



# Natick Community & Economic Development

BUILDING • PLANNING • ZONING • CONSERVATION  
 Town of Natick, 13 E. Central Street Natick, MA 01760  
 www.NatickMA.gov • (508) 647 – 6450

## Natick Letter of Interest (“LOI”) Report

Thank you for submitting a Letter of Interest (“LOI”) with the Natick Community Preservation Committee (“CPC”). The LOI is the first phase of the CPA Project Proposal review process. The LOI review process was established as an opportunity to aid in the formalization of a CPA Project Proposal for those interested in submitting a CPA Project Proposal for Community Preservation Funding. This LOI Report is used to assist the CPC in their budgeting process, in addition to aiding a CPA Project Proposal move forward with a formal CPA Funding Request Application.

1. CPA Category Area	
<input type="checkbox"/> Open Space Preservation <input type="checkbox"/> Acquire <input type="checkbox"/> Create <input type="checkbox"/> Preserve <input type="checkbox"/> Rehabilitate/Restore	<input type="checkbox"/> Outdoor Recreation <input type="checkbox"/> Acquire <input type="checkbox"/> Create <input type="checkbox"/> Preserve <input type="checkbox"/> Rehabilitate/Restore
<input checked="" type="checkbox"/> Community (Affordable) Housing <input type="checkbox"/> Acquire <input checked="" type="checkbox"/> Create <input type="checkbox"/> Preserve <input type="checkbox"/> Rehabilitate/Restore <input type="checkbox"/> Support	<input type="checkbox"/> Historic Preservation <input type="checkbox"/> Acquire <input type="checkbox"/> Create <input type="checkbox"/> Preserve <input type="checkbox"/> Rehabilitate/Restore
<b>Notes:</b>	
2. Property Information	
<b>Address/Assessor Map and Lot</b> 246 North Main Street (Map 18, Lot 99)	
<b>Property Owner</b> Town of Natick (Transferred to Natick Affordable Housing Trust Fund)	<b>Property Owner Permission for Use</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
<b>Zoning District</b> Residential Single A (RSA)	<b>Overlay Zoning District</b> N/A
<b>Historic &amp; Cultural District</b> N/A	<b>Easements/Restrictions</b> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Unsure
3. CPA Project Proposal Summary	
<p>Habitat for Humanity MetroWest/Greater Worcester (the “CPA Project Proposal Team”) has filed a Letter of Interest (“LOI”) under the CPA Category Area – Community (Affordable) Housing to utilize CPA Funds to aid in the construction of a single-family dwelling on 246 North Main Street (the “Property”). Natick Affordable Housing Trust Fund (“NAHTF”) released a Request for Proposal (“RFP”) process for the sale of the Property. The CPA Project Proposal Team was selected by NAHTF to purchase the Property for the construction of a One-Family Dwelling. The CPA Project Proposal Team will sell the Property and new One-Family Dwelling as an affordable home to a low-income homebuyer whose income is between 30 and 60 percent of the Boston-Cambridge Area Median Income (“AMI”). The One-Family Dwelling will have three bedrooms, two bathrooms with a combined living area of 1,200 square feet, plus two off-street parking spaces.</p> <p>Goals and Objectives of CPA Project Proposal</p> <ul style="list-style-type: none"> <li>• Goal: The goal of Habitat for Humanity is to help the community of Natick build affordable and safe housing for low-income families who are first-time homebuyers.</li> <li>• Objective: The objective for Habitat for Humanity is to complete construction of a new affordable and safe home by May of 2027 in Natick at 246 North Main Street. In addition to helping a low-income family as a first-time homebuyer close on a low-interest 30-year mortgage that is no more than 30 percent of their household income by the end of the summer 2027.</li> </ul>	



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<b>4. LOI Filing Project Team</b>	
<b>Project Team</b> Debbie Maruca Hoak, Chief Executive Officer, Habitat for Humanity MetroWest/Greater Worcester, Inc.; Paul Rebello, Construction Manager, Habitat for Humanity MetroWest/Greater Worcester, Inc.; Ted Oxholm, Construction Site Supervisor, Habitat for Humanity MetroWest/Greater Worcester, Inc.; Norma Tyznik, Family Services Administrator, Habitat for Humanity MetroWest/Greater Worcester, Inc.; Joseph S. Townsend, Development Director, Habitat for Humanity MetroWest/Greater Worcester, Inc.; Hank Rauch, Site Selection Committee Member – Volunteer, Habitat for Humanity MetroWest/Greater Worcester, Inc.	
<b>5. CPA Project Proposal Timeline</b>	
<b>Anticipated Town Meeting</b> 2025 Fall Annual Town Meeting	<b>Estimated Duration of Project</b> Construction est. April 2026 to August 2027
<b>6. CPA Project Proposal Budget</b>	
<b>Estimated Project Amount</b> \$150,000	<b>Number of Funding Requests</b> One time request for CPA Funding (anticipated that the CPA Project Proposal can be completed by one funding request)
<b>7. LOI Meeting Review Minutes</b>	
<b>LOI Team Attendees</b> Bill Ramage, CPC Member (Chair); David Krentzman, CPC Member (Vice-Chair); Jeremy Kadden, CPC Member (Natick Housing Authority); Ganesh Ramachandran, Natick Affordable Housing Trust Fund (Chair); Michael Boudreau, Director of Health; Tanya Quigley-Boylan, Fire Prevention of Natick Fire Department; John Digiacomio, Assistant Town Engineer, Department of Public Works; Bill McDowell, Town Engineer, Department of Public Works; Claire Rundelli, Conservation Agenda and Environmental Planner; Jon Marhsall, Deputy Town Administrator; and Amanda Loomis, Director of Community and Economic Development	
<b>CPA Proposal Project Team Attendees</b> Debbie Maruca Hoak, Chief Executive Officer (CEO), Habitat for Humanity MetroWest/Greater Worcester; and Hank Rauch, Site Selection Committee Member - Volunteer, Habitat for Humanity MetroWest/Greater Worcester	
<b>Overview</b>	
<ul style="list-style-type: none"> <li>Habitat for Humanity Metro West proposed a single-family home project at 246 N. Main Street, emphasizing its role in addressing local housing needs.</li> <li>Project plans include a 1200 sq ft, three-bedroom, two-bathroom home designed for aging in place and the potential for a 600 sq ft accessory dwelling unit (ADU).</li> <li>A comprehensive permit (40B application) is required due to necessary lot variances, including a frontage of 60 ft vs. the 110 ft required, and a lot size smaller than the minimum 15,000 sq ft.</li> <li>Total estimated construction cost is \$463,000, with a request for \$150,000 in CPC funding, representing 30% of the total project cost.</li> <li>The project aims to keep mortgage payments within 30% of gross income for selected families, ensuring long-term affordability through an affordable deed rider.</li> <li>Construction is projected to take 12-15 months, from April 2026 to August 2027, contingent on the timing of comprehensive permit approval.</li> <li>The habitat project emphasizes community involvement, with partner families required to contribute a minimum of 300 hours of sweat equity.</li> <li>Discussions included plans for ADA compatibility and adherence to building codes, ensuring safety and accessibility in the single-story design.</li> </ul>	



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- Affordable Housing Trust Chair Ganesh Ramachandran confirmed the Trust's full support for the project, highlighting organizational backing for funding applications.

## Project Overview & Introduction

- Habitat for Humanity Metro West presented proposal for 246 N. Main Street single-family home project
- Amanda Loomis facilitated LOI meeting with town department representatives
- Meeting purpose: provide guidance to prepare LOI report valid for 2 years and inform CPC funding application due August 8th for fall town meeting

## Project Specifications Summary

- Three bedrooms, two bath homes approximately 1200 square feet with two off-street parking spaces
- One-story design for aging in place accessibility with provision for future 600 square foot ADU in backyard
- All-electric home with heat pump, Energy Star appliances, hybrid hot water tank, and EV hookup provision
- Energy efficient design with super robust insulation package for long-term affordability

## Construction Timeline & Process Summary

- Construction timeline: April 2026 to August 2027 (12-15 months) dependent on comprehensive permit approval timing
- Partner families contribute 300 hours of sweat equity (minimum 100 construction hours, 30 education hours)
- Community volunteer involvement with contracted electrical, plumbing, and excavation work
- Marketing and lottery process managed by Habitat for family selection

## Technical Compliance & Accessibility Summary

- ADA compatibility consideration discussed for fully accessible unit given single-floor design
- Well-draining gravelly soils in area suitable for infiltration systems
- Hardwired smoke detectors and standard building/housing code compliance required
- No basement proposed (crawl space or slab on grade) eliminating radon testing requirements

## Organizational Support & Next Steps Summary

- Affordable Housing Trust full support confirmed by Chair Ganesh Ramachandran
- LOI report delivery expected by end of week/beginning of next week
- Town volunteer construction participation welcomed and encouraged by Habitat
- CPC evaluation checklists (general and housing-specific) to be provided for application preparation

## Summary of LOI Meeting

Ms. Hoak presented an overview of the Habitat for Humanity (the "CPC Project Proposal Team") in addition to a review of the proposed project at 246 North Main Street (the "Property"). Ms. Hoak stated that Habitat for Humanity partners with families who make 30 to 60 percent of the area median income, noting that 60 percent is our upper limit for home ownership, which is typically less than most other affordable housing programs. Partnering families are required to demonstrate the ability to pay a mortgage. Further, families are required to put in 300 hours of sweat equity during the project, between building the home, taking education classes, and other items to ensure they are prepared to take on home ownership.

