TOWN OF CARLISLE
2016
COMMUNITY
PRESERVATION
PLAN

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Members of the Carlisle Community Preservation Committee

Luke Ascolillo, Carlisle Board of Selectmen
Annette Lee, Carlisle Historical Commission
Steve Pearlman, Carlisle Housing Authority
Ed Rolfe, Carlisle Planning Board, Committee Chair
Samantha Rottenberg, Community Representative
Mark Spears, Carlisle Recreation Commission
Angie Verge, Conservation Commission

With the assistance of David Freedman, former Planning Board representative to the CPC.

November xx, 2016

TOWN OF CARLISLE 2016 COMMUNITY PRESERVATION PLAN

The Town of Carlisle Community Preservation Committee ("CPC") is pleased to present the 2016 Town of Carlisle *Community Preservation Plan* ("the Plan").[1] This Plan describes the process for administering the Community Preservation Act ("CPA") in the Town of Carlisle. The Plan presents a description of the CPA and its adoption by the Town, the procedure by which the CPA is administered, the criteria the CPC references when considering applications, and an accounting of CPA revenues and expenditures to date, including funds currently available for allocation and appropriation. The Plan is an informational document for the citizens of the Town, a guideline and instructional document for applicants seeking project funding through the CPA, and a guidance document for this and future CPA Committees in making recommendations to Town Meeting for project funding. This document will be modified by future CPA Committees in response to changing goals and experience with the CPA over time.

HISTORY OF THE CPA IN CARLISLE

The CPA was signed into law as MGL Chapter 44B in September 2000. It allows towns to create a Community Preservation Fund for open space protection, historic preservation, affordable housing and outdoor recreation. The CPA also creates a statewide Community Preservation Trust Fund ("Trust Fund"), administered by the Department of Revenue (DOR), which provides matching distributions each year to communities that have adopted CPA. The statute gives towns the right to place a surcharge on local property taxes of not more than 3% of the local real estate tax levy on each property, and to exempt the first $100,000 of the property value from the surcharge.

Carlisle voted to adopt the CPA at Town Meeting in 2001, with a 2% surcharge and the $100,000 exemption, also exempting property owned and occupied by a person who would qualify for low income housing or low- or moderate-income senior housing.

In 2002, articles to reduce the 2% surcharge to 0.5, 1, and 1.5% were defeated at Town Meeting. In 2010, Town Meeting opposed a non-binding article proposing a vote the following year to reduce or rescind the 2% surcharge. The non-binding question then passed by a slight margin at the ballot a few weeks later. In 2011, the Selectmen voted 3-2 to support an article at a Special Town Meeting for the complete rescission of the surcharge. A citizen petition article proposed an increase to 3% (in part because towns that adopt the CPA at the highest surcharge percentage have historically received higher percentages of state match). The article to rescind was defeated by an almost 2 to 1 margin. The article to increase the surcharge was also defeated, so Carlisle's CPA surcharge remains at 2%.

Since Carlisle's adoption of the CPA in 2001, the Town has collected CPA funds through fourteen fiscal years. Distributions from the state Trust Fund has have matched local collections at between 100% and 26.6%. As the number of communities electing to participate in the CPA, and thus sharing the distributions from the Trust Fund, increased from 34 in 2002 to 148 in 2012,

[1] Pursuant to the Community Preservation Act, MGL Ch 44B Section 5(b)(1): "The community preservation committee shall study the needs, possibilities and resources of the city or town regarding community preservation, including the consideration of regional projects for community preservation. The committee shall consult with existing municipal boards, including the conservation commission, the historical commission, the planning board, the board of park commissioners and the housing authority, or persons acting in those capacities or performing like duties, in conducting such studies. As part of its study, the committee shall hold one or more public informational hearings on the needs, possibilities and resources of the city or town regarding community preservation possibilities and resources, notice of which shall be posted publicly and published for each of two weeks preceding a hearing in a newspaper of general circulation in the city or town."

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the percentage of the state match decreased from the 100% match it was for the first seven years to a low of less than 27% in 2011 and 2012. A 2012 update to the CPA legislation provided additional revenues for the Trust Fund and the percentage match almost doubled in 2013, before dropping to 31% in 2014. The annual amounts expected to be collected through the local surcharge, the amount and percentage of the state match, and the final sum for each year are provided in the following table.

CPA REVENUES IN CARLISLE, BY YEAR				
Fiscal Year ending June 30	Carlisle Local Surcharge at 2%	Related State Trust Fund Distribution**	Percentage of state match relative to local collections	Total revenue (Local surcharge + Distribution)*
2002	$214,533	$214,533	100%	$419,066
2003	$238,618	$238,618	100%	$477,236
2004	$262,655	$262,655	100%	$525,310
2005	$270,723	$270,723	100%	$541,446
2006	$282,735	$282,735	100%	$565,470
2007	$297,471	$297,471	100%	$594,942
2008	$370,160	$250,303	67.62%	$620,463
2009	$328,541	$114,381	34.81%	$442,922
2010	$341,887	$93,000	27.20%	$434,887
2011	$351,402	$93,610	26.64%	$445,012
2012	$358,206	$96,122	26.83%	$454,328
2013	$358,879	$187,425	52.23%	$546,304
2014	$383,682	$120,726	31.46%	$504,408
2015	$399,401	$118,424	29.70%	$517,825
2016	$395,000	$114,000	28.86%	$509,000
Totals	$4,853,893	$2,754,726	56.75%	$7,608,619

