

For CPC use only: Date Received \_\_\_\_\_

**Town of Southborough Community Preservation Committee**

17 Common Street; Southborough, MA 01746

**APPLICATION FOR FY 2026 COMMUNITY PRESERVATION FUNDING**

**Application is due August 31, 2024**

**Name of Proposal -**

Date of Submission: [Aug 29, 2024](#)

Name of Applicant - [Affordable Housing Trust Fund](#)

Contact Person - [Al Hamilton, Chair, Board of Trustees of the Affordable Housing Trust Fund](#)

Sponsoring Organization and/or Affiliations – [Affordable Housing Trust Fund](#)

Mailing Address - [Town House, 17 Common St, Southborough Ma 01746](#)

Daytime Phone Number - [508 527 3952 \(Chair's Cell\)](#)

Email Address - [a.hamilton@southboroughma.com](mailto:a.hamilton@southboroughma.com)

CPA Funding Requested - [Available Balance of CPA Community Housing Funds as of 2025 ATM](#)

Total Cost of Project – [Available Balance of CPA Community Housing Funds as of 2025 ATM](#)

CPA Category (Check ALL that apply - refer to Coalition Chart on Last Page)

Open Space \_\_\_\_\_

Historic Preservation\_\_\_\_\_

Recreation\_\_\_\_\_

Community Housing [XXX](#)\_\_\_\_\_

Before filling out this application, familiarize yourself with the Southborough CPC Application Handbook available on the CPC webpage:

[communitypreservationcommittee@Southboroughma.com](mailto:communitypreservationcommittee@Southboroughma.com).

As you are filling out the application, make sure you are in-line with the requirements as documented in the Southborough CPC Application Handbook.

Please submit the following application by August 31, 2024; for consideration at Annual Town Meeting in 2025. Please email your completed application to both: Benjamin Smith, CPC Chair at [bsmith@southboroughma.com](mailto:bsmith@southboroughma.com) and Frederica Gillespie, CPA Consultant at [fg.cpaconsulting@gmail.com](mailto:fg.cpaconsulting@gmail.com)

PLEASE COMPLETE THE PROJECT DESCRIPTION BELOW AND INCLUDE WITH YOUR APPLICATION (use extra sheets, if needed)

## PROJECT DESCRIPTION

In describing the project, please include answers to the following questions. Applications may be returned as incomplete if all relevant requested information is not provided. Include supporting materials and exhibits, as necessary.

**1 Provide a Project Name (as it will appear on warrant article)**

[Transfer of CPA Community Housing Funds to the Affordable Housing Trust Fund](#)

**2 GOALS: What are the goals of the proposed project? Who will benefit and why? How will success be measured?** [See Attached Exhibit](#)

**3 ELIGIBILITY: Define how the project meets CPA requirements (please refer to the Community Preservation Coalition Chart on the last page**

[See Exhibit](#)

**4 COMMUNITY NEED: Why is this project needed? Does it address needs identified in existing Town plans?** [See Exhibit](#)

**5 COMMUNITY SUPPORT: What is the nature and level of support and/or opposition for this project?** [See Exhibit](#)

**6 BUDGET: What is the total budget for the project and how will CPA funds be spent? All items of expenditure must be clearly identified and back-up**

documentation provided. Distinguish between hard and soft costs. Depending on your project, more than one estimate may be required (NOTE: CPA funds may NOT be used for maintenance). Attach a two to five-year budget, if appropriate. [See Exhibit](#)

- 7 **FUNDING:** What additional funding sources are available, committed or under consideration? Include commitment letters, in kind donations and volunteer hours, and describe any other attempts to secure funding for this project.  
[See Exhibit](#)
- 8 **TIMELINE:** What is the schedule for project implementation, including a timeline for all critical elements? This should include the timeline for expenditures, receipt of other funds and/or other revenues, if any.  
[The AHTFC anticipates that the funds will be deployed within 5 years](#)
- 9 **IMPLEMENTATION:** Who will be responsible for implementing the project? Who will the project manager be? What relevant experience does the proposed project manager have? Who else will be involved in project implementation and what arrangements have been made with them?  
[See Exhibit](#)
- 10 **MAINTENANCE:** If ongoing maintenance is required, who will be responsible and how will it be funded? Please attach a detailed five-year budget.  
[No maintenance requirements are identified at present.](#)
- 11 **OPEN PROJECTS:** Do you have any existing CPA funded projects? If so, are you up-to-date with your reporting? Please list them here.  
[See Exhibit](#)
- 12 **SUMMARY:** Brief description of the project, which will be printed as project summary in the warrant article. [See Exhibit](#)

**ADDITIONAL INFORMATION:** Please provide the following additional information, if applicable

1. **FURTHER DOCUMENTATION:** Documentation that you have control over the site, such as a Purchase and Sale Agreement, option to deed. (Letters of support from relevant town entities)
2. **FEASIBILITY REPORTS:** Any feasibility reports, renderings or other relevant studies and material.

