

# **WORCESTER COMMUNITY PRESERVATION ACT (CPA) FUNDING APPLICATION FORM GUIDANCE FOR APPLICANTS**

## **Fall 2025 Funding Round**

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### **I. BACKGROUND ON THE COMMUNITY PRESERVATION FUND**

With the passage of the Community Preservation Act (CPA) in the Municipal Election of 2022, Worcester joined over 200 other communities in the Commonwealth of Massachusetts in establishing a Community Preservation Fund. Starting in 2024, approximately \$4 million per year of funding is available to support locally proposed projects in the categories of Historic Resources, Open Space and Recreation, and Community Housing. The Community Preservation Fund is awarded to eligible applicants by the Community Preservation Committee (CPC) with support from the City of Worcester Executive Office of Economic Development (EOED) in alignment with the [Community Preservation Plan](#).

CPA projects can be proposed by the City Administration, local organizations, and residents alike. While the Commonwealth of Massachusetts has minimum eligibility requirements for the use of CPA funds, the City of Worcester can prioritize eligible projects based on our local needs and priorities. The [Community Preservation Plan](#) contains information on project eligibility, as well as the community priorities and goals that the city hopes to achieve through the Community Preservation Program. The [Community Preservation Plan](#) also contains the criteria and Scoring Rubric by which the CPC shall rank eligible projects. The

CPC strongly encourage applicants to review the [Community Preservation Plan](#) prior to filling out an application. Additionally, the present document is an additional guide for applicants seeking CPA funding.

## II. NOTES TO APPLICANTS ABOUT COMMUNITY FUNDING

The Community Preservation Act presents a unique opportunity to local organizations and individuals in the realms of Community Housing, Historic Resources, and Open Space and Outdoor Recreation. However, being a community fund, there are certain structures in place to protect the public's investment that awardees should be aware of prior to applying. These structures are generally related to procurement/disbursement of funds and securing community benefit.

### a. Procurement/Disbursement of Funds

Massachusetts state law and local city policy govern how the City of Worcester can spend public money, with the intention of protecting taxpayer dollars from misuse. This extends to CPA funds. There are two implications for CPA awardees that should be noted. Procurement relates to the process by which products and services are selected for purchase. Disbursement relates to the process by which CPA funds can be delivered to awardees.

Applicants should be aware that when it comes to procurement, there are certain rules that apply to what vendors and contractors you can use after certain price thresholds, and if prevailing wage laws apply. These rules may change depending on whether the project takes place on public or private property, as well as if the project is managed by a public or private entity. See *Table 1* to better understand expectations on contractor selection. These rules would come into play only after a project was awarded, before work can begin. However, it may be advantageous for applicants to consider procurement expectations as they prepare

**Table 1: Procurement expectations for awardees.** Note: Property acquisitions are not subject to MGL C. 30B.

	Public Property	Private Property
Public Management	Massachusetts Procurement Laws apply, subject to Prevailing Wages.  <\$10,000: Sound business practices >\$10,000: Work with City Procurement Office	Massachusetts Procurement Laws apply, subject to Prevailing Wages.  <\$10,000: Sound business practices >\$10,000: Work with City Procurement Office
Private Management	Massachusetts Procurement Laws apply, subject to Prevailing Wages.  <\$10,000: Sound business practices >\$10,000: Work with City Procurement Office (bid privately)	Not subject to Massachusetts Procurement Laws not Prevailing Wage.  <\$10,000: Sound business practices >\$10,000: 3 quotes

their applications. Please reach out to Community Preservation Program Staff if you have additional questions about procurement expectations. In addition to being selected through the proper procurement technique, selected contactors must also have insurance and release the city from liability.

Applicants should also note certain rules about funds disbursement for projects. Payments are made to the awardee only, and on a reimbursement basis. This means that the awardee must be in a financial position to make initial payments to contractors or vendors prior to receiving reimbursement from the city. Depending on the size of the project, multiple payments can be made, such that a small organization would not need to front the entirety of a large project all at once. Funds can only be reimbursed for work or purchases that occur after the grant agreement is signed between the awardee and the city. Work performed prior to the agreement is not eligible for funding. Please reach out to CPP staff if you have any questions on the disbursement of funds.

#### *b. Ensuring Community Benefit*

The Community Preservation Committee scores CPA project applications with a Scoring Rubric that considers how a project will benefit the Worcester community, and it would behoove applicants to consider this while writing their applications. However, in many cases, CPA legislation requires certain assurances to protect the public investment. These assurances come in the form of deed restrictions, memorandums of understanding (MOUs), and clawback clauses.