Ms. Hoak presented a presentation, which included information on a series of slides, which included: a review of the CPA Project Proposal Team's mission, vision, partners, resource base; affiliate overview relative to community impact and 3 year strategic plan; scope of work for the project at 246 North Main Street (40B Comprehensive Permit process; energy efficiency, creation of an all-electric home; Pre-Construction Timeline; Construction Timeline; Project Budget; Recent Project Example (226 Cedar Street, Sturbridge; and 521-523 Sunderland Road, Worcester).

LOI Team Member Questions and Comments



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- Mr. Boudreau asked whether the structure would have a full basement or if it was intended to have a crawl space. Ms. Hoak replied that the structure would either feature a crawl space or be a slab on grade.
- Mr. Krentzman sought clarification about the possibility of an Accessory Dwelling Unit (ADU) in the future. Ms. Hoak replied that an ADU could be built later, but it would not be part of this project.
- Ms. Loomis requested clarification on why the CPA Project Proposal proposes a one-story instead of a two-story residential dwelling option. In response, Ms. Hoak explained that the residential dwelling could be either one story or two stories. Ms. Hoak also reviewed the composition of bedrooms and bathrooms for both the one-story and two-story residential options.
- Ms. Loomis sought clarification on the CPA Project Proposal Team's approach to permitting identification.
- Mr. Ramachandran sought clarification whether the residential dwelling unit would be accessible. Ms. Hoak confirmed that they could make the unit accessible, citing two recently completed accessible projects by Habitat for Humanity.
- Ms. Rundelli emphasized that constructing a new one-family dwelling must adhere to stormwater management regulations, which include the requirement to capture roof runoff. Additionally, she noted that the review and approval of stormwater infrastructure take place during the building permit process.
- Mr. Boudreau noted that the soil in the area is very gravelly, which should facilitate easy infiltration. It is not expected that there will be significant issues fitting the necessary infiltration system on the property.
- Mr. Boudreau further contributed that the CPA Project Proposal relates to the housing code, in addition to the infrastructure of connections. Mr. Boudreau further noted the requirements for ADU infrastructure connections related to sewer and water connections.
- Inspector Quigley-Boylan emphasized the requirement for hardwired smoke detectors.
- Mr. Marshall requested clarification regarding the cost of the project, noting that based on the proposed information provided in the LOI, the CPA Project Proposal would be funded through a combination of municipal funding, proceeds from sales, and anticipated grants. He also sought further clarification regarding the funding sources. Ms. Hoak provided a review of funding sources, in addition to fund-raising efforts. Ms. Hoak further noted that more successful Habitat for Humanity is in their fund-raising efforts, the lower the costs for the project. Ms. Hoak provided an example of a project during COVID, where the construction staff handled everything independently, without contractors, because we couldn't bring anyone else in. By running the project independently of contractors, Habitat for Humanity was able to save funds. Ms. Hoak stated that unused funds would be returned to the Natick Affordable Housing Trust Fund and CPC at the end of that project. Ms. Hoak stated that Habitat for Humanity spends the money up front for the project and then submits invoices for requests.
- Mr. Ramachandran Ganesh stated that NAHTF fully supports the project, describing it as an effective solution for managing tax title properties. He noted that the only viable option for such properties is to build a single-family home. Habitat has a proven track record of successfully carrying out similar projects with the community's support. Mr. Ramachandran emphasized that this process has been, and will continue to be, collaborative.

## 8. Documents Submitted for Review for LOI Filing

- Habitat for Humanity MetroWest/Greater Worcester Response to Request for Proposal Disposition & Development of Municipal Property at 246 North Main Street, dated May 1, 2025 (uploaded into OpenGov on July 7, 2025, at 10:10 pm by Joseph Townsend – titled RFP Proposal Submitted to Affordable Housing Trust in May of 2025.pdf)
- Habitat for Humanity MetroWest/Greater Worcester Annual Report FY2024 (uploaded into OpenGov on July 7, 2025, at 10:17 pm by Joseph Townsend – titled Annual-Report-FY2024-1.pdf)



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- Letter from Joseph S. Townsend, Development Director for Habitat for Humanity MetroWest/Greater Worcester (uploaded into OpenGov on July 22, 2025, at 20:35 pm by Amanda Loomis – titled [Housing\\_Trust\\_Meeting\\_Minutes\\_in\\_Lieu\\_of\\_letter\\_Mon\\_Jul\\_7\\_2025\\_21-59-15.pdf](#))
- Habitat for Humanity MetroWest/Greater Worcester Scope of Work for CPC LOI 2025 – Town of Natick, New Construction of an Affordable Home at 246 North Main Street (uploaded into OpenGov on July 22, 2025, at 2:35 pm by Amanda Loomis – titled [Scope\\_of\\_Work\\_for\\_CPC\\_LOI\\_2025\\_Mon\\_Jul\\_7\\_2025\\_21-51-37.pdf](#))
- Habitat for Humanity MetroWest/Greater Worcester Project Timeline – 246 North Main Street in Natick (uploaded into OpenGov on July 22, 2025, at 2:35 pm by Amanda Loomis – titled [Project\\_Timeline\\_Tue\\_Jul\\_8\\_2025\\_15-34-23.pdf](#))
- Preliminary Budget for LOI Application for Habitat for Humanity MetroWest/Greater Worcester, Inc., dated July 7, 2025 (uploaded into OpenGov on July 22, 2025, at 2:35 pm by Amanda Loomis – titled [Preliminary\\_Budget\\_246\\_N.\\_Main\\_St.\\_Natick\\_Mon\\_Jul\\_7\\_2025\\_22-02-56.pdf](#))
- Habitat for Humanity MetroWest/Greater Worcester, Project Team Roster (uploaded into OpenGov on July 22, 2025, at 2:35 pm by Amanda Loomis – titled [Project\\_Team\\_Roster\\_Mon\\_Jul\\_7\\_2025\\_22-01-40.pdf](#))
- Foundation Plan and First Floor Plan for Proposed House for 38 Aetna St., Worcester, Mass, Sheet 1 of 3, stamped by Benjamin Nickerson (Registered Architect), dated April 25, 2016 (uploaded into OpenGov on August 4, 2025, at 2:10 pm by Amanda Loomis – titled [Plot\\_plan\\_Floor\\_Plan\\_and\\_elevation\\_Page\\_2.pdf](#))
- Elevations (Left, Rear, Front, and Ride Side Elevation) Proposed House for 38 Aetna St., Worcester, Mass., Sheet 2 of 3, stamped by Benjamin Nickerson (Registered Architect), dated April 25, 2016 (uploaded into OpenGov on August 4, 2025, at 2:10 pm by Amanda Loomis – titled [Plot\\_plan\\_Floor\\_Plan\\_and\\_Elevation\\_Page\\_3.pdf](#))
- Habitat for Humanity MetroWest/Greater Worcester General Overview (Presentation), dated July 22, 2025 (uploaded into OpenGov on July 22, 2025, at 2:33 pm by Amanda Loomis – titled [07.22.2025\\_LOI\\_Meeting\\_Presentation\\_for\\_LOI-8.pdf](#))

## 9. Staff Comment (Letters and OpenGov Statements)

- Letter of comment from Claire Rundelli, ENV SP, Conservation Agent/Environmental Planner, Re: Conservation Commission comments – 246 North Main Street – LOI 25-8, dated July 11, 2025

## 10. LOI Filing Alignment/Fundable by CPA Funding

- LOI-8 was submitted for consideration for CPA Funding under CPA Category Area, Community (Affordable) Housing. The CPA Project Proposal includes the construction of a new One-Family Dwelling, which will be made available as an affordable residential dwelling

## 11. Notes regarding the LOI Filing


- The CPA Project Proposal Team should meet with the Building Commissioner (Dave Gusmini) to review avenues to permit the residential dwelling unit. Furthermore, if applicable, permits required from the Zoning Board of Appeals (ZBA) should be included in the CPA Project Proposal Timeline and Budget, in addition to applicable building permits.
- The CPA Project Proposal Team noted that the residential dwelling unit is intended to be an “all-electric home with heat pump and provision for an electric vehicle as well as a hybrid hot water tank which utilizes ambient air to partially heat the water.” Such design aligns with the new MA State Energy Code that went into effect in Natick on July 1, 2025. The Sustainability Department suggests considering Passive House design to support energy affordability for the future residents of the residential dwelling unit.
- The CPA Project Proposal Team has mentioned the future inclusion of an Accessory Dwelling Unit (ADU). The review, design, and potential inclusion of the ADU should take place during the construction of the residential dwelling. The inclusion of the ADU during initial construction would be more cost-effective and efficient, while ensuring the ADU can be located on the property.



