N/A
FY18 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Assessment and Project Redevelopment of Sherman Gardens	\$ 173,200	\$ -	\$ -	\$ 173,200	0.00%	Open
FY19 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Funds Set Aside to Housing Trust	\$ 250,000.00	\$ -	\$ -	\$ 250,000.00	0.00%	Open
FY20 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
N/A	\$ -	\$ -	\$ -	\$ -	0.00%	N/A

▪ Detailed project descriptions and expense summaries for all Town Meeting approved projects can be found on the CPC webpage on the Town of Belmont website:

<http://www.belmont-ma.gov/community-preservation-committee>

### ***Administrative Projects***

In order to have a better understanding of the Town of Belmont's open space and community housing resources and needs, the Conservation Commission and the Belmont Housing Trust jointly sponsored the use of Community Preservation Act administrative funds in FY 2014 to engage the services of a qualified Land Use Planner. Vanasse Hangen Brustlin, Inc, the selected Land Use Planner performed the following:

- 1) Studied the needs, possibilities and resources of the Town of Belmont with respect to Open Space and Community Housing;
- 2) Developed a sample inventory form and evaluation matrix;
- 3) Created a system for ranking properties in the Town of Belmont to enable the CPC to prioritize town funds when protecting Open Space or developing Community Housing.

## Community Preservation Committee Town of Belmont

### Standard Application Process

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#### Step One: Preliminary Application

Applicants must submit ten copies of the **Preliminary Application** to the **Community Preservation Committee (CPC)** by no later than 7pm on **September 30, 2019**. The CPC will review submitted applications to ensure the proposed projects can be legally funded from Community Preservation funds, and are consistent with the goals for CPA funding as set forth in the current Community Preservation Plan.

<http://www.belmont-ma.gov/community-preservation-committee>

Applicants are invited to attend the CPC's Public Meeting in mid-late September to ask any questions they may have regarding the application process.

Prior to submitting their Preliminary Application, applicants are encouraged to meet with any town department or board/committee/commission that could be involved with their project. They are also encouraged to meet with the CPC to discuss their project.

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#### Step Two: Final Application

**If a project is determined to be eligible for CPC funds, the applicant will be asked to complete a Final Application.**

Please note that an invitation to submit a Final Application does not imply project approval or endorsement from the CPC. CPA-funded design does not obligate the CPC to fund the construction of the subsequent proposed project. Only after reviewing all final applications will the CPC determine which projects to recommend to Town Meeting.

Projects financed with CPA funds must comply with Massachusetts procurement laws, which mandate special procedures for the selection of products, vendors, services, and consultants. Applicants are encouraged to provide examples of any past experience with Massachusetts procurement laws. In lieu of adequate procurement experience, applicants will likely be directed to seek mentorship with a Town of Belmont Department Head or Belmont's Procurement Coordinator. Please review the CPA legislation and the Belmont CPA Bylaw prior to submitting CPA funding applications.

For further information about how to obtain a department mentor, please contact the **Community Preservation Hotline** at **617-993-2774**.

The following information will be required to complete the final application:

- **Goals:** What are the goals of the proposed project?
- **Community Need:** Why is the project needed? Does it address needs identified in existing Town plans?
- **Community Support:** What is the nature and level of support for this project? Include any letters of support and petitions and evidence of appropriate notice to abutters, if any.
- **Project Documentation:** Attach any applicable engineering plans, architectural drawings, site plans, photographs, any other renderings, relevant studies or material.
- **Timeline:** What is the schedule for project implementation, including a timeline for all critical milestones?
- **Credentials:** How will the experience of the applicant contribute to the success of this project? What prior municipal procurement experience does the applicant have? If the applicant has no prior procurement experience, what member of the project's working team or Town of Belmont Department Head mentor will be responsible for ensuring the project adheres to the necessary procurement laws?
- **Success Factors:** How will the success of this project be measured?
- **Budget:** What is the total budget for the project and how will CPA funds be spent? All items of expenditure must be clearly identified. Distinguish between hard and soft costs and contingencies. (NOTE: CPA funds may not be used for maintenance.)
- **Other Funding:** What additional funding sources are available, committed, or under consideration? Include commitment letters, if available, and describe any other attempts to secure funding for this project.
- **Fundraising:** Private persons who wish to contribute to a particular CPA projects have the following fundraising options: A) Establish a 501(c) (3) organization and set up a separate bank account in its name. This requires IRS filings on the part of the entity that sets it up. Collect and deposit all funds into the bank account you set up. B) Work with the Treasurer's Office to set up an account in the name of the CPA Project. Define the purpose of the fund raising and what the money will be used for.
- **Town Properties:** All CPA applications filed by a private person or entity for a CPA project either located on, or which involves, public land, structures, personal property or amenities shall have the written consent of the committee(s), board(s), commission(s), department(s) or other entity or entities of the Town of Belmont which have control of, or jurisdiction over, said land, structure, personal property or amenity. The committee(s), board(s), commission(s), department(s) or other entity or entities of the Town of Belmont which have control of, or jurisdiction over, said land, structure, personal property or amenity may set guidelines, standards and rules for, or make revisions to a CPA project either located on, or which involves, public land, structures, personal property or amenities.
- **Maintenance:** If ongoing maintenance is required for your project, how will it be funded?

- **Impact on Town Budget:** What, if any, potential secondary effects will your proposed project have on the Town's Operating Budget? Are there any capital projects that rely on the successful completion of your project?

Additional information, as applicable, may also be required. Such as:

- **Control of Site:** Documentation that you have control over the site, such as a Purchase and Sales Agreement, option or deed. If the applicant does not have site control, explain how public benefits will be protected in perpetuity.
- **Deed Restrictions:** In order for funding to be distributed, an appropriate deed restriction, meeting the requirements of Chapter 184 of Mass General Laws pursuant to section 12 of the Community Preservation Act, must be filed with the CPC. Provide a copy of the actual or proposed restrictions that will apply to this project.
- **Acquisitions:** For acquisition projects, attach appraisals and agreements if available. Attach a copy of the deed.
- **Feasibility:** Provide a list of all further actions or steps that will be required for completion of the project, such as environmental assessments, zoning approvals, and any other known barriers to moving forward.
- **Hazardous Materials:** Provide evidence that the proposed project site is free of hazardous materials or there is a plan for remediation in place.
- **Permitting:** Provide evidence that the project does not violate any zoning ordinances, covenants, restrictions or other laws or regulations. What permits, if any, are needed for this project? Provide the expected date of receipt for necessary permits, and copies of any permits already acquired.
- **Environmental Concerns:** Identify all known wetlands, floodplains, and/or any natural resource limitation that occur within the boundaries of your submission.
- **Professional Standards:** Evidence that appropriate professional standards will be followed if construction, restoration or rehabilitation is proposed. Evidence that the applicant has the proven or potential capacity to conduct the scope and scale of the proposed project, as evidenced by project leaders with appropriate qualifications and technical experience or access to technical expertise.
- **Further Attachments:** Assessor's map showing location of the project.

Any CPA funding application on behalf by a private person project or entity on private property shall provide funds toward the cost of the CPA project being applied for in an amount set by the CPC. The CPC expects that private persons or entities shall provide funds equal to at least ten percent (10%) of the amount of public CPA funds being provided.

For any CPA funding application filed by (i) the Town of Belmont, (ii) a committee, board, commission, department or other entity of the Town of Belmont, or (iii) an employee or elected official (other than Town Meeting Members) of the Town of Belmont acting in his or her capacity

as an employee or elected official of the Town of Belmont, said applicant shall not be required to provide any private funds toward the cost of the CPA project being applied for.

Any CPA project either located on, or which involves, public land, structures, personal property or amenities may be required to have an Owners Project Manager (“OPM”) hired for said project, the cost for which should be included in the application. The CPC may waive the provision of private funds toward the cost of such a CPA project that also complies with the requirement that the application has the written consent of the committee(s), board(s), commission(s), department(s) or other entity or entities of the Town of Belmont which have control of, or jurisdiction over, said land, structure, personal property or amenity.

