

TOWN OF BELMONT
COMMUNITY PRESERVATION PLAN

TABLE OF CONTENTS

INTRODUCTION	3
THE COMMUNITY PRESERVATION ACT IN BELMONT	4
• Current Balance of Belmont's CPA Fund	6
• Breakdown of Cumulative Administrative Expenses	7
• Spending Guidelines for CPA Funds	8
• Guidelines to Determine a Project's Priority for CPA Funds	9
• CPA Funding Appropriated to Each Asset Category	10
OPEN SPACE	11
RECREATIONAL LAND	15
HISTORIC RESOURCES	19
COMMUNITY HOUSING	23
STANDARD APPLICATION PROCESS	26
SPECIAL (OFF-CYCLE) APPLICATION PROCESS	31
PRELIMINARY APPLICATION	32
FINAL APPLICATION	35
FUNDING PROCESS	38
SAMPLE OF PROJECT SUMMARY	41
SAMPLE OF PROGRESS REPORT	42

COMMUNITY PRESERVATION COMMITTEE:

Elizabeth Dionne (Chair) - Select Board Appointee
Margaret Velie (Vice Chair) – Conservation Commission
Sarah Caputo – Select Board Appointee
Michael Chesson - Historic District Commission
Juliet Jenkins – Select Board Appointee
David Kane - Recreation Commission
Gloria Leipzig - Housing Authority
Roy Epstein - Board of Parks Commissioners
Stephen Pinkerton - Planning Board



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 presented to the Town every year to reflect new CPA projects and updated annual financial statements. The Community Preservation Committee discusses and updates the plan during the summer before each new application cycle, and we welcome 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)** is a state law that 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 (MCP Trust Fund)**.

When did Belmont adopt the CPA?

51% of the citizens of Belmont voted to approve CPA 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 2022, the annual surcharge averaged \$225.15 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.

What other revenue sources contribute to Belmont's CPA Fund?

The MCP Trust Fund was established to provide an additional source of revenue for communities that chose to adopt the CPA. The MCP Trust Fund provides a partial match to the locally collected surcharge.

The State match, originally 100% of CPA funds collected by municipalities during the previous fiscal year, declined after 2006, as additional communities adopted the statute and joined the funding pool, and as registry fees which feed the State fund suffered after the housing crisis. In light of this, in 2013, 2014, 2015, 2018, and 2019 the state transferred funds from the State Budget Surplus to the MCP Trust Fund. Beginning in 2020 a permanent increase more than doubled the recording fees collected at the Registries of Deeds, which provide revenue to the MCP Trust Fund.

Fiscal Year	Local Surcharge	State Match Percentage	State Match	Distribution Date
2012	\$868,072	-	-	-
2013*	\$900,751	26.83%	\$232,884	10/15/2012
2014*	\$926,790	52.23%	\$470,418	11/15/2013
2015*	\$972,449	31.47%	\$291,615	11/14/2014
2016	\$1,066,743	29.65%	\$288,337	11/19/2015
2017	\$1,104,275	20.58%	\$219,502	12/1/2016
2018	\$1,146,124	17.20%	\$189,960	11/15/2017
2019*	\$1,213,313	19.01%	\$217,934	11/16/2018
2020	\$1,353,648	23.92%	\$290,206	11/22/2019
2021	\$1,463,067	28.63%	\$387,503	11/24/2020
2022	\$1,492,328	43.84%	\$641,403	11/16/2021
2023		35.00%	\$522,315	**
Total	\$12,507,560		\$3,752,077	

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

** This is an estimate of funds that will be collected in November of 2022, based on Belmont's 2022 Local Surcharge and guidance from the Massachusetts Department of Revenue.

The Division of Local Services of the Massachusetts Department of Revenue has projected the first round CPA state match at 35%. This will be available in November of 2022, which is when the FY 2022 State match is expected to be calculated and disbursed to all participating municipalities (currently 189 communities).

The annual contribution to the **Belmont CPA Fund** is the sum of the local surcharge plus the state match on the prior year surcharge.

Each year Belmont's Community Preservation Committee requests that Town Meeting 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 below. 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 Belmont CPA Fund balance once it has been approved by Town Meeting.

What is the current balance of Belmont's CPA Fund?

Revenue (FY2012-FY2022)		Total
Local Surcharge	\$	12,421,257
State Match	\$	3,229,762
Surcharge-Subsequent Year Collection	\$	80,775
Interest and Misc. Fees	\$	396,606
Total	\$	16,128,399

Expenses (FY2012-FY2022)		
Project Spending	\$	(11,026,045)
Remaining Appropriated Project Funding	\$	(2,073,153)
Admin. Expenses	\$	(243,133)
Total Expenses	\$	(13,342,331)

Appropriations June 2022 Town Meeting (FY2023)		
FY2023 Projects	\$	(2,430,039)
FY2023 Admin. Budget	\$	(70,000)
Total Appropriations (FY2023)	\$	(2,500,039)

Summary		
Collections	\$	16,128,399
Expenses	\$	(13,342,331)
Appropriations June 2022 Town Meeting	\$	(2,500,039)
Total Estimated CPA Fund Balance (6-30-22)	\$	286,030

Anticipated FY23 Receipts	\$	1,847,070
Total Funding Balance for ATM 2023	\$	2,133,100

The CPA Fund Balance is replenished annually by the local surcharge. The available CPA Fund Balance as of 6-30-2022 does not include the FY2023 Local Surcharge of \$1,400,000, which is a conservative estimate and should increase based on subsequent year collections. It also does not include an anticipated State match of approximately \$447,070 payable in November of 2022. The Anticipated Total CPA Fund Balance will be available for appropriation by Annual Town Meeting in the spring of 2023.