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- The CPA Project Proposal Team should include in their CPA Project Proposal the recording of the residential dwelling through the State’s Local Initiative Program (LIP) to ensure such residential dwelling remains affordable in perpetuity.
- The CPA Project Proposal Team should coordinate with the Conservation Agent and Assistant Town Engineer regarding the requirement for compliance with the Town’s Stormwater Management permitting requirements. Further, such permitting should be included in the CPA Project Proposal Timeline and Budget.
- An LOI Filing is not an approval, recommendation, or a guarantee that the CPA Project Proposal outlined in the LOI Filing LOI-8 will be granted CPA Funding.
- Comments regarding favorable action being taken during the CPA Funding Request Application phase during an LOI Review Meeting have no weight on the CPA Funding Request Application
- The LOI Report is only valid for two years.
- Significant amendments to an LOI Filing will require a new LOI Report. At any time, there are any question as to whether a LOI Report is required please contact the Community and Economic Development (“CED”) Office or [aloomis@natickma.org](mailto:aloomis@natickma.org)

12. LOI Report			
<b>OpenGov Case Number</b> LOI-8 (246 North Main Street)	<b>Date of LOI Filing</b> June 8, 2025	<b>Date of LOI Meeting</b> July 22, 2025	
<b>Date LOI Deemed Administratively Complete</b> July 9, 2025	<b>Date of LOI Report</b> August 6, 2025	<b>Expiration of LOI</b> August 6, 2027	



# CPA Funding Request Application Checklist (General Evaluation)

The CPA Funding Request Application Checklists (General Evaluation and CPA Category Area) have been created to assist CPA Project Proposal Teams in submitting a CPA Funding Request Application. This application consists of dropdown tabs, narrative boxes, and upload requirements. Please review the CPA Funding Request Application carefully before submitting it.

Note: [G#] indicates the General Evaluation Criteria—please refer to the Plan to ensure that the CPA Project Proposal meets the requirements of the CPC.

CPA Funding Request Application Checklist - Intended for the 2025 Fall Annual Town Meeting



## Part 1: Community Preservation Act (CPA) in Natick

### Goal of Part 1 - Ensure that a the CPA Project Proposal Team has reviewed the Plan

The Community Preservation Plan (referred to as the "Plan") has been developed to assist the Community Preservation Committee (the "CPC") in conveying its expectations for selecting CPA Project Proposals. The Plan aims to guide CPA Project Proposal Teams seeking CPA funding, while also establishing a clear and transparent process for reviewing, evaluating, and recommending these proposals. All CPA Project Teams seeking CPA funds are expected to read and understand the Plan.

#### 1.1 - The Community Preservation Plan Acknowledgment of the Community Preservation Plan

- Please select the appropriate response. (Dropdown Tab - please select one of the following)

- **Yes**, the CPA Project Proposal Team has reviewed the Community Preservation Plan
- **No**, the CPA Project Proposal Team has NOT reviewed the Community Preservation Plan – Please review prior to filing a CPA Funding Request Application



## Part 2: Letter of Interest

### Goal of Part 2 - Ensure that a LOI Report has been received and is valid

The Letter of Interest (LOI) provides guidance for individuals or CPA Project Proposal Teams in preparing a CPA Project Proposal for Community Preservation Funding consideration. All CPA Funding Request Applications must be accompanied by an LOI Report, which remains valid for two years.

#### 2.1 - Letter of Interest (LOI) Report Acknowledgment of the Community Preservation Plan -

Please select the appropriate response. (Dropdown Tab - please select one of the following)

- **Yes**, a current LOI Report has been uploaded to the Attachments of this CPA Funding Request Application
- **Yes**, an expired Report has been uploaded to the Attachments of this CPA Funding Request Application – please do not move forward with this CPA Funding Request Application and submit a LOI Filing
- **No**, a LOI Report has not been uploaded or received – please do not move forward with this CPA Funding Request Application and submit a LOI Filing



## Part 3: CPA Category Area

CPA Category Areas are defined by Massachusetts General Law (MGL) Chapter 44B and the Plan. Please check all applicable CPA Category Areas for this CPA Funding Request Application.

- ▶ **Open Space Protection** The acquisition, creation, and preservation of open space and natural resources and rehabilitation of open space or natural resources if acquired or created through the CPA.
- ▶ **Outdoor Recreation** The acquisition, creation, preservation, and rehabilitation of land and outdoor facilities for recreational use.
- ▶ **Community (Affordable) Housing** The acquisition, creation, support, and preservation of affordable community housing, as well as the rehabilitation of housing as affordable that has been acquired or created through the CPA.
- ▶ **Historic Preservation** The acquisition, preservation, or rehabilitation of historic resources that are listed on the State Register of Historic Places or determined to be locally significant by the Natick Historical Commission. Historic Preservation projects intending to seek Community Preservation Funds must comply with the U.S. Secretary of the Interior's Standards for the Treatment of Historical Properties for buildings and landscapes.

Please select all applicable CPA Category Areas (Parts 3.1a, 3.2a, 3.3a, 3.4a). For each CPA Category Area a Type of CPA Category Area will appear (Parts 3.1b, 3.2b, 3.3b, 3.4b - shown in purple)

### 3.1a - Open Space Protection

Open Space Protection: The acquisition, creation, and preservation of open space and natural resources and rehabilitation of open space or natural resources if acquired or created through the CPA.

#### 3.1b - Type of Open Space Protection (Pull-down Tab - select one of the following)

- Acquire
- Create
- Preserve
- Rehabilitate/Restore
- Two or more (Acquire, Create, Preserve, Rehabilitate/Restore)

### 3.2a - Outdoor Recreation

Outdoor Recreation: The acquisition, creation, preservation, and rehabilitation of land and outdoor facilities for recreational use.

#### 3.2b - Type of Outdoor Recreation (Pull-down Tab - select one of the following)

- Acquire
- Create
- Preserve
- Rehabilitate/Restore
- Two or more (Acquire, Create, Preserve, Rehabilitate/Restore)

Part 3 continued on next page (page 3)

## Part 3: CPA Category Area, cont. from page 2

### 3.3a - Community (Affordable) Housing

Community (Affordable) Housing: The acquisition, creation, support, and preservation of affordable community housing, as well as the rehabilitation of housing as affordable that has been acquired or created through the CPA.

#### 3.3a - Community (Affordable) Housing (Pull-down Tab - select one of the following)

- Acquire
- Create
- Preserve
- Rehabilitate/Restore
- Support
- Two or more (Acquire, Create, Preserve, Rehabilitate/Restore, Support)

### 3.4a - Historic Preservation

Historic Preservation The acquisition, preservation, or rehabilitation of historic resources that are listed on the State Register of Historic Places or determined to be locally significant by the Natick Historical Commission. Historic Preservation projects intending to seek Community Preservation Funds must comply with the U.S. Secretary of the Interior's Standards for the Treatment of Historical Properties for buildings and landscapes.

#### 3.4a - Historic Preservation (Pull-down Tab - select one of the following)

- Acquire
- Create
- Preserve
- Rehabilitate/Restore
- Two or more (Acquire, Create, Preserve, Rehabilitate/Restore)

## Part 4: General Funding Request Criteria

All CPA project proposals will be evaluated based on the General Evaluation Criteria. Please use this part of the CPA Funding Request Application to align the CPA project proposal with MGL c 44B, the Plan, and the General Evaluation Criteria. All Sub-Parts of Part 4 are Pull-down Tab - please select one option that best aligns with the CPA Project Proposal.

**4.1 - Consistency with Town Planning [G1]** The CPA Project Proposal must align with planning documents that have undergone extensive review, received public input, and have been adopted by the Town. These documents include, but are not limited to, the following: the Natick 2030+ Comprehensive Master Plan (2019), the Open Space and Recreation Plan (2020), the Natick Housing Production Plan (2021), the Master Plan for Parks and Fields (2016), and the Historic Preservation Inventory, as outlined by the Natick Historical Commission or the Historic District Commission. (Drop-down Tab - please select one of the following)

- **Yes**, the CPA Project Proposal is consistent with Town planning documents
- **No**, the CPA Project Proposal is NOT consistent with Town planning documents
- **Not Applicable** - Please upload statement in the Attachments of this CPA Funding Request Application as to why 4.1 is not applicable

## Part 4: General Funding Request Criteria, cont. from pg. 3

**4.2-Benefits to the community [G2/G3]** The CPA Project Proposal is expected to provide substantial benefits to the entire community or a large fraction thereof.

(Dropdown Tab - please select one of the following)

- **Yes**, the CPA Project provides a substantial benefit to the entire community or a large fraction thereof
- **No**, the CPA Project Proposal does NOT provide a substantial benefit to the entire community or a large fraction thereof
- **Not Applicable** - Please upload statement in the Attachments as to why Part 4.2 is not applicable

**4.3 - Addresses Community Need [G2/G3]** The CPA Project Proposal is expected to address the needs and provides benefits to currently underserved populations

(Dropdown Tab - please select one of the following)

- **Yes**, the CPA Project Proposal does address the needs and provides benefit to currently underserved populations
- **No**, the CPA Project Proposal does NOT address the needs and provide benefit to currently underserved populations
- **Not Applicable** - Please upload statement in the Attachments as to why 4.3 is not applicable

**4.4 - Demonstrates Support [G4/G10]** The CPA Project Proposal must show community and stakeholder support.

(Dropdown Tab - please select one of the following)

- **Yes**, the CPA Project Proposal demonstrates the support of the community and other stakeholders
- **No**, the CPA Project Proposal does NOT demonstrate the support of the community and other stakeholders
- **Not Applicable** - Please upload statement in the Attachments as to why 4.4 is not applicable

**4.5 - Town Support/Endorsement [G4]** The CPA Project Proposal must demonstrate support from relevant town bodies (examples, the Conservation Commission, Historical Commission, Historic District Commission, Natick Housing Authority, Planning Board, Recreation & Parks Commission, and Select Board).

