

# TOWN OF LAKEVILLE MEETING POSTING & AGENDA

Town Clerk's Time Stamp  
received & posted:

*K. DeGuzma*

LAKEVILLE TOWN CLERK  
ROUD 2023 MAR 15 PM 12:57  
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.

Name of Board or Committee:	<u>Community Preservation Committee</u>
Date & Time of Meeting:	<u>March 20, 2023 6:30pm</u>
Location of Meeting:	<u>Lakeville Police Station</u> <u>323 Bedford Street</u> <u>Lakeville, Ma</u>
Clerk/Board Member posting notice:	<u>Nancy Yeatts</u>

Cancelled/Postponed to: \_\_\_\_\_ (circle one)

Clerk/Board Member Cancelling/Postponing: \_\_\_\_\_

## A G E N D A

1. Treasurers Report
2. Community Preservation Coalition dues/ discussion/ possible vote
3. Review of Surveys received/ Kathleen
4. Draft Plan/ review new & old sections/ discussion/ possible vote
5. Applications/ review forms/ scheduling deadlines/ discussion/ possible vote
6. Minutes
  - a. Approve minutes of 12/06/22
  - b. Approve minutes of 1/04/23
  - c. Approve minutes of 1/30/23

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.

02/07/2023 12:22  
1344thassett

Town of Lakeville  
YEAR-TO-DATE BUDGET REPORT  
AS OF JANUARY 31, 2023

P 1  
glytdbud

FOR 2023 07

ACCOUNTS FOR: 2900 COMMUNITY PRESERVATION	ORIGINAL APPROP	TRNFRS/ ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
170 COMMUNITY PRESERVATION COMM							
28017000 REV - COMMUNITY PRESERVATION							
28017000 412523 2023 CPA SURCHA	-175,000	0	-175,000	-153,981.61	.00	-21,018.39	88.0%*
28017000 417100 PENALTIES & INT	0	0	0	-209.68	.00	209.68	100.0%
TOTAL REV - COMMUNITY PRESERVATION	-175,000	0	-175,000	-154,191.29	.00	-20,808.71	88.1%
28170200 CPC - COMMITTEE EXPENSES							
28170200 530000 PROFESSIONAL SE	0	6,000	6,000	.00	.00	6,000.00	.0%
28170200 534400 ADVERTISING	0	500	500	.00	.00	500.00	.0%
28170200 542000 OFFICE SUPPLIES	0	1,000	1,000	.00	.00	1,000.00	.0%
28170200 571000 MEETINGS & TRAV	0	250	250	.00	.00	250.00	.0%
28170200 573000 DUES & MEMBERSH	0	1,000	1,000	.00	.00	1,000.00	.0%
TOTAL CPC - COMMITTEE EXPENSES	0	8,750	8,750	.00	.00	8,750.00	.0%
TOTAL COMMUNITY PRESERVATION COMM	-175,000	8,750	-166,250	-154,191.29	.00	-12,058.71	92.7%
TOTAL COMMUNITY PRESERVATION	-175,000	8,750	-166,250	-154,191.29	.00	-12,058.71	92.7%
TOTAL REVENUES	-175,000	0	-175,000	-154,191.29	.00	-20,808.71	
TOTAL EXPENSES	0	8,750	8,750	.00	.00	8,750.00	



02/07/2023 12:22  
1344thassett

Town of Lakeville  
YEAR-TO-DATE BUDGET REPORT  
AS OF JANUARY 31, 2023

P 2  
glytbud

FOR 2023 07

	ORIGINAL APPROP	TRANSFRS/ ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
GRAND TOTAL	-175,000	8,750	-166,250	-154,191.29	.00	-12,058.71	92.7%

\*\* END OF REPORT - Generated by Todd Hassett \*\*



03/02/2023 08:54  
1344thassett

Town of Lakeville  
YEAR-TO-DATE BUDGET REPORT  
FISCAL YEAR 2023 AS OF FEBRUARY 28, 2023