* Does not include interest
** State Trust Fund Distribution is actually received by the Town the following fiscal year than what is shown, since the actual local tax revenues upon which the match is based cannot be reported to the state until the close of the fiscal year

HOW THE CPA IS ADMINISTERED IN CARLISLE

Each year, the Town must spend, or set aside for later spending, 10% of the annual revenue to a fund designated for open space protection (including expanded use for outdoor recreation since 2012), 10% to a fund designated for historic preservation, 10% to a fund designated for affordable housing, and the remaining 70% to an Undesignated Fund that can be used for any of the allowed purposes under the CPA. Up to 5% of the revenue may also be appropriated for administrative expenses. As the actual amount of local revenues and state match are not known at the time of the Annual Town Meeting when these allocations must be made each year, the allocations are based on estimated revenues from the surcharge and the estimate provided by the DOR of the expected match from the Trust Fund.

The CPC consists of seven members: one member each from the Board of Selectmen, the Planning Board, the Housing Authority, the Conservation Commission, the Recreation Commission, and the Historical Commission, plus one member from the community, all appointed by the Selectmen.

Funds are appropriated for projects pursuant to recommendations by the CPC and subsequent majority approval by Annual Town Meeting. Funds may be appropriated from the balance in the designated fund for each of the three categories for projects falling within those categories. The Undesignated Fund may be appropriated for any CPA-eligible project. In addition, the CPC may

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recommend, and Town Meeting may approve (by a two-thirds vote), bonding to be repaid by future CPA revenues.

Working with the Town Treasurer, the CPC confirms and then announces the fund balances annually late in the calendar year in a call for applications. Applicants may be Town entities (including boards and commissions) non-profits, individuals, or even commercial entities (the latter three groups will ideally have the support of a Town board but need not necessarily be Carlisle-based). Applications are generally due in January. *(See Appendix A for the current Application Form, also available through the CPC page on the Town website.)*

Applications must include a clear description of the project, the sponsoring Town board or committee (as applicable), responsible parties, the expected timeline, the purpose of the project with a statement as to how it is consistent with the CPA and applicable Town planning documents, a statement as to community support for the project, and a complete project budget including any available funding beyond the requested CPA grant.

After reviewing the applications within the committee and, as appropriate, with Town Counsel to confirm eligibility or other parameters, the CPC meets with applicants to discuss their applications, often requesting revisions to the scope of the project or the amount requested, refinements, or additional information. Based on its assessment of each application relative to available funds, competing applications, and the criteria established by the CPA, the CPC then votes whether or not to recommend at Town Meeting which project(s) should be funded with CPA monies. *(See Appendix B, "Criteria for Project Consideration & Recommendation by CPC.")*

For each project expected to receive a positive CPC recommendation, the CPC works with Town Counsel and the applicant to create a Grant Agreement which establishes the clear parameters of the appropriation including allowed use(s), the term for which the funds are available (including possible claw-back dates at which time any unspent funds must be returned to the fund from which they were appropriated, reporting requirements, public notice including signage as appropriate that the project is funded in whole or in part through the CPA, and any other requirements or restrictions. *(See Appendix C for a sample Grant Agreement.)*

Once a project receives Town Meeting approval for funding, the Town Treasurer is responsible for providing the funds consistent with the grant agreement. This may or may not include requirements for the presentation of paid invoices for reimbursement. Funds appropriated to a specific project may only be spent for the purposes identified in the grant agreement. The CPC is responsible for monitoring projects to assure that funds are spent per the terms of the grant agreement and to receive documentation at the completion of a project, including acknowledgement of the CPS funding source and, where appropriate, written reports and photographic documentation. *(See Appendix E for a Reporting Schedule for current CPA grants and Appendix F for a sample CPA Awareness sign.)*

To date, the CPC has recommended and Town Meeting has appropriated more than $6 million for a variety of projects. *(See Appendix D for a list of approved appropriations to date and a chart of expenditures to date, by category.)*

CURRENT FUND BALANCES AVAILABLE FOR APPROPRIATION

With the state match in hand as of September xx, 2016, the current fund balances available for appropriation are: Open Space - $0; Historic - $150,488; Housing - $256,174; and Undesignated -

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$474,424. The reserve fund, which comprises funds in hand that are held against the required FY ’17 allocations of 10% of anticipated revenues, is currently $375,100.

For the complete text of and additional information on the CPA statute and how it is being applied in towns across the Commonwealth, visit the Community Preservation Coalition website at www.communitypreservation.org. The Town paid $2,200 in annual dues to the Coalition in 2016, from the $2,500 appropriated in 2016 for Administrative Expenses. Any Administrative Expenses funds remaining at the end of the fiscal year are returned to the Undesignated Fund.

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PROJECT APPLICATION

Community Preservation Committee
66 Westford Street
Carlisle, MA 01741
TEL: 978-369-6155 (Town Clerk) FAX: 978-371-0594

Thank you for your interest in submitting a Community Preservation Act ("CPA") project application to the Carlisle Community Preservation Committee ('CPC"). We appreciate your care and concern for the Carlisle community. We are willing to assist where we can and we look forward to reviewing your application.

Please keep in mind the following parameters:

1. Project funding requests must be submitted in writing to the CPC using the Project Application.
2. The Project Application must be completed in its entirety for consideration.
3. Requests must be documented with appropriate support information.
4. If the request is part of a multi-year project, include the total project cost and yearly appropriations sought.
5. For applications that have multiple project requests, please prioritize projects.

Please note that applications for studies, assessments, and plans are discouraged.