(Dropdown Tab - please select one of the following)

- **Yes**, the CPA Project Proposal does demonstrate the support and endorsement of relevant town bodies
- **No**, the CPA Project Proposal does NOT demonstrate the support and endorsement of relevant town bodies
- **Not Applicable** - Please upload statement in the Attachments as to why 4.5 is not applicable

## Part 4: General Funding Request Criteria, cont. from pg. 4

**4.6 - Saves, Preserves, Restores [G5]** The CPA Project Proposal should aim to save, preserve, or restore resources that would otherwise be threatened

(Dropdown Tab - please select one of the following)

- **Yes**, the CPA Project Proposal does save, preserve, and/or restore resources that would otherwise be threatened
- **No**, the CPA Project Proposal does NOT save, preserve, and/or restore resources that would otherwise be threatened
- **Not Applicable** - Please upload statement in the Attachments as to why 4.6 is not applicable to this CPA Project Proposal

**4.7 - Practicality and Feasibility [G6]** The CPA Project Proposal has been prepared demonstrate practicality and feasibility, ensuring it can be implemented quickly and within budget

(Dropdown Tab - please select one of the following)

- **Yes**, the CPA Project Proposal demonstrates practicality and feasibility and that the CPA Project Proposal can be implemented expeditiously and within budget
- **No**, the CPA Project Proposal does NOT demonstrate practicality and feasibility and that the CPA Project Proposal can be implemented expeditiously and within budget
- **Not Applicable** - Please upload statement in the Attachments as to why 4.7 is not applicable to this CPA Project Proposal

**4.8 - Risk Management [G7]** The CPA Project Proposal is expected to succeed by reducing risk through careful planning, research, and oversight

(Dropdown Tab - please select one of the following)

- Yes, the CPA Project Proposal has a high likelihood of success, in part by ameliorating risk through prior planning, research, and oversight
- No, the CPA Project Proposal does NOT have a high likelihood of success, in part by ameliorating risk through prior planning, research, and oversight
- Not Applicable - Please upload statement in the Attachments as to why 4.8 is not applicable to this CPA Project Proposal

**4.9 - Implementation Ready [G8]** The CPA Project Proposal is expected to be ready to implement, with permits acquired and other funding sources already secured

(Dropdown Tab - please select one of the following)

- **Yes**, the CPA Project Proposal is ready to implement, with permits acquired and other funding sources already secured
- **No**, the CPA Project Proposal is NOT ready to implement, with permits acquired and other funding sources already secured
- **Not Applicable** - Please upload statement in the Attachments as to why 4.9 is not applicable

## Part 4: General Funding Request Criteria, cont. from pg. 5

**4.10 - CPA Project Proposal Team [G9]** The CPA Project Proposal is expected to feature a responsive CPA Project Proposal Team with expertise in the relevant areas (Dropdown Tab - please select one of the following).

- **Yes**, the CPA Project Proposal features a responsive CPA Project Proposal Team with expertise in the relevant areas
- **No**, the CPA Project Proposal does NOT feature a responsive CPA Project Proposal Team with expertise in the relevant areas
- **Not Applicable** - Please upload statement in the Attachments as to why 4.10 is not applicable

**4.11 - Funding Sources [G11]** The CPA Project Proposal aims to secure additional funding from both public and private sources (Dropdown Tab - please select one of the following).

- **Yes**, the CPA Project Proposal leverages additional public and/or private funds
- **Not Applicable** - Please upload statement in the Attachments as to why 4.11 is not applicable to this CPA Project Proposal

**4.12- Preserve/Utilize Town Assets [G12]** The CPA Project Proposal aims to preserve or utilize existing town-owned assets while ensuring a long-term contribution and enhancement to the community (Dropdown Tab - please select one of the following).

- **Yes**, the CPA Project Proposal preserves or utilizes current town-owned assets, while providing long-term contribution and/or enhancement to the Town
- **No**, the CPA Project Proposal does NOT preserve or utilize current town-owned assets, while providing long-term contribution
- **Not Applicable** - Please upload statement in the Attachments as to why 4.12 is not applicable

**4.13- Advantageous cost/benefit value** The CPA Project Proposal aims to deliver a favorable cost-benefit value (Dropdown Tab - please select one of the following).

- **Yes**, the CPA Project Proposal produces an advantageous cost/benefit value
- **No**, the CPA Project Proposal does NOT produce an advantageous cost/benefit value
- **Not Applicable** - Please upload statement in the Attachments as to why 4.13 is not applicable to this CPA Project Proposal

## Part 5: CPA Project Proposal Identification

**Goal of Part 5 - Establish a title and consistent narrative for the CPA Project Proposal for reference purposes**

### 5.1 - CPA Project Proposal Title

Please provide a title for the CPA Project Proposal to aid in reference and identification.

### 5.2 - Brief CPA Project Proposal Description

Please provide a 2-4 sentence abstract that briefly describes the CPA Project Proposal for reference purposes

## Part 6: Property Information

### Goal of Part 6 - Provide information for each parcel of land included as part of this CPA Project Proposal

Please provide the following information for each parcel of land included in the CPA Project Proposal. An entry should be created for each parcel of land included in this CPA Funding Request Application.

**6.1 - Total Number of Parcels** Please provide the total number of parcels included in this CPA Funding Request Application

**6.2 – Locus Plan/Map** Please upload a locus plan or locus map showing all the properties included in the CPA Project Proposal, in addition to abutting properties within a minimum of 300-feet. (Dropdown Tab - please select one of the following)

- **Yes**, a locus plan or locus map has been uploaded to the Attachments of this CPA Funding Request Application
- **Not applicable**, the CPA Project Proposal does not include land or property
- **No**, a locus plan or locus map has NOT been uploaded to the Attachments of this CPA Funding Request Application

**6.3 - Street Address**

**6.4 - Assessor Map and Lot**

**6.5 - Deed Book and Page Number** Please provide the most current deed showing current ownership

## Part 7: CPA Project Proposal – Scope

### Goal of Part 7 - An opportunity for the CPA Project Proposal Team to provide the Scope of Work for the CPA Project Proposal that aligns with the Plan and MGL c 44B

Each CPA Funding Request Application must be submitted alongside a CPA Project Proposal - Scope of Work, which should be created in conjunction with the CPA Project Proposal - Budget and Timeline. The CPA Project Proposal Teams are advised to review the LOI Report as well as the Plan before developing and finalizing the CPA Project Proposal – Scope of Work

**7.1 - CPA Project Proposal Narrative/Scope [G1 and G2]** Please provide a narrative that outlines the CPA Project Proposal - Scope of Work

**7.2 - CPA Project Proposal Goals [G1 and G2]** Please provide a detailed outline of the goals for the CPA Project Proposal.

**7.3 - CPA Project Proposal Objectives [G1 and G2]** Please provide a detailed outline or narrative for the objectives of the CPA Project Proposal, including the desired outcomes

**7.4 - CPA Project Proposal Deliverables [G1 and G2]** Please provide a list of identified deliverables of the CPA Project Proposal

**7.5 - CPA Project Proposal Sustainability [G1 and G2]** Please provide a detailed narrative on how the CPA Project Proposal will be sustained long-term if funded

## Part 8: Community Planning and Collaboration

**Goal of Part 8 - Identify any Town plans, reports, workplans, etc. that support the proposed CPA Project Proposal**

**8.1 - Town Planning Reports [G1 and G2]** Please provide a detailed narrative or documentation explaining how the CPA Project Proposal will align with the goals outlined in the Natick 2030+ Comprehensive Master Plan or any relevant planning document related to the Plan.

**8.2 - Natick Community Benefits [G3 and G4]** Please provide a narrative or documentation explaining the relevance of the CPA Project Proposal to the current and future needs of Natick. Discuss who will benefit from the execution of this CPA Project Proposal and why.

**8.3 - CPA Project Proposal Partnerships and Collaborations [G9]** Please provide a detailed narrative that outlines the partnerships or collaborations formed for the CPA Project Proposal, including information about the partners involved and their contributions.

## Part 9: CPA Project Proposal - Stakeholders and Communication

**Goal of Part 9 - Identify interested parties/stakeholder who may benefit from the CPA Project Proposal, gain support, and establish means of communication**

**9.1 - Identification of Project Stakeholders** Please provide a list of stakeholders (ex. direct abutters, those who will use the final product, investors, etc.)