Due to the heightened likelihood of costly litigation challenging CPA grants to religious institutions or organization, any CPA funding application filed by a religious institution or organization will be subjected to additional scrutiny by the CPA.

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### **Step Three: Consideration by various Town Boards, Committees and Commissions**

The selected applicants will submit an electronic copy of their completed Town Meeting Project Summary Form to the CPC by the date specified in their selection notification letters from the CPC. The CPC will consult with the Select Board, Warrant Committee, and Capital Budget Committee regarding the selected projects. The CPC will then reassess each project during its regularly scheduled CPC Meeting in March of 2020. The CPC will review the outcome of the Town board advisory meetings and examine whether sponsors have performed sufficient research to identify the secondary budgetary effects of their projects. The CPC reserves the right to withdraw its support for any proposed project at this CPC Meeting or at any point prior to the 2020 Annual Town Meeting.

Approval by the CPC of a funding application for a study or project design does not commit the CPC to approving the full scope of the project proposed in such a study or project design. The CPC, in its sole discretion, may provide guidance to applicants regarding the maximum amount it anticipates may be available or appropriate for ultimate construction of the proposed project.

The CPC will make its final recommendations for funding in the form of one or more warrant articles to be voted on at the 2020 Annual Town Meeting.

The CPC may recommend:

- the project as proposed by the applicant,
- a modified version of the original project,
- partial funding for the project,
- funding for only a portion or phase of the proposed project.

The CPC’s recommendations to Town Meeting may include detailed project scopes, conditions, and other specifications, as the CPC deems appropriate to ensure CPA compliance and project performance.

The selected applicants will receive an acceptance letter that will detail the next steps of the public meetings.

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## Step Four: Presentation of Proposed Projects at Town Meeting

CPA applications which have been approved by the CPC shall be placed on the Annual Town Meeting warrant or on the Warrant of a Special Town Meeting held within the Annual Town Meeting. However, Special Applications may be placed on the warrant for the next session of Town Meeting following the Special Application, whether it be the Annual Town Meeting or a Special Town Meeting.

The CPC will read the articles for each of the recommended projects at **Town Meeting** for discussion and vote. The selected applicants will give a brief-five minute presentation on their project and answer questions from Town Meeting members. Town Meeting has the final authority to award the CPC's recommended funds from Belmont's Community Preservation Act Fund. Failure to appear before Town Meeting may have a detrimental impact on Town Meeting's willingness to appropriate funds for a particular project, regardless of the recommendation of the CPC.

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## Step Five: Funding of Approved Projects

**Funding will be available for Approved Projects** following an affirmative vote of Town Meeting, starting July 1<sup>st</sup> of the applicable fiscal year.

When any private money is provided to fund a CPA project, the applicant and the Town shall enter into a Grant Agreement drafted by the CPC prior to any expenditure of CPA funds on said project, which Grant Agreement shall state how said private money shall be paid, how said private funds shall be applied, and other matters which the CPC determines proper to include. Private money which has been provided to fund a CPA project shall be spent first on said project before the public CPA funds are spent on said project.

Projects financed with CPA funds must comply with all applicable state and municipal requirements, including the state procurement law, which requires special procedures for the selection of products, vendors, services, and consultants. Project sponsors who are not familiar with Massachusetts procurement laws and are not soliciting help from a Town Department Head or another MCPPO certified third party must meet with Belmont's Procurement Coordinator before any work can begin on their respective project.

All CPA funds are administered and disbursed by the Town of Belmont. Project management, oversight, execution, and financial control will be under the control of the Town Administrator or his designee.

For more information regarding the **Funding Process**, see Page 34.

The CPC requires periodic status updates from the recipients of CPC funding (see Page 37). Updates will occur no less than annually and upon project completion. Written updates will be coordinated by the Staff Liaison. The purpose of such an update is to aid the CPC in refining



the CPA Plan, in identifying issues that may assist future applicants, and in reporting progress to the Town.

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If you have additional questions about this process, please contact:

**The Community Preservation Hotline**

617-993-2774

-or-

Glen Castro  
gcastro@belmont-ma.gov

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**Community Preservation Committee  
Town of Belmont**

**Special Application Process**

Use of the **Special Application Process** is only granted by the CPC under the unique circumstances that a significant opportunity would otherwise be lost if the application were to be processed using the standard timeline (as outlined in the **Standard Application Process** on Page 20).