P 1  
glytbud

FOR 2023 08

ACCOUNTS FOR: 2800 COMMUNITY PRESERVATION	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
170 COMMUNITY PRESERVATION COMM							
28017000 REV - COMMUNITY PRESERVATION							
28017000 412523 2023 CPA SURCHA	-175,000	0	-175,000	-164,984.38	.00	-10,015.62	94.3%*
28017000 417100 PENALTIES & INT	0	0	0	-277.33	.00	277.33	100.0%
TOTAL REV - COMMUNITY PRESERVATION	-175,000	0	-175,000	-165,261.71	.00	-9,738.29	94.4%
28170200 CPC - COMMITTEE EXPENSES							
28170200 530000 PROFESSIONAL SE	0	6,000	6,000	.00	.00	6,000.00	.0%
28170200 534400 ADVERTISING	0	500	500	180.00	.00	320.00	36.0%
28170200 542000 OFFICE SUPPLIES	0	1,000	1,000	49.99	.00	950.01	5.0%
28170200 571000 MEETINGS & TRAV	0	250	250	.00	.00	250.00	.0%
28170200 573000 DUES & MEMBERSH	0	1,000	1,000	.00	.00	1,000.00	.0%
TOTAL CPC - COMMITTEE EXPENSES	0	8,750	8,750	229.99	.00	8,520.01	2.6%
TOTAL COMMUNITY PRESERVATION COMM	-175,000	8,750	-166,250	-165,031.72	.00	-1,218.28	99.3%
TOTAL COMMUNITY PRESERVATION	-175,000	8,750	-166,250	-165,031.72	.00	-1,218.28	99.3%
TOTAL REVENUES	-175,000	0	-175,000	-165,261.71	.00	-9,738.29	
TOTAL EXPENSES	0	8,750	8,750	229.99	.00	8,520.01	

03/02/2023 08:54  
1344thassett

Town of Lakeville  
YEAR-TO-DATE BUDGET REPORT  
FISCAL YEAR 2023 AS OF FEBRUARY 28, 2023

P 2  
glytdbud

FOR 2023 08

	ORIGINAL APPROP	TRANSFERS/ ADJUSTMENTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
GRAND TOTAL	-175,000	8,750	-166,250	-165,031.72	.00	-1,218.28	99.3%

\*\* END OF REPORT - Generated by Todd Hassett \*\*



03/16/2023 12:27  
1344thassett

Town of Lakeville  
YEAR-TO-DATE BUDGET REPORT  
FISCAL YEAR 2023 AS OF FEBRUARY 28, 2023

P 1  
glytdbud

FOR 2023 09

ACCOUNTS FOR:		ORIGINAL	TRANFRS/	REVISED	YTD EXPENDED	ENCUMBRANCES	AVAILABLE	PCT	
2800	COMMUNITY PRESERVATION	APPROP	ADJSTMTS	BUDGET			BUDGET	USED	
170 COMMUNITY PRESERVATION COMM									
28170200 CPC - COMMITTEE EXPENSES									
28170200	530000	PROFESSIONAL SE	0	6,000	6,000	.00	.00	6,000.00	.0%
	2023/05/000065	11/14/2022 BUA	6,000.00	REF STM			NOV 2022 STM - ARTICLE 5		
28170200	534400	ADVERTISING	0	500	500	180.00	.00	320.00	36.0%
	2023/05/000065	11/14/2022 BUA	500.00	REF STM			NOV 2022 STM - ARTICLE 5		
	2023/08/000049	02/09/2023 API	180.00	VND 002221 IN 36373		NEMASKET WEEK	CPC		160669
28170200	542000	OFFICE SUPPLIES	0	1,000	1,000	49.99	.00	950.01	5.0%
	2023/05/000065	11/14/2022 BUA	1,000.00	REF STM			NOV 2022 STM - ARTICLE 5		
	2023/08/000049	02/09/2023 API	49.99	VND 003332 IN 01/04/23		YEATTS, NANCY	REIMB-SUPPLIES CPC		160688
28170200	571000	MEETINGS & TRAV	0	250	250	.00	.00	250.00	.0%
	2023/05/000065	11/14/2022 BUA	250.00	REF STM			NOV 2022 STM - ARTICLE 5		
28170200	573000	DUES & MEMBERSH	0	1,000	1,000	.00	.00	1,000.00	.0%
	2023/05/000065	11/14/2022 BUA	1,000.00	REF STM			NOV 2022 STM - ARTICLE 5		
TOTAL CPC - COMMITTEE EXPENSES			0	8,750	8,750	229.99	.00	8,520.01	2.6%
TOTAL COMMUNITY PRESERVATION COMM			0	8,750	8,750	229.99	.00	8,520.01	2.6%
TOTAL COMMUNITY PRESERVATION			0	8,750	8,750	229.99	.00	8,520.01	2.6%
TOTAL EXPENSES			0	8,750	8,750	229.99	.00	8,520.01	



**Community  
Preservation Coalition**  
*Preserving our past. Building our future.*

6 Beacon Street, Suite 615  
Boston, MA 02108  
617-367-8998

January 4, 2023

Community Preservation Committee  
Town of Lakeville  
Lakeville Town Hall  
346 Bedford Street  
Lakeville, MA 02347