**9.2 - Environmental Justice (EJ)** Natick has several Environmental Justice (EJ) populations throughout the community. If the CPA Project Proposal is in an EJ Census Tract, please use the State website “Environmental Justice Populations in Massachusetts, which includes an interactive map for the purposes of identifying EJ Census Tracts

<https://www.mass.gov/info-details/environmental-justice-populations-in-massachusetts>

**9.3 - Letters of Support [G3 and G4]** If the CPA Project Proposal includes any Letters of Support from community members, please upload them to the Attachments section of the CPA Funding Request Application. You may submit a maximum of 5 Letters of Support for each CPA Funding Request Application. (Dropdown Tab - please select one of the following)

- **Yes**, letters of support have been uploaded to this CPA Funding Request Application
- **No**, letters of support have NOT been uploaded to this CPA Funding Request Application
- **Not applicable**, letters of support are not necessary for this CPA Funding Request Application

**9.4 - Communication Planning** Effective communication with stakeholders, abutters, and the general public is crucial for the success of the CPA Project Proposal. Please provide a narrative regarding communication with stakeholders, abutters, and the general public regarding the CPA Project Proposal. Please upload a communications plan that outlines communication methods with stakeholders, abutters, members of the community, etc.

## Part 10: Approvals - Permitting and Licenses

**Goal of Part 10 - Identify and obtain necessary approvals and regulatory processes required to complete the CPA Project Proposal**

**10.1: CPA Project Proposal Permitting, Licenses, Approvals [G8]** Please provide a list of all Town, State, and/or Federal approvals permits, licenses, or approvals that have been obtained for the CPA Project Proposal. Please upload any decisions or licenses in the Attachments of this CPA Funding Request Application.

**10.2 - Request for Proposals (RFP), if applicable** If an RFP is needed for the CPA Project Proposal, please specify which stage the RFP process is currently in.

(Dropdown Tab - please select one of the following)

- **Yes**, an RFP has already been executed, and the CPA Project Proposal is ready to commence (Pending CPA Funding/other funding resources)
- **Pending**, CPA Funding before moving forward with an RFP
- **Investigating**, unsure if an RFP is required for the CPA Project Proposal
- **Not Application**, an RFP is not required

**10.3 - Comprehensive Permit (40B), if applicable [G8]** Please provide a narrative regarding the status of a Comprehensive Permit per MGL c 40B approval, if applicable. If a Comprehensive Permit has been granted, please upload a copy of the approved decision to the Attachments of this CPA Funding Request Application.

**10.4 - Immediate Implementation [G8]** Please provide a narrative that describes steps already taken to prepare for the immediate implementation of the CPA Project Proposal upon receiving Community Preservation Funds (Ex. What actions are ready to commence immediately, and what preparations are still required?)

**10.5 - Approvals and Supporting Documents** Please upload any Approvals and Supporting Documents outlined in Part 10 of this CPA Funding Request Application (Pulldown Tab - please select one of the following)

- Yes, a copy of applicable approvals (permits, decisions, licenses, etc.) have been uploaded to the Attachments of this CPA Funding Request Application
- Not applicable, approvals (permits decisions, licenses, etc.) are not required for this CPA Funding Request Application
- No, a copy of applicable approvals (permits, decisions, licenses, etc.) have NOT been uploaded to the Attachments of this CPA Application

### As outlined in Part 18: Request for Assistance

If the CPA Project Proposal Team has any questions or needs clarification before the CPA Funding Request Application portal closes, please contact Community and Economic Development via email at [aloomis@natickma.org](mailto:aloomis@natickma.org).



## Section 11: Risk Management

### Goal of Part 11 - Identify and mitigate any identified or potential risk associated with the CPA Project Proposal

**11.1 - Existing and Potential Risks [G7]** Please provide a narrative that outlines existing and potential risks or concerns associated with the CPA Project Proposal, land, or resources that are required.

**11.2 - Identified Risks [G7]** Please provide a narrative that outlines any identified risks, environmental impacts, legal disputes, etc., which includes mitigation strategies, legal/permitting requirements, and environmental concerns.

**11.3 - Documents Associated with Risk [G7]** Please provide a narrative that outlines any documentation associated with risks, environmental concerns, etc., which may include but are not limited to Activity Use Limitations (“AUL”) and Environmental Impact Assessments (“EIA”). Please upload any documentation associated with this Part of the CPA Funding Request Application in the Attachments



## Part 12: CPA Project Proposal – Budget

### Goal of Part 12 - Establish a CPA Project Proposal Budget that creates an opportunity for the Scoped CPA Project Proposal to be implemented

Each CPA Funding Request Application must include a CPA Project Proposal - Budget, which should be created in conjunction with the CPA Project Proposal - Scope of Work and Timeline. The CPA Project Proposal Teams are advised to review the Plan and research projected costs before developing and finalizing the CPA Project Proposal - Budget.

**12.1 - Total Cost of Project** Please provide total project cost in dollars

**12.2 - Total CPA Funds Requested** Please provide total amount of CPA Funding request in dollars

**12.3 - CPA Funding Narrative [G1 and G2]** Please provide a detailed narrative as to how CPA Funds will be leveraged or supplemented by other funding sources for the execution of the CPA Project Proposal.

**12.4 - Other Funding Resource Narrative [G1 and G2]** Please provide a detailed narrative that outlines how Community Preservation Funds will be leveraged or supplemented by other funding sources for the execution of the CPA Project Proposal.

**12.5 - Additional Funding Sources** Please identify any funding sources beyond CPA Funds (Dropdown Tab - please select one of the following).

- The CPA Project Proposal has no external funding or in-kind contributions (one-hundred percent reliant on Natick Community Preservation Funding)
  - The CPA Project Proposal has at least twenty-five percent of the total project funding comes from external sources, including alternative funding or in-kind contributions
- The CPA Project Proposal has fifty percent or more of the total project funding is secured from external sources, including alternative funding or in-kind contributions

## Part 12: CPA Project Proposal – Budget, cont. from pg. 10

**12.6 - Multi-year/Multi-phase CPA Funding Request Narrative** Please provide a detailed narrative outlining any additional CPA Funding requests or phasing of the CPA Project Proposal

**12.7 - Multi-year/Multi-request CPA Funding Request** Please identify if this CPA Project Proposal will require multiple CPA Funding Request  
(Dropdown Tab - please select one of the following)

- **No**, the CPA Project Proposal will only require this CPA Funding Request to complete the CPA Project Proposal (this does not include other funding resources)
- **Unsure** whether multiple CPA Funding Request will be required to complete the CPA Project Proposal (this does not include other funding resources)
- **Yes**, the CPA Project Proposal will require multiple CPA Funding Request to complete the CPA Project Proposal (this does not include other funding resources)

**12.8 - CPA Project Proposal – Budget** Please provide a detailed copy of the CPA Project Proposal Budget (Dropdown Tab - please select one of the following)

- **Yes**, a detailed CPA Project Proposal has been uploaded to the Attachments of this CPA Funding Request Application
- **No**, a detailed CPA Project Proposal has been NOT uploaded to the Attachments of this CPA Funding Request Application

## Part 13: CPA Project Proposal – Timeline

**Goal of Part 13 - Establish a CPA Project Proposal Timeline (includes tasks, milestone, etc.)**

Each CPA Funding Request Application must include a CPA Project Proposal - Timeline, which should be created in conjunction with the CPA Project Proposal - Scope of Work and Budget. The CPA Project Proposal Teams are advised to review the Plan and requirements outlined in this CPA Funding Request Application (ex. permitting, FRP, etc.) before developing and finalizing the CPA Project Proposal - Timeline.

**13.1 - Estimated duration of Project (months)** Please provide the total length of time in months that it will take to complete the CPA Project Proposal as outlined in the CPA Project Proposal - Scope of Work (Part 8)

**13.2 - Identification of Tasks and Dependencies** Please provide an outline of all tasks and dependencies for the CPA Project Proposal (tasks and dependencies should be included in the CPA Project Proposal Timeline)

**13.3 - Identification of Milestones and Deliverables, including dates** Please provide an outline of all milestones and deliverables for the CPA Project Proposal (milestones and deliverables should be included in the CPA Project Proposal Timeline)

**13.4 - CPA Project Proposal Urgency [G5]** Please provide a narrative or documentation outlining any urgency or special issues related to the CPA Project Proposal timing (e.g., Is a property “at risk” of development or otherwise threatened? Is a right of first refusal about to expire? Are there other timing issues related to the CPA Project Proposal?)

## Part 14: CPA Category Areas

Part 14 of the CPA Funding Request Application consists of four distinct sub-parts that outline the requirements for each of the four CPA Category Areas:

- Part 14.a: Open Space Protection
- Part 14.b: Outdoor Recreation
- Part 14.c: Community (Affordable) Housing
- Part 14.d: Historic Preservation

Most CPA Funding Request Applications will not require the completion of all sub-parts of Part 14. Therefore, please download the corresponding CPA Category Area and its supplemental checklist that has been created for each CPA Category.

## Part 15: Property Owner Information

**Goal of Part 15 - Ensure Property has granted permission for submittal of the LOI**

**15.1 - Total Number of Property Owners** Please provide the number of owners, groups, organizations, etc. that own land associated with this CPA Funding Request Application

**15.2 - Property/Resource Authorization [G9]** Where permission to use land or resources is required for the implementation of the CPA Project Proposal, written documentation shall be provided authorizing the use of land or resources by the owner. A copy of the written permission has been uploaded to the Attachments section of this application.