Breakdown of Cumulative Administrative Expenses

<u>Admin Fees</u>	<u>FY13</u>	<u>FY14</u>	<u>FY15</u>	<u>FY16</u>	<u>FY17</u>	<u>FY18</u>	<u>FY19</u>	<u>FY20</u>	<u>FY21</u>	<u>FY22</u>	<u>FY23 Estimated</u>	<u>Total</u>
Admin Salary	8,345	8,917	11,412	10,092	11,584	8,236	4,795	4,445	4,888	5,416	11,000	89,130
Procurement Training	-	450	1,265	-	-	-	-	-	-	-	-	1,715
Legal Fees	-	-	-	-	2,941	3,312	1,196	115	1,872	1,988	2,000	13,424
Open Space Land and Housing Inventory Project	-	30,000	-	-	-	-	-	-	-	-	-	30,000
CPA Coalition Dues	3,000	3,000	3,500	3,500	3,500	4,350	4,350	4,350	4,350	4,350	4,350	42,600
Deed Restriction - Homer House	-	-	-	4,266	-	-	-	-	-	-	-	4,266
Town Hall Railings and Retaining Wall Study	-	-	-	-	-	5,050	-	-	-	-	-	5,050
McLean Barn Stabilization Study	-	-	-	-	-	15,000	-	-	-	-	-	15,000
Belmont Police Station	-	-	-	-	-	-	21,000	-	-	-	-	21,000
Town Hall Chimney Study	-	-	-	-	-	-	-	9,671	-	-	-	9,671
Winn Brook Tennis Court Study	-	-	-	-	-	-	-	-	3,500	-	-	3,500
Park System Inventory and Analysis	-	-	-	-	-	-	-	-	-	24,150	-	24,150
Historic Assets Conditions Study	-	-	-	-	-	-	-	-	-	-	40,000	40,000
Misc. Office Supplies	111	154	-	363	-	242	109	-	-	-	-	978
Total Admin Spending Per Fiscal Year	11,456	42,521	16,177	18,220	18,025	36,190	31,450	18,581	14,609	35,904	57,350	300,483
Original Appropriated Admin Budgets	54,000	58,000	56,498	56,200	50,650	55,000	55,000	55,000	55,000	65,000	70,000	
Administrative Turnback	42,544	15,479	40,321	37,980	32,625	18,810	23,550	36,419	40,391	29,096	-	

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 (excluding the state match) and do not roll over to the subsequent fiscal year administrative budget but revert to the undesignated portion of Belmont's CPA Fund. The remaining revenue is considered undesignated and can be used towards any of the three community asset categories. Any funds returned to Belmont's CPA Fund upon completion of a project are also considered undesignated and may also be used towards any of the three community asset categories. From time to time, project sponsors may request that Town Meeting reserve CPA funds to cover the additional cost of current or 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 (which consists of the three members of the Select Board), Recreation Commission, Housing Authority, and three members appointed by the Select Board.

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

Elizabeth Dionne (Chair) - Select Board Appointee
Margaret Velie (Vice Chair) – Conservation Commission
Sarah Caputo – Select Board Appointee
Michael Chesson - Historic District Commission
Juliet Jenkins – Select Board Appointee
David Kane - Recreation Commission
Gloria Leipzig - Housing Authority
Roy Epstein - Board of Parks Commissioners
Stephen Pinkerton - Planning Board

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. Belmont's 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.