Applications must be submitted to Town Hall by **January 15, 2017** to be eligible for consideration. **Please submit seven hard copies of each complete project application at the Town Hall or email an electronic copy to Ed Rolfe** *(edward.g.rolfe@gmail.com)*

The CPC will review all applications and invite project applicants to a CPC meeting to present their project and answer questions. The CPC may work with an applicant to change the scope of a project, adjust the project amount, or otherwise revise a project based on whether the project meets the goals of the Town of Carlisle and the CPA. The CPC will vote on each application and make recommendations at Town Meeting as to which applications should be funded with CPA monies.

Please contact Ed Rolfe, Chairman of the CPC, at edward.g.rolfe@gmail.com or 978-590-9991, if you have any questions regarding your application.

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PROJECT APPLICATION

Community Preservation Committee
66 Westford Street
Carlisle, MA 01741
TEL: 978-369-6155 (Town Clerk) FAX: 978-371-0594

Please type your responses to the following questions:

1. Project Overview, Contact Information, Signatures

Project Name: _____

Project Applicant: _____

Amount Requested: _____

Sponsoring Board or
other organization(s)
(as applicable): _____

Primary Contact Person:

Name: _____

Address: _____

Phone Number: _____

Email Address: _____

Purpose: (please select all that apply)

- o Community Housing
- o Historic Preservation
- o Open Space
- o Recreation

Project location or address: _____

Signature of Applicant: _____

Print name: _____

Date: _____

Signature of Chairman of
Sponsoring Board
or other organization
(as applicable): _____

Print name: _____

Date: _____

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2. Project Summary

Provide a summary of the project.

3. Project Description

Provide a complete description of the project.

4. Responsible Parties

Who will implement the project? Is there a project manager? Please list the name and contact information of these persons and any additional responsible parties – i.e. property owner, consultant (if applicable).

5. Timeline

When will the project begin? When will it be completed? Are there multiple stages for the project?

6. Project Purpose

State the purpose of the project and indicate how the project meets the general and specific criteria for funding CPA projects (see "Criteria for Project Consideration & Recommendation by CPC"). How will the project benefit the Town of Carlisle? Address current and/or future community needs? Impact Carlisle's citizens? Preserve Carlisle's character? Why should this project be funded this year?

7. Community Support

What is the nature and level of community support for this project?

8. Jurisdiction or Ownership of Project Site

Indicate if the applicant has jurisdiction or ownership of the project site. If applicable, attach a copy of the deed or purchase agreement for the property.

9. Permitting Requirements and Endorsements

List permits or endorsements needed for completion of project, including any special permit, variance or other approval required by any Town of Carlisle Board or Committee.

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10. Project Budget

Attach a project budget. Expenditures and estimate costs must be clearly identified and back-up documentation provided. If the project is expected to last more than one year, delineate the budget for each year. Distinguish between hard and soft costs. List any additional or alternate funding sources for the project. **CPA funds cannot be used for maintenance.** If ongoing maintenance is required, who will be responsible and how will it be funded? Indicate anticipated annual income (if any).

11. Attachments

List all attachments, including, but not limited to, photos, plans, maps, quotes, costs, estimates, and letters of endorsement.

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CRITERIA FOR PROJECT CONSIDERATION & RECOMMENDATION BY CPC

General Selection Criteria

The Community Preservation Committee (CPC) is responsible for reviewing all projects proposed for Community Preservation Act funding and for making recommendations to Town Meeting. In order to be considered eligible for review by the CPC, a project must at a minimum meet the statutory requirements of the CPA. The CPC will consult with Town Counsel as appropriate to confirm eligibility or other parameters for an application.

CPA funding eligibility is shown in the table below.

	Open Space	**Historic**	**Recreation**	**Housing**
Acquire	Yes	Yes	Yes	Yes
Create	Yes	No	Yes	Yes
Preserve	Yes	Yes	Yes	Yes
Support	No	No	No	Yes
Rehabilitate and/or Restore	Yes, if acquired or created with CPA funds	Yes	Yes	Yes, if acquired or created with CPA funds

See more detail in appended official Department of Revenue allowable uses chart.

If a submitted project is deemed to be eligible for consideration by the CPC, it will be evaluated in relation to how well the project meets these General Selection Criteria and the specific criteria identified herein in the appropriate use category (Community Housing, Historic Preservation, Open Space and Recreation). Recommendations for funding will be based on how well the projects meet these goals and criteria, recognizing that all criteria may not apply to every project. The CPC will also give consideration to available funds and the urgency of the project, especially to those projects whose successful implementation is constrained by scheduling factors not in the control of the applicant such as the imminent placing of land on the market or an indication of an intention to do so.

