



TOWN OF LAKEVILLE MEETING POSTING & AGENDA

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.

Name of Board or Committee:	<u>Community Preservation Committee</u>
Date & Time of Meeting:	<u>January 18, 2023 @ 6:30pm</u>
Location of Meeting:	<u>Lakeville COA 1 Dear Crossing 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

R e v i s e d

1. CPA Budget report from Todd Hassett, Town Accountant/ discussion
2. Review revised & new sections of the CPP / discussion/possible vote
3. Historic and Recreational Goals/ discussion/ possible vote
4. Review applications for CPA funding, short & long form / discussion/ possible vote
5. Community Preservation Plan Public Informational Hearing, January 30, 2023, at 7pm/ notification in the Nemasket Week/ publicity/ discussion
6. Approve minutes of 9/13/22, 9/21/22, & 9/29/22

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



Nancy Yeatts <eaglelady27@gmail.com>

CPC thru December 2022

1 message

Todd Hassett, Lakeville Town Accountant <thassett@lakevillema.org>
To: "eaglelady27@gmail.com" <eaglelady27@gmail.com>
Cc: Marc Resnick <mresnick@lakevillema.org>

Thu, Jan 5, 2023 at 11:47 AM


Hi Nancy,

Attached please find a summary report, for CPC Revenues (\$104,249 collected to-date) and Admin Expenses (budget=\$8,750, expended=\$0) thru 12/31/2022. I plan to send this report to you monthly.

Let me know if I can assist further.

Regards,

Todd

 **CPC REV-EXP 12-31-2022 SUMM.pdf**
52K

01/05/2023 11:26
1344thassett

Town of Lakeville
YEAR-TO-DATE BUDGET REPORT
AS OF DECEMBER 31, 2022

1
g1ytdbud



FOR 2023 06
ACCOUNTS FOR: COMMUNITY PRESERVATION
2800

	ORIGINAL APPROP	TRANSRS/ADJUSTMS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
170 COMMUNITY PRESERVATION COMM							
28017000 REV - COMMUNITY PRESERVATION	-175,000	0	-175,000	-104,140.41	.00	-70,859.59	59.5%*
28017000 412523 2023 CPA SURCHA	0	0	0	-108.63	.00	108.63	100.0%
28017000 417100 PENALTIES & INT	0	0	0		.00		
TOTAL REV - COMMUNITY PRESERVATION	-175,000	0	-175,000	-104,249.04	.00	-70,750.96	59.6%
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	-104,249.04	.00	-62,000.96	62.7%
TOTAL COMMUNITY PRESERVATION	-175,000	8,750	-166,250	-104,249.04	.00	-62,000.96	62.7%

01/05/2023 11:26
1344thassett

Town of Lakeville
YEAR-TO-DATE BUDGET REPORT
AS OF DECEMBER 31, 2022

2
g1ytdbud

FOR 2023 06
GRAND TOTAL

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

ORIGINAL APPROP	TRANSRS/ADJUSTMS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
-175,000	8,750	-166,250	-104,249.04	.00	-62,000.96	62.7%

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 an 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.

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

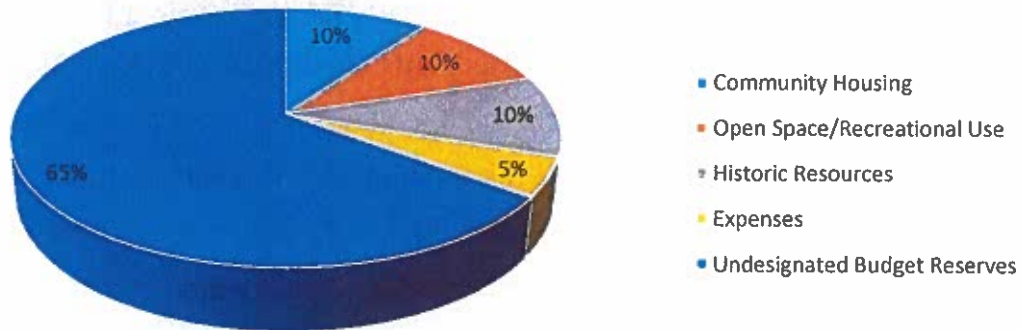
For additional information on the Community Preservation Act and how it is being applied in municipalities across the Commonwealth, please visit the Community Preservation Coalition website at www.communitypreservation.org

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 be anywhere from 23-53%. 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.