##### *i. Deed restrictions*

A **deed restriction** is a legally binding agreement that is recorded with a property's deed that governs how a property can be used for a term or perpetual time frame. A deed restriction is filed at the Registry of Deeds and runs with the land. It can apply to projects in the Historic Resources, Open Space and Outdoor Recreation, and Community Housing categories.

A **preservation restriction (PR)** is a deed restriction that provides assurance that an historic or culturally significant property's intrinsic values will be preserved through subsequent ownership by restricting the demolition or alteration of its significant historic features. It usually focuses on exterior architectural features but can also address significant interior spaces. A deed restriction can be permanent/perpetual, or for a specific number of years. For CPA awardees in the Historic Resources category, commitment to processing and recording this restriction would be part of the grant agreement, but the release of awarded funds may occur before the restriction is recorded. See *Table 2* for project type and award thresholds for PRs.

A **conservation restriction (CR)** or a **recreation restriction** is a deed restriction that permanently limits land use to protect its conservation values or recreational usage through subsequent ownership. The restriction can apply to portions of a parcel where a project may take place. All CPA funded projects that are in the Open Space or Outdoor Recreation category must either have existing CR or recreational restrictions or include recording them as part of the project outcome if they do not take place in a municipal or state park, or a property otherwise protected by Article 97.

An **affordable housing restriction** is a deed restriction that limits rent or resale prices to ensure housing remains accessible to low- and moderate-income individuals and families, typically for a specified period, but sometimes in perpetuity. An **affordable housing restriction** is required for projects that create or acquire affordable housing. Contact the Affordable Housing Trust Fund for more details on affordable housing restrictions.

**Table 2: Historic resource project protections.**

	Building, Structure, Property	Vessel, Document, Artifact
Acquire	Permanent Preservation Restriction (Interior and Exterior)	MOU with CPC that the artifact will never be sold and always available for public viewing upon request
Preserve, Rehabilitate, Restore	CPC Award: <\$25k: No requirements >\$25k: MOU with WHC for up to 10 years AND 30-year Clawback Clause >\$250k: Term Restriction (10-29 years) >\$500k: Permanent Preservation Restriction	30-year Clawback Clause

*ii. Memorandums of understanding (MOUs)*

An **MOU (Memorandum of Understanding)** is a contract between the awardee and a city organization (generally the Worcester Historical Commission or the Community Preservation Committee). An MOU contains conditions related to a specific project and are usually for a specified period. Most of the time, these MOUs are related to Historic Resources category projects. An MOU would be included in the grant agreement and may or may not be filed at the registry of deeds. See *Table 2* for project type and award thresholds for MOUs for Historic Resource projects.

### iii. Clawback clauses

A **clawback clause** is a contractual provision that allows the CPC to recover awarded funds from the awardee in certain circumstances that are outlined in the grant agreement. They can apply to projects in all three funding categories. Generally, a clawback clause will begin with the recovery of 100% of the award and diminish over time to 0%. The circumstances and term of a clawback clause may change from project to project, so be sure to talk to CPP staff about how this may apply to yours.

## III. APPLICATION TRACKS

There are three tracks to apply for CPA funding, and the track that an applicant uses will depend on the nature of the project.

**Table 3: Application Tracks.** *There are three CPA Application Tracks depending on the applicant's project.*

Application Track	Standard Application	Special Application	AHTF Application
Types of projects	<ul style="list-style-type: none"><li>• Almost all Historic Resource and Open Space &amp; Recreation projects.</li><li>• Community Housing projects not related to development of homeownership and rental units.</li></ul>	<ul style="list-style-type: none"><li>• Projects to acquire or preservation that is time-sensitive.</li><li>• Projects to restore an historic asset damaged by flood or fire.</li></ul>	<ul style="list-style-type: none"><li>• Projects to create new affordable homeownership and rental units.</li></ul>

The *Standard Application* track is the funding application process appropriate for most CPA funding requests, including almost all projects in the Historic Resources and Open Space and Recreation funding categories. Projects in the Community Housing category should also use this form *if the project is not related to the development of homeownership and rental units*. Applicants seeking to utilize the Standard Application track shall use the Pre-Application form found on the [Community Preservation Program webpage](#). Projects related to the creation of new affordable housing rental or homeownership units should contact the [Affordable Housing Trust Fund](#) (AHTF).

Under certain circumstances as determined by the CPC, the CPC will consider an expedited application outside of the Standard Application Process described above. The CPC shall consider a proposal under the *Special Application* track only if the project meets CPA project eligibility requirements. Additionally, to be considered for the Special Application Process, one of the following must also be determined.