**15.3- Property/Resource Owner Name**

**15.4 - Property Address(es)** Property owned by the Owner (Addresses)

**15.5 - Email Address** Email address for the respective property owner relative to this property

## Part 16: Main Point of Contact

**Goal of Part 16 - Establish a main point of contact for the LOI Filing**

Please identify one person on the CPA Project Proposal Team that will serve as the main point of contact on this CPA Funding Request Application

**16.1 - Primary Contact Name**

**16.2 - Association with the Project (Title)** Property Owner, Project Manager, Attorney, Engineer, Architect, etc.

**16.3 - Name of Organization** Name of Organization that the Primary Contact is associated with

**16.4 - Email Address**

**16.5 - Phone Number**

**16.6 - Cert. Number, if applicable** Professional number



## Part 17: CPA Project Proposal Team

**Goal of Part 17 - Identification of individuals identified to be part of the CPA Project Proposal Team or identification of professionals needed to complete the project**

**17.1 - Type of CPA Project Proposal Team** (Dropdown Tab - please select one of the following)

- **Government Entities** (municipal departments, boards, commissions, committees with the Town of Natick)
- **Nonprofit Organizations** (501(c)(3) nonprofits that have a valid and current tax-exempt status)
- **Private Organization and Individuals** (private organizations, individuals, or entities that are not under the legal control of the Town of Natick, municipal counsel shall be consulted to ensure compliance with the Anti-Aid Amendment and relevant case law (Mass. Const. Amend. Article 42, § 2, as amended by Article 103))

**17.2 - CPA Project Proposal Team Resume [G9]** A CPA Project Proposal Team member resume, which identifies the key members of the project team, describes expertise that will lead to a successful project, examples of prior experience. Please upload to the Attachments of this Application a copy of the Team Resume

**17.3 - CPA Project Proposal Team Roster/Resume Upload [G9]** Please provide CPA Project Team Resume/Roster information for team members , (Name, Title, Company, Email Address, Professional Certifications/Numbers, role in CPA Project Proposal) (Pulldown Tab - please select one of the following)

- **Yes**, a Project Team Roster has been uploaded to this CPA Funding Request Application
- **No**, a Project Team Roster has not been uploaded to this CPA Funding Request Application

**17.4 - Examples of past projects [G9]** Please provide examples and outcomes of past projects that demonstrate the capability and capacity of the CPA Project Proposal Team to successfully execute the CPA Project Proposal.



## Part 18: Request for Assistance

**If the CPA Project Proposal Team has any questions or needs clarification before the CPA Funding Request Application portal closes, please contact Community and Economic Development via email at [aloomis@natickma.org](mailto:aloomis@natickma.org).**



## Part 19: Final CPA Funding Request Application Review

### **Goal of Part 19 - Establish a expectation that the CPA Project Proposal Team should review the CPA Funding Request Application prior to submittal**

Please conduct a final review of the CPA Funding Request Application before submitting. The CPC is excited to review all CPA Funding Request Applications. However, CPA Funding Request Applications that are deemed administratively incomplete (missing information without justification or cause) will not be reviewed or considered for recommendation to Town Meeting by the CPC. CED staff will send a letter to all applicants who submit an incomplete CPA Funding Request Application. This letter will outline the deficiencies in the application and will be provided to the CPC.

**19.1 - Compliance with the Plan and CPA [G1 and G2]** Please review the CPA Funding Application to ensure that the information provided clearly demonstrates how the CPA Project Proposal meets the requirements of the CPA, CPC, and the Plan. If additional information is needed, please upload any relevant documents or materials to the Attachments section of this CPA Funding Request Application.

(Dropdown Tab - please select one of the following)

- **Yes**, the CPA Funding Request Application meets the requirements of the CPA, CPC, and the Plan - a narrative outlining compliance has been uploaded to the Attachments of this CPA Funding Request Application
- **Unsure** if the CPA Funding Request Application meets the requirements of the CPA, CPC, and the Plan
- **No**, the CPA Funding Request Application does not meet the requirements of the CPA, CPC, and the Plan - a narrative outlining compliance has NOT been uploaded to the Attachments of this CPA Funding Request Application

**19.2 - General Evaluation Criteria Compliance [G1 and G2]** Please review the CPA Funding Application to ensure that the information provided clearly demonstrates how the CPA Project Proposal meets the requirements of the General Evaluation Criteria. If additional information is needed, please upload any relevant documents or materials to the Attachments section of this CPA Funding Request Application.

(Dropdown Tab - please select one of the following)

- **Yes**, the CPA Funding Request Application complies with the General Evaluation Criteria - a narrative of General Evaluation compliance has been uploaded to the Attachments of this CPA Funding Request Application
- **Unsure** if the CPA Funding Request Application complies with the General Evaluation Criteria
- **No**, the CPA Funding Request Application does not comply with the General Evaluation Criteria - a narrative of General Evaluation compliance has NOT been uploaded to the Attachments of this CPA Funding Request Application



## Part 19: Final CPA Funding Request Application Review, cont. from pg. 14

**19.3 - CPA Category Area Compliance [G1 and G2]** Please review the CPA Funding Application to ensure that the information provided clearly demonstrates how the CPA Project Proposal meets the requirements of the CPA Category Area Evaluation Criteria. If additional information is needed, please upload any relevant documents or materials to the Attachments section of this CPA Funding Request Application.

(Dropdown Tab - please select one of the following)

- **Yes**, the CPA Funding Request Application complies with the respective CPA Category Area - a narrative of CPA Category Area compliance has been uploaded to the Attachments of this CPA Funding Request Application
- **Unsure** if the CPA Funding Request Application complies with the respective CPA Category Area
- **No**, the CPA Funding Request Application does not comply with the respective CPA Category Area - a narrative of CPA Category Area compliance has NOT been uploaded to the Attachments of this CPA Funding Request Application

### **19.4 - Uploading of Required Information**

(Dropdown Tab - please select one of the following)

- **Yes**, all information required to be uploaded to the Attachment of this CPA Funding Request Application have been uploaded
- **Not Applicable**, due to technical issues electric documents were submitted to CED prior to the submittal of this CPA Funding Request Applicant and confirmation of receipt has been received
- **No**, all information required to be uploaded to the Attachment of this CPA Funding Request Application have not been uploaded

## Document Review (Required Narratives, Outlines, Uploads)

### Part 2: Letter of Interest

- 2.1 - Upload: Letter of Interest (LOI) Report

### Part 5: CPA Project Proposal Identification

- 5.2 - Brief 2-4 sentence abstract of the CPA Project Proposal

### Part 6: Property Information

- 6.2 - Upload: Locus Plan or Locus Map

### Part 7: CPA Project Proposal – Scope

- 7.1 - Narrative/Outline: CPA Project Proposal - Scope of Work
- 7.2 - Outline: Goals for the CPA Project Proposal
- 7.3 - Narrative/Outline: Objectives of the CPA Project Proposal
- 7.4 - List: Identified deliverables of the CPA Project Proposal
- 7.5 - Narrative: Long-term sustainability of the CPA Project Proposal

### Part 8: Community Planning and Collaboration

- 8.1 - Narrative: Alignment between the CPA Project Proposal and the goals outlined in the Natick 2030+ Comprehensive Master Plan or any relevant planning document
- 8.2 - Narrative: Relevance of the CPA Project Proposal with the current and future needs of Natick.
- 8.3 - Narrative/Outline: Partnerships or collaborations formed for the CPA Project Proposal, including information about the partners involved and their contributions

### Part 9:

- 9.1 - Outline: Stakeholders (ex. direct abutters, investors, etc.)
- 9.2 - Upload: Communications Plan

### Part 10: Approvals - Permitting and Licenses

- 10.1 - List: Town, State, and/or Federal approvals permits, licenses, or approvals
- 10.1 - Upload: Town, State, and/or Federal decisions or licenses
- 10.3 - Narrative: If applicable, Comprehensive Permit per MGL c 40B approval
- 10.3 - Upload: If applicable, a Comprehensive Permit Decision

### Part 11: Risk Management

- 11.1 - Narrative/Outline: Existing and potential risks or concerns associated with the CPA Project Proposal, land, or resources that are required
- 11.2 - Narrative/Outline: Identified risks, environmental impacts, legal disputes, etc., which includes mitigation strategies, legal/permitting requirements, and environmental concerns
- 11.3 - Narrative/Outline: Any documentation associated with risks, environmental concerns, etc., which may include but are not limited to Activity Use Limitations (“AUL”) and Environmental Impact Assessments (“EIA”)
- 11.3 - Upload: Approvals or documents associated with Part 11



## Document Review

### **Part 12: CPA Project Proposal – Budget**

- **12.3** - Narrative: How CPA Funds will be leveraged or supplemented by other funding sources for the execution of the CPA Project Proposal
- **12.4** - Narrative/Outline: How Community Preservation Funds will be leveraged or supplemented by other funding sources for the execution of the CPA Project Proposal
- **12.6** - Narrative/Outline: Additional CPA Funding requests or phasing of the CPA Project Proposal

### **Part 13: CPA Project Proposal – Timeline**

- **13.2** - Outline: Tasks and dependencies for the CPA Project Proposal (tasks and dependencies should be included in the CPA Project Proposal Timeline)
- **13.3** - Outline: Milestones and deliverables for the CPA Project Proposal (milestones and deliverables should be included in the CPA Project Proposal Timeline)
- **13.4** - Narrative/Outline: Urgency or special issues related to the CPA Project Proposal timing (e.g., Is a property “at risk” of development or otherwise threatened? Is a right of first refusal about to expire? Are there other timing issues related to the CPA Project Proposal?)