Community Preservation Funds



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 selected 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>Land for active or passive recreational use including but not limited to-</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>Shall not include horse or dog racing, artificial turf, or the use of land for a stadium, gymnasium, or similar structure.</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 Lakeville.</p>
<p>ACQUIRE Obtain by gift, purchase, devise, grant, rental, purchase, lease or otherwise.²</p>	YES	YES	YES	YES
<p>CREATE To bring into being or cause to exist.³</p>	YES	YES	YES	NO
<p>PRESERVE Protection of personal or real property from injury, harm, or destruction.</p>	YES	YES	YES	YES
<p>REHABILITATE/ RESTORE 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.</p>	YES If acquired or created using CPA funds	YES	YES If acquired or created using CPA funds	YES
<p>SUPPORT 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.</p>	NO	NO	YES	NO

This chart is adapted from versions created by the Department of Revenue and the Community Preservation

Coalition: communitypreservation.org/ Coalition: communitonpreservation.org/allowable-uses

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

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

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).

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 4534 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.

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

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 was first settled in 1717 as part of the Town of Middleborough, but later split from Middleborough and was incorporated as a separate town in 1853. Lakeville has a rich history as home to many Wampanoag Indians dating back to the 1600's. The deadliest of all American wars, per capita, King Phillip's War, has ties to Lakeville and the "Praying Indian" John Sassamon whose body was found under the frozen ice of Assawompsett Pond in 1675.

Lakeville has both a Historical Commission, which is a branch of Town Government, and also a Historic Society which is a private, non-profit organization overseeing the Lakeville Historical Museum.

The Historical Museum is home to rare artifacts such as clothing pieces from the local Native American woman and World War I uniform among many other rare finds.

At present, only two sites in Lakeville are listed on the National Register of Historic Places: the Historic Town Hall and the Royal Wampanoag Cemetery located on Route 105. Listing on the National Register, State Register of Historic Places or Lakeville's Inventory of Historic Assets provides some protection for historic resources. Projects that affect listed historic resources may be required to undergo review by Massachusetts Historical Commission and/or the Massachusetts Environmental Policy Act (MEPA).

The State Register of Historic Places lists buildings, structures, objects, and sites within Lakeville that have received local, state or national designations based on their historical or archaeological significance. The State Register of Historic Place is published once a year by the Massachusetts Historical Commission (MHC). A Massachusetts document repository is available online at MassGIS Data: MHC Historic Inventory, as well as vial the MHC's Massachusetts Cultural Resource Information System (MACRIS) web-portal.

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 Resources and Needs

The rural, agricultural, and historic character of Lakeville is currently threatened by the rapid rise of local land values. It is often more feasible to remove older structures and replace them with new, much larger structures that are frequently out of scale with their neighborhood and setting, a development trend which damages the historic integrity of the Town. The lost structures which gave a sense of history and cultural character to the neighborhood are gone forever. Similarly, the Town is frequently placed in a position of defending itself from large developments and subdivisions that diminish its rural and historic character.

HISTORIC PRESERVATION GOALS

- Protect, preserve & restore threatened properties of particular historical, architectural, archaeological or cultural significance.

- Optimize the use and enjoyment of the Town's historic resources by residents and visitors, and the contribution such resources make to the Town's fiscal stability.
- Preserve rural/historic character of Lakeville, including buildings, barns, outbuildings, burial grounds, markers, monuments, stone walls, fields, historic landscapes, scenic vistas.
- Restore those natural and man-made features that have been degraded or impaired.

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 (see Appendix)

OPEN SPACE

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 OS updated 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.
- 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).

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

Version 1 of Application, Funding etc.

THE CPA FUNDING APPLICATION PROCESS

The Lakeville Community Preservation Committee (CPC) is responsible for reviewing projects proposed for Community Preservation funding. The CPC shall sponsor all CPA related warrant articles and make formal recommendations at Town Meeting. In order to be considered eligible for review by the CPC, a project must at a minimum, meet the statutory requirements of the CPA.

If the submitted project is deemed to be eligible for consideration by the CPC, it will be evaluated in relations to the CPA Selection Criteria and Consideration Guidelines of the Community Preservation Plan.

Recommendation for funding will be based on how well the project meets criteria, based on need and overall budget.

