

TOWN OF LAKEVILLE MEETING POSTING

Town Clerk's Time Stamp
received & posted:

48-hr notice effective
when time stamped

Notice of every meeting of a local public body must be filed and time-stamped with the Town Clerk's Office at least 48 hours prior to such meeting (excluding Saturdays, Sundays and legal holidays) and **posted thereafter in accordance with the provisions of the Open Meeting Law, MGL 30A §18-22 (Ch. 28-2009)**. Such notice shall contain a listing of topics the Chair reasonably anticipates will be discussed at the meeting.

& AGENDA

Cancelled/Postponed to: _____ (circle one)

Name of Board or Committee:	Community Preservation Committee
Date & Time of Meeting:	April 18, 2024 6:30pm
Location of Meeting:	Lakeville Council on Aging 1 Dear Crossing
Clerk/Board Member posting notice:	Michele MacEachern

Clerk/Board Member Cancelling/Postponing: _____

A G E N D A

Please ask if anyone other than LakeCAM is recording the meeting

1. **Review/possible vote Step 2 application:**
 - a. Clear Pond Park fence – accept 4/5/24 request from Paula Houle on behalf of Parks Commission to withdraw
2. **Review/possible vote on Handout for Town Meeting Warrant Articles for Recommended Projects**
3. **Review/possible vote on Draft Revisions for Community Preservation Plan**
4. **Review/Draft Annual Town Report 2023**
5. **Discuss and possible action on opportunity to participate in Lakeville Day on Sunday, May 5, 2024, 11-3:00pm At Ted Williams Camp**
6. **Review and approve meeting minutes for April 4, 2024**
7. **Next Meeting Date May 16, 2024**

Please be aware that this agenda is subject to change. If other issues requiring immediate attention of the Community Preservation Committee arise after the posting of this agenda, they may be addressed at this meeting.

Michele MacEachern

From: Paula Houle <paulahoule@gmail.com>
Sent: Friday, April 5, 2024 1:28 PM
To: Michele MacEachern
Cc: melisa turcotte
Subject: Clear Pond Park Fence

To: Michelle
CPC Chairperson

The Park Commission is withdrawing
the rte 79 Fence project from the CPC.
Thank you for your consideration. We look forward to working with you in the future.

Respectfully
Paula Houle
Park Representative

Historic Town Hall Door Replacement

Project Description: Replace existing broken doors on Historic Town House.

The replacement doors will match period correctness to best availability.

Pricing has been obtained through a local vendor, and lead time for delivery of the door is expected to be six (6) to eight (8) weeks.

The project is requesting \$6,950.00 from the Community Preservation Act Historic Funds, with \$1,750.00 being contributed by the Facilities Department Budget, and the installation and painting will be performed by the Facilities department and Town Painter.



Cupola Repairs to the Lakeville Historical Museum

Project Description: Water is leaking through the cupola into the Museum. This project will replace the rotted and damaged wood, repair and seal flashing between cupola and clapboard base, seal and prime all repaired wood areas and cupola flashing. Restore, paint and reinstall eight (8) shutters, and install plexi-panels with venting.

Pricing has been obtained through a local preservation and restoration company, and the expected time frame for completion is Fall of 2024.

This project is requesting \$20,000.00 from the Community Preservation Act Historical funds, with an additional \$5,000.00 funding being contributed by the Lakeville Historical Society.



TOWN OF LAKEVILLE

COMMUNITY PRESERVATION COMMITTEE



COMMUNITY PRESERVATION PLAN

March 1, 2023

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Mission Statement

The mission of the Lakeville Community Preservation Committee (CPC) is to maintain the rural character of Lakeville as a beautiful, residential community, rich in natural resources.

As per the Community Preservation Act, it is our mandate to create and maintain a Community Preservation Plan that will protect, expand or enhance open space, historic resources, affordable housing and outdoor recreation.

By utilizing community goals set forth in our Master Plan, Open Space and Recreation Plan and through a series of public meeting inviting community input, the CPC will recommend to Town Meeting projects that it feels are consistent with the Town's long term planning goals and provide the maximum benefit for the citizens of Lakeville.

Introduction

The Town of Lakeville Community Preservation Committee is pleased to present the 2022-2023 Lakeville Community Preservation Plan (The Plan). The Plan presents a description of the Community Preservation Act as it applies to Lakeville, includes procedures by which the CPA is administered, identifies CPA funding goals, outlines the process for eligible projects, and funding projects.

The Lakeville Community Preservation Committee (CPC) is appointed as mandated in the Community Preservation Town bylaw and charged with overseeing the town's CPA funds, making annual allocations and spending recommendations at Town Meeting.

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

For information on Lakeville's Community Preservation Act, please visit the town's website at www.lakevillema.org/communitypreservationcommitttee.

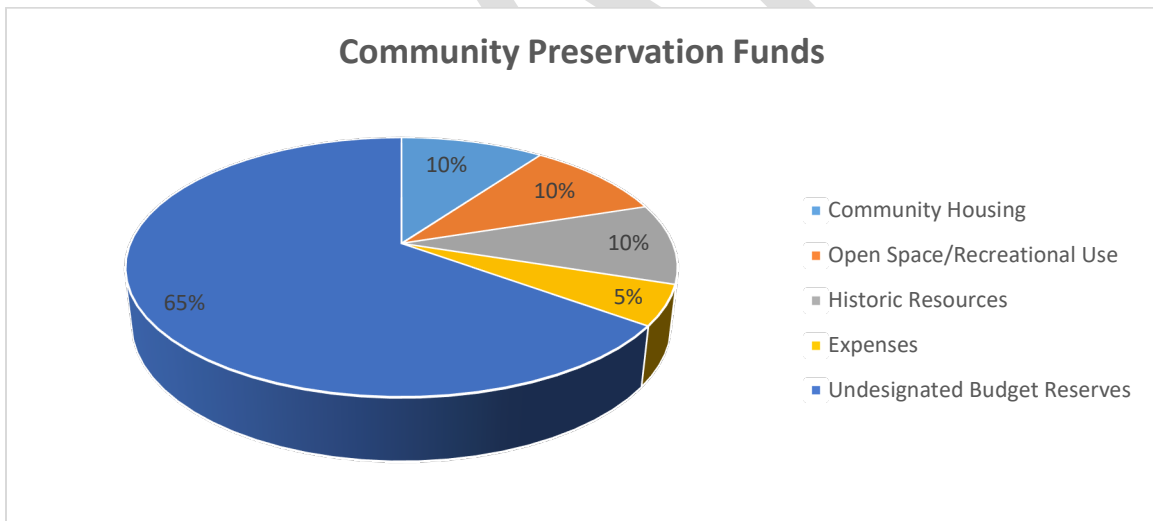
Questions or comments regarding Lakeville's Community Preservation Act may be directed to the Committee at CPC@lakevillema.org.

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

Community Preservation Act in Lakeville

The Community Preservation Act (CPA) is a smart growth tool that helps communities preserve open space and historic sites, create affordable housing, and develop outdoor recreational facilities. On April 4, 2022, Lakeville became the 188th community to pass CPA. Until this point, there was no steady funding source for preserving and improving a community's character and quality of life. The CPA is a 1% surcharge on your real estate tax minus \$100,000 exemption which goes into a special fund and receives a state match annually. The match comes from a fee that is charged state-wide at the registry of deeds and is distributed among the communities that have adopted CPA. The state match varies from year to year depending on the number of communities that have CPA and the revenue received from the registry of deeds in fees. In the past few years, state legislation has allocated state budget surplus funds into the CPA Trust fund to increase the amount of money going to CPA communities. The match can vary from year to year. For the average assessed home in Lakeville, the total surcharge is around \$40 per year. Low income households and seniors can file for an exemption with the assessor's office. [See Appendix for chart of yearly exemptions.](#)

Proceeds from the Community Preservation Act are collected and deposited into special municipal accounts identified for Community Housing, Historic Resources, Open Space & Recreation Use, Expenses, and Budget Reserves.