**Community Preservation Coalition Dues Notice**

Annual membership dues..... \$875.00

**Please make checks payable to: Community Preservation Coalition**

**Please remit to our address:**

**Community Preservation Coalition  
Attn: Stuart Saginor  
6 Beacon Street, Suite 615  
Boston, MA 02108**

*Contact the Community Preservation Coalition with any questions at 617-367-8998.*

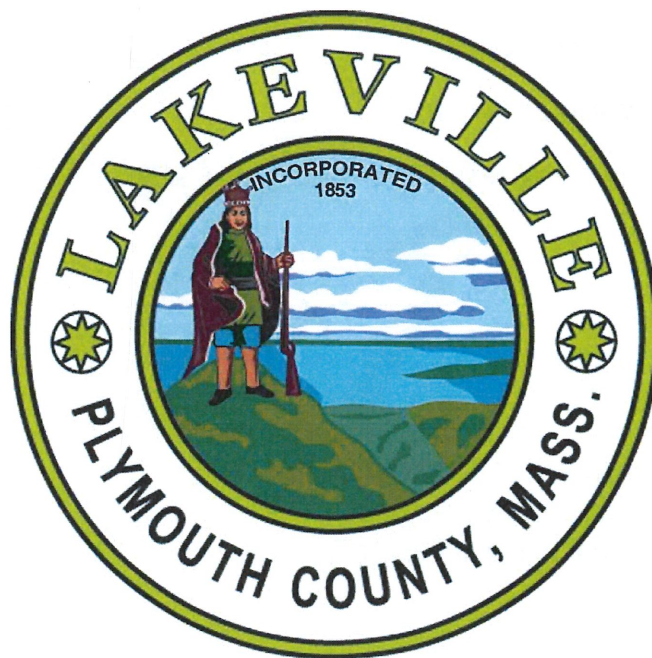
**[www.communitypreservation.org](http://www.communitypreservation.org)**