The following factors will be considered (*not* presented in order of priority or weight):

a. The project's consistency with reports or plans that have been adopted by the Town, including:
    i. *Town of Carlisle Housing Production Plan*, 2015 (2015 HPP)
    ii. *Town of Carlisle Open Space & Recreation Plan*, 2013 (2013 OS&RP)
    iii. *A Study Plan for the Town of Carlisle*, adopted at Town Meeting 1995
b. The project's support by relevant Town boards and committees and community groups and its consistency with recent Town Meeting actions
c. The extent to which the project preserves, protects or enhances existing Town-owned open space, recreation, historic and/or housing assets
d. The extent to which the project preserves a resource that would otherwise be threatened or lost
e. The extent to which the project serves a community purpose with a public benefit and/or multiple or underserved populations
f. Whether or not the project fulfills more than one purpose of the CPA legislation: housing, historic preservation, open space or recreation
g. Administrative and financial management capabilities of the applicant

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(Applicants that have previously received CPA funds should be prepared to demonstrate that they are in good standing with all paperwork and project conditions or requirements of the previous funding appropriation. Applicants should be prepared to provide a status report on any open projects that includes information on expenditures and the anticipated project completion date.)

h. The extent to which the applicant has successfully implemented projects of a similar type and scale or otherwise demonstrated the ability and competency to implement such a project (Whenever possible, prior applicants should seek to expend all previous CPA funds and complete the project or project phase before requesting additional funds. When it is not advisable or possible to complete a previous phase first, applicants should be prepared to explain why an expedited process is advantageous or necessary.)
i. Whether or not the applicant has site control or written consent by the property owner to submit an application
j. The extent to which the project leverages other public and/or private funding
k. The feasibility of the project plan, whether or not it is the most reasonable approach for implementing the project, and evidence that the project can be implemented expeditiously and within budget
l. The urgency of the project, the flexibility of the schedule and the impact of any delay in initiating the project
m. The provision for maintenance of the project
n. The inclusion of an appropriate permanent deed restriction, preservation restriction, or conservation restriction
o. The incorporation in the project of design features that reduce the impact on the environment including but not limited to reduced energy consumption, enhanced energy and water conservation and the use of recyclable materials

Community Housing

1. Consistency with the following goals from the 2015 HPP
    a. Meet local housing needs along the full range of incomes, promoting social and economic diversity and the stability of individuals and families living in Carlisle
    b. Leverage public and private resources to the greatest extent possible
    c. Ensure that new housing is well-integrated with the existing community
    d. Meet annual planned production goals for affordable housing, working towards the 10% state standard
    e. Provide a wide range of housing alternatives (including both rentals and smaller ownership units) to meet diverse housing needs, particular for the growing elderly population
    f. Preserve the existing affordable housing stock
2. Support strategies for housing production to meet the above goals
    a. Make Town-owned land available for affordable housing
    b. Incorporate accessory apartments in the SHI (Subsidized Housing Inventory)
    c. Encourage limited private development of affordable housing on sites with adequate upland, appropriate soils, and space for necessary buffers to abutters
    d. Support scattered-site housing
    e. Convert existing housing units to affordable units

Historic Resources

1. Consistency with Statute
    a. Preserve, restore, rehabilitate, or reconstruct properties held in ownership by the Town of Carlisle or a non-profit organization that are listed or eligible for listing

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on the National Register of Historic Places and/or the State Register of Historic Places, or have been determined by the Carlisle Historical Commission to be significant in the history, archeology, architecture or culture of the Town

b. Fund improvements to make historic resources functional for their intended use, including improvements to comply with the Americans with Disabilities Act and other building or access codes[2]

2. Support of the Carlisle Historical Commission

Open Space

1. Protection through acquisition or conservation easements of parcels of highest preservation value as listed in the 2013 OS&RP, "Table 7: Seven-Year Action Plan Private Property Protection Priority List" for properties of 10 acres or more
2. Preservation of smaller tracts of undeveloped land that contribute to open space goals, such as smaller parcels that are located adjacent to existing protected open spaces, or that preserve trail and wildlife corridor linkages between larger open space parcels
3. Support of the Carlisle Conservation Commission, the Carlisle Trails Committee, the Carlisle Conservation Foundation, and other conservation entities in the Town or region
4. Consistency with the goals from the 2013 OS&RP, including
    a. Maintain the rural character of Carlisle
        i. Protect natural features such as open fields, woodlands, wildlife habitat, and scenic vistas
        ii. Protect corridors and trail linkages for wildlife and provide additional protected connections between existing open spaces
        iii. Encourage agriculture in town
    b. Protect Carlisle's environment
        i. Protect the town's water resources: lands with surface water resources, wetlands, streams, ponds, or potential aquifer sites
        ii. Protect natural spaces that provide ecological diversity
        iii. Identify and protect sites with rare, endangered, or protected species.
        iv. Proactively manage protected lands, including invasives control
    c. Proactively manage land use in town
        i. Educate the town about the value of long-term planning for land use
        ii. Guide where and how concentrated development occurs
        iii. Encourage cooperation among diverse stakeholders involved in efforts to acquire land for municipal use
        iv. Improve the town's ability to finance preservation of open space and recreation

Recreation

1. Meet the town's recreational needs consistent with goals from the 2013 OS&RP, including:
    a. Expand and upgrade existing recreation areas and facilities
    b. Provide additional sites for active recreation facilities and a possible community center
    c. Improve signage, accessibility, and communication channels for the handicapped

[2] Rehabilitation work with respect to historic resources is required to comply with the Standards for Rehabilitation stated in the US Secretary of the Interior's Standards for the Treatment of Historic Properties (codified in 36 C.F.R. Part 68).

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SAMPLE GRANT AGREEMENT

Town of Carlisle Community Preservation Committee
Grant Agreement
with the
Gleason Public Library Board of Trustees

GRANT AGREEMENT #: 2015-3

RECIPIENT: Gleason Public Library Board of Trustees

PROJECT NAME: Preservation & Conservation of Gleason Public Library Civil War Collection

GRANT AMOUNT: $52,000 from the Historic Reserve Fund

GRANT TERM: 2 years, commencing upon execution of Grant Agreement

PROJECT DESCRIPTION: Stabilize and secure approximately 100 objects salvaged from the battlefields of Gettysburg, PA, and conserve 44 of the most noteworthy of these; acquire appropriate storage cabinets and supplies for the collection (with room for storage of other items from the collections of the library and/or Carlisle Historical Society), transport collection to secure storage facility and fund first year of storage fees; and acquire software and fund photographer to document the collection and to develop a professional inventory and searchable database and fund first year of software support and hosting.