CPA funds may be used to acquire, create and preserve Open Space; acquire, rehabilitate and preserve historic resources; acquire, create, preserve and support Community Housing; acquire, create rehabilitate and preserve land for Recreational use and rehabilitate Open Space and Community Housing that is acquired or created with CPA funds. [See Appendix for CPA Fund Revenue](#)

Community Preservation Committee: Formation and Responsibilities

The Community Preservation Committee bylaw was adopted at Town Meeting on June 13, 2005. CPA was passed at the Spring Town Elections on April 4, 2022 and the CPC was appointed in July 2022 with the committee formally meeting in August 2022. The Committee consists of nine members, including 4 at-large members and five members representing the Conservation Commission, Historic Commission, Planning Board, Parks Commission, Open Space Committee.

The first responsibility for this Committee is to study the needs, possibilities and resources of the community with regards to community preservation. In performing this research function, the CPC must meet and consult with other municipal boards and committees to get their input, and must hold at least one public hearing annually to get input from the general public. Following its research, the CPC is responsible for developing a local CPA plan to guide its decision-making on CPA project proposals.

The second responsibility of the CPC is to accept project proposals from the community and town boards by way of an application, conduct a review, and make recommendations to the community. Once the CPC has voted on any projects to recommend, along with the specific dollar amounts and CPA funding sources it recommends to complete them, it will be presented to the Town Meeting for the residents to vote.

CPA Funding Requirements

Each fiscal year Lakeville must spend or set aside for later spending a minimum of 10% of its annual CPA funds for each of the three categories: Open Space/Recreation, Community/Affordable Housing, Historic Preservation. Up to 5% can be used toward administrative expenses of the CPA. The remaining 65% may be appropriated for CPA projects in any category or transferred to an undesignated Budget Reserve account for the balance of the fiscal year. Any funds that remain unappropriated at the end of the fiscal year are deposited in the CPA Undesignated Funds Balance for use in future years. Additional funds can be obtained by bonding against future CPA revenue stream in order to fund large projects for which adequate CPA funds are not currently available. Another method of obtaining additional funds is leveraging from state and federal grant programs, other local funds, non-profit organizations, and/or private entities funds, which are kept separate from the town budget and cannot be used for any other purpose by the town.

A recommendation by the Committee and an appropriation by Town Meeting are both required to spend any CPA Funds for community preservation purposes. Appropriations from the CPA Fund, except in the cases of bonding are made by a simple majority vote. Borrowing money for CPA purposes require a two-thirds majority vote at Town Meeting.

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

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

All residents are welcome to attend the Committee meetings. The times and locations are posted on the Town website, www.lakevillema.org under Town Calendar.

Supplanting Other Costs (Not Allowed)

CPA funds are intended to augment municipal funds, not replace existing funding. To this end, CPA funds may not be appropriated to pay for project costs that have already been appropriated from another source. Any CPA eligible costs for a project that are identified in a municipality's capital improvement program are eligible for funding under the Act, if the municipality has not made a prior funding commitment to pay for such costs.

Leveraging CPA Funds

CPA funds may be used as a municipality's matching monies for state and federal grant programs that required a local match such as the Massachusetts Housing Partnerships Soft Second Program, state Department of Housing and Community Development (DHCD) Self-Help program, Massachusetts Preservation Program Fund (MPPF), and the Executive Office of Environmental Affairs (EOEA), Massachusetts Forest Legacy program, Self-Help and Urban Self-Help programs. CPA funds can also be used as matching or starting monies to acquire grants from private organizations or individuals such as the Nature Conservancy or the Wildlands Trust of Southeastern Massachusetts, among others.

Bonding

The authorization to bond CPA funds is in Section 11 of the Community Preservation Act (MGL c.44B) which states that CPA communities may issue general obligation bonds in anticipation of revenues to be raised through the local CPA surcharge. Note that in calculating how much of a bond can be issued under CPA, a community can only bond against the local surcharge portion of the revenue, not the trust fund matching portion. Bonded projects must pass at Town Meeting by 2/3 vote. This can be a powerful tool to successfully achieve projects that come with a larger price tag.

Gifts to Community Preservation Fund

The Town of Lakeville can accept monetary gifts to the Community Preservation Fund. Gifts can be designated for specific purposes consistent with the four statutory categories: open space, community housing, historic preservation, and recreation. Gifts may be made in a variety of forms, including cash

or securities. Gifts to the Town of Lakeville are tax-deductible to the full extent allowed under the Internal Revenue Code. For more information, please contact the Committee Chair at cpc@lakevillema.org.

Use of Community Preservation Act Funds

Community Preservation Act funds must be used for public community preservation purposes that benefit the public. The following guidelines summarize these public purposes.

Community preservation is defined by the Act as, “the acquisition, creation and preservation of open space; for the acquisition, preservation, rehabilitation and restoration of historic resources; for the acquisition, creation and preservation of land for recreational use; for the acquisition, creation, preservation and support of community housing that is acquired for created.”

Preservation is defined as, “the protection of personal or real property from injury, harm or destruction, but not including maintenance”.

CPA Fund monies may be spent to undertake the following primary community preservation purposes:

- ***The acquisition, creation, and preservation of open space.*** Open space, as defined by the CPA, “shall include, but not be limited to, land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh water marshes and other wetlands, river, stream, lake and pond frontage, lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use.”
- ***The acquisition, creation, preservation, and support of community housing.*** The CPA defines community housing as, “low-and moderate-income housing for individuals and families, including low-or moderate-income senior housing.” The term “support” includes expenditures such as development of a Housing Needs Assessment for the town, or creating a rental assistance program for income-eligible residents, recommend, wherever possible, the reuse of existing buildings or the construction of new buildings on previously developed sites.
- ***The acquisition, preservation, rehabilitation, and restoration of historic resources.*** The CPA recognizes historic resources as, including “a building, structure, vessel, or real property that is listed or eligible for listing on the State register of historic places or has been determined by the local historic preservation commission to be significant in the history, archeology, architecture, or culture of a city or town.” For CPA purposes, the local historic preservation commission is the Town of Lakeville Historical Commission.
- ***The acquisition, creation, and preservation of land for recreational use.*** The CPA defines recreational use as, “active or passive recreational use including, but not limited to, the use of land for community gardens, trails, and noncommercial youth and adult sports, and the use of land as a park, playground or athletic field. ‘Recreational use’ shall not include horse or dog racing or the use of land for a stadium, gymnasium, or similar structure nor the creation of artificial turf fields.”

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

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

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

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

The chart provided on the next page, offered by the Community Preservation Coalition, is intended to guide both the CPC and potential applicants on allowable use of CPA funds to determine project eligibility.

Lakeville Community Preservation Program – Allowable Spending Purposes

Project Eligibility & Terms ¹	Open Space	Recreation	Community Housing	Historic Preservation
	<p><i>Land to protect:</i></p> <ul style="list-style-type: none"> existing and future well fields aquifers and recharge areas watershed land agricultural land grasslands fields forest land marshes and other wetlands river, stream, lake and pond frontage lands to protect scenic vistas land for wildlife or nature preserve land for recreational use 	<p><i>Land for active or passive recreational use including but not limited to:</i></p> <ul style="list-style-type: none"> community gardens trails noncommercial youth and adult sports use as a park, play-ground, or athletic field. <p><i>Shall not include horse or dog racing, artificial turf, or the use of land for a stadium, gymnasium, or similar structure.</i></p>	<p><i>Housing for low- and moderate-income individuals and families, including low- or moderate-income seniors age 60+:</i></p> <ul style="list-style-type: none"> Moderate Income is less than 100%, of US HUD Area Wide Median (AMI). Low Income is less than 80% of AMI. 	<p>Buildings, structures, vessels, real property, documents, or artifacts State Register of Historic Places or determined by the Historic Commission to be significant in the history, archeology, architecture, or culture of Water-town.</p>
<p>ACQUIRE <i>Obtain by gift, purchase, devise, grant, rental, purchase, lease or otherwise.²</i></p>	YES	YES	YES	YES
<p>CREATE <i>To bring into being or cause to exist.³</i></p>	YES	YES	YES	NO
<p>PRESERVE <i>Protection of personal or real property from injury, harm, or destruction.</i></p>	YES	YES	YES	YES
<p>REHABILITATE/ RESTORE <i>Capital improvements, or the making of extraordinary repairs for the purpose of making [a resource] functional for its intended use including but not limited to improvements to comply with ADA, MAAB⁴, and other federal, state, local regulations, or access codes or federal standards for historic properties.</i></p>	YES If acquired or created using CPA funds	YES	YES If acquired or created using CPA funds	YES
<p>SUPPORT <i>Provide grants, loans, rental assistance, security deposits, interest-rate write downs or other forms of assistance directly to individuals and families who are eligible for community housing, or to an entity that owns, operates, or manages such housing for the purpose of making housing affordable.</i></p>	NO	NO	YES	NO

¹ This chart is adapted from versions created by the Department of Revenue and the Community Preservation Coalition: community.preservation.org/allowable-uses

² Specifications for eminent domain can be found in MGL c.44B §.5(e)

³ Seideman vs. City of Newton, 452 Mass. 472 (2008)

⁴ ADA - Americans with Disabilities Act; MAAB - Massachusetts Architectural Access Board

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

For examples of projects that have been funded in other communities, see the Community Preservation Coalition's webpage (www.communitypreservation.org). See Appendix for projects funded by Lakeville Community Preservation.