- The applicants were unaware of the opportunity to undertake the project; or the proponents did not have authority to identify such opportunity prior to the Standard Application Deadline (for example, the potential sale was still confidential).
- The proponents have either: (a) a letter of intent signed by the current owner of the real property expressing an interest in selling to the applicant; or (b) legal control (an option, signed purchase and sale agreement or legal title) of the real property.
- Failure to secure CPA funding will create a high likelihood that the project will not be able to be carried out for the benefit of the city, because the opportunity is of very short duration.
- Appropriation of CPA funding will contribute materially to the likelihood of success for the project.

Applicants seeking to utilize the Special Application track should contact CPP staff at [burmeisterj@worcesterma.gov](mailto:burmeisterj@worcesterma.gov) to discuss their application.

#### IV. STANDARD APPLICATION STEPS

The following are the steps to submit a Standard Application.

##### Step 1: Pre-Application Form.

The first step of the Application Process is to determine if a project is eligible to receive CPA funding under State law. **Only projects determined eligible for funding under State laws shall be considered by the CPC.** CPA may provide funding for local projects in three funding categories: Historic Resources, Open Space and Recreation, and Community Housing. Below are the State's general eligibility requirements for projects in each category. While these are the minimum requirements for a project to receive funding, the city can prioritize funding for eligible projects, and shall do so according to the [Community Preservation Plan](#).

*Historic Preservation:* CPA funds can be used to *acquire, preserve, rehabilitate, and restore* historic resources that are listed on the State Register or determined to be locally significant by the Worcester Historical Commission. In some cases, Historic Preservation awarded projects may be required to implement Preservation Restrictions on their building or property for a certain period of time or in perpetuity. More information on Preservation Restrictions can be found in *Section II b.* above.

*Open Space and Recreation:* CPA funds can be used to *acquire, create, and preserve* open space and natural resources. They can be used to *rehabilitate or restore* open space that was initially acquired with CPA funds. They can also be used to *acquire, create, preserve, rehabilitate, or restore* property for recreational use. Awarded projects in this category must take place on land that is protected, or that will be protected, in perpetuity for recreational

or conservation purposes under Article 97 or through a deeded restriction. See *Section II b.* above for more information on this requirement.

**Community Housing:** CPA funds can be used to *acquire, create, preserve, and support* community housing for households with incomes at or below 100 percent of the area median income (AMI). They can also be used to *rehabilitate or restore* community housing that was initially acquired or created with CPA funds. Awarded projects in this category must include an affordability restriction, generally in the form of a deeded restriction, to ensure affordability for Low- and Moderate-Income households, as identified in *Table 4* below.

**Table 4: Community Housing household income eligibility limits for Worcester.** CPA Funds can be used to support housing for individuals and families at or below 100% area moderate income (AMI).

FY 25 Income Limits Worcester CPA Community Housing								
	Household Size							
	1 Person	2 People	3 People	4 People	5 People	6 People	7 People	8 People
Low Income (80% AMI)	\$ 68,432	\$ 78,208	\$ 87,984	\$ 97,760	\$ 105,581	\$ 113,402	\$ 121,222	\$ 129,043
Moderate Income (100% AMI)	\$ 85,540	\$ 97,760	\$ 109,980	\$ 122,200	\$ 131,976	\$ 141,752	\$ 151,528	\$ 161,304

For more information on project eligibility requirements, see the [Community Preservation Plan](#). Contact CPP staff for outstanding questions. The questions in the Pre-Application form found in *Appendix A* of this document are for reference only. Applications must be submitted electronically via the online version of this form found on the Community Preservation Program webpage. However, applicants are strongly urged to compose their answers in a word processor first, then paste them into the online form, paying particular attention to character count requirements.

**NOTE FOR HISTORIC RESOURCES PROJECTS:** A Determination of Local Historic Significance is necessary for applicants seeking CPA funding in the Historic Resources category if the resource in question is (a) not a building, structure, or real property; (b) not listed on the State Register of Historic Places; or (c) the resource is a building or structure that is less than 50 years old. The determination must be made prior to the application deadline. Please find the Determination of Local Historic Significance application on the [City of Worcester Historical Commission webpage](#).

The Pre-Application form for the Standard Application track can be found on the [Community Preservation Program website](#) starting **October 29<sup>th</sup>, 2025**, and will be available for 5 weeks, until the due date of **December 3<sup>rd</sup>, 2025**. Pre-Application forms received after this date will not be considered.