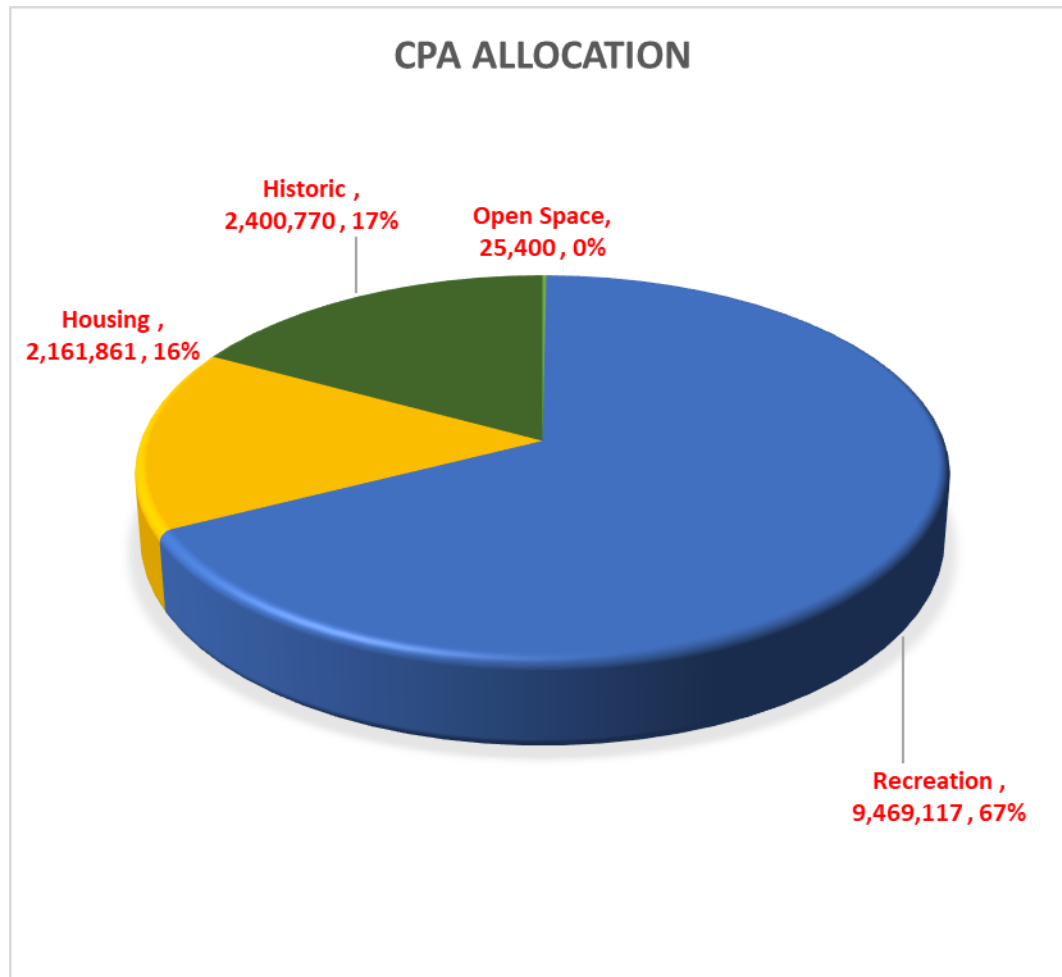
What guidelines will determine a project's priority for CPA funds?

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 Town of Belmont Comprehensive Plan 2010-2020 (**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 (with particular weight given to endorsements by the CPC's constituent committees).
- 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.
- Provide ongoing support for multi-year projects that have previously received CPA funding, to ensure project completion. (Examples include the Community Path and the redevelopment and expansion of Belmont's Community Housing stock.)

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

	<u>Open Space</u>	<u>Recreation</u>	<u>Housing</u>	<u>Historic</u>	<u>Total</u>
2014	-	425,994	128,161	282,975	837,130
2015	-	2,169,562	165,000	11,964	2,346,526
2016	-	210,047	522,500	170,105	902,652
2017	-	521,350	-	165,000	686,350
2018	-	972,857	173,200	24,051	1,170,107
2019	-	1,209,745	250,000	278,000	1,737,745
2020	25,400	1,080,000	-	887,575	1,992,975
2021	-	680,624	273,000	325,000	1,278,624
2022	-	425,000	250,000	-	675,000
2023	-	1,773,939	400,000	256,100	2,430,039
Total	25,400	9,469,117	2,161,861	2,400,770	14,057,148



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 are assets valued by the citizens of Belmont, balance the continued urbanization of Belmont, and provide a safeguard against the level of urbanization seen in Cambridge, Watertown, and other adjacent municipalities. Preserving open space also helps protect wetlands, streams, floodplains and wildlife habitats. 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.

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 publicly accessible open space in Belmont include:

- Alewife Brook Reservation (43 acres)
- Beaver Brook Reservation (72 acres)
- Cambridge Reservoir (12 acres)
- Clay Pit Pond and Park (~18 acres)
- Lone Tree Hill (106 acres)
- Mass Audubon Habitat Education Center and Wildlife Sanctuary (88 acres)
- Olgilby/Richardson Farm (10 acres, agricultural restriction)
- Rock Meadow (70 acres)

Belmont also has other important open space resources, both public and private, including about fifteen acres protected with conservation restrictions not listed above, a parcel owned by the Belmont Land Trust, and unprotected open spaces such as the parks, country clubs, and private schools in town.

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. Additionally, preserving open space can help to reduce the dangers to life and property from natural hazard events and the potential impacts of climate change. Open spaces are climate adaptation assets.¹ 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 Belmont 2020 Hazard Mitigation-Municipal Vulnerability Preparedness Plan, prepared by Weston & Sampson.

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.