COMMUNITY HOUSING

As of 2022, Lakeville does not have a Housing Authority, and housing lotteries are administered through the Middleborough Housing Authority.

According to the Massachusetts Subsidized Housing Inventory listing, dated December 21, 2020, Lakeville has a total housing stock of 4,534 year-round housing units, 433 development units, and 250 units of Subsidized Housing Inventory (SHI), with a percentage of 6.5%.

The Commonwealth of Massachusetts Chapter 40B statute allows eligible affordable housing developments to receive a comprehensive permit, even when projects require waivers of local zoning. In cities and towns that achieve 10% of the state standard for affordable production goals, Zoning Boards of Appeals may reject 40B proposals giving those communities greater discretion over 40B development. Municipalities that have not achieved minimum affordable housing production thresholds have a more limited ability to reject 40B proposals.

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

Lakeville's estimated Area-Wide Median income for a family of four is \$156,204, a moderate income limit for property owned & occupied by a senior 65 or older of \$71,029. (Source: US Census)

CPA funds can be used for housing units serving households of 80%-100% of the area median income even though they will not count towards Lakeville's 10% (SHI-Subsidized Housing Inventory). At present 250, or 6.5% of Lakeville's Housing Units are classified as affordable or "subsidized housing" by the State's Department of Housing and Community Development (DHCD) for purposes of Community Preservation Program and Plan.

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

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

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

Community Housing Goals

- Meet or exceed at least one of the State standards for SHI so that Lakeville is no longer vulnerable to Chapter 40B housing developments, i.e. projects that contribute to the town’s 10% affordability.
- Ensure that new affordable housing is harmonious with the existing community by making sure that proposed projects are in line with the Lakeville Open Space and Recreation Plan, and with existing Zoning Bylaws.
- Strive to keep the current SHI units in perpetuity rather than see those units expire.
- Promote use of existing buildings or construction on previously developed or town-owned sites.

HISTORIC RESOURCES

The area known as Lakeville contains evidence of the oldest Native American settlement in Massachusetts. The Massachusetts Historical Commission considers the Assawompset Pond Complex the most significant archaeological site in Southeastern Massachusetts, providing evidence of approximately 10,000 years of continuous habitation by native populations. After the conclusion of King Philip War, a conflict between the English settlers of this area and the Wampanoag Federation in the mid-1670s, Wampanoag occupation, of what is now Lakeville, continued for an unusually long period of time, especially in the area of Betty’s Neck.

In the early 1700s settlers moved to what was then considered western Middleborough, originally to the areas of present day Main Street and Pierce Avenue, sustained by extensive forests for fuel and lumber and fertile soil for agriculture.

Breaking away from Middleborough, Lakeville was incorporated as a town in 1853. Lakeville is a town with a rich history of industry and agriculture.

Lakeville has both a Historical Commission, which is a branch of Town Government, and a Historical Society, which is a private non-profit organization dedicated to preserving the town’s history and maintaining the Lakeville Historical Museum.

The Historical Museum is home to Native American artifacts and other items significant to Lakeville’s vital history and of interest to residents.

The Historical Commission is responsible for oversight of Lakeville's historical assets. The Commission maintains the Veterans Honor Roll and the Veterans Brick Walkway. It plans the town's Memorial and Veterans Day observances as well as the town's anniversary celebrations.

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

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

- the historic resource must be listed on the Massachusetts State Register of Historic Places OR
- it must be determined by the local historical commission that the historic resources are locally significant.

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

Lakeville currently has two sites on the National Register of Historic Places – the Historic Town House at the intersection of Bedford Street and Precinct Street and the Royal Wampanoag Cemetery on Route 105. Listing on the National Register, Commonwealth (State) Register of Historic Places or Lakeville's Inventory of Historical Assets provides some protection for historical resources. Projects that affect historical resources may be required to undergo review by the Commonwealth or the town.

Goal 5-2 of the Lakeville 2030 Master Plan is to "complete and implement a Historic Preservation Plan". This plan should identify any and all locations of historical significance throughout Lakeville with a goal of the creation of a Historic District article to be presented at a future town meeting.

Areas in town which have already been identified as historically significant include:

- The intersection of Routes 18 & 105, encompassing the Historic Carnegie Lakeville Public Library, the Historic Town House, World War I Dickran Diran Square, and the Lakeville United Church of Christ, the former Precinct Congregational Church moved to the site of the Washburn House. This area should be designated as Lakeville's first Historic District.
- Tack Factory Neighborhood along Taunton Street
- The Pierce Avenue area

Historic Structures of Note:

- Town owned: Historic Town House, Historic Carnegie Lakeville Public Library, Town Office and Fire Station Building
- Privately owned: Lakeville United Church of Christ, Hilltop Farm, Lakeville Historical Society Museum (formerly Grove Chapel Congregational Church) and the Sailor's Home Tower

Landscapes of Note:

- Lakeville has seven designated scenic roadways: Pierce Avenue, Crooked Lane, Long Point Road, Mill Street, Southworth Street, Kingman Street, and Old Main Street
- Vistas along the Nemasket River
- Views across Assawompset Pond
- Betty's Neck/Assawompset Pond Complex

Sites of Historic Interest:

- Tack Factory Site
- Ted Williams Camp/O.K. Gerrish Nursery
- Sites of Native American occupation at Betty's Neck and other sites
- Thompson Hill Cemetery
- Pond Cemetery

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

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

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

Historic Preservation Goals

- Recognize, preserve and enhance the historic heritage of Lakeville.
- Preserve and/or restore properties of historical, architectural, archaeological, and cultural significance to Lakeville.
- Preserve and protect the remaining historic character of Lakeville, including houses, barns, outbuildings, churches, cemeteries, monuments, stonewalls, and scenic roadways.
- Update and maintain Historic Asset Survey forms.

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

OPEN SPACE and RECREATION

The CPA statute defines Open Space as land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh water marshes and other wetlands, river, stream, lake and pond frontage, lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use.

The Town of Lakeville, is a community with a diversity of natural resources and open space surrounded by three large waterbodies – Quittacas, Assawompset, and Long Pond occupying approximately 4,000 acres. There are various levels of development within these waterbodies. Quittacas and Assawompset shores are completely or largely protected from development however Long Pond is not protected and is heavily developed. Over the years this has led to a negative impact on water quality. Conversion of natural areas to impervious, increased storm water volumes which leads to localized flooding. Flooding may cut off access to major thoroughfares, damage shorefront property and septic systems, and further threaten water quality.

The town is currently updating its Open Space Plan which will reflect Lakeville’s continued commitment to protecting, maintaining, and expanding its open space and natural resources. Lakeville has experienced a significant increase in residential growth and development, straining its open space and natural resources. The updated OSP shall identify and help facilitate the preservation and protection of Lakeville’s natural landscapes and identify priority land for habitat and water resource protection.

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

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

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

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

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

Open Space Goals

- Preserve the rural character of Lakeville to protect water resources, wildlife corridors and habitats, retain and preserve cultural aspects of Lakeville, establish outreach programs with farmers, and maintain strong rural zoning regulations.
- Enhance open space and recreational opportunities to establish strong representation with other town boards, improve handicap accessibility on town open spaces, develop “Guide-to-Use” data for Open Spaces, organize education guided walks on town trails and create an interactive map on the town website of open space and recreational regions.
- Create administrative structure and channel growth so as to preserve the unique quality of the Town and its natural, cultural and historical resources to work to enhance By-Laws that protect open space, place conservation and agricultural restrictions on valuable town properties, to acquire grant funds to purchase valuable open space parcels in Lakeville, complete assessment town owned open land and develop a criteria for protection and preservation, and review properties in Chapter 61 categories to ensure open space remains up to date.
- Improve trailhead parking and access to open space assets in Lakeville.
- Develop a linked system of conservation and recreation areas for human and wildlife use, prioritizing parcels that abut existing protected land parcels.

