

# ***Community Preservation Committee Town of Templeton Application Process***

## **Submission**

Proposals for Community Preservation funding must be submitted by using the attached application form. All relevant information requested on the application form must be included with the proposal. Please refer to the Community Preservation Guidelines for Project Eligibility.

Applications must be typewritten or provided as a word processing document using a minimum font size of 11. **Ten copies of the application and all supporting documentation must be submitted to:**

Community Preservation Committee Town Hall, 690 Patriots Road Templeton, MA 01468
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**Applications may be submitted between December 1, 2008 and January 31, 2009 for proposals to be considered at the May 2009 Town Meeting.** Unless an applicant can demonstrate that a significant opportunity would otherwise be lost, applications will not be accepted after this date.

For further information about the application process, visit the CPC Web page at [www.templeton1.org](http://www.templeton1.org) or email us at \_\_\_\_\_.

## **Review by the Community Preservation Committee**

Each application will be acknowledged when it is received. It will be reviewed for completeness and the applicant will be notified if additional information or an interview is required.

The Community Preservation Committee encourages submission of projects under \$5,000.

## **Funding Decisions**

The Community Preservation Committee will submit its recommendations for the use of CPA funds to Town Meeting. In advance of that vote, the CPC will hold a public meeting to discuss their recommendations with the Town.

# APPLICATION FOR COMMUNITY PRESERVATION FUNDING

## Submit to: Community Preservation Committee

Town Hall, 690 Patriots Road  
 Templeton, Massachusetts 01468  
 Email: \_\_\_\_\_

<b>Name of Applicant/Contact Person:</b>	
<b>Sponsoring Organization, if applicable:</b>	
<b>Mailing Address:</b>	
<b>Daytime Phone:</b>	
<b>Evening Phone:</b>	
<b>Email:</b>	
<b>Name of Proposal</b>	
<b>Date</b>	

Total Project Cost	CPA Funds Requested	Cost Share Amount	Cost Share Percent
\$	\$	\$	%

<b>Assessor's Map Number</b>		<b>Assessor's Lot/Parcel Number</b>	
<b>Deed Book Number</b>		<b>Deed Page Number</b>	

Attach separate sheet if more than one lot/parcel/deed book/deed page number.

Attach a copy of the Assessor's Map(s) with the project parcel outlined (if appropriate for your project).

**CPA Category** (YOU MUST CHECK OFF A MINIMUM OF ONE CATEGORY, but may identify more than one category, if applicable to your project)

- **Open Space**
- **Historic Preservation**
- **Recreation**
- **Community Housing**

**PROJECT DESCRIPTION:**

- **All of the following MUST be answered in the space provided.**
- Applications will be returned as incomplete if all relevant requested information is not provided.
- Include supporting materials and exhibits as necessary.
- Please refer to the Templeton Community Preservation Criteria to complete this application.

**1. Describe the project.**

**2. Goals:**

a. What are the goals of the proposed project?

b. Who will benefit and why?

c. How will success be measured?

**3. Community Preservation Committee Criteria:**

How does the project fulfill the General and Specific Criteria of the Community Preservation Committee Guidelines? (Refer to the specifications in the Guidelines for Project Eligibility)

**4. Community Need:**

a. How does the community benefit from this project?

b. If applicable, explain how this project addresses needs identified in existing Town plans? (Such as the Open Space and Recreation Plan, Community Plan, etc.)

**5. Community Support:**

a. What is the nature and level of support? Include letters of support from any Town boards or community groups that have endorsed the project.

**6. Budget:**

**Budget Summary**

Total Project Cost	CPA Funds Requested	Cost Share Amount	Cost Share Percent
\$	\$	\$	%

Equipment is generally defined as an item with a useful life expectancy of more than one year.  
 Supplies are defined as an item with a useful life of less than one year.  
 Construction means all types of work done on a particular property or building including erecting, altering or remodeling.