In addition, there may be future opportunities to increase the open space in Belmont, similar to the opportunity which occurred in connection with the development of the McLean Hospital property. 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, and where possible, expand 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** – 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 and/or connecting 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, water quality improvements 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 open spaces and 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.
- Invasive control and removal 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, or could become 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

FY20 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Rock Meadow Habitat Preservation: Control of Nonnative & Inva	\$ 25,400.00	\$ -	\$ -	\$ -	0.00%	Open
Total	\$ 25,400.00	\$ -	\$ -	\$ -	0.00%	

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.

In the fall of 2021, the CPC used administrative funds to commission a Recreational Facilities Inventory, submitted by Activitas, Inc., on June 30, 2022. This comprehensive study will have a significant impact on how Belmont's Recreation Department and Recreation Commission prioritizes and endorses future CPA recreation projects, and the CPC will give significant deference to their recommendations.

As a requirement, applicants will need to present their project to the recreation commission to gain support.

Resources

Some examples of recreational land in Belmont include:

- Belmont Elementary Schools (fields and playgrounds)
- Belmont Middle and High School multi-purpose field and athletic facilities
- Clay Pit Pond Intergenerational Walking Path
- Grove Street Fields and Playground
- Grove Street Park Intergenerational Walking Path
- Payson Park
- Pequossette Park Fields and Playground
- Tennis Courts: Chenery, Grove Street, Pequossette, Winn Brook
- Town Field and Playground
- Underwood Playground
- Underwood Pool
- Washington Street Playground
- Winn Brook Fields and Joey's Park

Needs and Goals

The increase in Belmont's student-aged population has put a strain on the existing recreational facilities. According to enrollment records maintained by Belmont Public Schools, school enrollment as of October 1, 2012 was 4,356, an increase of 56% from 1990, when enrollment was 2,801. 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 (including athletic fields) would also significantly help Belmont to address the needs of its expanding youth 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 and ongoing construction of the Grades 7-8 School, the Town needs to focus on maintenance and possible replacement of fields.

- Purchase open space to use as hybrid recreational space providing passive and active recreation opportunities.
- Evaluate plans to develop and/or acquire land for use by non-traditional sports and activities. (Skateboarding/biking)
- Preserve and improve 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.

Specific Selection Criteria

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

- 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.
- Existing recreational lands, including community gardens, trails, parks, playgrounds, and athletic fields.

Funded Projects

FY14 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Irrigation Improvements at Rock Meadow Community Gardens	\$ 10,000.00	\$ 9,023.63	\$ 976.37	\$ -	100.00%	CLOSED
Joey's Park Rehabilitation	\$ 100,000.00	\$ 100,000.00	\$ -	\$ -	100.00%	CLOSED
Landscape Plan for Intergenerational Walking Path at Clay Pit Pond	\$ 20,000.00	\$ 18,970.00	\$ 1,030.00	\$ -	100.00%	CLOSED
Underwood Park (Plan & Design)	\$ 298,000.00	\$ 298,000.00	\$ -	\$ -	100.00%	CLOSED
TOTAL	\$ 428,000.00	\$ 425,993.63	\$ 2,006.37	\$ -	100.00%	
FY15 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Daniel Butler School Playground Project (Phase II)	\$ 66,524.00	\$ 64,488.00	\$ 2,036.00	\$ -	100.00%	CLOSED
JV Field Irrigation Upgrade	\$ 8,700.00	\$ 8,700.00	\$ -	\$ -	100.00%	CLOSED
Underwood Pool	\$ 2,000,000.00	\$ 2,000,000.00	\$ -	\$ -	100.00%	CLOSED
Winn Brook Field Renovation	\$ 100,000.00	\$ 96,373.54	\$ 3,626.46	\$ -	100.00%	CLOSED
TOTAL	\$ 2,175,224.00	\$ 2,169,561.54	\$ 5,662.46	\$ -	100.00%	
FY16 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Pequossette Tennis Courts Rehabilitation and Restoration	\$ 295,000.00	\$ 210,046.66	\$ 84,953.34	\$ -	100.00%	CLOSED
TOTAL	\$ 295,000.00	\$ 210,046.66	\$ 84,953.34	\$ -	100.00%	
FY17 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Construction of Intergenerational Walking Path at Clay Pit Pond	\$ 228,350.00	\$ 228,350.00	\$ -	\$ -	100.00%	CLOSED
PQ Playground Revitalization (Phase I)	\$ 25,000.00	\$ 25,000.00	\$ -	\$ -	100.00%	CLOSED
Winn Brook Tennis Courts	\$ 325,000.00	\$ 268,000.33	\$ 56,999.67	\$ -	100.00%	CLOSED
TOTAL	\$ 578,350.00	\$ 521,350.33	\$ 56,999.67	\$ -	100.00%	
FY18 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Grove Street Tennis Courts	\$ 336,000.00	\$ 322,856.64	\$ 13,143.36	\$ -	100.00%	CLOSED
Grove Street Park Intergenerational Walking Path Construction	\$ 35,000.00	\$ 35,000.00	\$ -	\$ -	100.00%	CLOSED
PQ Playground Revitalization Project Phase 2	\$ 615,000.00	\$ 591,964.89	\$ -	\$ 23,035.11	96.25%	Open
TOTAL	\$ 986,000.00	\$ 949,821.53	\$ 13,143.36	\$ 23,035.11	97.63%	
FY19 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Town Field Playground Restoration	\$ 25,000.00	\$ 24,658.00	\$ 342.00	\$ -	100.00%	CLOSED
Architectural Drawings for Music Bandstand at Payson Park	\$ 5,000.00	\$ 3,660.00	\$ -	\$ 1,340.00	73.20%	Open
Construction of Grove Street Park Intergenerational Walking Path	\$ 780,087.00	\$ 706,639.70	\$ 73,447.30	\$ -	100.00%	CLOSED
Phase 1a of the Community Path, Alexander Avenue Underpass and	\$ 400,000.00	\$ 293,885.45		\$ 106,114.55	73.47%	Open
Total	\$ 1,210,087.00	\$ 1,028,843.15	\$ 73,789.30	\$ 107,454.55	90.54%	
FY20 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Clay Pit Pond: Preservation and Restoration of Vegetation	\$ 20,000.00	\$ 20,000.00	\$ -	\$ -	100.00%	Open
Community Path Phase 1b (Brighton Street to Clark Street Bridge)	\$ 1,000,000.00	\$ 633,912.75	\$ -	\$ 366,087.25	63.39%	Open
Town Field Playground Restoration	\$ 60,000.00	\$ 60,000.00	\$ -	\$ -	100.00%	CLOSED
Total	\$ 1,080,000.00	\$ 713,912.75	\$ -	\$ 366,087.25	66.10%	
FY21 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Town Field Playground & Court Restoration	\$ 680,624.00	\$ 3,438.40	\$ -	\$ 677,185.60	0.51%	Open
Total	\$ 680,624.00	\$ 3,438.40	\$ -	\$ 677,185.60	0.51%	