Review of submitted Pre-Application forms is rolling, meaning that the sooner that the form is submitted, the sooner you will receive confirmation of eligibility. The last day to submit the Pre-Application form is December 3<sup>rd</sup>, 2025. CPP staff will reach out to you within 10 business days with eligibility status. Only applicants of projects that are eligible to receive funding under State Law will be invited to complete a Full CPA Application for review by the Community Preservation Committee. CPP staff will work with applicants to try to correct ineligible elements prior to the Pre-Application form deadline of December 3<sup>rd</sup> if possible. CPP staff encourages applicants that are unsure about their eligibility to reach out prior to December 2<sup>nd</sup>, as forms submitted after this deadline cannot be amended.

Filling out a Pre-Application form does not guarantee a project will be funded. Once a project is confirmed eligible, the applicant can begin the Full CPA Application Form.

### **Step 2: Full CPA Application.**

The Full CPA Application form is an electronic form that will be delivered to the project representative identified in the Pre-Application form upon confirmation of project eligibility. The copy of the Full CPA Application form questions can be found in the Appendix of this document are for reference only. Only applications received via the electronic form shall be considered. Applicants are strongly urged to compose their answers in a word processor, then paste them into the online form, paying particular attention to character count requirements.

**Fall 2025 Funding Round Applications are due by 11:00 am on January 7<sup>th</sup>, 2026.** Applications received after this deadline will not be considered.

The last day to request technical assistance from Community Preservation Program staff for the Full CPA Application form is December 30<sup>th</sup>, 2025. After this date, CPP staff cannot guarantee that you will receive an answer to your request before the application deadline. Note that incomplete applications received after this date may not be considered.

### **Step 3: Public Hearing.**

Depending on the number of requests, some or all applicants of eligible projects will be invited to present their project at a CPC Public Hearing. This will be an opportunity for applicants to talk more about the project, for the CPC to ask questions, and for the public to show support for the project. The CPC may also request from applicants additional or more detailed information to be presented at this time. Based on the hearing and application, projects will be scored using the Project Scoring Rubric found in *Appendix B* of this document.

The following is a summary of the criteria with which the CPC shall score eligible projects. For more information on each criterion, see the [Community Preservation Plan](#). *NOTE: These criteria have changed slightly since the Spring Pilot Round. Please examine the updated*



*Project Scoring Rubric in the Appendix of this document to see the new point values assigned to each criterion.*

- A. Project Preparedness:** To ensure that public funds are committed to projects have the greatest chance of being completed in a timely manner, and a lower chance for delay due to problems with securing permissions, permits, or outside funding when applicable.
- B. Match Funding:** To encourage projects which utilize both CPA funds and other public and private funding, including donations and bargain sales.
- C. Applicant Experience:** To ensure that public funds are committed to projects have the greatest chance of being completed in a timely manner by project managers that have experience related to the proposed project.
- D. Long-Term Sustainability:** To ensure that the project is a sustainable investment into the community.
- E. Community Benefit:** To ensure that the project has a positive impact on Worcester residents.
- F. Community Priorities/Community Planning and Buy In:** To ensure that projects align with CPA Community Priorities or are compatible with other community plans; and/or have demonstrated community buy-in.
- G. Community Preservation Plan Category Goals:** To ensure that projects align with Category Goals.
- H. Compatibility Between CPA Funding Categories:** To encourage projects that include eligible activities in multiple CPA areas, such as affordable housing and recreation.

#### **Step 4: CPC Funding Recommendation.**

Following the Public Hearings, the CPC will consider each application based on the merits of the application and the available Community Preservation Fund balance. CPC may choose to award less than the requested amount in the funding proposal. In these cases, the applicant will be contacted prior to the award being recommended to City Council to ensure that the project will still be viable with the reduced funding available.

Applicants of top scoring projects will be notified that their projects are being recommended for funding to the City Council. The CPC reserves the right to attach conditions and to require deed restrictions and additional agreements before its favorable funding recommendation to City Council as a condition in the award letter. Applicants will be notified of all agreement criteria prior to recommendation. Projects not recommended by the CPC are not eligible for consideration by the City Council per state statute.

### **Step 5: City Council Approval.**

The slate of recommended projects and their approved funding amounts will be sent to City Council for approval together. Applicants should note that recommendation by the CPC for project funding does not guarantee a project will be awarded.

City Council shall review the slate of projects at a scheduled City Council meeting, where the recommended appropriations can be affirmed, rejected, or lowered. Funding recommendations may not be increased. City Council is bound to act only upon an affirmative recommendation of the CPC and cannot consider requests that do not receive a CPC recommendation.

### **Step 6: Grant Agreements.**

All applicants that are ultimately selected to receive CPA funding must enter a grant agreement/contract with the City of Worcester for use of said funds. The grant agreement will contain requirements and expectations around grant draws, reporting, and provisions for grant compliance.