PROJECT LOCATION: Gleason Public Library, 22 Bedford Road, Carlisle, MA and Carlisle Historical Society, Heald House, 698 Concord Street, Carlisle MA

DATE OF TOWN MEETING & WARRANT ARTICLE NUMBER:

PROJECT SPONSOR(S) (IF DIFFERENT FROM RECIPIENT):

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This Grant Agreement made this _____ day of _____, 2015 by and between the Town of Carlisle, a municipal corporation duly organized under the laws of Massachusetts and having a usual place of business at 66 Westford Street, Carlisle, MA 01741, acting by and through its Community Preservation Committee (hereinafter referred to as the "CPC"), and the Gleason Public Library Board of Trustees (hereinafter referred to as the "Recipient"), with an address of 22 Bedford Road, Carlisle, MA 01741. The purpose of this Grant Agreement is to implement the following grant award:

Fifty-two Thousand US Dollars (US$52,000.00) to stabilize and secure approximately 100 objects salvaged from the battlefields of Gettysburg, PA, and conserve 44 of the most noteworthy of these; acquire appropriate storage cabinets and supplies for the collection (with room for storage of other items from the collections of the library and/or Carlisle Historical Society), transport collection to secure storage facility and fund first year of storage fees; and acquire software and fund photographer to document the collection and to develop a professional inventory and searchable database and fund first year of software support and hosting.

Witnesseth

Whereas, the CPC invited the submission of proposals for grants of funds for purposes consistent with the Community Preservation Act, M.G.L. c. 44B; and

Whereas, in response thereto, the Recipient submitted an application for funding for purposes described above as Project Description (hereinafter referred to as the "Project"), and the CPC reviewed and approved the Project and recommended that the funding for the Project be approved at the above referenced Town Meeting; and

Whereas, the above referenced Town Meeting thereafter appropriated the funds recommended by the CPC pursuant to the above referenced Warrant Article and authorized the CPC to enter into a grant agreement with the Recipient for the purposes set forth in the Project; and

Now, Therefore, the CPC and the Recipient agree as follows:

1. Award. Subject to the terms of this Agreement, the CPC agrees to award the Recipient the amount of Fifty-two Thousand US Dollars (US$52,000.00) from the Historic Reserve Fund, for the Project for the purposes as set forth herein.

2. Project Application. The Recipient's Project Application, as may be amended by agreement with the CPC upon award, is incorporated into this Grant Agreement by reference.

3. Term. The term of this Grant Award is two years from July 1, 2015, unless the CPC grants an extension for good cause shown. Funds not utilized on the Project must be returned to the Historic Reserve Fund and will be made available for future appropriation to this or other recipients.

4. Project Description. Stabilize and secure approximately 100 objects salvaged from the battlefields of Gettysburg, PA, and conserve 44 of the most noteworthy of these; acquire appropriate storage cabinets and supplies for the collection (with room for storage of other items from the collections of the library and/or Carlisle Historical Society), transport collection to secure storage facility and fund first year of storage fees; and acquire software and fund photographer to document the collection and to develop a professional inventory and searchable database and fund first year of software support and hosting.

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5. Budget: Other Sources of Funding. Prior to the commencement of the Work, the Recipient must submit a complete project budget that accounts for (1) the expenditure of all funds awarded under this Grant Agreement; and (2) all other sources of funding, if necessary, to complete the project as described herein. Recipient shall not expend any grant funds unless sufficient sources of funding have been secured to complete the Work and the Project Budget has been approved by the CPC. If the CPC determines that funds have been spent on goods or services not included in the Project Budget or otherwise not authorized under the CPA, the Recipient shall be responsible for returning such funds to the Community Preservation Fund Reserve.

6. Disbursement of Funds. The Recipient hereby acknowledges and expressly agrees that grant funds will be disbursed upon provision by the Recipient of third party invoices for work completed on the Project.

7. Reporting. The Recipient shall provide the CPC with an annual Project Status Report including expenditures to date and reporting on progress. The Project Status Report shall be due by the last day of December until the Project is complete. A Project Closeout Report, including a final accounting and digital photo documentation of the Project where appropriate, is due within 60 days after the Completion Date of the Project.

8. Records. The Recipient agrees to maintain such records with respect to utilization of the grant funds and income derived therefrom as are kept in the normal course of business.

9. Compliance with Laws and Agreement. Recipient understands and agrees that projects funded through this Award are made pursuant to and must comply with the requirements of the Community Preservation Act, M.G.L. c. 44B. Recipient also agrees to comply with all requirements of this Grant Agreement.

10. Community Preservation Act Awareness. Recipient shall identify that the Project was funded through the Town of Carlisle Community Preservation Act in its written and online materials about the Project, including but not limited to press releases, brochures, and online database. Whenever any part of the collection is displayed publicly, recipient shall arrange to be posted, in an appropriate location mutually acceptable to the parties, a sign stating that the Project was funded through the Town of Carlisle's Community Preservation Act program.