The CPC will allow an applicant to utilize the **Special Application Process** only if the project meets the General Selection Criteria on Page 7, the Specific Criteria for the affected community asset category, and the following additional criteria:

- The proponents were unaware of the opportunity to undertake the project; or the proponents did not have authority to identify the opportunity prior to the **Preliminary Application Deadline** of September 30, 2019.

- The applicant has either: (a) a letter of intent signed by the current owner of the real property expressing an interest in selling to the applicant; or (b) legal control (an option, signed purchase and sale agreement or legal title) of the real property.
- The project is supported by one or more Town Bodies with responsibility for projects of a similar nature.
- Failure to secure CPA funding will create a high likelihood that the project will not be able to be carried out to the benefit of the Town, because the opportunity is of very short duration.
- Appropriation of CPA funding will contribute materially to the likelihood of success for the project.
- The project holds a high priority in the Comprehensive Plan, the Housing Plan, the Open Space and Recreation Plan, or other planning documents currently accepted and utilized by the Town.

Should the CPC grant use of the **Special Application Process**, the CPC will continue to adhere to the applicable procedures as outlined in the **Standard Application Process**. Only the pertinent submission and hearing deadlines will be changed in order to accommodate the unique conditions surrounding the proposed project.

If the timing of the application is such that the CPC cannot meet the deadline for the Annual Town Meeting, the applicant or the Selectmen must call a **Special Town Meeting** for the purpose of considering the appropriation of CPA funds for the proposed project. The CPC will not be responsible for recommending a **Special Town Meeting** or any other changes in the Town's calendar.

## Community Preservation Committee Town of Belmont

### CPA Funding - Preliminary Application

Ten copies of the completed Preliminary Application must be submitted to the following address by no later than 7pm on September 30, 2019:

Community Preservation Committee  
c/o Floyd S. Carman, Treasurer  
Town of Belmont  
PO Box 56  
Belmont, MA 02478

Project Title \_\_\_\_\_

Project Location \_\_\_\_\_

Applicant/Contact Person \_\_\_\_\_

Organization \_\_\_\_\_

Mailing Address \_\_\_\_\_

Telephone \_\_\_\_\_ E-mail \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

CPA Category (refer to chart on the following page and check all that apply):

- |  |  |
|--|--|
| <input type="checkbox"/> Community Housing | <input type="checkbox"/> Historic Preservation |
| <input type="checkbox"/> Open Space        | <input type="checkbox"/> Recreation            |

Amount Requested \_\_\_\_\_

Total Project Cost \_\_\_\_\_

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

DEFINITIONS (G.L. c. 44B, § 2)	OPEN SPACE	HISTORIC RESOURCES	RECREATIONAL LAND	COMMUNITY HOUSING
Land to protect existing and future wet fields, aquifers and riparian areas, 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	Yes	Building, structure, vessel, real property, document or artifact that is of historic interest, 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, community gardens, trails and sports, and the use of land as a park, playground or athletic field. Does not 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
<b>ACQUISITION</b> Obtain property interest by gift, purchase, devise, grant, rental, lease, purchase, lease or otherwise. Only includes eminent domain taking as provided by G.L. c. 44B	Yes	Yes	Yes	Yes
<b>CREATION</b> To bring into being or cause to exist. <i>Stadown v. City of Newton</i> , 452 Mass. 412 (2008)	Yes		Yes	Yes
<b>PRESERVATION</b> Protect personal or real property from injury, harm or destruction	Yes	Yes	Yes	Yes
<b>SUPPORT</b> Provide grants, loans, rental assistance, security deposits, interest-free write downs or other forms of assistance directly to individuals and families who are eligible for community housing, or to enterprises, operators or managers of such housing, for the purpose of making housing affordable				Yes, includes funding for community's affordable housing trust
<b>REHABILITATION AND RESTORATION</b> Make capital improvements, or extraordinary repairs to make assets functional for intended use, including improvements to comply with federal, state or local building or access codes or other standards for rehabilitation of historic properties	Yes if acquired or created with CP funds	Yes	Yes	Yes if acquired or created with CP funds

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

**Brief Description of Project**

Include the address/location and current owner of the property, as well as any critical dates. Please attach supplemental information (photographs, drawings, documents, etc.) as desired

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**Brief Description of Benefit**

How does the project fulfill the General and Specific Criteria of the Community Preservation Committee Guidelines?