### **Part 15: Property Owner Information**

- **15.2** - Upload: Landowner/ Resource Owner Authorization Letter/Document

### **Part 17: CPA Project Proposal Team**

- **17.2** - Upload: CPA Project Team Resume
- **17.4** - Upload: Examples and outcomes of past projects completed by the CPA Project Proposal Team



# Part 14.c Community (Affordable) Housing Checklist

The CPA allows the use of Community Preservation Funds for the acquisition, creation, preservation, and support of Community (Affordable) Housing. The rehabilitation and restoration of Community (Affordable) Housing can only be done if acquired or created using money from Community Preservation Funds.

Part 14.c Community (Affordable) Housing of this CPA Funding Request Application provides an opportunity to provide additional information specifically about the CPA Category Area The Community (Affordable) Housing section of the Plan can be found on Pages 40-43, and should be reviewed prior to completing this Part of the CPA Funding Request Application

## Part 14.c.1 - Community (Affordable) Housing Goals

Please review goals outlined on page 41 of the Plan and provide a narrative as to how the CPA Project Proposal supports and/or aligns with the Community (Affordable) Housing goals provided below (Please provide a narrative or upload a response to this Evaluation Standard)

- Provide housing affordable to the full range of incomes.
- Provide a mixture of housing options at the full spectrum of price points.
- Support seniors who wish to remain in their homes, as well as those who are looking for other housing types at different sizes and price points.
- Support the increase of naturally occurring affordable housing.
- Support and create housing options for special needs populations such as veterans, the homeless, families in need, individuals with developmental or physical disabilities and the elderly.

## Part 14.c.2 - CPA Category Area Review

Please review the "CPA Funding Request Application Information" outlined in the Plan on page 42 (also provided below) to ensure the following information has been provided throughout this CPA Funding Request Application. (Please provide a narrative or upload a response to this Evaluation Standard)

- The type of affordable housing being created, land and resources utilized, and populations that will be served
- The existing conditions of existing land and resources, in addition to the type of construction (e.g., demolition, new construction, redevelopment, etc.)
- Describe the plan for long-term management of affordable housing (retaining affordability) and maintenance of the resource (property management, unit up-keep, etc.)
- The prioritization of community members, such as residents, Town employees, and employees of local businesses
- The relationship between the Community (Affordable) Housing – CPA Project Proposal and the other CPA Category Areas (e.g., connection with other CPA Project
- Proposals or existing resources within the immediate area, provides access to other resources, etc.)

**Part 14.c.3 - Community Support and Vulnerable Populations - Evaluation Standard**

Please provide a narrative that demonstrates the need for protection of identified vulnerable populations (ex. Does the CPA Project Proposal identify and support vulnerable populations? How does the the CPA Project Proposal include housing conditions, documented challenges, and descriptions of affected areas.)

(Please provide a narrative or upload a response to this Evaluation Standard)

**Part 14.c.4 - Community Support and Vulnerable Populations – Benchmark**

Please select one of the following Evaluation Criteria that best aligns with the CPA Project Proposal relative to Community (Affordable) Housing (Dropdown Tap - please select the following option that best describes the CPA Project Proposal).

- The Community (Affordable) Housing - CPA Project Proposal does not or minimally identifies that the proposal serves at-risk populations, assesses housing conditions, documents challenges, and aligns with policy or community goals
- The Community (Affordable) Housing - CPA Project Proposal moderately identifies that the proposal serves at-risk populations, assesses housing conditions, documents challenges, and aligns with policy or community goals
- The Community (Affordable) Housing - CPA Project Proposal comprehensively identifies that the proposal serves at-risk groups, assesses the housing market, maps affected areas, documents challenges, and aligns with policy or community goals

**Part 14.c.5 - Long-term Management and Sustainability - Evaluation Standard**

Describe the plan for long-term management and sustainability of the CPA Project Proposal (ex. Are there plans to ensure long-term affordability?)

(Please provide a narrative or upload a response to this Evaluation Standard)

**Part 14.c.6 - Long-term Management and Sustainability - Benchmark**

Please select one of the following Evaluation Criteria that best aligns with the CPA Project Proposal relative to Community (Affordable) Housing (Dropdown Tap - please select the following option that best describes the CPA Project Proposal).

- The Community (Affordable) Housing - CPA Project Proposal does not or has limited plans to ensure long-term affordability
- The Community (Affordable) Housing - CPA Project Proposal has plans to keep some units affordable in perpetuity
- The Community (Affordable) Housing - CPA Project Proposal has plans to keep a majority of units affordable in perpetuity

**Part 14.c.7 - Enhancement for Community Members - Evaluation Standard**

Please provide a narrative that describes how the CPA Project Proposal provides enhancement to community members that align with the Plan.

Does the project prioritize community members, such as residents, Town employees, and employees of local businesses?

(Please provide a narrative or upload a response to this Evaluation Standard)

**Part 14.c.8 - Enhancement for Community Members - Benchmark**

Please select one of the following Evaluation Criteria that best aligns with the CPA Project Proposal relative to Community (Affordable) Housing. (Dropdown Tap - please select the following option that best describes the CPA Project Proposal).

- The Community (Affordable) Housing - CPA Project Proposal has no priority for Local Preference
- The Community (Affordable) Housing - CPA Project Proposal designates 30 to 50 percent for Local Preference
- The Community (Affordable) Housing - CPA Project Proposal designates 51 percent or more for Local Preference

**Part 14.c.9 - Adaptive Reuse - Evaluation Standard**

Please provide a narrative that describes how the CPA Project Proposal provides adaptive reuse and how it aligns with the Plan. Does the project use previously developed land and/or existing construction?

(Please provide a narrative or upload a response to this Evaluation Standard).

**Part 14.c.10 - Adaptive Reuse- Benchmark**

Please select one of the following Evaluation Criteria that best aligns with the CPA Project Proposal relative to Community (Affordable) Housing. (Dropdown Tap - please select the following option that best describes the CPA Project Proposal).

- The Community (Affordable) Housing - CPA Project Proposal uses previously undeveloped land
- The Community (Affordable) Housing - CPA Project Proposal uses previously undeveloped land and maintains a minimum of thirty percent open space
- The Community (Affordable) Housing - CPA Project Proposal uses previously developed land or promotes the use of existing construction

## CPA Funding Request Application Evaluation Criteria - General

<b>CPA Funding Request Application Number</b>	CPA - ___ - _____
<b>CPA Funding Request Application Title</b>	
<b>Evaluation Category Area</b>	General
<b>Focus of Evaluation Category Area</b>	General expectations and requirements, including scope, budget, timeline, deliverables, the capability of the CPA Project Proposal Team, ability to execute, and long-term sustainability
<b>Score</b>	Total of 70 points Evaluated and ranked on a scale of 1 to 5 (one being the lowest and five the highest)
<b>Total Score (General Evaluation Criteria)</b>	___ / 70
<b>Evaluation Category Area Notes (Overall)</b>	

Category Area	General	Open Space Protection	Outdoor Recreation	Community (Affordable) Housing	Historic Preservation	Total (combined)
Eligible Score*	70					
Score						

\* Eligible Score is the maximum number of total points that may be awarded per Category Area per respective CPA Funding Request Application

1. Evaluation Standard	Evaluation Criteria				
Meets goals and objectives laid out in Natick 2030+ Comprehensive Master Plan (2019) and other relevant planning documents	1 = The CPA Project Proposal is not included in a Town of Natick planning document and requires further clarification on several key aspects				
	3 = The CPA Project Proposal is not included in a Town of Natick planning document; however, it offers innovative solutions to a community problem or deficit identified in a town planning document				
	5 = The CPA Project Proposal explicitly identified as a priority in a Town of Natick planning document				
Notes	Evaluation Score				
	1	2	3	4	5

2. Evaluation Standard	Evaluation Criteria				
CPA Project Proposal Impact	1 = A CPA Project Proposal that does not address a Town identified need, and its impact is specific to a small area or population of the community				
	3 = A CPA Project Proposal that does address a Town identified need, and its impact is specific to a small area or population of the community				
	5 = A CPA Project Proposal that does address a Town identified need, and provides substantial benefits to the entire community				
Notes					Evaluation Score
					1    2    3    4    5
3. Evaluation Standard	Evaluation Criteria				
Who will benefit?	1 = A CPA Project Proposal that primarily serves an adjacent or low-density area, with a high-income population with proximity to comparable amenities				
	3 = A CPA Project Proposal that primarily serves an adjacent or low-density to mid-density area, with a middle-income population with convenient access to similar amenities				
	5 = A CPA Project Proposal that primarily serves an adjacent or high-density area, with a lower-income population where access to comparable amenities is more challenging, thereby providing critical support and opportunities for this demographic				
Notes					Evaluation Score
					1    2    3    4    5