**Budget Categories** (Leave any category blank if not applicable to your project)

	CPA FUNDS	OTHER FUNDS (cost share)	TOTAL
Personnel			
Equipment			
Supplies			
Contractual			
Construction			
Other			
TOTAL			

Note: CPA FUNDING FOR ANY CATEGORY REQUIRES COMPETITIVE BIDDING unless you can provide a sole source justification for any category not competitively selected

**\*\*Attach a minimum of one recent bid\*\***

**Budget Cost Sharing**

Identify the amount of cost sharing for this project. Sources include private, federal, state or local government, or any other sources.

Organization	Item	Amount	Type (cash, in-kind, etc.)

**7. Funding:**

a. Attach commitment letters from any organization providing a cost share contribution listed in the table above.

b. Describe any other attempts (including unsuccessful) to secure funding for this project.

- c. Are any "Other Funds" in the budget in-kind? If yes, describe how the value of the in-kind contribution was derived. (In-kind contributions can be defined as a contribution of services or property, donated equipment, buildings or land, or donated supplies.)

8. **Timeline:**

Provide a schedule for project implementation, including a timeline for starting and ending major tasks and project completion.

9. **Implementation:**

- a. Project Manager Contact Information

Who will be the Project manager	
Daytime Phone:	
Evening Phone:	
Email:	

10. **Maintenance:** (LEAVE BLANK IF NOT APPLICABLE TO YOUR PROJECT)

- a. If ongoing maintenance is required, who will be responsible for it?

- b. How will it be funded?

**Maintenance Budget**

<i>Year one</i>	<i>Year two</i>	<i>Year three</i>	<i>Year four</i>	<i>Year five</i>
\$	\$	\$	\$	\$

**11. Site Documentation:** (Submit 3 copies only)

Attach documentation that you have control over the site, such as a Purchase and Sale Agreement, option or deed.

**ADDITIONAL INFORMATION:** (NOT REQUIRED BUT RECOMMENDED IF APPLICABLE)

**12. Project Documentation:** (Submit 3 copies only)

Attach any applicable engineering plans, architectural drawings, site plans, any other renderings, relevant studies or material.

**13. Other Information:** Any additional information that might benefit the CPC in consideration of this project.

**TO THE BEST OF MY KNOWLEDGE AND BELIEF, ALL DATA IN THIS APPLICATION ARE TRUE AND CORRECT. THE DOCUMENT HAS BEEN DULY AUTHORIZED BY THE INDIVIDUAL OR GOVERNING BODY OF THE APPLICANT.**

Authorized Representative			
First Name		Last Name	
Title		Telephone Number	
Email:		Fax Number	
Signature of Authorized Representative		Date Signed	

ALTERNATIVE – two dates??

1. **Application for Eligibility.** This initial document will introduce your proposal to the Committee so that it can determine the project's eligibility and offer guidance. The CPC meets regularly on the third Thursday of each month at the Scout Hall. Applications must be submitted by the second Friday of each month for consideration at the regular monthly meeting. The Committee may request that you present your idea at a meeting.

**Deadline:** Submit anytime, but as soon as possible, and by the third Friday in September for consideration at the April Town Meeting.

2. **Application for Funding.** If the Committee agrees that your proposal is eligible, complete the Application for Funding as soon as possible. The Committee will review both the application for eligibility and that for funding.

**Deadline:** Last business day in October for consideration at the April Town Meeting.

3. **Review process.** Projects will be evaluated and prioritized using the criteria attached to the application form. The Committee will review all applications and schedule hearings beginning in November to discuss each proposal publicly with applicants. These discussions may lead to the need for proposal revisions. The CPC must vote to recommend proposals before they can be placed on the warrant. For the April Town Meeting, the CPC anticipates that the vote to recommend will be taken at the Committee's meeting on the fourth Wednesday in January.
4. **Town Meeting approval.** Each project must be approved at a Town Meeting. The Meeting can approve, reduce or reject recommended amounts for a project, by majority vote.
5. **Project Implementation.** Funds for approved projects will be available following Town Meeting, subject to the satisfaction of any conditions or procedures established by the Committee.
- 6.
7. **Requesting Payment.** Invoices for work completed or for funds allocated to grantees on approved projects should be submitted to the CPC together with a Project Status Report prepared according to Request for Funds -- Guidelines.

