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PLANNING DIVISION
TOWN OF CONCORD MA



TOWN OF CONCORD COMMUNITY PRESERVATION COMMITTEE

141 KEYES ROAD, CONCORD, MA 01742
TEL. (978) 318-3290 FAX (978) 318-3291

Application for CPC Funding

Due no later than 12:00 noon on Friday, September 12, 2024

Applicant*: Town of Concord

Federal Tax Id. No.*: 046-001-121

Co-Applicant (if applicable): _____

Project Name*: CPA Staff and Technical Services (CPA Administration)

Project Location/Address (if applicable): 141 Keyes Road, Concord, MA

Purpose*: (Select all that apply)

- Open Space
- Community Housing
- Historic Preservation
- Recreation

Project Budget*:

Amount of CPC Funds Requested: \$ \$50,000

Amount from Other Funding Sources: \$ _____

Total Project Budget: \$ \$50,000

(If multi-year project, note current phase only)

Please check which of the following is included with this Application:

- | | |
|--|--|
| <input checked="" type="checkbox"/> One Paragraph Project Summary * | <input type="checkbox"/> Architectural plans, site plans, photographs (if appropriate) |
| <input type="checkbox"/> Map (if applicable) | <input type="checkbox"/> Copy of IRS determination letter (Non-profit Organizations only)* |
| <input checked="" type="checkbox"/> Narrative * | <input type="checkbox"/> Copy of Audit or most recent Financial Information (Non-profit Organizations only)* |
| <input type="checkbox"/> Selection Criteria and Needs Assessment | <input type="checkbox"/> Letters of Support (if any) |
| <input checked="" type="checkbox"/> Detailed Project Budget * | |
| <input type="checkbox"/> Feasibility Assessment | |
| <input type="checkbox"/> Statement of Sustainability (if applicable) | |
| <input type="checkbox"/> Timeline * | |

Project Contact Person*: Ann Clifford, Senior Planner

Project Contact Address*: 141 Keyes Road, Concord, MA 01742

Project Contact Phone*: (978) 318-3290 Email*: aclifford@concordma.gov

Authorized Signature of Applicant*: *Kerry J. Spleen* *Ann Clifford*

Authorized Signature of Property Owner* (if different): _____

* Required

For Historic Preservation Projects Only – please check the box below left and acknowledge:

- I/We have read the **U.S. Secretary of the Interior's Standards for the Treatment of Historic Properties** and understand that planning for and execution of this project must meet these standards.

CPC Application. Staff and Technical Services FY26. Cover Sheet

Final Audit Report

2024-09-12

Created:	2024-09-12
By:	Shannon McAndrew (smcandrew@concordma.gov)
Status:	Signed
Transaction ID:	CBJCHBCAABAAC3zbGVyOA-3_07d719N5z3jaQWey7D49

"CPC Application. Staff and Technical Services FY26. Cover Sheet" History

-  Document created by Shannon McAndrew (smcandrew@concordma.gov)
2024-09-12 - 5:14:46 PM GMT
-  Document emailed to Kerry Lafleur (klafleur@concordma.gov) for signature
2024-09-12 - 5:15:50 PM GMT
-  Email viewed by Kerry Lafleur (klafleur@concordma.gov)
2024-09-12 - 8:36:35 PM GMT
-  Document e-signed by Kerry Lafleur (klafleur@concordma.gov)
Signature Date: 2024-09-12 - 8:38:04 PM GMT - Time Source: server
-  Agreement completed.
2024-09-12 - 8:38:04 PM GMT

Brief Project Summary:

The Town of Concord requests funding to support the Community Preservation Act (CPA) in Concord by providing staff support from the Planning Division; legal, technical, and consulting assistance for the CPA and Town CPA-funded projects; annual membership dues for the Community Preservation Coalition; supplies and associated administrative requirements including legal ads, copying, etc.; and funding to purchase CPA signage.

Narrative

In order to fund the work of the local Community Preservation Committee (CPC), the CPA statute allows for 5% of Total Annual Revenue to be used for administrative purposes, such as employee salaries, office expenses and contractual services as described above. In Concord where the budget is nearly \$2 million, nearly \$100,000 may be used for administrative purposes.

In recent years the annual requests to CPC for administrative support have been about \$40,000-\$45,000, with \$30,420 or 12.5 hours per week for staff support. These funds do not reflect the true costs of CPA administration to the Town. In all municipalities with over \$1,500,000 in CPA funding, Concord is the only town with a staff position funded for less than 19 hours per week. However, the frequency of meetings in Concord (17 per year) far exceeds those of most other municipalities surveyed which typically meet 12 times annually.

Staff support includes but is not limited to the following:

1. Provides administrative assistance to the CPC; prepares for meetings, posts agendas for distribution to CPC committee and Town Clerk. Attends CPC meetings, prepares meeting minutes, and provides follow up for meetings. Prepares correspondence and reports; and maintains records for office. Give presentations and input as needed.
2. Drafts and reviews Memoranda of Understanding and Grant Agreements for CPA-funded projects with the CPC, Town Counsel, and relevant Town divisions.
3. Coordinates with Finance Division and Grantees on project reports and financial reports to the CPC.
4. Provides information and assistance to the public; responds to inquiries, requests, and complaints; explains departmental programs and policies; and refers individuals to other resources as deemed appropriate.
5. Processes and assists in evaluation of funding applications as to eligibility, completeness and compliance with CPA provisions, rules and policies.
6. Performs administrative duties of office.

7. Processes all CPA invoices and reimbursement requests (check for accuracy, obtain CPC treasurer’s signature, copy deliver to accounting department, field status calls from vendors).
8. Researches, retrieves and maintains information in CPC project files or other resources to assist board in its deliberations.
9. Maintains and keeps current all information on the CPC home page of the Town website.
10. Prepares and updates education materials.
11. Maintains inventories of project applications and project status reports; along with preparing legally required annual CPA filings to the Commonwealth of Massachusetts.
12. Assists in preparation of CPA annual report and presentations to Town Meeting, Public Hearings, and Informational Sessions.
13. Schedules and arranges hearings and site visits as needed and informs individuals of meeting information.

In addition to routine business described above, FY23 involved the review of sixty-one (61) open projects associated with seventy-nine (79) open accounts, which were updated in FY24 to align with a new municipal accounting system. Seventeen (17) Grant Agreements and Memoranda of Understanding were prepared for projects with complex ownership and leasing issues in FY25. With the closing of completed projects and the opening of new projects, there are currently fifty (50) active projects to track. Updates to the Community Preservation Plan and a new Procedures Manual helped clarify expectations for grant applicants and recipients and streamline procedures. Additional updates regarding procurement, coordination with Town departments, Housing Trust reporting requirements and application procedures are anticipated. In FY23, the cost of CPC consulting services born by the Town (not the CPC) was about \$6500.

FY25 Budget:

1. Staff Salary:	\$34,000
2. Community Preservation Coalition Annual Membership Dues:	\$ 4,500
3. Other legal, technical, consulting services:	\$ 8,500
4. Supplies (CPA Signage)	<u>\$ 3,000</u>
TOTAL	\$50,000