4. Evaluation Standard	Evaluation Criteria									
Community and government support	1 = A CPA Project Proposal does not demonstrate community support (CPA Funding Request Application has no letters of support)									
	3 = A CPA Project Proposal that has support primarily from individuals, organizations, and committees directly related to the project									
	5 = A CPA Project Proposal that has broad and strong community support demonstrated by multiple support letters from diverse community members and groups and multiple town committees									
Notes						Evaluation Score				
						1	2	3	4	5
5. Evaluation Standard	Evaluation Criteria									
Urgency of the CPA Project Proposal	1 = A CPA Project Proposal that can be undertaken at any time and is not a high priority in current Town plans									
	3 = A CPA Project Proposal that addresses a recognized need and should be completed sooner rather than later									
	5 = A CPA Project Proposal that represents a once-in-a-generation opportunity to address significant or innovative need(s)									
Notes						Evaluation Score				
						1	2	3	4	5

6. Evaluation Standard	Evaluation Criteria				
Planning Thoroughness	1 = A CPA Project Proposal that has a plan that is not feasible, fragmented with missing information, has many unresolved issues, and is not ready for implementation				
	3 = A CPA Project Proposal that has a plan that is feasible, but requires further development to clarify how the work will be executed, and not ready for immediate implementation				
	5 = A CPA Project Proposal that has a plan that is comprehensive and fully prepared for immediate implementation				
Notes					Evaluation Score
					1    2    3    4    5
7. Evaluation Standard	Evaluation Criteria				
Level of risk	1 = A CPA Project Proposal that does not understand or has not adequately explored potential or identified risks (e.g., geological, environmental, legal, environmental issues, or scope creep, increasing susceptibility to complications), and does not address or mitigate risks				
	3 = A CPA Project Proposal that appears to understand potential or identified risk, with a CPA Funding Request Application that provides minimal reports and documentation, and will benefit from further investigation, documentation, clarification to address and mitigate risk				
	5 = A CPA Project Proposal that has a comprehensive understanding of potential or identified risks, with a CPA Funding Request application that includes research reports, engineering study, or other documentation demonstrating project feasibility, in addition to effectively addressing and mitigating risks				
Notes					Evaluation Score
					1    2    3    4    5

8. Evaluation Standard	Evaluation Criteria								
CPA Project Proposal Readiness	1 = A CPA Project Proposal is in the very early stages of preparation, has not identified required permits or approvals, and is not feasible at this stage								
	3 = A CPA Project Proposal that has identified necessary permits, which have been obtained or are in process to obtain, and is feasible but requires additional support to execute the project								
	5 = A CPA Project Proposal that is fully prepared, with all necessary permits and approvals obtained, and highly feasible and secured all supports to execute the project								
Notes					Evaluation Score				
					1	2	3	4	5
9. Evaluation Standard	Evaluation Criteria								
CPA Project Proposal Team Participation and Preparation	1 = The CPA Project Proposal Team has submitted an administratively complete CPA Funding Request Application but is not responsive, does not provide additional requested information, and is not prepared								
	3 = The CPA Project Proposal Team has submitted an administratively complete CPA Funding Request Application, is responsive, attempts to address issues and requests for additional information, and is prepared when prompted								
	5 = The CPA Project Proposal Team has submitted an administratively complete CPA Funding Request Application, proactively engages, communicates effectively, and responds promptly to issues raised, demonstrating a high level of involvement and cooperation throughout the application process								
Notes					Evaluation Score				
					1	2	3	4	5

10. Evaluation Standard	Evaluation Criteria								
Expertise, Partnerships, and Collaboration	1 = The CPA Project Proposal Team has limited experience, and there is minimal collaboration with relevant stakeholders								
	3 = The CPA Project Proposal Team has some experience, and some gaps are addressed by partnerships with local conservation organizations, government agencies, land trusts, or neighboring municipalities, contributing to project implementation								
	5 = The CPA Project Proposal Team has exceptional expertise directly related to the project and numerous partnerships are established to bring additional experience to project implementation								
Notes					Evaluation Score				
					1	2	3	4	5
11. Evaluation Standard	Evaluation Criteria								
Funding source(s) of the CPA Project Proposal	1 = The CPA Project Proposal has no external funding or in-kind contributions (one-hundred percent reliant on Natick Community Preservation Funding)								
	3 = The CPA Project Proposal has at least twenty-five percent of the total project funding comes from external sources, including alternative funding or in-kind contributions								
	5 = The CPA Project Proposal has fifty percent or more of the total project funding is secured from external sources, including alternative funding or in-kind contributions								
Notes					Evaluation Score				
					1	2	3	4	5

12. Evaluation Standard	Evaluation Criteria									
Preserve or utilize current town-owned assets	1 = A CPA Project Proposal that does not take advantage of any current town-owned assets or identified non-owned town assets identified in a town plan or report									
	3 = A CPA Project Proposal that makes improvements to the usability of town-owned assets or identified non-owned town asset identified in a town plan or report									
	5 = A CPA Project Proposal that creates substantial new value to town-owned assets or identified non-owned town assets identified in a town plan or report that would otherwise be underused									
Notes					Evaluation Score					
					1	2	3	4	5	
13. Evaluation Standard	Evaluation Criteria									
CPA Project Proposal Budget	1 = A CPA Project Proposal budget does not provide enough detail for review or has been identified as not feasible									
	3 = A CPA Project Proposal budget does provide enough detail but may not be feasible									
	5 = A CPA Project Proposal budget that is detailed, and project can be completed within the presented budget (e.g., CPA Funding Request Application has factored in cost contingency or price escalation)									
Notes					Evaluation Score					
					1	2	3	4	5	

14. Evaluation Standard	Evaluation Criteria								
Additional Resources	1 = A CPA Project Proposal requires five or more additional resources (e.g., securing land, funding, professional resources (engineers, trades, etc.), material sources, etc.) to be identified or secured to complete the project								
	3 = A CPA Project Proposal requires one to four additional resources (e.g., securing land, funding, professional resources (engineers, trades, etc.), material sources, etc.) to be identified or secured to complete the project								
	5 = A CPA Project Proposal has received all necessary resources (e.g., securing land, funding, professional resources (engineers, trades, etc.), material sources, etc.) to complete the project								
Notes					Evaluation Score				
					1	2	3	4	5

## CPA Category Area Evaluation Criteria – Community (Affordable) Housing

<b>CPA Funding Request Application Number</b>	CPA - ____ - _____
<b>CPA Funding Request Application Title</b>	
<b>CPA Category Area</b>	Community (Affordable) Housing
<b>Score</b>	Total of 20 points Evaluated and ranked on a scale of 1 to 5 (one being the lowest and five the highest)
<b>Total Score (Open Space Protection</b>	____ / 20

1. Evaluation Standard	Evaluation Criteria				
Demonstrated Need for Protection through the Identification of Vulnerable Populations	1 = The Community (Affordable) Housing - CPA Project Proposal does not or minimally identifies that the proposal serves at-risk populations, assesses housing conditions, documents challenges, and aligns with policy or community goals				
	3 = The Community (Affordable) Housing - CPA Project Proposal moderately identifies that the proposal serves at-risk populations, assesses housing conditions, documents challenges, and aligns with policy or community goals				
	5 = The Community (Affordable) Housing - CPA Project Proposal comprehensively identifies that the proposal serves at-risk groups, assesses the housing market, maps affected areas, documents challenges, and aligns with policy or community goals				
Notes					Evaluation Score
					1    2    3    4    5
2. Evaluation Standard	Evaluation Criteria				
Long-Term Management	1 = The Community (Affordable) Housing - CPA Project Proposal does not or has limited plans to ensure long-term affordability				
	3 = The Community (Affordable) Housing - CPA Project Proposal has plans to keep some units affordable in perpetuity				
	5 = The Community (Affordable) Housing - CPA Project Proposal has plans to keep a majority of units affordable in perpetuity				
Notes					Evaluation Score
					1    2    3    4    5

3. Evaluation Standard	Evaluation Criteria				
Enhancement for Community Members	1 = The Community (Affordable) Housing - CPA Project Proposal has no priority for Local Preference				
	3 = The Community (Affordable) Housing - CPA Project Proposal designates 30 to 50 percent for Local Preference				
	5 = The Community (Affordable) Housing - CPA Project Proposal designates 51 percent or more for Local Preference				
Notes					Evaluation Score
					1    2    3    4    5
4. Evaluation Standard	Evaluation Criteria				
Adaptive Reuse	1 = The Community (Affordable) Housing - CPA Project Proposal uses previously undeveloped land				
	3 = The Community (Affordable) Housing - CPA Project Proposal uses previously undeveloped land and maintains a minimum of thirty percent open space				
	5 = The Community (Affordable) Housing - CPA Project Proposal uses previously developed land or promotes the use of existing construction				
Notes					Evaluation Score
					1    2    3    4    5