

**Town of Middleborough
Community Preservation Committee
Application for Community Preservation Funding**

FY 2013 Round One: Due July 2, 2012, 12:00 p.m

Welcome to the Town of Middleborough Community Preservation Committee (CPC) funding application process. The Community Preservation Act (CPA) provides a special funding source that is dedicated to community preservation needs related to community housing, historic resources, open space, and recreation. In general the goals of the CPA are to:

1. Acquire, Create, and Preserve Open Space (*plus* Rehabilitate and Restore Open Space *if* the Open Space was acquired with CPA funds)
2. Acquire, Create, and Preserve Land for Recreational Use (*plus* Rehabilitate or Restore Land for Recreational Use *if* the Recreational Land was acquired with CPA funds)
3. Acquire, Create, Rehabilitate, Restore, and Preserve Historic Resources
4. Acquire, Create, Preserve, and Support Community Housing

This application packet contains the following:

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In addition, all applicants should be aware that projects may be required to adhere to the Commonwealth of Massachusetts Procurement Requirements, and non-government applicants also should review the attached draft Grant Agreement.

Please read through all of the Guidelines and Application instructions. Applications must be complete including supporting documents. Note the emphasis on community need, the importance of broad community support, and the significance of securing other funding commitments in addition to the requested CPA funds. The CPC appreciates your participation and looks forward to reviewing your project application for Community Preservation Funding.

**Town of Middleborough Community Preservation Committee
Application for Community Preservation Funding**

GUIDELINES A. Definitions and Allowable Purposes

Community Preservation Funds	Open Space	Recreational Land	Historic Resources	Affordable Housing
Definition:	Land to protect existing & future well fields, aquifers & recharge areas, watershed or agricultural land, grass-lands, fields, forest, fresh & salt water marshes & other wetlands, ocean, river, stream, lake & pond frontage, coastal lands, lands to protect scenic vistas, wildlife, nature preserve, & for recreational use.	Land for active or passive recreation including, but not limited to, the use of land for community gardens, trails, & noncommercial youth & adult sports, & 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, gym, or similar structure.	Building, structure, vessel, document, artifact, or real property 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.	Housing for low & moderate income individuals & 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.
Purpose:				
ACQUIRE	Yes	Yes	Yes	Yes
CREATE	Yes	Yes	No	Yes
PRESERVE	Yes	Yes	Yes	Yes
Protect from injury, harm or destruction [not maintenance].				
SUPPORT	No	No	No	Yes, includes funding for town's affordable housing trust
REHABILITATE/RESTORE	Yes, if acquired or created with Community Preservation funds	Yes, if acquired or created with Community Preservation funds	Yes	Yes, if acquired or created with Community Preservation funds
Remodel, reconstruct, or repair [not maintenance] to make property functional for intended use, including improvements to comply with federal, state, or local building or access codes or with federal standards for rehab of historic properties.				

Source: Chart adapted from a document prepared by the Massachusetts Department of Revenue, 2007

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B. Project Evaluation Criteria

All applications will be evaluated according to the following criteria. Listed criteria is not necessarily relevant to every project:

1. All proposed projects must be eligible for CPA funding according to the requirements described in Community Preservation Act (MGL Chapter 44B);
2. Proposal is both thorough and comprehensive;
3. Proposal is consistent with the Town of Middleborough's Community Preservation Plan, Master Plan, Open Space & Recreation Plan, Affordable Housing Plan, Historic Preservation Plan and other planning documents that have received wide scrutiny and input;
4. Proposal is feasible with the expectation that all federal, state, and municipal approvals and permits necessary for successful project implementation are reasonably attainable within the project timeframe;
5. Project has support of immediate abutters (property owners of contiguous properties);
6. CPA funding for the project is urgent; a delay in funding will result in the failure to address an important Town need;
7. Project serves multiple needs and populations;
8. Project serves a currently under-served population;
9. Project has strong community support;
10. Project is consistent with recent Town Meeting actions and does not seek to contradict or overturn any Town Meeting policy decision;
11. Project advances preservation of currently owned Town assets;
12. Historic preservation project has Middleborough Historical Commission certification and project approval;
13. Project on Town property has certification from appropriate department head(s);
14. Project facilitates acquisition of threatened resources;
15. Project is cost effective;
16. Funding will leverage other sources of funding;
17. Proposal identifies resources to continue maintenance of project once completed.
18. Sponsor's past performance with managing CPA grants has been satisfactory.

If you would like more information about the CPA, the following websites may be useful:

Middleborough Community Preservation	middleborocpa.org
Community Preservation Coalition	
www.communitypreservation.org	
MA Executive Office of Energy & Environmental Affairs	www.mass.gov/eea
MA Department of Revenue	
www.dls.state.ma.us/dor2.htm	

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C. Use of Funds and Leveraging Other Support

1. The Community Preservation Act is statewide enabling legislation to allow cities and towns to exercise control over local planning decisions. CPA monies are public funds raised from dedicated Middleborough tax revenues and State subsidies to the Town. Projects financed with CPA funds must comply with all applicable State and Town requirements, including the Commonwealth's procurement laws, which require special procedures for the selection of products, vendors, services, and consultants. Contracts for goods and services must be awarded to the lowest qualified bidder. Project purchases cannot be split to avoid State procurement laws.
2. CPA funds may not be used to cover ongoing applicant costs of operations and salaries that are typically supported by the applicant's annual operating revenue. Such costs for activities directly associated with the proposed project may be listed in the budget as in-kind services.
3. CPA funds may not be used for maintenance.
4. Funds may be spent only on items listed in the submitted proposal budget. All changes to budgets must first be approved by the CPC.