Survey #	1		2		3					4										5					6					7				8	9		
	Have you heard about the CPA and/or the CPC in Lakeville?	Yes	No	How did you hear about CPA?	Rank Each of the OPEN SPACE Goals, 1=Most Important, 5 Least Important					Rank each of the following RECREATION Goals, 1 - Most Important, 5 Least Important										Rank each of the following HISTORIC PRESERVATION GOALS, Most Important, 5 = Least Important					Rank each of the following AFFORDABLE HOUSING GOALS, 1 - Most Important, 5 = Least Important					How would you prioritize the use of Lakeville's CPA fund? 1=Most Important, 5= Least Important				CPA Funds may be used to preserve open space, historical resources, affordable housing and create outdoor recreation. How would you like to see CPA funds used in Lakeville?	What other thoughts or advice do you have for the CPC?		
					To protect and preserve Lakeville's Natural Resources including water and unique wildlife habitats, for the benefit of present and future generations	To preserve the rural character and atmosphere of Lakeville	To promote and preserve the role of agriculture and agricultural lands in Lakeville	To preserve and protect parcels for conservation status, watershed lands	To develop a linked system of conservation and recreation areas, prioritizing parcels that abut existing protected land parcels	To improve and upgrade existing courts, fields, or facilities	Name which fields or courts	Build a new facility for recreation use that does not exist	Name type need	To develop a trail network that links the town parks and other open spaces together	What Park projects should be prioritized (1 to 5)	Improvements to allow the use of the new fields at Ted Williams	New basketball courts at Ted Williams	New courts at Clear Pond	New Playground at Clear Pond	Add another softball field at John Pann Park	To recognize, preserve and enhance the historic heritage of the Town of Lakeville	To optimize the use and enjoyment of the Town's historic resources by residents and visitors	To preserve natural and man-made features that contribute to Lakeville's historic landscape and character, ie. Scenic roads and vistas, stone walls, historic farms and houses etc	To improve historic buildings and sites that need repair or restoration	To strive to meet our housing requirements under Chapter 40B	To ensure that new affordable housing is harmonious with the existing	To provide affordable housing for seniors	To provide affordable housing for first-time homebuyers	To provide affordable housing for veterans	To strive to keep the current affordable units in perpetuity rather than see those units expire	Open Space	Outdoor Recreation	Historic Preservation	Affordable/Community Housing			
average	1	1			1.74	2.71	3.59	2.88	2.71	2.20		5.58		2.21	2.89	2.21	3.29	3.13	2.79	3.71	2.88	2.44	2.00	2.47	4.13	2.65	2.19	4.25	3.30	2.61	1.95	2.55	2.53	2.71			
total responses: 22	16	5			19	17	17	17	17	15		12		14	9	14	14	16	14	14	17	18	17	19	16	17	21	16	20	18	20	20	19	21			
1	1		Voted for it		1	4	3	5	2	4		3	One for teens	2	1	4	3	2	1	5	4	1	2	3	6	1	3	4	5	2	3	1	4	2		Not sure, I'd let CPA members decide	
2	1		Town Mtg		2	3	5	4	1	2		4		1	3	1	4	6	2	3	4	2	1	2	5	4	6	3	1	3	4	2					
3	1		Facebook, others		1	1	1	1	1	3		4		3							1	2	4	4			1	1		1	3	2	4		save our lakes	please save our lakes	
4	1		signs, personal interest		2	4	5	1	3	2				1		5	4	3	2	3	4	1	2	2	6	4	5	3	1	3	4	2	1		(1) Open Space, (2) Affordable Housing, (3) Historic Preservation, (4) Outdoor Recreation	Allow expanded build out of large tracts of land with little frontage known as "Estate Zoning"	
5	1		Town Mtg		1																														put together a public/private plan using local, state, federal and private environmental organization funding to acquire, safely demolish and clean up the Lakeville Hospital site and preserve it as open space and recreational use. The state abdicated its responsibility long ago. Private commercial proposals are inadequate and self-serving. It is up to the town to make this a priority, high above any other concern.		
6	1		signs posted		1	2	5	3	4	1	sets at T	4		3	2		1							3	1	4	6	5	2	1	2	3	4		Open Space: Address the invasive weeds in Long Pond and other ponds, rivers. Outdoor Recreation: Build new, dedicated Pickle ball Courts at Ted Williams, Historic Preservation: Maintain the Old Town Hall and Library Buildings	The weeds in Long Pond are expanding exponentially each year, more aggressive and effective methods of getting control over the weeds are needed. The harvesting that was done is a good start but only addressed about 5% of the problem. Longer harvesting time is needed and probably at least one round of chemical treatment to knock down the weeds. Similar to shocking a pool, hot tub or weed control on lawns. Then regular maintenance can occur	
7	1		Nancy Yeatts		1	3	5	4	2	1		4		3	2	1	3	4	2	5	3	4	2	5	3	1	4	2	6	1	2	3	4				
8	1		Flyer		5	1	2	3	4	2		1	sports complex at hospital After-school Boys/Girls Club	4	3	1	2	4	3	5	2	1	3	4	6	3	1	5	2	4	2	1	3	4		Weed Control Long Pond, Affordable Housing for Seniors priority	Please encourage any further growth in particular affordable housing to conform with town country charm, stop overbuilding and crowding. Priority for seniors
9	1		Sarah Kulakovich		1	5	4	3	2	1	Pickle ball	3		2	4	3	1	5	4	2	4	3	1	2	6	3	2	5	4	1	3	1	4	2		Hiking Areas, Picnic Areas, Preserve Town Hall and Church and Library, Affordable housing for 55+	
10	1				1	2	4	5	3	2		4		1	3	2	4	5	3	1	2	4	3	1	4	1	2	5	6	3	1	3	2	4		(1) Open Space, (2) Historic Preservation, (3) Outdoor Recreation, (4) Affordable Housing	
11	1		at summer concerts		4	1	5	2	3	2				1	3	3	4	2	1	5	4	2	3	1	5	1	4	6	3	2	4	2	1	3		Open Space Preserve, Outdoor Recreation Quality Facilities, Historic Preservation Extremely, Affordable housing to fit scope of area	spread spending around, not all on one issue
12					1	1	1	1	3	3		4		3		4	4	4	4	4	1	1	1	1	6	3	1	3	2	4	1	3	1	4			
13	1		paying attention to town politics and goings on							4		4		4	5						4	3	1	2			2	3	1	2	3	1	4		Open Space: Bettys Neck, Native Grounds on County St, Vigers Conservation, Historic Preservation: Old Town Hall, Bettys Necks Barn, Tamarack Park	Never Mind Golf Courses! Go after real open space in town	
14	1		Lakeville Days 2021		1	3	2	4	5	1	more pickle ball courts	4		2		1	2	4	5	3	1	4	3	2	4	5	1	3	2	6	1	2	3	4		Open Space and Outdoor Recreation: I would like to see Lakeville remains a rural community. Who wants all these apartment buildings going up around town? That leads to more crime, new schools etc. We can see now with the apartments at the train stations.	My general consensus is that the residents want to keep Lakeville a rural community. Once you start building apartments it changes everything about the town.
15	1		LakeCam Meetings		2	1	4	3	5											2	3	1	4	6	3	2	5	4	1	1	3	2	4		At the 11/14/22 town meeting there was much complaining about increasing taxes to pay for new Town Hall, new Fire Station etc. Do people not realize these expenses are directly related to the increase in housing units? Limit building!	Quest #4: do not have enough info to date	
16	1		Tom Baron		5	5	5	5	1	4		4		1	5	5	1	5	5	5	5	1	5	5	5	5	1	5	5	5	5	5	5	1		Affordable Housing: There is no >55 affordable housing. People on Social Security cannot afford increase maintenance, water fees	Concentrate on >55 community
17		1	Lakeville COA																			1												1		Affordable Housing: There is a great need for affordable senior housing. Many seniors can no longer afford the high rents.	Quest 3 & 4: not knowledgeable enough to
18		1			1	1	1	1	1						1	2	2	2	2	2	2	2	2	2	2	2	1	2	1	1	3	3	2				
19	1		TV Lakeville Channel		1	4	5	2	3					3	4	1	2	5	2	1	4	3	1	2	5	6	4	3	3	4	2	1			Open Space: Golf courses, Outdoor Recreation: Clear Pond Historic Preservation: Old Town Hall, Affordable Housing: Kensington Court	No affordable housing for seniors	
20		1								1											1										4	3	2	1			
21		1	N.Yeatts		1																															keep trucking	
22		1			1	5	4	2	3						1	3	4	2	5	5	1	1	5	5	3	2	4	1	1	4	4	4			Open Space and Affordable Housing	I don't know	