The CPC may also give consideration to the urgency of a project, especially to those projects whose successful implementation is constrained by scheduling factors not in the control of the applicant. In special situations, such as the imminent placing of land on the market or an indication of an intention to do so, the CPC may consider an application outside of the normal schedule of project solicitations. The CPC may consider late applications only after a 2/3 vote of the Committee to accept the later application.

The application process for requesting Community Preservation funding has two parts; Applicants must first submit a Pre-application to the CPC to determine project eligibility, followed by a Project Application to the CPC for funding requests of eligible projects. The project eligibility process introduces potential projects to the CPC, to determine eligibility and allows the CPC to offer some initial guidance. If the CPC determines a potential project is eligible a Project Funding Application may then be submitted to the Community Preservation Committee.

Each application must be submitted to the Community Preservation Committee using the application(s) as a coversheet. Applicants shall submit ten (10) copies and one (1) electronic file (pdf) of all projects material to the Lakeville Community Preservation Committee, 345 Bedford St., Lakeville, MA 02347 (cpc@lakevillema.org). Please be sure to include any maps, diagrams, and/or photographs that pertain to your project.

All applicants will be expected to present their project at a CPC meeting to review and answer questions about their proposal during the pre-application and application process. The CPC will review all project funding applications and schedule a public meeting to discuss each proposal with the applicant. These discussions may lead to the need for proposal revisions, etc.

APPLICATION REVIEW

The CPC shall review all applications and make all decisions during open public meeting. Applicants will be informed of the meetings and are required to attend. For each application step, applicants should be prepared to clearly state their project goals, timeline, funding request, additional funding resources, and how the project fits with other community goals as may be defined in existing planning document or ongoing local initiatives.

Step 1 – applications will be reviewed for:

- a. Compatibility with CPA legislation & Community Preservation Plan
- b. Completeness of the information presented
- c. Impact of project to local community

Step 2 – applications will be reviewed for:

- a. Whether the CPA funds serve as a catalyst for leveraging other funding sources
- b. Scope of impact on the lives of the residents of Lakeville
- c. Long term benefits to the town
- d. Long term costs to the town, if action is not taken
- e. Urgency of the project
- f. Any other factors that may be relevant to a specific project

Following Step 2 review, the Committee will recommend projects to Town Meeting for funding. The final decision to fund or not fund a project recommended by the CPC shall be decided by the voters of Town Meeting.

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.

Depending on the eligibility and strength of applications, the Committee 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.

Applications should demonstrate the relevant experience of their team. All applicants must demonstrate that they have staff and other resources necessary to see the proposed project successfully through to completion.

APPLICATION REQUIREMENTS

1. CPA Application Cover Page – complete form
2. Brief Project Summary – introduce the project with a brief summary which notes the category, goals, project scope, and budget. The summary should be 1 or 2 paragraphs in length and suitable for distribution to other Boards and Committees as a reasonable depiction of the overall project.
3. Map – indicate the location of the project using a town-based GIS or Assessor Map. Include additional maps as may be helpful including aerial, zoning, vegetation, and abutting buildings.
4. Narrative – expand on the information presented in the project summary and provide a complete description of the project and its proposed use relative to the CPA. Describe what agency or organization will be responsible, what kind of community support has been given to the project, and why Town Meeting should support it. Include an implementation plan describing the steps or phases for completion and the process needed for approval. Summarize the goals of the project and how they will be measured.
5. General Evaluation Criteria & Consideration Guidelines – please include responses as to how your project (where applicable) addresses the issues raised in the General Evaluation Criteria & Consideration Guidelines for your project category.
6. Budget – outline the total budget for the project and how CPA funds will be spent. Break the project down by year expenditure. Describe all funding sources. Where applicable, describe how much of the proposed CPA funding should be ascribed to each of the four CPA purposes. Make sure to consider any administrative expenses required to complete the project (appraisals, environmental assessments, bidding requirements, copying, legal notices, etc.) and explain how they have been accounted for in the budget. (This is particularly necessary for construction and land acquisition projects and can include up to 10% of the budget). Please note. Non-Profit Organizations should also include a current financial statement.
7. Feasibility – summarize and attach any feasibility reports that may have been prepared. Explain all further actions that will be required for completion of the project such as zoning, environmental assessment, permits, restrictions, agreements or other potential impediments to implementation.
8. Timeline – describe the major milestones and when the anticipated completion date is. Include an estimate of when CPA funds requested will be needed.
9. Architectural Plans, Drawings, Site Plans, Photographs – provide as appropriate.
10. Letters of Support – are welcome from the public or appropriate organization.