FY22 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Consulting Services for Payson Park Renovation	\$ 35,000.00	\$ 33,882.76	\$ -	\$ 1,117.24	96.81%	Open
Community Path Right of Way Acquisition	\$ 200,000.00	\$ -	\$ -	\$ 200,000.00	0.00%	Open
Tennis Court Expansion-Winn Brook School	\$ 190,000.00	\$ 34,050.00	\$ -	\$ 155,950.00	17.92%	Open
Total	\$ 425,000.00	\$ 67,932.76	\$ -	\$ 357,067.24	15.98%	
FY23 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Payson Park Revitalization Phase II	\$ 1,190,530	\$ -	\$ -	\$ 1,190,530	0.00%	Open
Town Field Playground and Court Restoration	\$ 343,409	\$ -	\$ -	\$ 343,409	0.00%	Open
Community Path Phase II	\$ 200,000	\$ -	\$ -	\$ 200,000	0.00%	Open
Grove Street Baseball and Basketball Reconstruction	\$ 40,000	\$ -	\$ -	\$ 40,000	0.00%	Open
Total	\$ 1,773,938.83	\$ -	\$ -	\$1,773,938.83	100.00%	

- 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

Winn Brook Tennis Courts

In January 2021 the CPC approved \$3500 to fund a siting study of the Winn Brook Tennis Courts, preparatory to the tennis court expansion ultimately approved and appropriated by Town Meeting for FY2022.

Recreational Facilities Inventory

In the fall of 2021, the CPC approved the expenditure of \$24,150 in administrative funds to commission a Recreational Facilities Inventory, submitted by Activitas, Inc., on June 30, 2022.

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.

During FY2023, the CPC hopes to use administrative funds to commission an inventory and conditions study of Town-owned historic assets, so that we have a comprehensive understanding of future preservation needs and the associated expense.

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.

- Complete Phase II of the Historic Inventory.
- Update Historic District Commission (HDC) Design Guidelines; and revise information materials for realtors and home buyers and residents.
- Upgrade vault spaces in the Town Hall complex to adequately address environment controls to achieve “archival” quality.