RECREATIONAL USE

The CPA statute defines recreational use as active or passive use including, the use of land for community gardens, trails, and noncommercial youth and adult sports, and the use of land as a park, playground or athletic field. Recreational use shall not include horse or dog racing or the use for a stadium, gymnasium or similar structure.

Lakeville has over 200 acres of recreation land which includes a number of town-owned parcels offering passive recreation, 5 town facilities for active recreation (playgrounds and playfields). Many of these town recreational amenities may be undersized/inadequate, lack of proper drainage/irrigation, in need of repair, and do not meet ADA (American Disabilities Act or MAAB (Massachusetts Architectural Access Board) requirement standards.

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

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

- The acquisition, creation, and preservation of land for recreational use. Recreational use as defined by CPA, is “active or passive recreational use including, but not limited to, the use of land for community gardens, trails, and noncommercial youth and adult sports, and the use of land as a park, playground, or athletic fields.

Recreational Use Goals

- Comply with ADA & MAAB requirements and standards.
- Improve trailhead parking and access to recreational assets in Lakeville.
- Create additional active recreational amenities, such as a large municipal playground, multi-use fields, tennis courts, pickle ball courts, walking paths, x-country course, dog park;
- Improve existing ballfields, courts, playgrounds, and bathroom facilities.
- Acquire land for additional athletic fields and/or passive recreation opportunities throughout town.
- Create/Establish a town-wide trail system (including trailhead signage and trail markings).
- Promote/Improve water-based recreational activities.

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

GENERAL EVALUATION CRITERIA

All projects must meet the following minimum criteria:

- Projects with a feasible project plan that demonstrates the best approach and timeline for implementation.
- Projects must demonstrate administrative and financial management capabilities of the applicant.
- Projects must demonstrate a means of support for maintenance and upkeep.
- Projects must show community support and a positive impact to the community.
- Projects that have support from other relevant Town Boards and Committees.
- Projects that can show support from the abutters.

Projects that can also demonstrate some of the following additional criteria will be given preference over projects that only meet the minimum criteria.

- Projects that can provide other sources of funding from outside sources, making our money go further and have a greater impact on our community.
- Projects that protect lands critical to the protection of our natural resources, i.e. the acquisition of critical parcels to protect the regions water resources, including riparian zones and watersheds.
- Projects that implement open space and recreational planning on a regional basis.
- Projects that fulfill more than one purpose of the CPA: Open Space or Recreation, Historic Preservation, Community Housing.
- Projects where the applicant has successfully implemented other projects of similar scale or otherwise demonstrate the ability and competency to implement this project.
- Projects that ensure preservation of currently owned Town assets.
- Projects that involve acquisition of threatened resources.
- Projects where all permits and Board reviews are in place.

Criteria Specific to Open Space

- Projects that protect important wildlife habitat including areas that are of local significance for biodiversity or preserves a habitat for threatened/endangered species of plant or animal.
- Projects that preserve the remaining elements of Lakeville's rural and agricultural character.
- Projects that protect both surface and ground water supplies including drinking water, wetlands, aquifers, and riparian zones.
- Projects that restore environmental resources, including removal of invasive species.
- Projects that support development of environmental educational resources
- Projects that preserve small tracts of undeveloped land that contribute to other open space goals, such as smaller parcels that are located adjacent to protected open spaces, or that preserve corridor linkages between larger open space parcels.
- Projects that preserve or expand priority parcels as listed in Lakeville's Open Space and Recreation Plan.
- Projects that provide flood control/storage.

Criteria Specific to Recreation

- Projects that provide or expand opportunities for both active and passive recreation.
- Projects that support multiple recreational uses.
- Projects that enable the usage of recreational space for all ages and abilities.
- Projects that maximize use of Town owned land.
- Projects that improve existing ballfields, courts and playgrounds, and canoe/kayak access.
- Projects for land acquisition that provide for new or expanded recreational uses.
- Projects that promote water-based recreational activities, i.e. canoe/kayak access.

Criteria Specific to Community Housing

- Projects that provide a variety of housing opportunities that serve all segments of Community, including seniors, smaller households, and low/moderate income households.
- Projects that ensure long term affordability in perpetuity.

Criteria Specific to Historic Preservation

- Projects that protect, preserve, enhance, and/or rehabilitate the historic integrity of a property or site.
- Projects that prevent the potential loss or destruction of a historic, cultural, architectural, or archeological resource if action is not taken.
- Projects that protect, preserve, enhance, and/or rehabilitates the historical function of a property or site.
- Projects that demonstrate a public benefit.

HOW TO APPLY FOR FUNDING

HOW TO APPLY FOR FUNDING

Lakeville's CPC ~~accepts applications for funding on an annual basis.~~ **invites municipal departments, community organizations and individuals to submit applications for CPA funding on an annual basis.** The application is a two-step process. Applicants must first submit a simple one-page Step One application describing the project and an estimated budget. ~~The Step One~~ **application determines if the project is eligible for funding and** lets the CPC know how many potential projects to plan for. ~~and It also~~ **gives the applicant a chance for feedback before completing a Step Two application.** If the CPC determines the project is eligible, applicants are then asked to submit a Step Two **application which requires more extensive information on the project. Projects will be judged by both general and specific criteria which can be found in the Community Preservation Plan. ~~showing the project meets both statutory local eligibility requirements.~~ **showing the project meets both statutory local eligibility requirements.** All decisions made by The Community Preservation Committee will be made at public meetings posted on the Town Web Site.**

For each fiscal year, the Committee shall accept Step 1 applications from September 1st to October 15th, and Step 2 applications from November 1st to December December 15th to allow time for warrant articles to be prepared for consideration at the Annual Town Meeting in June. ~~where warrant articles may be prepared for consideration for the Spring Annual Town Meeting.~~

The applications can be found on pages 23 through 26 of the Community Preservation Plan and on the town website at lakevillema.org on the Community Preservation Committee tab.

Under special circumstances, Lakeville's CPC may consider an application submitted after the deadlines. The most common circumstances are the availability of real property on the market; or time-sensitive stabilization of a historic asset damaged by flood, fire, or other emergencies, not normal deterioration. Applicants must first submit a letter requesting special application status outside of normal grant deadlines and may submit a Step One at the same time. The application must be

submitted with sufficient time for the CPC to hold two regular meetings for hearings before the next annual or special Town Meeting.

Application Review

Step 1 applications will be reviewed for compatibility with CPA legislation and Community Preservation Plan; completeness of the information presented; and impact of project to local community.

Step 2 applications will be reviewed for whether the CPA funds serve as a catalyst for leveraging other funding sources; breadth of impact on the lives of the residents of Lakeville; long term benefits to the town; long term costs to the town, if action is not taken; urgency of the project and any other factors that may be relevant to a specific project.

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

After reviewing applications, the CPC decides by majority vote which projects to recommend and how much funding to approve. ~~They may recommend partial funding, full funding or choose to not recommend an application. Projects that serve more than one purpose of the CPA will be viewed more favorably than those that do not. Projects that can demonstrate that they have been developed through a participatory process in which the public has had the opportunity to provide input will be viewed more favorably than those that have not had public input.~~ The CPC then brings those recommendations as warrant articles to the Town Meeting. The Select Board may not increase funding nor consider requests that do not come with CPC recommendation. Funds approved at the Town Meeting will be available for projects to begin work.

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

~~Historic Resource Projects, the application should be prepared to provide a copy of the Historic Resource Inventory Form for the property with the application submittal. Further, the Committee strongly encourages all Historic Resources applicants to have Historic Structure Report completed before requesting any CPA funds for restoration or rehabilitation projects. The Committee may require the completion of a Historic Structure Report prior to the use of any CPA funding at historic sites and may recommend the reallocation of some or all of the requested funds for this purpose.~~

Land Acquisition projects for real property or real property interest in any of the four funding categories, the applicant should be aware that a permanent deed restriction is required if all or a portion of the land is purchased with CPA funds. The type of restriction required will vary depending on the funding category and may require the review of the State or other government entity. Applicants should identify

the holder of the restriction as early in the process as possible and be prepared to submit a draft restriction as part of their CPA funding review.