# 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/communitypreservationcommittee](http://www.lakevillema.org/communitypreservationcommittee).

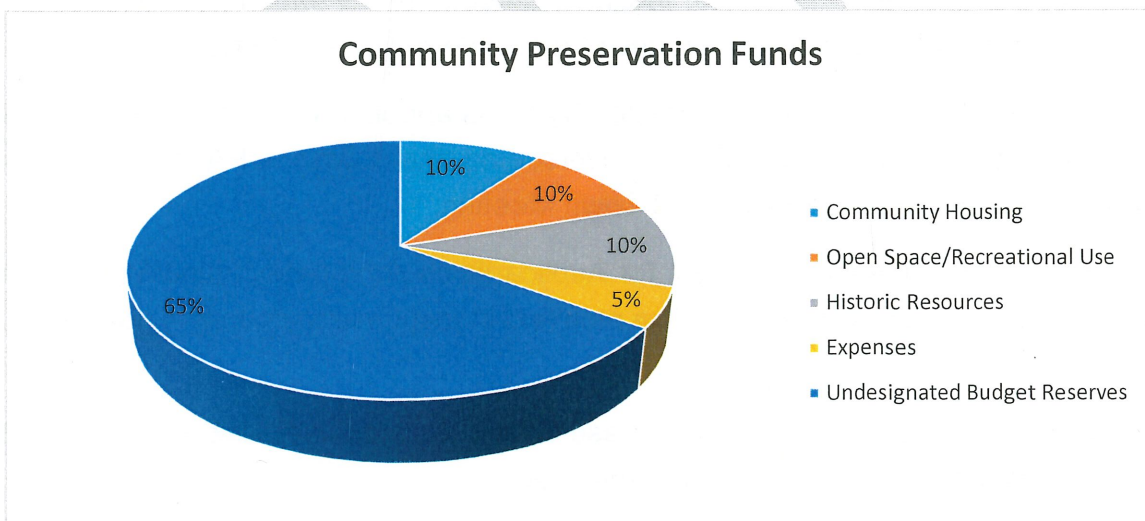
Questions or comments regarding Lakeville's Community Preservation Act may be directed to the Committee at [CPC@lakevillema.org](mailto:CPC@lakevillema.org).

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](http://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 188<sup>th</sup> 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.

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.

## **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](http://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](mailto: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 <sup>1</sup>	Open Space	Recreation	Community Housing	Historic Preservation
	<p><i>Land to protect:</i></p> <ul style="list-style-type: none"> <li>existing and future well fields</li> <li>aquifers and recharge areas</li> <li>watershed land</li> <li>agricultural land</li> <li>grasslands</li> <li>fields</li> <li>forest land</li> <li>marshes and other wetlands</li> <li>river, stream, lake and pond frontage</li> <li>lands to protect scenic vistas</li> <li>land for wildlife or nature preserve</li> <li>land for recreational use</li> </ul>	<p><i>Land for active or passive recreational use including but not limited to:</i></p> <ul style="list-style-type: none"> <li>community gardens</li> <li>trails</li> <li>noncommercial youth and adult sports</li> <li>use as a park, play-ground, or athletic field.</li> </ul> <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"> <li>Moderate Income is less than 100% of US HUD Area Wide Median (AMI).</li> <li>Low Income is less than 80% of AMI.</li> </ul>	<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><b>ACQUIRE</b> <i>Obtain by gift, purchase, devise, grant, rental, purchase, lease or otherwise.<sup>2</sup></i></p>	YES	YES	YES	YES
<p><b>CREATE</b> <i>To bring into being or cause to exist.<sup>3</sup></i></p>	YES	YES	YES	NO
<p><b>PRESERVE</b> <i>Protection of personal or real property from injury, harm, or destruction.</i></p>	YES	YES	YES	YES
<p><b>REHABILITATE/ RESTORE</b> <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, MAAB<sup>4</sup>, 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><b>SUPPORT</b> <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