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.

For Historic Resource Projects only – Applicants 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 a 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.

For Land Acquisition Projects -Applicants for the acquisition of real property or real property interests in any of the four (4) funding categories should be aware that a permanent deed restriction is required if all or a portion of the land is purchased with CPA funds as specified in Section 12(a) of the Community Preservation Act (see Appendix F). 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. While the Committee understands that land acquisition projects can be difficult to coordinate with a review schedule, it is important that the CPC have adequate time to consider application(s). All decisions on the use and ownership of the land should be made before an application is submitted. Informal inquiries are always welcomed and should be directed through the Committee Chair (cpc@lakevillema.org), who will present inquiries to the Committee during a posting public meeting of the CPC.

Version 1 continues after Criteria portions

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, playgrounds, and canoe/kayak access.
- Projects for land acquisition that provide for new or expanded recreational uses.

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.
-

TIMELINE FOR COMMUNITY PRESERVATION PROJECT APPLICATIONS

The Community Preservation Committee invites municipal departments, community organizations and individuals to submit applications for CPA funding on an annual basis. For each fiscal year, the Committee shall solicit calls for pre-application during the months of August and September with Project Applications for CPA funding requests due by October 1; where, warrant articles may be prepared for consideration for the Spring Annual Town Meeting (May). First time applicants are advised to attend a public informational meeting hosted by the Community Preservation Committee. The first of which shall be held on the second Monday of September, in advance of the Committee's official solicitation for CPA projects for the following fiscal year. To be recommended for CPA funding by the CPC, project budgets must be fully vetted, with proof appropriate procurement being satisfied, when applicable. Reference made to Office of Inspector General letter dated July 2018 & Procurement Charts (-see Appendix). Because of the unpredictability of CPA projects involving the purchase of land or historic buildings, the CPC may accept applications on an on-going basis as needed. However, CPC recommendation and Town Meeting vote are still required to allocate CPC funds. Special circumstances may arise that make it infeasible to adhere to the application submission timelines. For example, a priority open space property may unexpectedly come on the market just past the application due date or an historic resource requires immediate attention. In these instances, the Committee may allow for special situations to consider an application outside the normal schedule outlined in this Plan. See Appendix for Special Application Process.

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 of 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. See Appendix M -Request for Funds form.

Version 2

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 in September 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 in November, showing the project meets both statutory and local eligibility requirements (see Appendices). The application can be found at lakevillema.org/communitypreservationcommittee.

In open public meetings between September and February, 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 annual Town Meeting, which can affirm, reject, or amend them. The Select Board may not increase funding nor consider requests that do not come with CPC recommendation. Funds approved at the annual Town Meeting in April will be available for projects to begin work at the beginning of the fiscal year on July 1.

Under special circumstances, Lakeville's CPC may consider an application submitted after the deadlines (September 1 for Step One application, November 1 for Step Two). 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 monthly meetings for hearings before the next annual or special Town Meeting. The CPC gives strong preference to projects that can fund at least two-thirds 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.

Insert Evaluation Criteria Here.....

AFTER FUNDING HAS BEEN APPROVED

Managers of Town-owned projects may submit invoices directly to the Town for payment. The Town requires that private projects (local organizations and individuals) pay invoices upfront and submit them to the CPC with proof of payment for reimbursement. In accordance with stipulations of the Town's Purchasing and Procurement Policy, and individual grant agreements or award letters, project managers should submit invoices at least one week prior to the next CPC meeting, for approval by the Committee. Applications and warrant articles must specify the scope of work for a project. If a project has a balance after the work has been completed, those funds will be returned to CPA fund accounts. Additional projects for the same property, building, facility, organization, etc., must submit a separate application. If a project has already submitted an engineering, architectural, historic inventory, or similar plan describing multiple phases of work with its original application, the CPC will consider an amendment to apply an unexpended balance to the next phase of a plan it has already reviewed.