3. **ZONING COMPLIANCE:** Evidence that the project does not violate any zoning by-laws or any other laws or regulations, including environmental, and/or plans to obtain necessary approvals.
4. If a non-town government entity is the applicant, please list contact information for all relevant contacts for the project and if a non-profit list contact information of the board members.
5. Have you determined if your project requires a Preservation Restriction, Conservation Restriction or Deed Restriction?  
Yes xx no \_\_\_\_\_ Unsure \_\_\_\_\_
6. **OTHER INFORMATION:** Any additional information that might benefit the CPC in their consideration of this project.

**A representative from the project will be required to present the project to the CPC. After the application deadline, you will be sent the presentation schedule.**

**Applicant requirements after CPC recommends project for Town Meeting:**

- To assist with fielding questions concerning the project, a Project Representative shall attend the Board of Selectmen and Advisory Committee meetings with the CPC when the CPC warrant articles are reviewed.
- A Project Representative shall attend Town Meeting to answer questions. Any Project Presentation to be reviewed by CPC.
- All Town Meeting approved projects must submit a project schedule and proposed payment timeline. That schedule will be used to determine project completion deadline. The MOU must be signed prior to start of Project

- All Town Meeting approved projects shall present progress reports at 6-month intervals along with written reports to the CPC.
- All Town Meeting approved projects are required to include permanent signage stating that Southborough CPA provided funding for the project (wording shall be reviewed with the CPC prior to completion of the project).
- All publicity shall include statement that the Southborough Community Preservation Act provided funding for the project.

The chart below demonstrates the allowable uses of CPA funds in each of the CPA project categories: open space, recreation, housing, and historic preservation. This chart is critical for determining whether a proposed project is eligible for CPA funding. Projects are only eligible for CPA funding if they fit in a “Yes” box below.

	Open Space	Historic	Recreation	Housing
<b>Acquire</b>	Yes	Yes	Yes	Yes
<b>Create</b>	Yes	No	Yes	Yes
<b>Preserve</b>	Yes	Yes	Yes	Yes
<b>Support</b>	No	No	No	Yes
<b>Rehabilitate and/or Restore</b>	Yes, if acquired or created with CPA funds	Yes	Yes (new 7/8/2012)	Yes, if acquired or created with CPA funds

NOTE: The 7/8/2012 Legislation prohibits use of CPA funds to pay for Artificial Turf Fields.

## **CPA Application Exhibit**

### **Affordable Housing Trust Fund Application for CPA Community Housing Funds**

#### **Item 2 Goals**

The goal of this program is to expand the number of affordable housing units in the Town of Southborough. Progress will be measured by the number of affordable housing units created.

#### **Item 3 Eligibility**

This is a use that is specifically identified in the CPA. The transfer of CPA funds to Affordable Housing Trusts is a common practice in the Commonwealth.

#### **Item 4 Community Need**

The Governor has stated that the Commonwealth has an affordable housing crisis. The town is well behind its housing production plan. The need for affordable housing is identified in multiple town planning documents and production plans.

#### **Item 5 Community Support**

The Select Board has voted unanimously to support this application. The Southborough Housing Opportunity Partnership Committee has voted unanimously to support this application.

#### **Item 6 Budget**

a) Notwithstanding the TRUST's bylaws, all funds expended pursuant to this Grant Agreement shall be limited to the allowable spending purposes as defined under M.G.L c.44B and M.G.L. c.44, §55C. Additionally the TRUST agrees that while there are 16 powers granted to the it by State Law and the Town bylaw, the TRUST has proposed and shall limit the WORK to the following 7 areas within their power for this Project, except as may be otherwise authorized by the COMMITTEE.