### **Step 7: Reporting and Monitoring.**

All applicants that are awarded CPA funding shall be required to submit a minimum of one report on project activities. Reporting and monitoring requirements will be project-based and required as part of the grant agreement. Project reimbursements may be contingent upon reporting and monitoring requirements.

## **V. STANDARD APPLICATION AND FUNDING TIMELINE**

The following is the projected timeline for applications and funding decisions for the Spring 2025 Pilot Round.

- **October 29<sup>th</sup>, 2025:** Pre-Application form opens (rolling).
- **November 5<sup>th</sup>, 2025,** Application Q&A Session (Virtual), Date TBD.
- **November 21<sup>st</sup>, 2025:** Last day to request technical assistance from Community Preservation Program staff for the Pre-Application form. Note that incomplete applications received after this date may not be considered.
- **December 3<sup>rd</sup>, 2025:** Last day to submit a Pre-Application form at **11:00 am.**
- **December 30<sup>th</sup>, 2025:** Last day to request technical assistance from Community Preservation Program staff for the Full CPA Application form. Note that incomplete applications received after this date may not be considered.
- **January 7<sup>th</sup>, 2025:** Full CPA Applications deadline at **11:00 am.**
- **Mid-January:** CPC shall review eligible applications and invite applicants to a public hearing.

- **Early-February:** CPC shall host a public hearing in which applicants can present their projects to the CPC.
- **Late-February:** Successful applicants will be contacted. The slate of funding recommendations will be sent to City Council for final approval.
- **Spring 2025:** Grant agreements shall be developed between the awardees and the City.

## VI. SPECIAL APPLICATION STEPS

Under certain circumstances as determined by the CPC, the CPC shall consider an expedited application outside of the Standard Application track described above. The CPC will consider a proposal under the Special Application track only if the project meets CPA project eligibility requirements. Additionally, to be considered for the Special Application Process, one of the following must also be determined:

- The applicants were unaware of the opportunity to undertake the project; or the proponents did not have authority to identify such opportunity prior to the Standard Application Deadline (for example, the potential sale was still confidential).
- The proponents have either: (a) a letter of intent signed by the current owner of the real property expressing an interest in selling to the applicant; or (b) legal control (an option, signed purchase and sale agreement or legal title) of the real property.
- Failure to secure CPA funding will create a high likelihood that the project will not be able to be carried out for the benefit of the city, because the opportunity is of very short duration.
- Appropriation of CPA funding will contribute materially to the likelihood of success for the project.

In all such cases, the CPC will adhere to all the procedures applicable under the Standard Application track, except for the submission and hearing deadlines outlined in that process. Special Applications may be submitted at any time, even outside of the Standard Application cycle window. For eligible projects, the CPC will hold a public hearing to review such an application as expeditiously as possible. For cases where a Determination of Local Historical Significance is necessary, this process may occur concurrently to the Special Application process, so long as the Determination is made prior to the Public Hearing. As with the Standard Application track, following CPC recommendation, final funding decisions must be made by City Council at a scheduled City Council meeting.

Applicants seeking to utilize the Special Application track shall use the same Pre-Application form and Full CPA Application form as other applicants. If the Pre-Application

form is not available on the City Webpage, contact CPP staff at [burmeisterj@worcesterma.gov](mailto:burmeisterj@worcesterma.gov).

## **VII. APPLICATION GUIDANCE**

To open the application process to as many applicants as possible, additional application guidance will be available through CPP staff up until November 21<sup>st</sup> 2025 for the Pre-Application and December 30<sup>th</sup>, 2025 for the Full CPA Application. CPP staff may be contacted at [burmeisterj@worcesterma.gov](mailto:burmeisterj@worcesterma.gov). Additionally, CPP staff will provide at least one workshop per application cycle to assist potential applicants in developing eligible projects and navigating the application process.

## APPENDIX A – PRE-APPLICATION FORM QUESTIONS

### SECTION 1: PROJECT SUMMARY

1. **Project Name\*** *(100 Characters)*
2. **Project Location and/or Address\*** *(200 Characters)*
3. **Project lead organization (or individual if applicable) \*** *(100 Characters)*
4. **Legal Status of the Organization\*** *(Multiple Choice: 501(c)3; Government Entity; Individual; Unincorporated Community Group; LP or LLP; LLC; B, C, or S Corp.; Other (please specify))*
5. **Current property owner (if different from the applicant)** *(100 Characters)*
6. **Please attach written permission by the property owner for submission of this application if other than applicant.** *(Optional upload)*
7. **Brief project description (2 sentences) \*** *(250 characters)*
8. **Project contact information:**
  - Name\* *(100 Characters)*
  - Phone\* *(100 Characters)*
  - Email\* *(100 Characters)*