ADMINISTRATIVE AND TECHNICAL ASSISTANCE

Lakeville's CPC is a dues-paying member of the statewide Community Preservation Coalition, which provides technical assistance and lobbies for state policy and funding. Coalition staff have provided workshops to the Lakeville CPC and reviewed CPC Town Meeting warrant articles. The Coalition and state Department of Revenue have both answered questions about the use of CPA funds.



COMMUNITY PRESERVATION ELIGIBILITY DETERMINATION FORM

The purpose of this form is to make sure that all project applications applying for Community Preservation Act funding are eligible for funding. Please refer to Appendix-B in the Community Preservation Plan when filling out this form. This form must be approved in order for an application to be accepted.

Project Title:	
Project Sponsor/Organization:	
Contact Name:	
Mailing Address:	
Daytime phone #:	Fax #:
E-mail address:	
CPA Program Area (check those that apply): <input type="checkbox"/> Open Space <input type="checkbox"/> Historic Preservation <input type="checkbox"/> Community Housing <input type="checkbox"/> Recreation	
Project Purpose (check those that apply): <input type="checkbox"/> Acquisition <input type="checkbox"/> Creation <input type="checkbox"/> Preservation <input type="checkbox"/> Support <input type="checkbox"/> Rehabilitation/Restoration	
Project Summary: Please provide a brief description of the project.	
For CPC Use Eligible: _____ Not Eligible: _____ Date: _____ Reviewer: _____	



**COMPLETE AND SUBMIT THE PROJECT ELIBILITY FORM!
DO NOT PROCEED UNTIL ELIGIBLTY HAS BEEN DETERMINED!**



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

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
September 13, 2022 – 5:00 PM

On September 13, 2022, the Community Preservation Committee held a meeting at 5:00 PM at the Lakeville Police Station, 323 Bedford Street. The meeting was called to order at 5:01 PM by Chairman Nancy Yeatts. Community Preservation Committee Members present were: Nancy Yeatts, Amy Knox, Barbara Standish, Kathleen Barrack, Nancy LaFave, Michele MacEachern, Michael Smith and Susan Spieler. Also present were Marc Resnick, Town Planner and Christina Cotsoridis, Assistant to the Town Administrator. LakeCAM was recording the meeting for broadcast and noted that there were technical difficulties at the start of the meeting.

TRAINING/COMMUNITY PRESERVATION COALITION

Stuart Saginor, Executive Director of the Community Preservation Coalition, was present for the discussion. Chairman Yeatts introduced the Committee to Mr. Saginor. He began by explaining the organization and the services they offer. They are a non-profit organization that assist communities with resources, provide trainings and work with State legislators on the Act. He provided an overview of the website and how to find key information.

He spoke about items that the group needs to get working on. He spoke about the goals and getting public input. He provided an overview of putting together a Community Preservation Act Plan. This plan requires a public hearing to be held to take input on any changes to be made to the plan, this is done yearly. He spoke about the CPA budget and the work that goes into putting that together. He discussed the FY '23 budget and proposed presenting a budget at the Fall Town Meeting for the Town's approval. This can set up an administrative budget for the Committee to utilize as well as get the correct percentages put into accounts as requested. There was a review of the example budget.

S. Saginor recommended to the Committee that they move forward with the draft article for the Community Preservation Committee budget and get it on the upcoming warrant. Chairman Nancy Yeatts spoke about the Select Board's agreement to provide Administrative Funding to the Committee so they do not have to quickly do a budget. S. Saginor spoke about the importance of getting the budget approved so that the funding can be utilized.

Member N. Lafave and Marc Resnick, Town Planner, left the meeting.

Member M. MacEachern spoke about the Community Preservation Committee taking a vote at this meeting to request a spot on the warrant before it closed. Chairman Yeatts explained that the CPC will be meeting on September 29th and can take the vote on a correctly posted agenda. She explained that this meeting was not for taking any votes.

Upon motion made by Member M. MacEachern and seconded by Member S. Spieler, the Community Preservation Committee voted to request a placeholder, from the Select Board, on the Fall Town Meeting Warrant for a CPC budget. Motion Carries. 4-3-0

S. Sagino continued with the presentation. There was a review of the 5% for the Administrative budget. There is a review of the breakdown of each of the funds and what they can be used for. It was noted that a copy of the presentation will be provided to the Committee.

Chairman Yeatts called a recess of the Community Preservation Committee Meeting at 6:50 PM.

Note: I checked the 9/13/2022 ConCom recording and found that “due to technical difficulties” the first part of the Conservation Commission hearing was not recorded, so I am not able to record that part of the meeting.