<sup>1</sup> This chart is adapted from versions created by the Department of Revenue and the Community Preservation Coalition: [community.preservation.org/allowable-uses](http://community.preservation.org/allowable-uses)

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

<sup>3</sup> Seideman vs. City of Newton, 452 Mass. 472 (2008)

<sup>4</sup> 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](http://www.communitypreservation.org)).

## **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.

### **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.
- Projects that use existing infrastructure for new housing and, when possible, fit into existing neighborhoods.
- Projects that promote use of existing buildings or construction on previously developed or Town owned sites.
- Projects that intermingle affordable and market rate housing.
- Projects that contribute to the Town's 10% affordability.

### **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**

Lakeville's CPC accepts applications for 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 lets the CPC know how many potential projects to plan for, and it gives the applicant a chance for feedback before completing a more detailed Step Two application. If the CPC determines the project is eligible, applicants are then asked to submit a Step Two showing the project meets both statutory local eligibility requirements. The application can be found on the town website at lakevillema.org on the Community Preservation Committee tab.

In open public meetings, the CPC considers each funding application based on the project's merits and available funding. The CPC may request changes to the application or funding request.

After reviewing applications, the CPC decides by majority vote which projects and how much funding to approve. 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.

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.

The CPC gives strong preference to projects that can provide a meaningful match of the total budget through other sources, such as state and private grants, other Town Budgets, private donations, fundraising, and volunteer or in-kind contributions of materials and labor.

## **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).

## **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.

## **PROJECT SUBMISSION GUIDELINES**

The CPC strongly encourages applicants to review the Community Preservation Evaluation Criteria and the Department of Revenue's Allowable Uses chart before beginning the application process.

### **Submission Requirements**

- Application forms will be available at the town hall, library, and online at the CPC website.
- Step 1 - Eligibility Determination Form must be received by October 15<sup>th</sup>. Please note, the CPC requires that historic preservation projects receive a Determination of Historical Significance from the Historic Commission once your project has been approved to go forward with the CPA Funding Application. This pre-application will introduce your proposal to the CPC so that it can determine the project's eligibility for funding and offer further guidance.
- If Step 1 application is approved, applicants then complete an Application for Community Preservation Funding Form by November 15<sup>th</sup> which includes a cover sheet and an attached

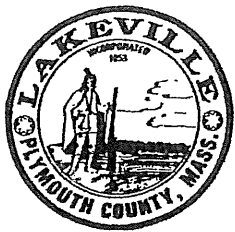
detailed narrative that addresses the general guidelines and applicable project specific guidelines outlined below.

### **General Guidelines**

- Each project must be submitted to the Community Preservation Committee using the Eligibility Determination Form.
- If the Eligibility Determination Form is approved, an Application for Community Preservation Funding Form, along with a cover sheet and detailed narrative must be included.
- Applicants are encouraged to include any maps, diagrams, and/or photographs pertaining to the project.
- Letters of support for the project from community organizations or other sources may also be submitted along with details as to how to above stated goas are achieved.
- Ten (10) hard copies should be submitted to the CPC along with an electronic copy.
- The Community Preservation Committee may require additional (or more detailed) information to clarify a submitted application.
- Applicants will be expected to attend a CPC meeting to answer questions regarding the proposed project.
- Applicants should obtain quotes for project costs whenever possible. If not available, estimates may be used, provided the basis of the estimate is fully explained.
- If the request is part of a multi-year project the total project costs and allocations should be included.
- Applicants that have multiple project requests should prioritize projects.
- Applicants should pursue matching or supplemental funds from state, federal and/or private sources when appropriate and available.
- Applicants should detail who will be responsible for project implementation and management. Their relevant experience should be included in the narrative. Please be sure that project management costs have been included in the overall project budget.