### SECTION 2: PROJECT ELIGIBILITY

1. **What CPA category does this project fall under? \*** *(Check all that apply: Historic Resources; Open Space and Recreation; Community Housing)*
2. **What activity are you proposing to do in this category? \*** *(Check all that apply: Acquire; Create; Preserve; Support; Rehabilitate/Restore)*
3. **What is the total project budget? \*** *(100 Characters)*
4. **How much are you requesting in CPA funding? \*** *(100 Characters)*

5. **What general budget line items will the CPA funds be used for?** CPA funds can only be used to fund capital expenses. Maintenance activities are not eligible. \* (250 characters)

**HISTORIC RESOURCE PROJECT ADDITIONAL QUESTIONS:**

6. **Eligible Historical Resources: Which of the following applies to your historical resource:** \* (multiple choice, pick one)
- a. **The historical resource is more than 50 years old AND is listed on the State Register of Historic Places.** *Note: Any property listed on the National Register or located in a Local Historic District is automatically listed on the State Register.*  
*If checked: Please upload a copy of your MACRIS listing or other proof of Register listing. \* (pdf upload)*
  - b. **The historical resource has received a Positive Determination of Local Historic Significance from the Worcester Historical Commission.**  
*If checked: Please upload a copy of your Determination of Local Historic Significance. \* (pdf upload)*
  - c. **None of the above.** *Note: A Determination of Local Historic Significance is necessary for applicants seeking CPA funding in the Historic Resources category if the resource in question is (a) not a building, structure, or real property; (b) not listed on the State Register of Historic Places; or (c) the resource is a building or structure that is less than 50 years old. A Determination of Local Historic Significance must be received by the Full CPA Application due date of January 7<sup>th</sup>, 2025. For more information, see the City of Worcester [Historical Commission Webpage](#).*  
*If checked: A Positive Determination of Local Historic Significance must be submitted to [burmeisterj@worcesterma.gov](mailto:burmeisterj@worcesterma.gov) by the Full CPA Application due date of January 7<sup>th</sup>, 2025. By initialing the following box, you recognize that failure to obtain a Positive Determination will result in project ineligibility and exclusion from the applicant pool. \* (3 characters)*
7. **Preservation Restrictions: Does your property have any deeded Preservation Restrictions?** *Note: Project awards over certain thresholds may require the Awardee to place a Preservation Restriction on the property as part of the grant agreement. More information on award thresholds and Preservation Restrictions*

can be found in the [Worcester Community Preservation Act \(CPA\) Funding Application Form Guidance for Applicants](#). \* (multiple choice, pick one)

a. My historic resource is not a building, property, or monument.

b. Yes.

*If checked: Please upload a copy of your Preservation Restriction. \* (pdf upload)*

**By initialing the following box, you recognize that an additional Preservation Restriction may be required as part of your Grant Agreement.** More information on award thresholds and Preservation Restrictions can be found in the [Worcester Community Preservation Act \(CPA\) Funding Application Form Guidance for Applicants](#). \* (3 characters)

c. No.

*If checked: You do not need an existing Preservation Restriction to apply for CPA funding. However, by initialing the following box, you recognize that a Preservation Restriction may be required as part of your Grant Agreement.* More information on award thresholds and Preservation Restrictions can be found in the [Worcester Community Preservation Act \(CPA\) Funding Application Form Guidance for Applicants](#). \* (3 characters)

d. I don't know.

*If checked: Community Preservation Program staff will assist you in determining if the property has an existing deed restriction. Please note that you do not need an existing Preservation Restriction to apply for CPA funding. However, by initialing the following box, you recognize that a Preservation Restriction may be required as part of your Grant Agreement.* More information on award thresholds and Preservation Restrictions can be found in the [Worcester Community Preservation Act \(CPA\) Funding Application Form Guidance for Applicants](#). \* (3 characters)

## OPEN SPACE AND OUTDOOR RECREATION ADDITIONAL QUESTIONS:

**6. Eligible Open Space and Outdoor Recreation Project location. Open Space and Outdoor Recreation projects funded with CPA must take place on land that is permanently protected for recreational or conservation use.** NOTE: Projects that take place in the public right of way (ROW) are not eligible for CPA funding.

**Which of the following applies to your project location?**

**a. This project takes place in an existing municipal or state park.** These spaces are considered protected under Article 97.