11. No Assignment. This Grant Agreement may not be assigned by Recipient without prior written agreement by the CPC.

12. Notice. Any and all notices, or other communications required or permitted under this agreement, shall be in writing and delivered in hand or mailed by certified mail, return receipt requested or by other reputable delivery service to the parties hereto at the following addresses:

If to the Recipient: Gleason Public Library Board of Trustees
22 Bedford Road, Carlisle, MA 01741

If to the CPC: Town of Carlisle Community Preservation Committee
66 Westford Street, Carlisle, MA 01741

With copies to: Town of Carlisle, Town Administrator
66 Westford Street, Carlisle, MA 01741

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13. Severability. If any term or condition of this Grant Agreement or any application thereof shall to any extent be held invalid, illegal or unenforceable by a court of competent jurisdiction, the validity, legality, and enforceability of the remaining terms and conditions of this Grant Agreement shall not be deemed affected thereby.

14. No Other Agreement. This Agreement constitutes the entire agreement between the parties hereto, and may be amended only in writing executed by both the Town of Carlisle Community Preservation Committee and the Recipient. Signatory below acknowledges and avers that he/she has the authority to execute this Agreement on behalf of the Recipient.

RECIPIENT
GLEASON PUBLIC LIBRARY BOARD OF TRUSTEES
By its Chair, Larissa Shyjan

TOWN OF CARLISLE COMMUNITY PRESERVATION COMMITTEE
By its Chair, Luke Ascolillo

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CPA APPROPRIATIONS IN CARLISLE, BY CATEGORY & YEAR		
Historic	Appropriation	Expended (09/xx/16)
FY'05 - Historical & Architectural Prelim Survey Plan	8,000.00	5,382.50*
FY'06 - Historic Society Barn	30,000.00	30,000.00*
FY'07 - Historical Commission Survey	41,000.00	41,000.00*
FY'09 - Liberty Statue	4,000.00	3,250.00*
FY'09 - Protection/Display of Historic Artifacts	2,500.00	2,210.31*
FY'09 - Gleason Library Façade Restoration	40,000.00	36,668.35*
FY'09 - War Memorial	98,000.00	98,000.00*
FY'09 - Library	775,000.00	598,908.39*
FY'10 - Highland Building Restoration	445,000.00	397,347.15*
FY'11 - Bog House Restoration	165,000.00	159,719.36*
FY'12 - Town Records Restoration	2,500.00	2,500.00*
FY'12 - First Religious Society Steeple Restoration	47,000.00	47,000.00*
FY'15 - Danner Collection Restoration	52,000.00	33,200.19**
FY'16 - Central Burial Ground Preservation Plan	20,000.00	0.00**
FY'16 - Environmental Improvements Heald House	40,000.00	0.00**
Housing		
FY'04 – Master Site Plan for Parcel A (Benfield)	50,000.00	47,233.77*
FY'06 - Benfield Professional Planning Expenses	30,000.00	29,001.50*
FY'06 - Benfield Affordable Housing Development	50,000.00	39,891.36**
FY'06 - Accessory Apartment Bylaw	10,000.00	9,975.50*
FY'07 - Accessory Apartment Bylaw Subsidies	90,000.00	0.00**
FY'07 - Affordable Housing Trust Fund	50,000.00	50,000.00*
FY'09 - Benfield Infrastructure	425,000.00	425,000.00*
FY'11 - Housing Coordinator	50,000.00	45,835.10*
FY'12 - Housing Coordinator – 2 years	100,000.00	99,983.81*
FY'13 - 338 Bedford Rd Evaluation	42,500.00	37,068.72**
FY'13 - Search for parcels other than Banta-Davis	25,000.00	0.00*
FY'13 - Banta-Davis Studies	27,500.00	12,085.42**
FY'14 - Affordable Housing Trust Fund	50,000.00	0.00*
FY'14 - 338 Bedford Rd Infrastructure Subsidy	125,000.00	85,269.11**
FY'15 - Affordable Housing Trust Fund	50,000.00	379.90**
Open Space		
FY'06 - Trail Improvements	15,000.00	12,554.16*
FY'07 - Bruce Freeman Rail Trail	20,000.00	19,111.75**
FY'07 - Conservation Signage	11,715.00	11,280.15*
FY'07 – Demolition of Greenough Cottage	25,000.00	22,300.00*
FY'07 - Footpaths	300,000.00	293,856.65*
FY'10 - Open Space & Recreation Plan	16,610.00	8,195.64*
FY'11 - Trails	15,000.00	6,314.56**
FY'11 - Bruce Freeman Rail Trail	5,000.00	0.00**
FY'12 - Elliott Preserve CR purchase	150,000.00	150,000.00*
FY'13 - Elliott Preserve CR purchase	150,000.00	150,000.00*
FY'14 - Center Park	10,000.00	9,918.33**
FY'16 - Towle Field Restoration	14,000.00	2,345.50**
FY'17 - Sorli Farm Field Purchase	850,000.00	0.00**

(continued to next page)