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## Community Preservation Committee Town of Belmont

### CPA Funding – Final Application

Ten copies of the completed Final Application must be submitted to the following address **by no later than 7pm on December 2, 2019:**

Community Preservation Committee  
c/o Floyd S. Carman, Treasurer  
Town of Belmont  
PO Box 56  
Belmont, MA 02478

**Project Title** \_\_\_\_\_

**Project Location** \_\_\_\_\_

**Applicant/Contact Person** \_\_\_\_\_

**Organization** \_\_\_\_\_

**Mailing Address** \_\_\_\_\_

**Telephone** \_\_\_\_\_ **E-mail** \_\_\_\_\_

**Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

CPA Category (*check all that apply*):

- |  |  |
|--|--|
| <input type="checkbox"/> Community Housing | <input type="checkbox"/> Historic Preservation |
| <input type="checkbox"/> Open Space        | <input type="checkbox"/> Recreation            |

**Amount Requested** \_\_\_\_\_

**Total Project Cost** \_\_\_\_\_

Applicants will present their projects at the **CPC Public Meeting on November 13, 2019** and address questions from Belmont residents. It is required that information about the project be in writing and copied for distribution and review at the Public Meeting. This is also an opportunity for project sponsors to ask the CPC any questions regarding the application process.

Unless an applicant can demonstrate that a significant opportunity would otherwise be lost, preliminary applications and final applications will not be accepted after their respective deadlines. In order for the CPC to consider a project proposal that cannot adhere to the deadlines as outlined in the **Standard Application Process**, the project must meet the additional selection criteria as outlined in the **Special Application Process**.

The CPC will review the Final Applications. Applicants will be contacted if additional information or an interview is required. The CPC may also request to visit the site of the proposed project. Applicants will be notified by mid-January whether the CPC plans to recommend their project at the 2020 Annual Town Meeting.

**PROJECT DESCRIPTION:** Attach answers to the following questions. Applications will be returned as incomplete if all requested information is not provided. Include supporting materials as necessary.

- **Goals:** What are the goals of the proposed project?
- **Community Need:** Why is the project needed? Does it address needs identified in existing Town plans?
- **Community Support:** What is the nature and level of support for this project? Include any letters of support and petitions.
- **Project Documentation:** Attach any applicable engineering plans, architectural drawings, site plans, photographs, any other renderings, relevant studies or material.
- **Timeline:** What is the schedule for project implementation, including a timeline for all critical milestones?
- **Credentials:** How will the experience of the applicant contribute to the success of this project? What prior municipal procurement experience does the applicant have? If the applicant has no prior procurement experience, what member of the project's working team or Town of Belmont Department Head mentor will be responsible for ensuring the project adheres to the necessary procurement laws?
- **Success Factors:** How will the success of this project be measured?
- **Budget:** What is the total budget for the project and how will CPA funds be spent? All items of expenditure must be clearly identified. Distinguish between hard and soft costs and contingencies. (NOTE: CPA funds may not be used for ongoing maintenance expenses.)

- **Other Funding:** What additional funding sources are available, committed, or under consideration? Include commitment letters, if available, and describe any other attempts to secure funding for this project.
- **Town Properties:** All CPA applications filed by a private person or entity for a CPA project either located on, or which involves, public land, structures, personal property or amenities shall be co-sponsored by a committee(s), board(s), commission(s), department(s) or other entity or entities of the Town of Belmont which have control of, or jurisdiction over, said land, structure, personal property or amenity. The committee(s), board(s), commission(s), department(s) or other entity or entities of the Town of Belmont which have control of, or jurisdiction over, said land, structure, personal property or amenity may set guidelines, standards and rules for, or make revisions to a CPA project either located on, or which involves, public land, structures, personal property or amenities.
- **Maintenance:** If ongoing maintenance is required for your project, how will it be funded?
- **Impact on Town Budget:** What, if any, potential secondary effects will your proposed project have on the Town's Operating Budget? Are there any capital projects that rely on the successful completion of your project?