**b. This project takes place on property with a Conservation or Recreational deed restriction on the area where the work is to take place.**

*If checked: Please upload a copy of the deed restriction here. \* (pdf upload)*

**c. This project takes place on public OR private property that is NOT a designated park (such as part of a school campus) OR does not currently have a Conservation or Recreational deed restriction for the area where the proposed work is to take place.**

*If checked: You do not need an existing Restriction to apply for CPA funding. However, by initialing the following box, you recognize that a Restriction will be required as part of your Grant Agreement.* More information on deed restrictions can be found in the [Worcester Community Preservation Act \(CPA\) Funding Application Form Guidance for Applicants](#). \* (3 characters)

**d. I don't know.**

*If checked: Community Preservation Program staff will assist you in determining if the property has an existing deed restriction. Please note that you do not need an existing Restriction to apply for CPA funding. However, by initialing the following box, you recognize that a Restriction will be required as part of your Grant Agreement.* More information on deed restrictions can be found in the [Worcester Community Preservation Act \(CPA\) Funding Application Form Guidance for Applicants](#). \* (3 characters)



**COMMUNITY HOUSING PROJECT ADDITIONAL QUESTIONS:**

**6. Please describe how you intend to incorporate affordability deed restrictions for this project. \* (250 characters)**

**LAST QUESTIONS FOR ALL APPLICANTS:**

**Is there anything else you would like us to know about your project at this stage? (500 characters)**

**With my initials below, I confirm that the above information is true to the best of my knowledge and understand that major changes to the project outlined above may void project eligibility. \* (3 characters)**

**With my initials below, I understand that CPA funding is reimbursement based, and that, if awarded, my organization would have to cover some or all of the upfront costs of the project. \* (3 characters)**

## APPENDIX B - FULL CPA APPLICATION FORM QUESTIONS

1. **Project Name** (Please make sure this corresponds with the Project Name on the Pre-Application Form) *\*(100 Characters)*
2. **Project contact information:**  
Name *\*(100 Characters)*  
Phone *\*(100 Characters)*  
Email *\*(100 Characters)*
3. **Please briefly describe your project.** *\*(1000 characters)*
4. **What permissions, permits, and plans will be necessary to carry out this project, and what is the status of their acquisition?** Please attach any related permissions or permits related to the project. *\*(1000 characters, with optional upload option)*
5. **Do you foresee any delays in acquiring these permissions within the next 6 months?** If “yes” please explain. *\*(500 characters)*
6. **What is the desired start and end date of this project?** Please attach a Timeline for the project in the attachments portion of this form. *\*(250 characters, required attachment)*
7. **Please upload a complete project budget (xls or pdf) that includes the source of the funding for each line item.** CPA funds can ONLY be used on CPA eligible project elements. Please make sure to be specific about the use of all CPA monies requested. *\*(required document upload)*
8. **Please upload any renderings and/or estimates for this project.** *(optional document upload)*
9. **What is the status of the match funding identified in the budget?** Please upload commitment letters and/or funding agreements demonstrating that match funding is in place. *\*(500 characters, optional document upload)*

10. **Please explain why CPA funding is needed for this project.** If CPA is the only proposed funding source for this project, please explain why. \* *(500 characters)*
11. **Please describe the experience of the project manager or project management team in completing a project like this one.** Please include examples of similar projects pursued in the past, and why they are relevant. \* *(1000 characters)*
12. **Please describe the financial position of the organization and its ability to cover the upfront costs of this project.** CPA funding is provided on a reimbursement basis. Please attach any reports that may be helpful in establishing a capable financial position. \* *(1000 characters) (optional document upload)*
13. **How will this resource/property/building be maintained in the future?** Please provide any maintenance commitments as attachments. \* *(500 characters, optional document upload)*
14. **12. Please describe how this project/program will benefit Worcester residents in general, as well as specific groups that will benefit from the project.** \* *(500 characters)*

13. Please identify which of the Community Priorities identified in the [Community Preservation Plan](#) align with this project. \* *(Check all that apply:*

- *PRIORITY 1: Increase accessibility to historic resources, open space, parks, and in community housing;*
- *PRIORITY 2: Advance the city's sustainability and climate resilience goals;*
- *PRIORITY 3: Prioritizing investments into projects that address a demonstrated need in a geographic area;*
- *This project does not align with any of these Community Priorities.)*

14. Please describe how this project aligns with the above Community Priorities. *(1000 characters)*

15. Please identify which of the Category Goals identified in the [Community Preservation Plan](#) align with this project. \* *(Check all that apply:*

### **Historic Resources Category Goals**

- GOAL 1: Acquire and restore historic buildings in danger of demolition.
- GOAL 2: Promote adaptive reuse or deconstruction for historical preservation.
- GOAL 3: Preserve, digitize, and archive historic records.
- GOAL 4: Preserve underrepresented stories.