- Acquiring land for the construction of permanently affordable housing.
- Acquiring existing homes for conversion to permanently affordable housing
- Working with third party developers to build permanently affordable housing
- Working with third party developers to renovate existing homes as permitted by law.
- Working with third parties to qualify individuals and families for occupation of permanently affordable housing.
- Working with third parties to support qualified individuals and families for rental assistance or home buying (e.g. down payment, closing costs, other costs) assistance.
- Disposing of properties under the TRUST's care in furtherance of the above goals.

b) Every six months until the Completion Date, the TRUST shall provide the COMMITTEE with a written update on the progress toward completion of the Work. A final report, including digital photo documentation of the project where appropriate, is due within 30 days of the Completion Date.

c) Consistent with the provisions of M.G.L. c.44B §5(b)(2), under no circumstances shall the Funds be used to rehabilitate existing community housing units, unless such units have been acquired with CPA funds.

d) Consistent with the provisions of M.G.L. c.44B §5(b)(2), when creating community housing the TRUST shall, wherever possible, reuse existing buildings or construct new buildings on previously developed sites.

e) Consistent with the provisions of M.G.L. c.44B §6, the Funds shall not replace existing TOWN operating funds nor reimburse the TOWN for services provided to the TRUST.

f) If the Funds are the sole funding source for the acquisition of real property, the property shall only be used for Community housing as defined in M.G.L. c.44B §2. In all other cases, the Funds may be used to cover a share of the project expenses proportionate to the part of the project that will qualify as Community housing as defined in M.G.L. c.44B §2. The TRUST shall track the cost of the allowable scope through a reasonable means of cost estimating and only use the Funds for the allowable portion of the project cost.

#### **Item 7 Funding**

The AHTF will seek other funds as appropriate. No specific funding sources are identified as of this application.

#### **Item 9 Implementation**

The Trustees of the Affordable Housing Trust Fund will be responsible for oversight of any project funded by the Affordable Housing Trust Fund. The Trustees have the statutory authority to hire experts, consultants and advisors as required if the managerial requirements exceed the capacity of the Trustees.

#### **Item 11 Open Project**

The Trustees of the Affordable Housing Trust Fund are current with their requirement to make an annual report to the CPAC.

#### **Item 12 Summary**

This article transfers the balance of the Community Preservation Act Community Housing Funds to the Affordable Housing Trust Fund as authorized by the Community Preservation Act. Said funds will be used to promote affordable housing consistent with the requirements of authorizing legislation.

#### **Additional Items (Which are included in the Warrant Article)**

##### Affordable Housing Restriction

With respect to any real property purchased using the Funds or housing created or preserved using the Funds, the TRUST shall execute or obtain a perpetual affordable housing restriction meeting the statutory requirements of M.G.L. c.184 and M.G.L. c.44B, §12 and running to the benefit of the TOWN. The deed restrictions executed for each unit of housing created or preserved pursuant to this grant must be approved and accepted by the TOWN will have a perpetual deed restriction attached to ensure affordability. To meet the requirements of CPA, the restriction must be approved and signed by the state's Executive Office of Housing and Livable Communities. The TRUST shall provide a draft copy of the restriction with the COMMITTEE for review and a copy of the executed restriction shall be filed with the Committee.



#### Sale of any Property Funded by CPA Monies

Within 60 days of the sale of any property funded by CPA monies, the proceeds obtained by the TRUST from the sale of any real estate interest acquired with monies from the Community Preservation Fund must be credited to the CPA Fund Community Housing Reserves in accordance with M.G.L. 44B §7(iv) and described in the Property Tax Bureau Informational Guideline Release (IGR) No. IGR 19-14 Section 8. Community Preservation Property, E. Disposition.

#### Record Keeping

The TRUST shall keep such records with respect to the utilization of the Funds as are kept in the normal course of business and such additional records as may be required by the TOWN. Should the TRUST have multiple funding sources, the TRUST shall track specific expenditures of the Funds separate from other funding sources. The TOWN shall have full and free access to such records and may examine and copy such records. The TRUST further agrees to meet with the COMMITTEE or its designee(s), upon reasonable request, to discuss expenditures of the Project Funds.

#### Reporting

The TRUST shall supply the COMMITTEE with annual reports of all CPA funds spent. The COMMITTEE needs to be able to maintain proper records of all appropriations to the TRUST and the expenditures of the TRUST.