~~Under special circumstances, Lakeville's CPC may consider an application submitted after the deadlines. The most common circumstances are the availability of real property on the market; or time-sensitive stabilization of a historic asset damaged by flood, fire, or other emergencies, not normal deterioration. Applicants must first submit a letter requesting special application status outside of normal grant deadlines and may submit a Step One at the same time. The application must be submitted with sufficient time for the CPC to hold two regular meetings for hearings before the next annual or special Town Meeting.~~ **Move to above**

CPA FUNDING AWARD PROCESS

Following the conclusion of Town Meeting, each successful applicant will receive an award letter from the Community Preservation Committee confirming its funding award. The letter will be accompanied by either a Memorandum of Understanding (town projects), outlining the agreed upon scope of the project, or a Grant Agreement (non-town projects), outlining the agreed upon scope of the project, any conditions and terms of the funding. Grant Agreements must be signed and returned to the Town of Lakeville before project start. Applicant shall meet with the CPC to review project scope, timelines, milestones and CPA funding disbursement process. The Community Preservation Committee shall issue award letters for projects approved at Town Meeting with information on the funding amount, funding conditions, project modifications (if any), CPC Admin contact information, and guidelines for project execution. Projects receiving CPA funding shall credit this source of funding in promotional materials and where appropriate at the project location. Except for town-sponsored projects, a Grant Agreement prepared by the CPC must be signed by the applicant (Awardee) after the project has been approved at Town Meeting and before CPA funds are to be disbursed. Applicants must recognize the CPA as a funding sources for their project. This recognition should appear on any materials involving the project, such as press releases, brochures, etc. In order for Lakeville residents to see the results of their tax funding, a CPA sign shall be displayed on the property on a case-by-case basis, as determined by the CPC. Signage indicating CPA support shall be made available through the CPC.

PROJECT IMPLEMENTATION

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

approval. The CPC may recommend at a subsequent Town Meeting the rescission of any authorized CPA funds remaining unexpended or undocumented after 12 months.

AVAILABILITY OF AWARDED CPA FUNDS

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

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DISBURSEMENT AND USE OF CPA FUNDS

CPA funds are public funds raised from dedicated Lakeville revenues and from State subsidies. Projects financed with CPA funds must comply with all applicable State and municipal requirements, which requires special procedures for the selection of products, services, consultants, etc. Contracts for goods and services must be awarded to the lowest qualified bidder, which may be someone other than who assisted the applicant with a project application. Project purchases cannot be split or manipulated to avoid State procurement laws. The CPC will provide successful applicants with a memo describing the completed award process, which adheres to the guidelines of the Massachusetts Procurement Law. In general, funds may be spent only on items listed on the submitted budget in the application. All changes to budgets must receive prior approval by the CPC. Funding from the CPC may not be used to replace or free up for any other use, alternate funds or revenue sources. In certain situations, funds may not be disbursed until there is an appropriate deed restriction or the Department of Revenue, the Department of Conservation & Recreation, the Massachusetts Historical Commission, or the Department of Housing & Community Development (as appropriate) must be satisfied with the status of the restriction. Projects for which 50% (or other fraction) of costs will be paid from awarded CPA funds will be reimbursed on the basis of 50% (or other fraction) of actual expenditures up to the amount of the total CPA grant, and as may be detailed in project milestones reviewed and approved by the CPC. CPA funding for project involving properties or artifacts which are owned by nonprofit organizations is conditioned on the public benefit received from the completed work. The sale or gift of these properties or artifacts within five (5) years from the date of the award letter shall require the reimbursement of the entire amount awarded unless the CPC waives this requirement in part or in its entirety.

Funds are to be administered and disbursed by the Town of Lakeville according to municipal disbursement procedures. Applicants should note Chapter 30B of the Massachusetts General Laws, the Uniform Procurement Act, establishes uniform procedures for local governments to use when contracting for supplies, services, and real property. Project oversight, monitoring and financial control are the responsibility of the Community Preservation Committee or its designee. When the project is completed, any and all unused funds shall be returned to the Lakeville Community Preservation Fund. The CPC, from time to time may request project status updates from CPA fund recipients. The purpose of such updates is to track the progress of funded projects, aid the CPC in refining the Community Preservation Plan and identify issues that may assist future applicants. For construction projects, CPA funding recipients may be asked to instruct their general liability insurer to add the Town of Lakeville as an additional insured as related to the specific CPA funded project, and to require all contractors of the project do the same. Proof of coverage must be submitted for the CPC files prior to first request for reimbursement.

REQUESTING AWARDED FUNDS

Invoices for work completed or for funds allocated for approved projects shall be submitted and signed by the applicant, accompanied by a Request for Funds form submitted to the Community Preservation Committee for review and processing. Each Request for Funds form must include an updated project status report, original invoices, receipts and canceled checks. Payments will be made directly to the applicant unless the applicant is a Town of Lakeville department. If an invoice has already been paid and requesting reimbursement, include copy of the cancelled check attached to the invoice. If payment is for contracted services, a copy of the fully executed contract shall accompany the request for payment. Additionally, the CPC shall require a detailed report of billable hours, if applicable. State law prohibits reimbursement for sales tax; invoices shall identify and appropriately reflect this. The CPC may appoint the CPA Administrator or authorize the CPC Chair to process certain payments. Requests for funds above \$10,000 are to be voted on by the Community Preservation Committee.

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APPENDIX

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Town of Lakeville

COMMUNITY PRESERVATION COMMITTEE
346 Bedford Street
Lakeville, MA 02347
774-776-4350

Approved _____
Not Approved _____
Date _____

Application for Eligibility Determination – Step 1

Project Title: _____

Name of Entity, Group, or Committee _____

Address _____

Telephone: _____ Email _____

Contact Person _____

Telephone: _____ Email: _____

Application Category: Housing _____ Historic _____ Open Space/Recreation _____

Describe your project: _____

Amount of CPA funds Requested: _____ Total Estimated Cost: _____

Describe the level of planning which has occurred: _____

Please attach the following:

- Assessors tax card and map
- Photos if applicable
- Plans/sketches if applicable

Signature of Applicant: _____ Date: _____

Is Your Project Allowable?

	Open Space	Historic	Recreation	Housing
Aquire	YES	YES	YES	YES
Create	YES	NO	YES	YES
Preserve	YES	YES	YES	YES
Support	NO	NO	NO	YES
Rehabilitate and/or Restore	NO (unless aquired or created with CPA \$\$)	YES	YES	NO (unless aquired or created with CPA \$\$)

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Town of Lakeville

COMMUNITY PRESERVATION COMMITTEE
346 Bedford Street
Lakeville, MA 02347
774-776-4350

FOR OFFICIAL USE ONLY

Approved _____

Not Approved _____

Date _____

Application for Community Preservation Funding – Step 2 (Projects Must Have Received a Step 1 - Determination of Eligibility)

APPLICANT INFORMATION

Project Title: _____

Name of Entity, Group, or Committee: _____

Address: _____

Telephone: _____ Email: _____

Contact Person: _____

Address: _____

Telephone: _____ Email: _____

Application Category: Housing _____ Historic _____ Open Space/Recreation _____

PROJECT INFORMATION:

Project Address _____

Map/Parcel: _____ Deed Book/Page: _____

Current Owner _____

Owners Address: _____

Owners Phone: _____ Owners Email: _____

Project Description: _____

Total Funding Requested: _____

Funding From Other Sources: Amount: _____

Source: _____

Timeline of Project: _____

If funding is requested for multiple years please attach a breakdown of the total project cost for each year, amount of CPC funds requested for each year, and amount of confirmed additional funding secured for each year. Also provide a schedule for the project indicating the tasks to be completed each year.