TOWN OF LAKEVILLE
Community Preservation Committee
Meeting Minutes
September 21, 2022 – 7:00 PM

On September 21, 2022, the Community Preservation Committee held a meeting at 7:00 PM at the Lakeville Council on Aging, One Dear Crossing. The meeting was called to order at 7:01 PM by Chairman Nancy Yeatts. Community Preservation Committee Members present were: Nancy Yeatts, Barbara Standish, Nancy LaFave, Michele MacEachern and Susan Spieler. Also present were Ari Sky, Town Administrator, Marc Resnick, Town Planner and Christina Cotsoridis, Assistant to the Town Administrator. Absent were Michael Smith, Kathleen Barrack and Amy Knox. LakeCAM was recording the meeting for broadcast and noted that there were technical difficulties at the start of the meeting.

COMMUNICATIONS/OPEN MEETING LAW/REVIEW PROTOCOLS

Chairman Yeatts referenced the memo from the Community Preservation Coalition, which has now been provided to all the Committee Members and opens it up for discussion. There was no comment.

Chairman Yeatts referenced the memo from the Town Administrator. A. Sky spoke to the Committee about his memo, the role of the staff and their ability to assist in the implementation of the Community Preservation budget and process for Town Meeting.

Chairman Yeatts referenced the Community Preservation Committee discussion and vote that took place at the 9/13/2022 meeting and the violation of Open Meeting Law. She took responsibility for the vote and how it was taken and acknowledged that it will not happen again.

Chairman Yeatts spoke to the Committee about the importance of following the protocols for having items on the agenda. She clarified the procedure and committed as Chairman to always put items onto the agenda, provided documentation is provided.

RATIFY VOTE TO SEND CPC BUDGET REQUEST TO SELECT BOARD FOR FALL TOWN MEETING

The Committee discussed the proposed budget of \$200,000. There was discussion on the Administrative budget in the amount of \$10,000. It was noted that this is a one year budget and will require a re-appropriation every year. Member B. Standish asked about lowering the proposed budget to \$175,000. Member M. MacEachern provided a revised budget based on that total with the following: Administration - \$8750, Historic Reserve - \$17,500, Open Space - \$17,500, Recreation \$17,500 and Housing \$17,500, Budget Reserve \$113,750.

Upon motion made by Member M. MacEachern and seconded by Member B. Standish the Community Preservation Committee voted to ratify the 9/13/2022 vote and send the following budget request to the Select Board for placement on the Town Meeting Warrant. Administration - \$8750, Historic Reserve - \$17,500, Open Space - \$17,500, Recreation \$17,500 and Housing \$17,500, Budget Reserve \$113,750.

Upon motion made by Member M. MacEachern and seconded by Member B. Standish the Community Preservation Committee vote unanimously to rescind the previous motion.

Upon motion made by Member M. MacEachern and seconded by Member B. Standish the Community Preservation Committee voted unanimously to send the following budget request to the Select Board for placement on the Town Meeting Warrant. Administration - \$8750, Historic Reserve - \$17,500, Open Space - \$17,500, Recreation \$17,500 and Housing \$17,500, Budget Reserve \$113,750.

Ari Sky invited the Community Preservation Committee members attend the September 29, 2022 Select Board's meeting where they will be reviewing the Special Town Meeting Articles.

WITHDRAW REQUEST FOR \$5,000 ADMINISTRATIVE FUNDING FROM THE GENERAL FUND

Chairman Yeatts discussed the withdrawal of the \$5,000 in administration funding request with the Committee.

Upon motion made by Member M. MacEachern and seconded by Member B. Standish, the Community Preservation Committee voted unanimously to withdraw the request of \$5,000 in administrative funding.

DRAFT CPA REVISED SURVEY/DISCUSSION/POSSIBLE VOTE

Chairman Yeatts noted that the Park Department goals still need to be worked on. Member M. MacEachern noted that she will be meeting with the Park Department next week. M. Resnick will coordinate with the Chair of the Park Commission and provide some sample questions for him to look at. There was discussion on general questions for Park. Chairman Yeatts reviewed the survey questions with the Board. There are edits made to the survey.

Upon motion made by Member M. MacEachern and seconded by Member S. Spieler, the Community Preservation Committee voted unanimously to accept the Lakeville CPA Resident Survey with the addition of the Recreation Questions to be supplied by the Park Commission.