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

FY14 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
(Town Hall) Concord Avenue Door Remediation	\$ 72,000	\$ 71,871	\$ 130	\$ -	100.00%	CLOSED
Building Survey and Investigation of the William Flagg Homer	\$ 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
TOTAL	\$ 297,000	\$ 282,975	\$ 14,025	\$ -	100.00%	
FY15 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Belmont Community Moving Image Archive	\$ 12,000	\$ 11,964	\$ 36	\$ -	100.00%	CLOSED
TOTAL	\$ 12,000	\$ 11,964	\$ 36	\$ -	100.00%	
FY16 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
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	\$ 99,900	\$ 100	\$ -	100.00%	CLOSED
Wellington Station Exterior Restoration and Rehabilitation	\$ 26,300	\$ 26,300	\$ -	\$ -	100.00%	CLOSED
TOTAL	\$ 204,223	\$ 170,105	\$ 34,118	\$ -	100.00%	
FY17 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Preserving Belmont's Original Vital Records	\$ 80,000.00	\$ 25,000.00	\$ -	\$ 55,000.00	31.25%	Open
Digitizing Belmont's Town Meeting Records	\$ 85,000.00	\$ 61,827.00	\$ -	\$ 23,173.00	72.74%	Open
Town Hall Exterior Railings Improvements	\$ 75,000.00	\$ -	\$ 75,000.00	\$ -	0.00%	CLOSED
TOTAL	\$ 240,000	\$ 86,827	\$ 75,000	\$ 78,173	52.62%	
FY18 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Belmont Headquarters Sons of Italy - Historical Artifacts Pres	\$ 24,125.00	\$ 24,050.55	\$ 74.45	\$ -	100.00%	CLOSED
TOTAL	\$ 24,125.00	\$ 24,050.55	\$ 74.45	\$ -	100.00%	
FY19 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Belmont Veterans Memorial Restoration and Enhancement	\$ 103,000.00	\$ 103,000.00	\$ -	\$ -	100.00%	CLOSED
McLean Barn Conditions Stabilization	\$ 175,000.00	\$ 162,737.98	\$ -	\$ 12,262.02	92.99%	Open
Total	\$ 278,000.00	\$ 265,737.98	\$ -	\$ 12,262.02	95.59%	
FY20 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Belmont Police Station	\$ 787,575.10	\$ 785,176.30	\$ 2,398.80	\$ -	100.00%	CLOSED
Town Hall Complex Slate Roofs	\$ 100,000.00	\$ -	\$ -	\$ 100,000.00	0.00%	Open
Total	\$ 887,575.10	\$ 785,176.30	\$ 2,398.80	\$ 100,000.00	88.70%	
FY21 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Chimney Repair	\$ 125,000.00	\$ -	\$ -	\$ 125,000.00	0.00%	Open
Homer House Window Restoration	\$ 100,000.00	\$ 100,000.00	\$ -	\$ -	100.00%	Open
Belmont Police Exterior Stairs	\$ 100,000.00	\$ 77,680.98	\$ 22,319.02	\$ -	100.00%	CLOSED
Total	\$ 325,000.00	\$ 177,680.98	\$ 22,319.02	\$ 125,000.00	58.70%	

FY22 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
N/A	\$ -	\$ -	\$ -	\$ -	0.00%	N/A
Total	\$ -	\$ -	\$ -	\$ -	#DIV/0!	
FY23 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Belmont Cemetery Preservation Master Plan with Treatment	\$ 60,000	\$ -	\$ -	\$ 60,000	0.00%	Open
Restoration of Belmont's Historic Tower Clock	\$ 26,100	\$ -	\$ -	\$ 26,100	0.00%	Open
Restoration of Benton Library Chimney and Building Repairs	\$ 150,000			\$ 150,000	0.00%	Open
Benton Library Building Envelope Study	\$ 20,000			\$ 20,000	0.00%	Open
Total	\$ 26,100.00	\$ -	\$ -	\$ 26,100.00	100%	

▪ 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. The CPC funded a study to assess the metal railings and retaining wall. After overgrown shrubs were removed below the railings, it became apparent that the retaining wall on which the railings is in poor condition, so the funds were returned to the Belmont CPA Fund.

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.

Town Hall Chimneys

In FY2020, the CPC approved \$9,800 to perform a condition assessment of the Town Hall Chimneys.

Municipal Light Building Study

In FY2020, the CPC approved \$25,000 to perform a condition assessment of the Municipal Light Building, but the project was put on hold and the money was never spent, as no preservation work can take place until after decommissioning of the substation there by Belmont Light.

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

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 homes are affordable, including the apartments at the Royal Belmont and the Bradford. Northland Residential has proposed a new development on the McLean property that will create an additional 34 affordable homes (6 townhouses and 28 apartments). Because the apartment complex is being developed as a LIP (Local Initiative Program) with 25% affordable apartments, all 110 apartments in the complex will be counted towards Belmont's Subsidized Housing Inventory (SHI). However, even with the addition of all 110 apartments and 6 affordable townhouses, Belmont's SHI will still only be 7.8%, well below the threshold of the 10% state statutory requirement for affordability.

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. Town Meeting has also approved the use of CPA funds to establish an emergency rental assistance program in a time of economic crisis.

Belmont's public housing developments provide the best opportunity for affordable housing for our elderly, disabled, and low- and moderate-income residents. However, these family and elderly developments face the impact of increased energy prices, deferred maintenance costs and inadequate state funding. The CPA fund can be used as a resource for the town to initiate the redevelopment of these properties and leverage state funding to support the creation of additional affordable and market-rate apartments that could address both the Town's and the region's housing needs.

The new MBTA Multi-Family Zoning regulations that will be developed over the next two years will likely stimulate development. CPA funds awarded to the Belmont Housing Trust for pre-development and development activities could help to encourage new development opportunities that maximize affordability options for both rentals and homeownership.