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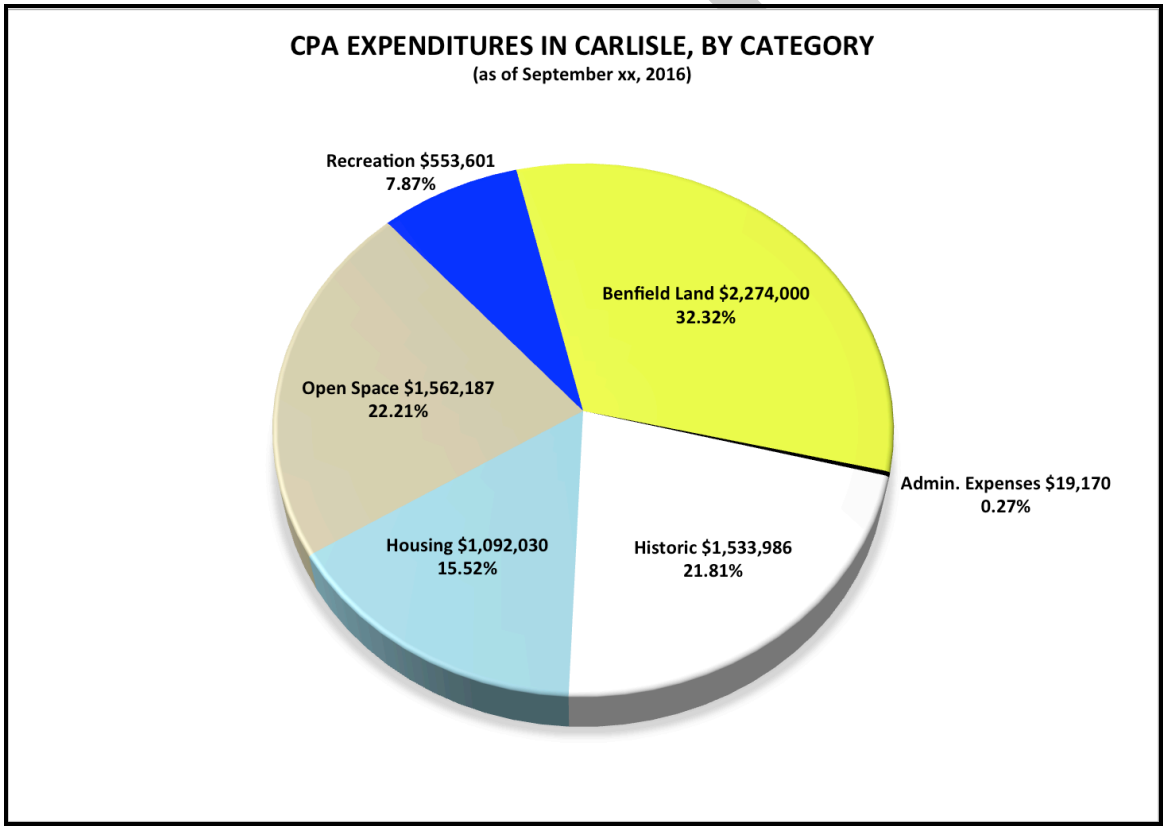
CPA APPROPRIATIONS IN CARLISLE, BY CATEGORY & YEAR (continued)		
Recreation (within Open Space category)	Appropriation	Expended (09/xx/16)
FY'06 – Benfield Athletic Field Design	25,000.00	0.00*
FY'07 – COA Survey of Rec Needs for Seniors	25,000.00	7,825.81*
FY'13 – Spalding to Banta-Davis Boardwalk	152,000.00	145,775.00*
FY'16 - Recreation Facilities at High School	400,000.00	350,000.00**
Benfield Land (within Housing and Open Space)		
FY'04 - Benfield Land Purchase	2,000,000.00	2,274,000.00***

* Project account closed, all unexpended funds returned to CPA balances
** The balance of the funds appropriated have not yet been expended or returned, as of Sept xx, 2016
*** Project account closed. Includes interest on bonding

Table 1 CPA Appropriations in Carlisle, by Category & Year

The chart below puts the information from the table above into a pie chart to show the relative expenditures by category. The total after each is the sum total (for all projects within that category) of expenditures plus the balance of funds appropriated that have not yet been expended or returned. To date, these expenditures and appropriations not yet expended or returned total $7,036,990.



REPORTING SCHEDULE
FOR CURRENT CPA GRANTS

Grant #	Project	Recipient	Grant $	Term	Reports due
2014-1	Infrastructure Subsidy	Housing Trust	125,000	3 yrs	10/1/14*, 10/1/15, 10/1/16, Closeout
2015-1	Housing Trust Fund	Housing Trust	50,000	3 yrs	12/31/15, 12/31/16, 12/31/17, Closeout
2015-2	Recreation Facilities	CC at Play	400,000	3 yrs	10/1/15*, 4/1/16, 10/1/16, 4/1/17, Closeout
2015-3	Danner Collection	Library Trustees	52,000	2 yrs	12/31/15, 12/31/16 Closeout
2016-1	Sorli Field	Carlisle Conservation Foundation	$850,000	2 yrs	12/31/16, 12/31/17, Closeout
2016-2	Central Burial Ground	Historical Commission	$20,000	2 yrs	12/31/16, 12/31/17, Closeout
2016-3	Towle Field	Conservation Commission	$14,000	2 yrs	12/31/16, 12/31/17, Closeout
2016-4	Heald House	Historical Society	$40,000	2 yrs	12/31/16, 12/31/17, Closeout