# APPENDIX

DRAFT



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

Draft

## Application for Community Preservation Funding

### APPLICANT INFORMATION

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

Name of Entity, Group, or Committee: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone \_\_\_\_\_ Email: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone \_\_\_\_\_ Email: \_\_\_\_\_

Purpose: Check all that apply  Open Space  Historic  
 Recreation  Housing

### PROJECT INFORMATION:

Project Address: \_\_\_\_\_

Map/Parcel \_\_\_\_\_ Deed Book/Page: \_\_\_\_\_

Current Owner: \_\_\_\_\_ Owners Phone: \_\_\_\_\_

Owners Address: \_\_\_\_\_ Owners Email: \_\_\_\_\_

Project Description: \_\_\_\_\_

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

Total Funding Requested: \_\_\_\_\_

Additional project Funding: 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
- Budget for Acquisition or Construction
- Letters of Commitment by Additional Funding Sources
- Letters of Support from Individuals or Organizations

**ADDITIONAL QUESTIONS AS APPLICABLE:**

Does this project require urgent attention? \_\_\_\_\_

\_\_\_\_\_

Does this project require any permits or licenses from any local board or state office? \_\_\_\_\_

\_\_\_\_\_

Does this project require any long-term maintenance and how will this be provided? \_\_\_\_\_

\_\_\_\_\_

Does this project require any professional design or legal assistance? \_\_\_\_\_

\_\_\_\_\_

Signature of Applicant: \_\_\_\_\_ Date: \_\_\_\_\_



**TOWN OF LAKEVILLE**  
**Community Preservation Committee**  
**Meeting Minutes**  
**December 6, 2022 – 6:30 PM**

On December 6, 2022, the Community Preservation Committee held a meeting at 6:30 PM at the Lakeville Council on Aging, One Deer Crossing. The meeting was called to order at 6:31 PM by Chairman Nancy Yeatts. Community Preservation Committee Members present were: Nancy Yeatts, Barbara Standish, Nancy LaFave, Amy Knox, Susan Spieler and Kathleen Barrack. Also present was Christina Cotsoridis, Assistant to the Town Administrator and Mark Resnick, Town Planner. Absent were Michael Smith and Michele MacEachern. LakeCAM was recording the meeting for broadcast.

**REVIEW WARRANT ARTICLES FROM TOWN MEETING/DISCUSSION**

Chairman N. Yeatts noted that first article that was passed from the Town Meeting for the CPA was the budget. The second article that was passed was a bylaw change that reduced the scope of the requirement for the Housing Member to the Community Preservation Committee. There was discussion on how that position will be appointed through the Select Board.

**UPDATE ON CPC EMAIL**

Chair N. Yeatts reported that the Community Preservation Committee now has an email address. It is [cpc@lakevillema.org](mailto:cpc@lakevillema.org) and will be utilized to submit an application or ask questions.

**CPA SURVEY/SURVEY MONKEY/DISCUSSION/POSSIBLE VOTE**

M. Resnick spoke about putting up the survey on Survey Monkey. C. Cotsoridis updated the Committee and explained that the Town does not have a Survey Monkey account. It was noted that a paid version has been purchased by other Committees and it is possible to purchase their own account. Chair Yeatts noted that she passed out at least 400 copies and to date, only fifteen have been returned. A fillable pdf option was discussed and then that would require manually tally the results.

Upon motion made by Member A. Knox and seconded by Member S. Spieler, the Community Preservation Committee voted unanimously to ask Christina Cotsoridis to take the survey and put it into a fillable pdf and put the survey up on the Community Preservation Committee Town website.

**WORK ON COMMUNITY PRESERVATION PLAN**

Beginning Section/Sue's Draft/Discussion/Possible Vote

The Committee reviewed the Overview Section. There is a review of the charts. There are edits made to the chart that was chosen for the plan.

General Criteria and Specific Criteria Sections/Discussion/Possible Vote

M. Resnick provided an organized overview that lists out the items that must be included in every application. There was discussion on a ranking system. The Committee discusses applicant's having to have matching funds or funding from other sources for their project. There

is a review and discussion on the other requirements to be consider. There was discussion to add all permits and board reviews must be completed prior to filing and application. There are other criteria edits made.

Updated Goals/Discussion

The Committee members agree to move this item to the next agenda.

**APPROVE MINUTES/AUGUST 30, 2022**

Chair N. Yeatts asked the members to review the 8/30/22 minutes. There is one edit.

Upon motion made and seconded the Community Preservation Committee voted unanimously to approve the August 30, 2022 minutes as amended.

**DISCUSS POSSIBLE DATES AND LOCATION FOR PUBLIC HEARING/POSSIBLE VOTE**

The Committee Members discussed possible dates for the planned public hearing as well as the next several meeting dates for the Committee. The dates of Wednesday, January 4<sup>th</sup> and Wednesday January 18<sup>th</sup> and Monday January 30<sup>th</sup> are set. It was noted that the Committee hopes to hold a public hearing in early February.