LAKEVILLE ARTS FESTIVLE/AVAILABLE MATERIALS/SIGN UP BOOTH/DISCUSSION/POSSIBLE VOTE

The Committee discusses coordinating getting the survey printed to be available. There was coordination discussed on completed surveys or how to get completed survey's back to us. M. Resnick offers the Planning Department for drop off of the completed surveys. It is suggested that copies of the CPA Bylaw be available for review if there is interest. A sign-up sheet is sent around to coordinate keeping the booth manned. The Chair will also email those members that aren't in attendance. There was a review and edit of a flyer for the CPA that can be reused.

TOWN OF LAKEVILLE
Community Preservation Committee
Meeting Minutes
September 29, 2022 – 6:00 PM

On September 29, 2022, the Community Preservation Committee held a meeting at 6:00 PM at the Lakeville Police Station, 323 Bedford Street. The meeting was called to order at 6:01 PM by Chairman Nancy Yeatts. Community Preservation Committee Members present were: Nancy Yeatts, Amy Knox, Barbara Standish, Nancy LaFave, Michele MacEachern and Susan Spieler. Absent were Michael Smith and Kathleen Barrack. LakeCAM was recording the meeting for broadcast and noted that there were technical difficulties at the start of the meeting.

JOINT MEETING WITH SELECT BOARD TO DISCUSS IMPLEMENTATION OF THE COMMUNITY PRESERVATION ACT

Select Board Chairman LaCamera, L. Fabian and L. Carboni were present for the discussion. Chairman LaCamera noted that the Select Board and the CPC are not on the same page. He referenced the September 13, 2022 meeting and noted that it was supposed to be a training only but instead there was a violation of the Open Meeting Law. The Attorney General's Office are watching and members can be removed or fined. It was stated that the Town Clerk has given out information on the Open Meeting law and. He stated that they cannot tolerate this happening and that they should have had a full committee when taking a vote like that.

Chairman LaCamera referenced the Town Officers that have experience with the Community Preservation Act. He explained that they are trying to help the Community Preservation Committee but they are not being well received. There is no debate about the figures. The figures come from the Board of Assessors, Town Accountant and Treasurer and are certified. He spoke about the Community Preservation Coalition and how they are not a state agency and that they are lobbyist. They are not supposed to be giving advice to the Committee or legal options.

Chairman LaCamera stated that they would have rather of seen the numbers certified by the Assessors and those numbers would have automatically gone into the reserve accounts. He referenced the Administrative Expenses and noted that any employee hired has to be approved by the Wage & Personnel Board and go through Human Resources. He stated that the Town is providing secretarial services and legal services that they are not charging for.

He referenced the draft Community Preservation plan. He noted that according to the bylaw it is supposed to be studied over a period of time not over three meetings and they have a draft plan. He stated that there are a lot of mistakes to be corrected and the Select Board has not officially reviewed it either. There is discussion on the two trainings that were setup, one for the staff and one for the Community Preservation Committee. Chair N. Yeatts spoke about how they are new a committee

Select Board Member Carboni spoke about how sometimes violations of the Open Meeting Law can happen accidentally. They will work together to get this process moving along. CPC Member S. Spieler spoke about how the consultant explained that they should pass the budget now otherwise we will not be able to utilize any funds until FY 2024. It was noted that the instructor from the Community Preservation Coalition was advocating for the group to take action and he was actually interfering with the Town's process. He explained that the difference between Town Meeting in the spring and FY '24 is only six weeks. Select Board Member Fabian spoke about how the group needs to have a level of trust in the Town Staff. It was noted that the funding for this runs on an annual basis and is based on the certified revenues. There are estimates used to project what the budget will be. This can be coordinated with the Assessors.

The members of the Community Preservation Committee spoke on the information that was provided from the Town Clerk regarding the Open Meeting Law and how the events of the September 13, 2022 discussion unfolded. Chair Yeatts spoke about agreeing to put anything on the agenda at the request of the members for the purpose of discussion. They member all agree to work together moving forward. They agree to not have the situation happen again.

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.

ADJOURNMENT

Upon motion made by Member N. LaFave and seconded by Member M. MacEachern, the Community Preservation Committee voted unanimously to adjourn at 9:45 PM.