REQUIRED ATTACHMENTS AS APPLICABLE:

- Detailed Description of Project
- Copies of Deeds
- Description of Property
- Maps
- Surveys
- Site Plans
- Appraisals
- Purchase and Sale Agreements
- Cost Proposals/Estimates
- Budget for Acquisition or Construction
- Letters of Commitment by Additional Funding Sources
- Letters of Support from Individuals or Organizations

ADDITIONAL QUESTIONS AS APPLICABLE (If Yes, please explain):

Does this project require urgent attention? Yes ___ No ___

Does this project require permits or licenses from local boards or state offices? Yes ___ No ___

Does this project require any long-term maintenance? Yes ___ No ___

Does this project require any professional design or legal assistance? Yes ___ No ___

Signature of Applicant: _____ Date: _____

REQUEST FOR FUNDS/PROJECT STATUS REPORT GUIDELINES

Lakeville Community Preservation Committee

1. Each "Request for Funds" form must include an updated project status report. If you need help, please contact your CPC Project Liaison. This form must be signed by the project applicant, as well as the CPC Project Liaison and CPC Chairperson.
2. The "Request for Funds" must include the original invoices, receipts and cancelled checks. Payments will be made directly to the Applicant unless the Applicant is a Town of Lakeville department. Please indicate on the "Request of Funds" form to whom the payment should be made out to, if it is not to be sent to the Applicant.
3. If an invoice has already been paid by your agency and you are requesting reimbursement, please have a copy of the cancelled check attached to that invoice or a PAID stamp and an authorized signature on that invoice, so that the CPC knows to reimburse your organization.
4. If payments are for contracted services, a copy of the signed contract should accompany the request. Additionally, we require a detailed report of billable hours (if applicable).
5. If charges are for newspaper ads, tear sheets must be provided. If this is not available, a copy of the advertisement showing the date of publication is required.
6. If charges are for travel, receipts are required (tickets, parking vouchers, food) as well as documentation regarding the reason for travel (i.e., program, agenda, registration form).
7. State Law prohibits reimbursement for sales tax or for tips and gratuities. Please adjust invoices appropriately to reflect this Town by-laws provide standardized limits for meals and mileage reimbursements. These limits are strictly adhered to by the CPC. No allowance is permitted for alcoholic beverages.
8. Please do not staple or paperclip anything in the Request of Funds packet. Insert the Request for Fund packet in a flat (9x12 or 10x13) envelope. Whenever possible make sure copies are on 8 ½ x 11 paper (i.e., a copy of a cancelled check for a bank statement should be copied onto a standard sheet of paper, not cut out and attached as is).
9. Requests for Funds above \$10,000.00 are voted on by the CPC at a monthly meeting (usually the fourth Wednesday for each month). All Requests for Funds and supporting documentation are to be submitted to the CPC Administrative Assistant. It is imperative that the Project Liaison and applicant have jointly reviewed the Request for Funds before it is submitted to the Committee by the CPC Project Liaison.
10. Completed requests must be in the CPC inbox located on the first floor of the Town Hall by no later than one week before the scheduled CPC monthly meeting.

Please do not hesitate to contact your Project Liaison or the CPC Administrative Assistant, (cpc@lakevillema.org) if you have any questions about how to submit a Request for Funds.

**PROJECT STATUS REPORT
REQUEST FOR FUNDS**

Project Title _____ Date: _____

Project Manager: _____ Federal Tax ID #: _____

Deed Restriction: On File ____ Pending ____ Exempt ____

Project Representative: (Contact Person) _____

Address: _____

Phone/Fax/Email: _____

Description of Request/Project Phase:

Project Timeline/Schedule and approximate amounts of future Disbursements: _____

The "Request for Funds" must include the original invoices, receipts and cancelled checks, or such other documents as the Committee may require. Please have a copy of the cancelled check attached to the invoices or a PAID stamp and an authorized signature on that invoice. If payments are for contracted services, a copy of the signed contract should accompany the request. Additionally, we require a detailed report of billable hours (if applicable).

Original Amount Approved: \$ _____ FY _____
Balance brought forward: \$ _____
AMOUNT REQUESTED HERE: \$ _____
Remaining Project Balance: \$ _____

Applicant Signature: _____ Date: _____

CPC Project Liaison Signature: _____ Date: _____

CPC Chairperson Signature: _____ Date: _____

CPA Surcharge Exemptions

There are two surcharge exemptions available in Lakeville. There is an automatic exemption of the first \$100,000 of residential property value in calculation of the CPA surcharge. An additional exemption is available to low-income residents. This must be applied for annually. The application and requirements for exemptions are available here:

<https://www.lakevillema.org/assessors-office/files/community-preservation-act-exemption-application>

ANNUAL EXEMPTION TOTALS

Levy Year (Fiscal Year)	Total Exemption Value	Number of Exemptions
2022		
2023		
2024		
2025		
2026		
2027		
2028		
2029		
2030		
2031		
2032		
2033		
2034		
2035		
2036		
2037		
2038		
2039		
2040		

CPA FUND REVENUES

By maintaining the CPA surcharge of 1%, Lakeville has maximized its own contributions as well as interest and state matching funds. This table shows the total annual revenues from Lakeville's participation in the CPA program.

CPA FUND REVENUES

Fiscal Year	Surcharge Paid	Tax Liens Redeemed	Interest (Earnings on Investments)	State Match	Match as Percentage of Surcharge	Total Annual Revenues
2022						
2023						
2024						
2025						
2026						
2027						
2028						
2029						
2030						
2031						
2032						
2033						
2034						
2035						
2036						
2037						
2038						
2039						
2040						
Total						

Source: Town of Lakeville Finance Department

HISTORIC CPA PROJECTS APPROVED BY TOWN MEETING

Title of Project	TM Date and Article	Amount Funded	Amount Expended	Status
Gravestone Repairs	STM 11/2023 #5	\$10,000		
Historic Town House Roof Replacement	STM 11/2023 #5	\$30,000		

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OPEN SPACE/RECREATION CPA PROJECTS APPROVED BY TOWN MEETING

Title of Project	TM Date and Article	Amount Funded	Amount Expended	Status
Jon Paun Park Engineering & Architectural Plans for Improvements	STM 11/2023 #5	\$25,000		

COMMUNITY HOUSING CPA PROJECTS APPROVED BY TOWN MEETING

Title of Project	TM Date and Article	Amount Funded	Amount Expended	Status

DRAFT

CPA FUNDS BALANCE

	Community Housing	Historic Preservation	Open Space/Recreation	Undesignated	Admin Expenses	Reserve
FYE 2022 Fund Balance						
FYE 2023 Fund Balance						
FYE 2024 Fund Balance						
FYE 2025 Fund Balance						
FYE 2026 Fund Balance						
FYE 2027 Fund Balance						
FYE 2028 Fund Balance						

Community Preservation Committee

Nancy Yeatts, Chair – Conservation Commission

Amy Knox – Open Space Committee

Michele MacEachern, Vice-chair – Planning Board

John Lucey – At Large Member, Housing

Susan Spieler, Secretary – At Large Member

Nancy LaFave – Historical Commission

Kathleen Barrack – At Large Member

Barbara Standish – At Large Member

Paula Houle – Parks Commission

The Community Preservation Committee is a nine (9) member Committee with representatives from the Open Space Committee, Parks Commission, Historical Commission, Conservation Commission, and Planning Board along with four (4) Resident at Large members, with one (1) having interest in Housing. Terms are staggered and appointed yearly by the respective Committee, Commissions, or Board and Select Board. The Committee is governed by Massachusetts General Laws Chapter 44B.

The Committee is charged with studying the needs of the of the community and shall hold one or more properly noticed public informational hearing yearly, and gather input from other Town departments and offices. The Committee creates a Community Preservation Plan and will review and revise on a yearly basis. The Committee shall make recommendations to Town Meeting accordingly:

the acquisition, creation and preservation of open space;

for the acquisition, preservation, rehabilitation and restoration of historic resources;

for the acquisition, creation, preservation, rehabilitation and restoration of land for recreational use;

for the acquisition, creation, preservation and support of community housing;

and for rehabilitation or restoration of open space and community housing that is acquired or created as provided in this section;

provided, however, that funds expended shall not be used for maintenance.

With respect to community housing, the community preservation committee shall recommend, wherever possible, the reuse of existing buildings or construction of new buildings on previously developed sites.

Community Preservation Committee

With respect to recreational use, the acquisition of artificial turf for athletic fields shall be prohibited. (Chapter 44B, §5.B.2.)