**ADJOURNMENT**

Upon motion made by Member N. LaFave and seconded by Member B. Standish, the Community Preservation Committee voted unanimously to adjourn at 8:10 PM.

**TOWN OF LAKEVILLE**  
**Community Preservation Committee**  
**Meeting Minutes**  
**January 4, 2023**

On January 4, 2023 the Community Preservation Committee held a meeting at 6:30 PM at the Lakeville Council on Aging, One Deer Crossing. Community Preservation Committee Members present were: Nancy Yeatts, Amy Knox, Susan Spieler and Kathleen Barrack. Also present was Marc Resnic. Absent were Michael Smith, Nancy LaFave and Michele MacEachern.

**Because there was not a quorum present, the members present reviewed the Community Preservation Plan and made suggestions as to revisions to be presented at the next regular meeting. No votes were taken.**

**The meeting ended at 7:55 pm.**

**TOWN OF LAKEVILLE**  
**Community Preservation Committee**  
**Meeting Minutes**  
**January 30, 2023 – 7:00 PM**

On January 30, 2023, the Community Preservation Committee held a meeting at 7:00 PM at the Lakeville Police Station, 323 Bedford Street. The meeting was called to order at 7:00 PM by Chairman Nancy Yeatts. Community Preservation Committee Members present were: Nancy Yeatts, Barbara Standish, Nancy LaFave, Michele MacEachern, Amy Knox, Susan Spieler and Kathleen Barrack. Also present was Christina Cotsoridis, Assistant to the Town Administrator and Mark Resnick, Town Planner. LakeCAM was recording the meeting for broadcast.

**PUBLIC INFORMATIONAL HEARING ON DRAFT COMMUNITY PRESERVATION PLAN**

Chairman N. Yeatts read into the record the public notice and declared the hearing on the draft Community Preservation Plan open. She explained that the Community Preservation Committee voted at their last meeting to present the current draft to the public for comment and that there are copies available for everyone to review. She asked if the Committee has any comments on the draft. The Committee has no comment. She asked if the audience had any comments on the draft.

A resident from Staple Shores Road spoke about the Town of Middleborough and their recent acquisition of, Picone Farm, with a large amount of waterfront on the Nemasket River using Community Preservation Funds. They would like to see more attention paid to the Nemasket River and the watershed. The resident discussed with the Committee the canoe launch area and how the parking lot has no catch basins and there is erosion running into the river. There was also discussion on the slow progress toward getting the river dredged. The Committee discussed Water Recreation in the plan.

Chairman N. Yeatts encouraged the attendees to email with any comments on the draft. She asked if there were any further comments. There is no further public comment.

Mark Resnick reported that both the Town Accountant and the Town Administrator have read the draft. M. Resnick reviewed with the Committee the change that the Town Administrator suggested on page two on the percentage for the State match.

Chairman N. Yeatts asked if there are any other questions or comments. There was a brief discussion on trails, the Betty's Neck location and creating maps for the areas. M. Resnick spoke about working with SRPEDD to see about creating some trail maps.

Chairman N. Yeatts apologized to the group for not doing introductions at the beginning of the hearing. She asked the members to introduce themselves and introduced the Town Planner and the Assistant to the Town Administrator. She also noted that one of the CPC members resigned

and that with the passing of the article at Town Meeting, a Housing Member will also be added, so there are two opening currently on the Community Preservation Committee.

There is no further comment.

Upon motion made by Member N. LaFave and seconded by Member A. Knox, the Community Preservation Committee voted unanimously to close the hearing.

#### **DRAFT PLAN/REVISIONS OR ADDITIONS/DISCUSSION/POSSIBLE VOTE**

The Committee discussed the revision for the Recreational Goals and Criteria on page 14. The wording for the state match is corrected as suggested. It was noted that the survey is still online and the Committee hopes to have the results to review at the next meeting.

#### **MINUTES**

##### **Approve Minutes of 10/18/22**

Upon motion made by Member B. Standish and seconded by Member S. Spieler, the Community Preservation Committee voted to approve the 10/18/22 minutes as presented.

##### **Approve Minutes of 11/1/22**

Upon motion made by Member K. Barrack and seconded by Member A. Knox, the Community Preservation Committee voted to approve the 11/1/22 minutes as presented.

#### **SET NEXT REGULAR MEETING DATE(S)/AGENDA**

The Committee agrees that the next meeting dates will be on February 21, 2023 at 6:30 PM and March 20, 2023 at 6:30 PM. The location will be either at the COA or the Police Station depending on availability.

#### **ADJOURNMENT**

Upon motion made by Member B. Standish and seconded by Member S. Spieler, the Community Preservation Committee voted unanimously to adjourn at 8:02 PM.