**Application timeline for applicants seeking recommendation for the April Town Meeting warrant:**

- Third Friday in September: Application for Eligibility deadline
- Last business day in October: Application for Funding deadline
- November through mid-January: CPC review process and hearings; proposals may need revision
- Fourth Wednesday in January: CPC votes on proposals

Other timelines may be created in order to bring proposals to a Special Town Meeting. The Committee encourages the year-round submission of Applications for Eligibility.

FORMS FOR LATER:

## PROJECT STATUS REPORT

### Approved / Denied

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

CPC Project Manager: \_\_\_\_\_ Federal Tax ID #: \_\_\_\_\_

Deed Restriction: On File  Pending  Exempt

Project Representative: \_\_\_\_\_

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

Phone / Fax / E-mail: \_\_\_\_\_

Description of Request / Project Phase:

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

Project Timeline / Schedule:

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

Issues / Comments / Concerns:

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

Total Amount Approved: \$ \_\_\_\_\_ for FY \_\_\_\_\_

Balance Forward: \$ \_\_\_\_\_

Disbursement Amount Requested: \$ \_\_\_\_\_

Balance Due: \$ \_\_\_\_\_

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

CPC Project Liaison Signature: \_\_\_\_\_ Date: \_\_\_\_\_

CPC Chairperson Signature: \_\_\_\_\_ Date: \_\_\_\_\_

# of Attachments: \_\_\_\_\_ Next Contact Date: \_\_\_\_\_

## REQUEST FOR FUNDS—GUIDELINES

### Templeton Community Preservation Committee

1. Each Request for Funds must be accompanied by a **PROJECT STATUS REPORT (PSR)**. The PSR is to be completed by the CPC Project Liaison with the Applicant's assistance and signed by the Applicant's authorized representative and CPC Project Liaison.
2. A Cover Invoice, *from the Applicant to the CPC on the agency's letterhead*, must be attached under the Project Status Report and over the other supporting documents, including invoices, receipts, and cancelled checks. The Cover Invoice should include line by line the annexed invoices (from vendors) and listed in the exact same order as the attached substantiating invoices. Payments will be made directly to the Applicant unless the Applicant is a Town of Templeton department.
3. If an invoice has already been paid by your agency and you are requesting *reimbursement*, please have either a copy of the cancelled check attached to that invoice or a PAID stamp and an authorized signature on that invoice, so that the CPC knows to reimburse your organization.
4. If payments are for contracted services, a copy of the signed contract should accompany the request. Additionally, we require a detailed report of billable hours (if applicable).
5. If charges are for newspaper ads, tear sheets must be provided. If this is not available, a copy of the advertisement showing the date of publication is required.
6. If charges are for travel, receipts are required (tickets, parking vouchers, food) as well as documentation regarding reason for travel (i.e., program, agenda, registration form).
7. State Law prohibits reimbursement for sales tax or for tips and gratuities. Please adjust invoices appropriately to reflect this. Town by-laws provide standardized limits for meals and mileage reimbursements. These limits are strictly adhered to by the CPC. No allowance is permitted for alcoholic beverages.
8. Please do not staple or paperclip anything in the Request for Funds packet. Insert the Request for Funds packet in a flat (9x12 or 10x13) envelope. Whenever possible make sure copies are on 8 ½ x11 paper (i.e., a copy of a cancelled check for a bank statement should be copied onto a standard sheet of paper, not cut out and attached as is).
9. Requests for Funds are voted on by the CPC at a monthly meeting (usually the fourth Wednesday of each month). All Requests for Funds and supporting documentation are to be submitted to your Project Liaison. It is imperative that the Project Liaison and applicant have jointly reviewed the Request for Funds before it is submitted to the Committee by the CPC Project Liaison.
10. Completed requests must be in the CPC Inbox located on the first floor of the Town Hall by no later than one week before the scheduled CPC monthly meeting.