* Report received as of December 31, 2015

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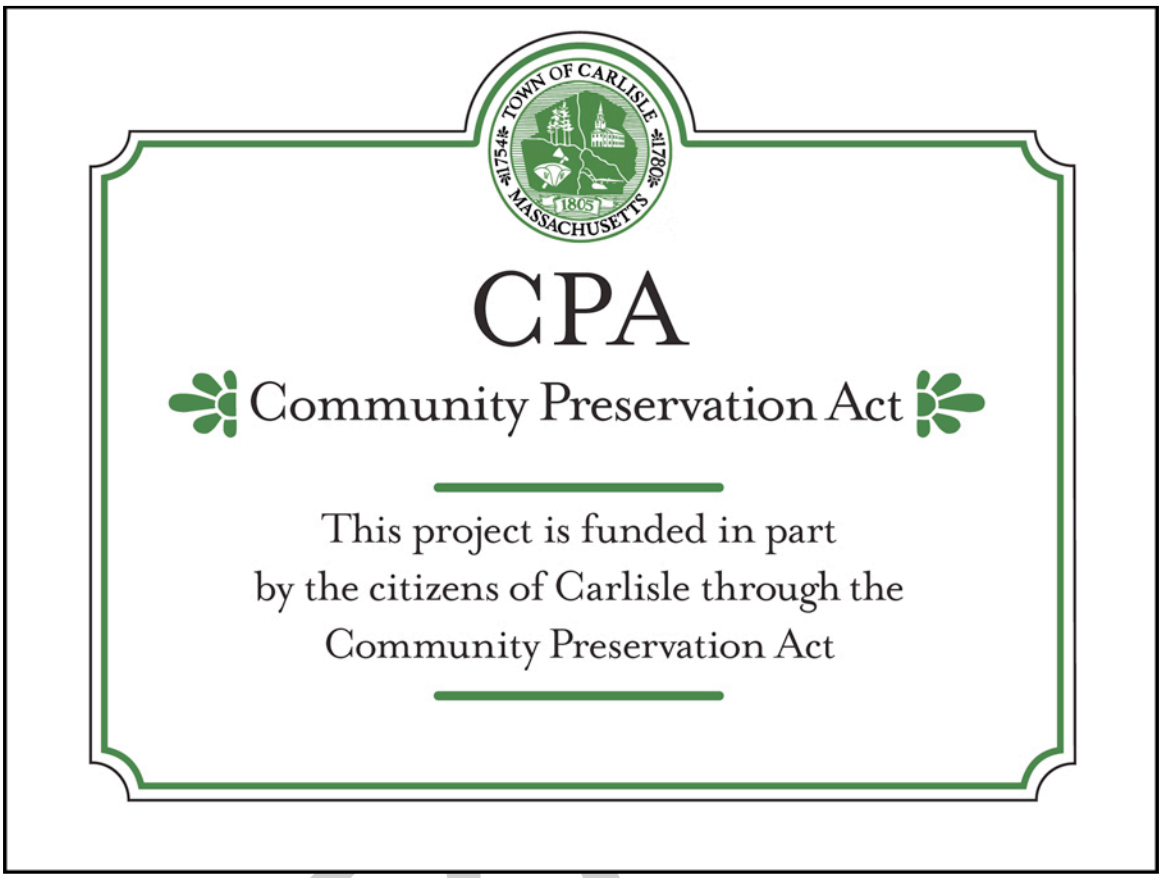
COMMUNITY PRESERVATION ACT AWARENESS
SAMPLE SIGN



As shown in the photographs below, the Community Preservation Awareness sign for the Carlisle CPA grant to Concord Carlisle at Play for recreational facilities at Concord-Carlisle High School is prominently displayed along the drive up to the school from Walden Street, along the fence at the entrance to the stadium. A similar sign is displayed acknowledging support from the Town of Concord's CPA funds.

Community Preservation Coalition
Preserving our past. Building our future.

COMMUNITY PRESERVATION FUND ALLOWABLE SPENDING PURPOSES (G.L. c. 44B, § 5)

	OPEN SPACE	HISTORIC RESOURCES	RECREATIONAL LAND	COMMUNITY HOUSING
DEFINITIONS (G.L. c. 44B, § 2)	**Land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and salt water marshes and other wetlands, ocean, river, stream, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use**	**Building, structure, vessel, real property, document or artifact listed or eligible for listing on the state register of historic places or determined by the local historic preservation commission to be significant in the history, archeology, architecture or culture of the city or town**	**Land for active or passive recreational use including, but not limited to, the use of land for community gardens, trails, and noncommercial youth and adult sports, and the use of land as a park, playground or athletic field** **Does not include horse or dog racing or the use of land for a stadium, gymnasium or similar structure**	**Housing for low and moderate income individuals and families, including low or moderate income seniors** **Moderate income is less than 100%, and low income is less than 80%, of US HUD Area Wide Median Income**
ACQUISITION Obtain property interest by gift, purchase, devise, grant, rental, rental purchase, lease or otherwise. Only includes eminent domain taking as provided by G.L. c. 44B	**Yes**	**Yes**	**Yes**	**Yes**
CREATION To bring into being or cause to exist. *Seideman v. City of Newton*, 452 Mass. 472 (2008)	**Yes**		**Yes**	**Yes**
PRESERVATION Protection from injury, harm or destruction, but not maintenance, which is upkeep of property	**Yes**	**Yes**	**Yes**	**Yes**
SUPPORT (not defined)				**Yes, includes funding for community's affordable housing trust**
REHABILITATION AND RESTORATION Remodeling, reconstruction or making extraordinary repairs to make assets functional for intended use, including improvements to comply with federal, state or local building or access codes or federal standards for rehabilitation of historic properties	**Yes if acquired or created with CP funds**	**Yes**	**Yes if acquired or created with CP funds**	**Yes if acquired or created with CP funds**

Chart Directly Copied from: *Community Preservation Fund Frequently Asked Questions - Budgeting, Accounting and Spending*. Page 10.
Prepared by the Department of Revenue for Community Preservation Coalition Workshop - April 2011