**ADDITIONAL INFORMATION:** Provide the following additional information, as applicable.

1. **Control of Site:** Documentation that you have control over the site, such as a Purchase and Sales Agreement, option or deed. If the applicant does not have site control, explain how public benefits will be protected in perpetuity.
2. **Deed Restrictions:** In order for funding to be distributed, an appropriate deed restriction, meeting the requirements of Chapter 184 of Mass General Laws pursuant to section 12 of the Community Preservation Act, must be filed with the CPC. Provide a copy of the actual or proposed restrictions that will apply to this project.
3. **Acquisitions:** For acquisition projects, attach appraisals and agreements if available. Attach a copy of the deed.
4. **Feasibility:** Provide a list of all further actions or steps that will be required for completion of the project, such as environmental assessments, zoning approvals, and any other known barriers to moving forward.
5. **Hazardous Materials:** Provide evidence that the proposed project site is free of hazardous materials or there is a plan for remediation in place.
6. **Permitting:** Provide evidence that the project does not violate any zoning ordinances, covenants, restrictions or other laws or regulations. What permits, if any, are needed for this project? Provide the expected date of receipt for necessary permits, and copies of any permits already acquired.
7. **Environmental Concerns:** Identify all known wetlands, floodplains, and/or any natural resource limitation that occur within the boundaries of your submission.



- 8. Professional Standards:** Evidence that appropriate professional standards will be followed if construction, restoration or rehabilitation is proposed. Evidence that the applicant has the proven or potential capacity to conduct the scope and scale of the proposed project, as evidenced by project leaders with appropriate qualifications and technical experience or access to technical expertise.
- 9. Fundraising:** Private persons who wish to contribute to a particular CPA projects have the following fundraising options: A) Establish a 501 (c) (3) organization and set up a separate bank account in its name. This requires IRS filings on the part of the entity that sets it up. Collect and deposit all funds into the bank account you set up. B) Work with the Treasurer's Office to set up an account in the name of the CPA Project. Define the purpose of the fund raising and what the money will be used for.
- 10. Further Attachments:** Assessor's map showing location of the project.

Applicants will present their projects at the **CPC Public Meeting on November 13, 2019** and address questions from Belmont residents. It is required that information about the project be in writing and copied for distribution and review at the Public Meeting. This is also an opportunity for project sponsors to ask the CPC any questions regarding the application process.

Ten copies of the **Final Application** must be submitted to the CPC by no later than 7pm on December 2, 2019 in order to be considered for the spring 2020 Town Meeting.

Unless an applicant can demonstrate that a significant opportunity would otherwise be lost, preliminary applications and final applications will not be accepted after their respective deadlines. In order for the CPC to consider a project proposal that cannot adhere to the deadlines as outlined in the **Standard Application Process**, the project must meet the additional selection criteria as outlined in the **Special Application Process** (see Page 25).

The CPC will review the Final Applications. Applicants will be contacted if additional information or an interview is required. The CPC may also request to visit the site of the proposed project. Applicants will be notified by mid-January whether the CPC plans to recommend their project at the 2020 Annual Town Meeting.

## Community Preservation Committee Town of Belmont

### Funding Process

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#### ***Initial Documentation***

Following approval from Belmont's **Annual Town Meeting** or **Special Town Meeting**, the Community Preservation Committee will notify grant recipients of the funding that has been awarded. This award letter will outline any terms, funding conditions, or additional instructions applicable to the approved CPA grant. A confirmation of receipt must be returned to the CPC as proof that project sponsors received the procurement procedures and accepted the terms and conditions outlined in the award letter.

Projects financed with CPA funds must comply with all applicable state and municipal requirements, including the state procurement law, which requires special procedures for the selection of products, vendors, services, and consultants. Project sponsors who are not familiar with Massachusetts procurement laws and are not soliciting help from a Town Department Head or another MCPPO certified third party must meet with Belmont's Procurement Coordinator before any work can begin on their respective project.