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:

- Use redevelopment opportunities at Belmont's public housing developments to create additional affordable and market rate homes.
- 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.
- Provide rental assistance to eligible households.

Funded Projects

FY14 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
(Belmont Village) Electric Service Upgrade Underground Wiring	\$ 147,000.00	\$ 128,161.22	\$ 18,838.78	\$ -	100.00%	CLOSED
TOTAL	\$ 147,000.00	\$ 128,161.22	\$ 18,838.78	\$ -	100.00%	
FY15 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
(Belmont Village) Electrical Upgrade Interior Wiring	\$ 165,000.00	\$ 165,000.00	\$ -	\$ -	100.00%	CLOSED
First Time Homebuyer Assistance	\$ 375,000.00	\$ -	\$ 375,000.00	\$ -	100.00%	CLOSED
TOTAL	\$ 540,000.00	\$ 165,000.00	\$ 375,000.00	\$ -	100.00%	

FY16 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Electrical Upgrade	\$ 522,500.00	\$ 522,500.00	\$ -	\$ -	100.00%	CLOSED
TOTAL	\$ 522,500.00	\$ 522,500.00	\$ -	\$ -	100.00%	
FY18 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Assessment and Project Redevelopment of Sherman Gardens	\$ 173,200.00	\$ 120,499.34	\$ -	\$ 52,700.66	69.57%	Open
Total	\$ 173,200.00	\$ 120,499.34	\$ -	\$ 52,700.66	69.57%	
FY19 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Funds Set Aside to Housing Trust	\$ 250,000.00	\$ 250,000.00	\$ -	\$ -	100.00%	Open
Total	\$ 250,000.00	\$ 250,000.00	\$ -	\$ -	100.00%	
FY21 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Feasibility for the Redevelopment and Creation of New Affordable Housing Units at Belmont Village	\$ 173,000.00	\$ -	\$ -	\$ 173,000.00	0.00%	Open
Phase Two Emergency Rental Assistance Program	\$ 100,000.00	\$ 100,000.00	\$ -	\$ -	100.00%	CLOSED
Total	\$ 273,000.00	\$ 100,000.00	\$ -	\$ 173,000.00	36.63%	
FY22 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Transfer to Belmont Housing Trust	\$ 250,000.00	\$ -	\$ -	\$ 250,000.00	0.00%	Open
Total	\$ 250,000.00	\$ -	\$ -	\$ 250,000.00	0.00%	
FY23 Projects	Appropriated	Expenses	Turnback	Remaining	Spending	Status
Predevelopment Funding for Revitalization of Sherman Gardens	\$ 400,000.00	\$ -	\$ -	\$ 400,000.00	0.00%	Open
Total	\$ 400,000.00	\$ -	\$ -	\$ 400,000.00	100.00%	

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

Step One: Preliminary Application

Applicants must submit ten copies of the **Preliminary Application** to the Community Preservation Committee (CPC) by no later than 7:00pm on Monday, October 3, 2022. The CPC will review submitted applications to ensure that the proposed projects can be legally funded from CPA 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 early 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.

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**. Applicants must submit ten copies of the completed Final Application to the CPC by no later than 7:00 pm on Monday, December 5, 2022.

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.

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

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.

The form of Final Application located on page 35 of this Plan includes all the information that will be required to submit a complete Final Application. Please carefully examine these requirements and bring any questions you may have to the CPC before submission of the Final Application.

Any CPA funding application submitted by a private person or entity for a CPA project located on private property shall provide funds toward the cost of the 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 organizations, any CPA funding application filed by a religious institution or organization will be subject to additional scrutiny by the CPC.

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

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 2023. 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 2023 Annual Town Meeting.

The selected applicants will submit an electronic copy of their completed Town Meeting Project Summary Form (see p.36) to the CPC by the date specified in their selection notification letters from the CPC.

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 2023 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, or
- 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.

According to guidance from the Massachusetts Community Preservation Coalition:

A CPC really has two decisions to make on each proposed project:

- 1. Is the project eligible for CPA funding?*
- 2. Does the CPC feel it is worthy of funding?*

The CPC must evaluate each project carefully, balancing a number of factors, including available funding, priority, public benefit, category needs, and a whole host of other factors. The CPC does not automatically forward every legal project to Town Meeting...; it is the gatekeeper that recommends the best projects.²

In line with guidance contained in the CPA statute (MGL Ch. 44B, Sec. 5), the CPC may take an active role in prioritizing future projects, including statements to Town Meeting of support for or reservations about a given project. In the event that the CPC receives funding applications in excess of amounts available in the Belmont CPA Fund, the CPA in its sole discretion may determine which projects to advance to Annual Town Meeting, based on its assessment of how proposed projects further the goals of the Comprehensive Plan and otherwise benefit the Town as a whole.

Finally, the CPC may decline to recommend an otherwise eligible application to Town Meeting if the CPC determines, in its sole discretion, that the project fails to meet any of the CPC's funding guidelines or priorities, as set forth in the funding guidelines on page 9 of this Plan and established in consultation with its constituent committees.