2023 was a productive year for the Community Preservation Committee as the Committee drafted a Community Preservation Plan [CPP] and brought the first three (3) recommended projects to Town Meeting. All three (3) projects were approved for funding by Town Meeting. These projects included:

- \$25,000.00 for a set of Engineered Plans for improvements to John Paun Park
- \$30,000.00 as a Contingency for any unexpected repairs needed to the Historic Town House during roof repairs
- \$10,000.00 for Cemetery Stone repairs to the Thompson Hill Cemetery

Community Preservation Committee meetings are open to the public and are held at various locations and dates as availability allows. Residents are welcome and encouraged to attend.

Additional information on the Community Preservation Committee can be found at [Community Preservation Committee | Lakeville MA](#) . The webpage includes current and past agendas, Minutes of Meetings, the Community Preservation Plan, Step 1 Application, as well as other various information related to the Community Preservation Committee.

SAMPLE
COMMUNITY PRESERVATION COMMITTEE
REPORT 2020

Submitted to Town Meeting, April 2021

The Community Preservation Committee (CPC) respectfully submits this report to the Town of Middleborough for the year ending December 31, 2020.

The Community Preservation Act (CPA) was adopted by Middleborough voters in 2010 to preserve open space, offer diverse recreational opportunities, protect natural and historic resources, and support community housing.

Middleborough currently receives more than \$400,000 annually for its CPA fund. Most of the fund is raised through a 1% surcharge on local property taxes, with exemptions for the first \$100,000 of property value, as well as for all low-income households and senior moderate-income households. State matching funds contribute anywhere from 10% to 50% of what is raised locally each year. The state matching funds come from Registry of Deed fees, which were raised in 2019, and any state budget surplus.

Since its inception in Middleborough, CPA has provided \$2.4 million in funding for projects, leveraging 85 percent for those project budgets—now more than \$14.4 million for the town—in outside funding such as federal, state, and private grants; other town budgets; private donations; contributions of money and materials; in addition to countless hours of volunteer labor.

Community Preservation Plan

This year the Community Preservation Committee produced its five-year plan, cowritten by Chair Kimberly French and J.M. Goldson Associates, with help from committee members.

In surveys, workshops, and focus groups, residents consistently told the committee that preserving Open Space is a top priority for CPA funds, with a focus on passive recreation, such as walking, biking, birdwatching, nature photography, and picnicking.

This year the CPC adopted a new policy to reserve part of its fund for priority open space acquisitions when they come on the market. At the same time the CPC continues its commitment to balance the fund among of mix of projects that preserve the community's character: large (Shoe Shop Place) and small (tree planting on Titicut Green), public (Oliver Estate and Mill) and private (Nemasket Hill Cemetery), in all eligible funding categories (open space and recreation, historic preservation, and community housing).

In the planning process, town leaders and residents brainstormed many creative ideas. As a result, the CPC has received more new project proposals to preserve and improve the community than ever before.

In June 2020 Town Meeting approved FY21 grants for these CPA projects:

- \$40,000 to replace roofs and preserve senior-housing units at 7 Frank and 8 Hale streets.
- \$44,100 for Phase III exterior restoration at the historic Peter Oliver House, replacing rear shingles, sills, and gutters.
- \$110,000 to restore approximately 60 windows in the historic Peirce Building.
- \$105,000 to create multipurpose playing and baseball practice fields on Wood Street.
- \$5,500 to plant trees on the town-owned Titicut Green, by the volunteer Titicut Green Parish Committee.

Step One applications for the annual grant fund are due on September 1 each year for project funding that begins in the following fiscal year. In fall 2020 the CPC received and studied nine applications for FY22 CPA funding and approved five of those projects to recommend to the April 2021 Town Meeting.

The Committee thanks all our members for their dedication and commitment, our consultants Jennifer Goldson and Avery Wolfe for their knowledge in preservation and planning, and Stuart Saginor, Chase Mack, and the state Community Preservation Coalition for their frequent assistance throughout the year.

Respectfully submitted,
Kimberly French, Chair and At-Large Member

Frederick (Ted) Eayrs, Vice Chair and At-Large Member
Josephine Ruthwicz, Secretary and Housing Authority Representative
Mark Belanger, Webmaster and At-Large Member
Judy Bigelow-Costa, Treasurer and Park Commission Representative
Laurene Gerrior, Historical Commission Representative
John F. Healey, Planning Board Representative
Annemarie Jacobson, At-Large Member
Nancy Ockers, Conservation Commission Representative

PLANNING BOARD

Mark Knox, Chair

Michele MacEachern

Peter Conroy, Vice-Chair

Barbara Mancovsky

Jack Lynch

The Planning Board is a five (5) member Board with terms staggered so that each year one (1) member is elected at the Annual Town Election for a term of five (5) years. The Board is governed by the statutes of the Massachusetts General Laws, primarily but not limited to Chapter 41. They have authority for the following items within the Town:

Planning in General (Chapter 41, §81A-81J)

Master Plan (Chapter 41, §81D)

Official Land Use Map (Chapter 41, §81E-81H)

Public Ways (Chapter 41, §81I-81D)

Definitive Subdivision Plans or Form C Plans (Chapter 41, §81O)

Approval of Plans not subject to control law (ANR) or Form A Plans (Chapter 41, §81P)

Subdivision Control and the Rules and Regulations that govern the subdivision of land (Chapter 41, §81Q)

Preliminary Subdivision Plans or Form B Plans
(Chapter 41, §81S)

Special Permits (Chapter 40A)

Zoning By-laws (Chapter 40A)

Smart Growth Zoning & Housing Production (Chapter 40R)

Street Names (Chapter 85, §3, 3A, and 3B)

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In addition, the Planning Board reviews conceptual plans, Site Plans, and Zoning Board of Appeals applications.

2021 was a busy year for the Planning Board. They continued to meet remotely in response to the on-going Covid-19 pandemic. The Board endorsed three (3) Form A Plans and approved seven (7) Site Plans. They also approved one (1) Definitive Subdivision, Form C plan and one (1) was withdrawn. No action was taken on two (2) Form B, Preliminary Subdivision Plans, which were withdrawn. The Board held hearings on Zoning Amendments to Section 3.1, Zoning Districts; Sub-section 3.2.3; Section 6.7 Site Plan Review; Sub-Sections 6.7.2 and 6.7.3; Section 7.0 Special Regulations; Section 7.1 Flood Plain District Regulations; Sub-section 7.1.3, Definitions; Sub-sections 7.1.7, Administration and all Sub-sections under that; Section 7.4 Special Permits, Sub-section 7.4.6, Specific Uses by Special Permit; Section 7.7, Smart Growth Overlay Districts, Sub-section 10 and 10.4; Section 7.9 Development Opportunities District; Sub-section 7.9.6 and Section 8.0 Administration; Sub-section 8.1 and 8.2.

One of the most significant things achieved this year was the approval of the Site Plan and Special Permit for the redevelopment of 43 Main Street, formerly the Lakeville State Hospital. The Hospital originally opened its doors in 1910 as the Lakeville Sanatorium. Its purpose was for the treatment of people with tuberculosis. As the number of tuberculosis cases began to decline in the 1950s, the hospital began to treat patients with other conditions. In 1963, it was renamed Lakeville Hospital and continued in operation until it was closed by the State in 1993. Since that time, the property has remained empty and fallen into great disrepair. The buildings continue to decay, contain asbestos and other hazards that need to be addressed.

Rhino Capital Advisors, a Boston based real estate developer, submitted an application in 2020 to the Planning Board to tear down the

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abandoned buildings, clean up the site, and construct a warehouse building to lease to future tenants. Meetings were held in regards to this proposal over several months and included the Planning Board as well as many other Town boards. After careful review, the Board approved the proposed project. Their decision contains numerous conditions and safeguards to protect the area and residents of the Town, but is currently under appeal.

Planning Board meetings are held on the second and fourth Thursday of every month and have recently returned to in person meetings. These meetings are normally held at the Lakeville Police Station. These meetings are open to the public and residents are encouraged to attend. All meetings are also recorded and can be viewed later at <http://www.lakecam.tv/>

Additional information on the Planning Board can be found at <https://www.lakevillema.org/lakeville-planning-board>. This includes current and past agendas, Minutes of Meetings, the Lakeville Master Plan, current plans under review, as well as other various information related to the functions of the Planning Board.