### **Open Space and Recreation Category Goals**

- GOAL 1: Maintain high quality drinking water resources and protect wetlands and floodplains.
- GOAL 2: Refurbish existing park amenities to meet the city's changing needs.
- GOAL 3: Provide access to fresh, locally grown foods.
- GOAL 4: Increase native species populations and grow the urban forest.
- GOAL 5: Expand green networks to create corridors for wildlife and alternative mobility options.

### **Community Housing Category Goals**

- GOAL 1: Produce more housing, especially owner-occupied housing.
- GOAL 2: Support deeper housing affordability (at or below 60% AMI).
- GOAL 3: Increase infill and adaptive reuse development.
- GOAL 4: Increase the number of perpetual affordability deed restrictions.
- GOAL 5: Support unhoused individuals, especially youth and families.
- This project does not align with any of these Category Goals.)

**16. Please describe how this project aligns with the above Category Goals (1000 characters)**

**17. Does your project align with any other City or Regional plans? Please be specific. See the [City of Worcester webpage](#) to view local plans. \* (500 characters)**

**18. Does your project have community support? Please describe outreach efforts for this project and upload any letters of support. (500 characters, [optional document uploads](#))**

**19. Is there anything else you want the CPC to know about your project? (1000 characters)**

## APPENDIX C – PROJECT SCORING RUBRIC

		Excellent (5)	Good (3)	Fair (1)	Poor (0)	Rating
A	Project Preparedness	All required permissions, permits, and plans necessary for completion are included, and all additional funding commitments are secured.	Required permissions, permits, and plans necessary for project completion are expected to be complete within 3 months. All additional funding commitments secured.	Required permissions, permits, and plans necessary for project completion are expected to be complete within 6 months. Project is eligible for additional funding sources, though not yet secured.	Required permissions, permits, and plans necessary for project completion will not be complete within 6 months. Project is eligible for additional funding sources, though not yet secured.	
B	Match Funding	Project leverages more than 50% of total project costs and/or has demonstrated commitment for in-kind contributions to reduce costs.	Project leverages 25-50% of total project costs and/or has demonstrated commitment for in-kind contributions to reduce costs.	Project leverages less than 25% of project costs and/or has demonstrated commitment for in-kind contributions to reduce costs.	CPA funds requested for 100% of project costs with no in-kind donations or sweat-equity.	
C	Applicant Experience	Project manager(s) has demonstrated that they have successfully completed multiple projects similar to this one previously.	Project manager(s) has demonstrated that they have successfully managed at least one project similar to this one previously.	Project manager(s) has demonstrated a track record of good project management in other areas.	No applicable project management experience is provided.	
D	Long-Term Sustainability	Project strongly demonstrates adequate capacity for long-term maintenance of property/asset/CPA investment with no additional costs or future CPA asks.	Project demonstrates adequate capacity for long-term maintenance of property/asset/CPA investment with no additional costs or future CPA asks.	Project demonstrates adequate capacity for long-term maintenance of property/asset/CPA investment with some/minimal additional costs or future CPA asks.	Project does not demonstrate adequate capacity for long-term maintenance of property/asset/CPA investment without additional costs or future CPA asks.	
E	Community Benefit	Project demonstrates a high public benefit to a large number of residents <b>AND</b> an outsized impact on a vulnerable group.	Project demonstrates a high public benefit to a large number of residents <b>OR</b> an outsized impact on a vulnerable group.	There will be opportunities for the public to benefit from this project <b>AND</b> there will be some impact on a vulnerable population.	There will be few to no opportunities for the public to benefit from this project and there will be no impact on a vulnerable population.	
F	Community Priorities/Community Planning and Buy-in	Project demonstrates strong alignment/compatibility with community priorities or community plans <b>AND</b> demonstrates strong community support.	Project demonstrates alignment/compatibility with community priorities or other community plans <b>AND</b> demonstrates some community support.	Project demonstrates some alignment/compatibility with community priorities or other community plans <b>OR</b> demonstrates some community support.	Project does not demonstrate alignment/compatibility with community priorities or other community plans <b>AND</b> does not demonstrate community support.	
G	Community Preservation Plan Category Goals		Project aligns with more than one category goals.	Project aligns with at least one category goal.	Project does not align with any category goal.	
H	Compatibility Between CPA Funding Categories			Project includes eligible activities <b>AND/OR</b> demonstrates compatibility in other CPA category goals.	Project includes eligible activities in only one CPA area <b>AND</b> does not demonstrate compatibility across other CPA category goals.	
Overall Rating						