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

² CPA Bootcamp Training – Fall 2021 Questions and Answers from Chat.
https://www.communitypreservation.org/sites/g/files/vyhlif4646/f/uploads/bootcamp_fall_2021_qa_handout.pdf

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 (as defined below) 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 Chair will read the articles for each of the recommended projects at **Town Meeting** for discussion and vote. The selected applicants will each 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 CPA 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.

Step Five: Funding of Approved Projects

Funding will be available for Approved Projects following an affirmative vote of Town Meeting, starting July 1 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 her/his designee. In addition, the CPC will designate one or more of its members to monitor progress on each approved project, to ensure compliance with the statutory requirements of the CPA, to ensure compliance with the Final Application submitted by the project sponsor to the CPC, and to provide periodic updates to the CPC.

For more information regarding the **Funding Process**, see page 38.

The CPC requires periodic status updates from the recipients of CPC funding (see page 42). Updates will occur no less than annually and upon project completion. Written updates will be coordinated by the CPA Administrator. 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 in its Annual Report to Town Meeting.

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

The Community Preservation Hotline

617-993-2774

-or-

Matthew Haskell
mhaskell@belmont-ma.gov

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 26).

The CPC will allow an applicant to utilize the **Special Application Process** only if the project meets the general selection funding criteria on page 9, 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 the relevant application cycle.
- 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 boards or committees 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 7:00 pm on Monday, October 10, 2022:

Community Preservation Committee
c/o Matthew Haskell, CPA Administrator
Office of the Select Board
Belmont Town Hall
455 Concord Avenue
Belmont, MA 02478

Unless an applicant can demonstrate that a significant opportunity would otherwise be lost, preliminary applications will not be accepted after the submission deadline.

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 _____

Applicants will present their projects at the **CPC Public Meeting on November 9, 2022** 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.

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 recreational, agricultural, wetland, agricultural land, grasslands, fields, forest land, fresh and salt water marshes and other wetlands, ocean, river, stream, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use	Building, structure, vessel, real property, monument or artifact 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 use located on land that is not limited to, the use of land for community gardens, trails, and noncommercial youth and adult sports, and the use of land as a park, playground or athletic field Does 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
ACQUISITION Obtain property interest by gift, purchase, devise, grant, rental, purchase, lease or otherwise. Only includes eminent domain taking as provided by G.L. c. 44B	Yes	Yes	Yes	Yes
CREATION To bring into being or cause to exist. <i>Seaborn v. City of Newton</i> , 452 Mass. 412 (2008)	Yes		Yes	Yes
PRESERVATION Protect personal or real property from injury, harm or destruction	Yes	Yes	Yes	Yes
SUPPORT 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 eligible tenants, private owners, or such housing for the purpose of making housing affordable				Yes, includes funding for community's affordable housing trust
REHABILITATION AND RESTORATION 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 standards and/or 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

[illegible]

Brief Description of Benefit

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

[illegible]

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 7:00 pm on Monday, December 5, 2022:

Community Preservation Committee
Matthew Haskell, CPA Administrator
Office of the Select Board
Belmont Town Hall
455 Concord Avenue
Belmont, MA 02478

*Unless an applicant can demonstrate that a significant opportunity would otherwise be lost, final applications will not be accepted after the submission deadline. 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**.*

Project Title_____

Project Location_____

Applicant/Contact Person_____

Organization_____

Mailing Address_____

Telephone_____ **E-mail**_____

Signature_____ **Date**_____

CPA Category (*check only one, in consultation with the CPC*):

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

Amount Requested_____

Total Project Cost_____

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 next 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.
- **Private Entity as a Private Project Sponsor:** Private entities sponsoring CPA projects on private property, not town-owned, are required to be nonprofit 501(c) (3) organizations and provide a copy of their IRS determination letter as part of their application.

- **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 project 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.

Community Preservation Committee Town of Belmont

Funding Process

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.

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 her/his designee. In addition, the CPC will designate one or more of its members to monitor progress on each approved project, to ensure compliance with the statutory requirements of the CPA, and to provide periodic updates to the CPC.

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.

Updates to the CPC

Grant recipients will notify the CPC when work on projects has commenced and submit periodic project status updates (see page 42). Progress Reports will be submitted to the CPC and incorporated into the CPC's Annual Report to Town Meeting. 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. Town Meeting approves and appropriates CPA project funds subject to the information and commitments contained in Final Applications, which are binding upon project applicants.

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

Expenditures

Invoices will be submitted to the CPC Administrator for CPC review and 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**.

Closing Process

CPA grant recipients will notify the CPC in writing through a Final Progress Report when work is completed for their project. 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.

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. At the discretion of the CPC, grant recipients may be required (a) to post temporary signs provided by the CPA, noting that work is being funded by CPA funds and (b) to post a permanent sign upon completion of the project, noting that the project was funded in whole or in part 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 rescinding 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

Project Goals and Objectives

Project Benefit

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

Current Status
