

APPLICATION REVIEW

Step 1: Initial Application Review

Applications will first be evaluated for:

1. **Eligibility:** Alignment with CPA legislation and the Community Preservation Plan.
2. **Completeness:** Inclusion of all required information and documentation.
3. **Impact:** Potential benefits to the local community and alignment with town priorities.

Step 2: Detailed Evaluation

Applications that pass the initial review will undergo a more detailed evaluation, focusing on:

1. **Funding Leverage:** Whether CPA funds act as a catalyst for other funding sources.
2. **Community Impact:** Breadth of impact on residents and alignment with underserved populations.
3. **Long-Term Benefits:** Sustainability and long-term value of the project to the town.
4. **Cost of Inaction:** Consequences of not funding the project.
5. **Urgency:** Timeliness and necessity of the project.
6. **Other Relevant Factors:** Any unique considerations specific to the project.

Following this review, the CPC will make funding recommendations to the Town Meeting, which will make the final decision on project funding.

Post-Funding Requirements

For non-municipal projects funded by the Town Meeting, the applicant will enter a contract with the Town of Upton outlining the project's scope, timeline, deliverables, payment terms, and any special conditions.

The CPC may impose the following conditions:

- **Permitting and Approvals:** Funding may be withheld until all required permits and approvals are obtained.
- **Performance Bonds:** Assurance mechanisms may be required to ensure project completion.
- **Funding Adjustments:** The CPC may recommend partial funding, full funding, or no funding, depending on project eligibility and merit.

Evaluation Priorities

Projects that address multiple CPA purposes (e.g., open space, historic preservation, affordable housing, and recreation) and demonstrate public engagement in the development process will be prioritized. Applicants must:

- Provide evidence of public support and alignment with community goals.
- Demonstrate the capability to complete the project within the proposed timeline and budget.

Specific Project Requirements

Historic Resource Projects:

- Applicants must provide a Historic Resource Inventory Form. A Historic Structure Report may be required before project initiation.

Land Acquisition (Open Space) Projects:

- A permanent conservation restriction will be required. Applicants must identify a restriction holder early during the review process.

Affordable Housing Projects:

Applicants must attempt to align their project with the following criteria:

- Consistency with community development and preservation goals as established through the Affordable Housing Trust Action Plan, Housing Production Plan, the most recent Master Plan, the Open Space and Recreation Plan, the Economic Development Plan, and any other relevant planning documents.

Recreation Projects:

Applicants must attempt to align their project with the following criteria:

- Consistency with recreation goals as established through the Open Space & Recreation Plan and the Four Parks Plan
- Enhancement of Accessibility and Inclusivity
- Investment in Recreational Infrastructure Upgrades

Evaluation Criteria

Applications will be assessed based on the following:

1. Alignment with CPA legislation.
2. Consistency with Upton's planning goals and initiatives.
3. Public and town board support.
4. Preservation or enhancement of existing town assets.
5. Accessibility to multiple or underserved populations.
6. Fulfillment of multiple CPA purposes.
7. Site control or owner consent.

8. Demonstrated financial need and leveraging of additional funding sources and/or volunteer support
9. Feasibility and reasonableness of the implementation plan.
10. Urgency and flexibility of the project timeline.
11. Inclusion of appropriate restrictions to protect resources.
12. Applicant's capacity to manage and complete the project.

Consideration Guidelines

The CPC will consider:

1. Preservation of threatened resources or opportunities.
2. Long-term community benefits.
3. Multi-source funding and collaboration potential.
4. Feasibility and reasonableness of the proposal.
5. Provisions for ongoing maintenance funding.

Community Input and Review

The CPC encourages informal inquiries and public input throughout the application process. Final decisions and funding recommendations will be discussed with the Select Board and Finance Committee before consideration at the town meeting.

For questions or guidance, contact the CPC Chair via email at cpc@uptonma.gov



TOWN OF UPTON

APPLICATION FOR

COMMUNITY PRESERVATION ELIGIBILITY

Date: _____

Project Title: _____

Name of Applicant: _____

Name of Organization: _____

Address: _____

Telephone: _____

Email: _____

CPA Category (circle all that apply): **Open Space** **Historic Preservation**
 Recreation **Community Housing**

CPA Funding Requested: \$ _____ **Total Project Cost:** \$ _____

Project Description: Please provide a brief project description below. Include a brief description of how your project accomplishes the goals of the CPA and include an estimated budget. Please include supporting materials, as necessary.

NOTE: This application enables the CPC to review the request to ensure eligibility and offer guidance. If eligible, an Application for Funding must be completed.



TOWN OF UPTON

APPLICATION FOR

COMMUNITY PRESERVATION FUNDING

Date:

Project Title: _____

Name of Applicant: _____

Name of Organization: _____

Address: _____

Telephone: _____

Email:

CPA Category (circle all that apply): **Open Space** **Historic Preservation**
 Recreation **Community Housing**

CPA Funding Requested: \$_____ **Total Project Cost:** \$_____

Application Requirements

Applicants must submit one (1) original, two (2) printed copies, and one (1) digital PDF of the following materials:

1. **CPA Application Cover Page:** Fully completed Eligibility and Funding Form.
2. **Project Summary:** A concise 1-2 paragraph overview detailing the project category, goals, scope, and budget.
3. **Location Map:** MassMapper, GIS, or Assessor's map showing the project location, along with additional maps and imagery if applicable.
4. **Narrative:** Detailed description of the project, its relevance to CPA goals, implementation plan (including public outreach), and measurable outcomes. Note other proposed funding and volunteer support.
5. **Evaluation Criteria Responses:** Explanation of how the project addresses applicable evaluation criteria.
6. **Budget:** Comprehensive budget with funding breakdown by year, source, and CPA category, including administrative expenses.
7. **Feasibility:** Supporting available feasibility studies or reports, along with a summary of required approvals or permits.
8. **Timeline:** Key milestones and anticipated completion dates.
9. **Visual Materials:** Relevant plans, drawings, site photos, or architectural renderings.
10. **Letters of Support:** From community groups, organizations, or stakeholders (encouraged but not required).

General Criteria for CPA Projects Satisfied by Proposed Project

Criteria	Response
Eligible for Community Preservation Act (CPA) funding.	
Consistent with the Upton Master Plan, Open Space Plan and other planning documents that have received wide scrutiny and input and have been adopted by the town.	
Preserve the essential character of the town as described in the Master Plan.	
Respond to documented needs.	
Save resources that would otherwise be threatened.	
Serve more than one CPA purpose.	
Demonstrate practicality and feasibility and demonstrate that they can be implemented expeditiously and within budget.	
Produce an advantageous cost/benefit value.	
Leverage additional public and/or private funds.	
Preserve or utilize currently owned town assets.	
Receive endorsement by other municipal boards or departments.	
Serve the whole community or a significant part of the population.	