Michele MacEachern

From: Peter Murdy
Sent: Thursday, March 28, 2024 2:08 PM
To: Conservation; Community Preservation Committee; library; Historical Commission; Lori Fahey - Council on Aging Director; Mary McCann; David Frates, Animal Control Officer; Chelsea Gage (chelsgage215@gmail.com); Derek Dumond; jaime.vball@gmail.com; Jamie Bissonnette; marc.freelake.softball@gmail.com; Jacob Robitaille (jacob.robitaille83@gmail.com); Justin Varricchione (jhvarr@gmail.com); Andrew Rodrigues; John Ricciardi (jricciardi@gmail.com); Jordan Latham; Kira Watkins (kira.l.watkins@gmail.com); Clayton Demoranville (claytondemoloonpond@gmail.com); Deb Michaud; Dale Simmons (dsimmons@midcape.net); Dave Slutz (dslutz@potentiallc.net); Ken Lalli (kenlalli@samuraibaseballacademy.com); Danielle Holmes (swholmes4@comcast.net); jaclynweiner@gmail.com
Cc: Melissa Tucotte
Subject: Lakeville Day, May 5, 2024

The Park Commission is proud to bring back Lakeville Day on Sunday, May 5, 2024 from 11 am to 3 pm at Ted Williams Camp.

This day will include live music, food and drinks at Loon Pond Lodge, engaging activities, local vendors, and great examples of everything that Ted Williams Park has to offer. With you being such an integral member of our community, we would like to formally invite you to this active and free community event.

We want to make this an offer that appeals to many of you! Together we have the power to bring our community together and give everyone an affordable day out. We are asking that those who join forces with us provide their activity for the attendees. This could be a promotional item, free raffle, a sports demonstration or something uniquely your own!

Please let us know if you are interested in working alongside us to make Lakeville Day another success. If in-person participation doesn't work with your schedule, there are limited sponsorship opportunities available to help support this community event.

Thank you for all that you do, and we are looking forward to working with you.

Lakeville Park Commission

Melisa Turcotte
617-653-8821
Mmmsturco1@gmail.com

Paula Houle
508-947 -2655
Paulahoule@gmail.com

Peter Murdy
Lakeville Park Commission Clerk (part-time)

Lakeville Town Hall
346 Bedford St
Lakeville MA

TOWN OF LAKEVILLE
Community Preservation Committee
Meeting Minutes
April 4, 2024

On April 4, 2024, the Community Preservation Committee held a meeting at 6:30 PM at the Lakeville Library, 4 Precinct St. The meeting was called to order at 6:40 PM by Chairman Michele MacEachern. Community Preservation Committee Members present were Chairman Michele MacEachern, Kathleen Barrack, Paula Houle, Amy Knox, John Lucey, Susan Spieler, Barbara Standish and Nancy Yeatts. Absent – Nancy LaFave. LakeCAM was recording the meeting for broadcast.

Budget Report of March – Nancy Yeatts

N. Yeatts stated that not much has changed since last month other than a little more money has been received. Previously we were at 77.2% of reaching our goal of \$24,811. We are at 78.0% and only need to collect \$22,804 more. It was suggested that we change the budget reporting to quarterly March, June, September, and December. The next tax payments aren't due until May so we should wait until June for the next report. N. Yeatts has also come up with the numbers to put on the sheet that was added to the appendix. She will show these to Todd Hassett to make sure the information is accurate. K. Barrack will continue to submit the CP3 reports to the state but will give Chairman MacEachern the log in information for a backup.

Review and possible vote Step 2 Applications:

- **Historic Town Hall Door Replacement**

The Committee reviewed the application by the Facilities Department to remove and replace two front entry doors on the Historic Town Hall. The doors will match period correctness. The amount requested is \$6,950 from CPA with \$1,750 as another funding source. The timeline from start to finish is 3 days with long-term maintenance of painting the doors every few years by Facilities.

A motion was made by J. Lucey and seconded by B. Standish, it was;

VOTED: to recommend approval of \$6,950 for the Step 2 application for town meeting under the historic budget Unanimous vote

- **Cupola Repairs to the Lakeville Historical Museum**

The Committee reviewed the application submitted by the Historical Society to replace rotted and damaged wood, repair and seal flashing between cupola and clapboard base, seal and prime all repaired wood areas and cupola flashing, restore, paint, and reinstall eight (8) shutters, install Plexi panels with venting. The amount requested is \$20,000 from CPA with \$5,000 for another funding source. The timeline of completion will be Fall 2024 and the project required urgent attention due to water leaking through the cupola into the museum. The project will require a building permit and long-term maintenance. The cupola will require the same maintenance as any other old wooden structure.

A motion was made by J. Lucey and seconded by S. Spieler, it was:

VOTED: to recommend placing this on the warrant in the sum of \$20,000 to repair the cupola at the Historic Museum.

Unanimous

- **Clear Pond Park Fence**

The Committee reviewed the application submitted by the Parks Commission to replace the old, rusty and broken fence at Clear Pond Park area of Route 79 with a galvanized six (6) foot chain link fence. The amount requested is \$20,000 with no other funding source. B. Standish had a question about the email received from Franklin, the DPW

director. He recommended a survey to stake out the layout of the fence and she wanted to know who would do the survey and who would be paying for it. The fence would also be near utility poles and would require Dig Safe. P. Houle stated the fence would be 10 feet away from the guardrail and would go behind the telephone pole and 20 feet into the woods. J. Lucey asked if vegetation would need to be cleared and P. Houle stated no. Chairman MacEachern asked what kind of maintenance would be required and P. Houle stated none, it would be maintained by DPW to cut the brush. The email from DPW stated Clear Pond would be responsible for maintaining the brush. The question was asked again about doing a survey and P. Houle said they wouldn't be doing one. S. Spieler mentioned that the coalition had raised the same question during the Step 1 application review. She also spoke to two members of the Middleboro CPA and they both said that even if a project is eligible, the committee does not have to recommend it to go to Town Meeting if it's not a good use of CPA funds. It's in our purview to either recommend or not recommend a project. They also said to not make the same mistake they made and approve every project to Town Meeting and spend all the money. When a significant project came along, they didn't have the money to fund it. S. Spieler didn't feel the fence benefits many residents and didn't feel it was a good project to move forward. The coalition email was read again about the project stating the first step is to determine if the fence is located on a protected parcel and if located in general municipal land along the road. It's only eligible if located in parkland and they will need to submit a survey to show the fence will be located within the park. If it's on general municipal land or in the road right of way, it is not eligible. If it is in the park, then it would appear to be a validate project under rehabilitation of parkland but as you know just because a project is eligible does not mean it's a good use of your limited CPA funds. Chairman MacEachern stated that a survey would be needed to determine where the road layout is. J. Lucey said there could be easements with the utilities that we do not know about, so a survey is needed. N. Yeatts recommended the application be continued to our next meeting to get answers to these questions. Chairman MacEachern will email the Park Commission and ask for a survey and means of ongoing maintenance. This will come back to the April 18, 2024 meeting.

Review and approve meeting minutes for March 21, 2024 and March 25, 2024

A motion was made by N. Yeatts and seconded by J. Lucey, it was:

VOTED: to approve meeting minutes of March 21, 2024

Unanimous

A motion was made by S. Spieler and seconded by J. Lucey, it was:

VOTED: to approve meeting minutes of March 25, 2024

Unanimous

Review Draft Revisions for Community Preservation Plan

S. Spieler submitted some edits to the plan that the Committee reviewed. There was discussion regarding some of the edits. N. LaFave joined the meeting by phone at 7:39 pm. She gave some feedback on the Historic Structure Report additions to the plan. She would like to show the edits to the Historical Society at their next meeting. The Historic Resource Inventory Form should be added to the Step 2 application if it was applicable. The Committee decided they will each look at other town plans and bring their recommendations to the next meeting.

Next meeting date April 18, 2024 at COA

A motion was made by J. Lucey, and seconded by B. Standish, it was:

VOTED: to adjourn the meeting at 7:53 pm.

Unanimous

Presented at Meeting:

Page 2 of Step 2 Clear Pond Park Fence application