Should a property or artifact that has benefitted from CPA funding be sold or given to a new owner within ten years of the award letter's issuance date, the CPA fund must be reimbursed the entire amount awarded unless the CPC waives this requirement in part or in its entirety.

Supplementary contracts may be required by the Town Administrator's Office, depending on the details of the approved project. For construction projects, recipients of CPA funds and all contractors on the project may be asked to have their general liability insurer add the Town of Belmont as an additional insured. Proof of this coverage must be submitted to the CPC before any invoices can be paid using CPA funds. Projects on Town-owned properties that are already required to indemnify the Town may be asked to reconfirm coverage before any invoices can be paid.

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#### ***Updates to the CPC***

Grant recipients will notify the CPC when work on projects has commenced and submit periodic project status updates. Progress Reports will be submitted to the CPC and incorporated into the Annual Town Meeting CPA package (see Page 37). Approved projects will be carried out in accordance with the terms outlined in the award letter and any supplementary contracts from the Town. Any significant deviations from the project as presented in the original **Final Application** must be approved by the CPC to ensure that such changes are CPA-eligible expenditures and within the scope of the project as approved by Town Meeting.

Grant recipients should contact the **Community Preservation Hotline** at **617-993-2774** to notify the CPC of any significant changes to their projects.

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### ***Expenditures***

Invoices will be submitted to the CPC for their approval. Approved expenditures will be processed through the Town Accountant's Office and paid through the Treasurer's Office. Any funds for a CPA project that remain at the completion of work will return to the general CPA fund once the project is officially closed. The remaining funds will then be re-appropriated at the next Town Meeting, unless the CPC votes to approve the use of remaining funds for the completion of additional related work. In such cases, approval will be dependent upon whether the additional proposed work is within the general scope and intent of the original **Final Application**.

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### ***Closing Process***

CPA grant recipients will notify the CPC in writing through a Final Progress Report when work is completed for their project (see Page 37). The Final Progress Report must be completed before the final invoice can be paid. Once this notification is received, the CPC will review the initial acceptance letter to make sure that all terms and conditions have been met. The CPC will schedule a final site visit as appropriate with the CPA grant recipient to examine and photograph the completed work. If a final site visit is not appropriate for the project, the CPC may accept photographs or hardcopies of the deliverable as additional proof that the CPA project has been completed. The CPC will also generate a final summary of the CPA fund expenditures for the project. Once all tasks have been performed, the CPC will vote to officially close the project file.

Once the project file is officially closed, the CPC will work with the Town Accountant to return any unexpended funds to the general CPA fund. Projects must be officially closed before June 30 of the current year for the funds to be available for reappropriation at the following year's Town Meeting.

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### ***Additional Requirements***

CPA grant recipients are required to acknowledge the Community Preservation Act in all press releases, publicity materials, news, and written or oral announcements about work supported by CPA funds.

Projects receiving CPA funds must be completed within 30 months following the Town Meeting approval, unless the CPC votes to approve an extension of time due to compelling and documented circumstances. Without such support, the CPC may recommend to rescind any remaining CPA funds at a subsequent Town Meeting.

## SAMPLE of Project Summary for Town Meeting

Project: \_\_\_\_\_  
CPA Category: \_\_\_\_\_  
Amount Requested: \_\_\_\_\_  
Amount Recommended: \_\_\_\_\_  
CPC Vote: \_\_\_\_\_  
Sponsors: \_\_\_\_\_

### Project Description

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\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Project Goals and Objectives

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\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Project Benefit

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\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## SAMPLE of Progress Report for Town Meeting

Project: \_\_\_\_\_  
CPA Category: \_\_\_\_\_  
Original CPA Grant: \_\_\_\_\_  
CPA Spending to Date: \_\_\_\_\_  
Turnback: \_\_\_\_\_  
Update Submitted By: \_\_\_\_\_  
Submission Date: \_\_\_\_\_

### Project Description

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Original Goals and Objectives

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\_\_\_\_\_  
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\_\_\_\_\_

### Current Status

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\_\_\_\_\_