CPA funds may not be used to supplant current spending or previously approved funding commitments, including but not limited to municipal capital improvement funds, general operating funds, bonds, grants, and loans.

5. Based on the availability of funds, proposals that may otherwise merit full funding may be recommended for lesser amounts. Under such circumstances, the CPC will give higher priority to funding fully those proposals that include significant funds from other public and private sources. Proposals identified for lesser funding will be considered for recommendation to Town Meeting if the project sponsors demonstrate a willingness and ability to raise the additional funds from other sources within a reasonable period.

**Town of Middleborough
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Application for Community Preservation Funding

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D. Application Process

STEP 1: APPLICATION FOR COMMUNITY PRESERVATION ELIGIBILITY

- The application process is a two step process. Step 1 - The Application for Community Preservation Eligibility will introduce your proposal to the CPC so that it can determine the project's eligibility and offer guidance.
- If the CPC agrees that your proposal is eligible, an Application for Community Preservation Funding (Step 2) must be completed.
- The Application for **Community Preservation Eligibility** (Step 1) may be submitted at any time during the year but must be received by the CPC by **noon July 1st of each year, or if on a weekend, the first business day thereafter** in order to be considered for the next funding round.

STEP 2: APPLICATION PREPARATION

- Applications should be typed using the attached application form. Applicants are encouraged to download the application at www.middleboroughcpa.org. In addition, applications may be available at the Town Clerk's Office and at the Public Library.
- If you are in doubt about your project's eligibility or have other questions, you may submit a letter or e-mail well in advance of the due date describing the project and the proposed use of funds. Please address your inquiry to:

Jane Lopes, Chair
Community Preservation Committee
Middleborough Town Hall Annex
20 Center Street
Middleborough, MA 02346
Or: cpc@middleborocpa.org

All responses will be sent via regular mail and/or e-mail.

- **PLEASE NOTE: Only complete applications will be considered for funding. Please answer all questions and furnish all requested information, supporting documents, and certifications.**

STEP 3: APPLICATION SUBMISSION

- Submit 10 copies plus one (1) electronic copy [PDF or Word Document] of the completed application and all supporting documents. Electronic copy can be via email or on a compact disc to:

Community Preservation Committee
Middleborough Town Hall Annex
20 Center Street
Middleborough, MA 02346
Email: cpc@middleborocpa.org

- The Application for Community Preservation **Funding** deadline is **November 1st each year, if on a weekend, the first business day thereafter, no later than 12:00 p.m.** The CPC may accept late applications after this deadline for emergency or other appropriate reasons, solely at the Committee's discretion.
- If Town Hall is closed on the submission due date due to uncontrolled events, the submission deadline will be postponed until 12:00 p.m. on the next business day.
- Applicant will be notified of receipt of application by email.
- The CPC will not be responsible for any expenses incurred in preparing and submitting applications. All submittals shall become the property of the Town of Middleborough. Unless specifically exempt under Massachusetts public records law, the Town has the right to disclose information contained in proposals.

STEP 4: CPC REVIEW, PUBLIC HEARING & RECOMMENDATION

a. Application Review:

The CPC will review the submitted application to determine whether:

- Application is complete;
- Proposed project is eligible for CPA funding;
- Proposed project meets the Evaluation Criteria requirements; and
- Proposed project is sufficiently developed in terms of the work plan and merits further consideration.

The applicant will be notified if additional information is required. Failure to respond in a timely manner will eliminate the proposal from consideration. The CPC may ask to meet with the applicant or its authorized representative at a CPC meeting. It also may request a site visit.

The applicant's successful selection will be based upon an evaluation of the information and materials submitted.

The CPC reserves the right to recommend funding of a project, in full or in part, and to impose specific conditions and restrictions. It reserves the right to reject any and all proposals if it believes that such rejection is in the best interests of the Town of Middleborough.

b. Changes or Withdrawal:

A submission may be modified, corrected, or withdrawn only by written notice and received by the CPC at least 7 days prior to the public hearing held before the upcoming Town Meeting. The notice must reference the original proposal.

c. Public Hearing:

Applicants chosen for consideration will be given an opportunity at a public hearing to present the project and respond to questions from the CPC and the public. Applicants or their representatives must be present.

d. Final Recommendation:

Following the public hearing, CPC will notify the applicant in writing if its project is to be recommended to the next Town Meeting. The recommendation will be contingent upon satisfaction of any grant conditions that have been identified by the CPC and in accordance with the Grant Disbursement Schedule as submitted by the applicant and approved by the CPC. The CPC will draft an appropriate warrant article; the applicant should expect to assist the CPC in preparing project information and the presentation.

The CPC will make its final funding recommendations in the form of the warrant articles to be voted on at Town Meeting.

Final recommendations for Town Meeting are expected to be completed by **February 1st of each year**. Although the CPC makes recommendations, Town Meeting must approve the appropriation for a project to receive funding. All applicants will be notified in writing as to the status of their applications by **February 15th of each year**.

STEP 5: TOWN MEETING APPROVAL

Town Meeting has the final authority to award funds from Middleborough's Community Preservation Fund. A majority vote is required to approve funding; a two-thirds vote is required for borrowing. An applicant or its authorized representative of a project being recommended will be required to attend Town Meeting to respond to questions and/or present information.

STEP 6: FUNDING AWARD

Applicants will be notified in writing as to the status of their application within 2 weeks after the end of the Town Meeting.

Funding for approved projects will be available following completion of the annual town meeting and subject to satisfaction of all conditions for funding established by the CPC in a Grant Award Letter and Grant Agreement.

Funds are awarded on a disbursement basis according to the Town of Middleborough's Purchasing/ Procurement Policy, the Award Letter, and the Grant Agreement. CPA funds may not be used to reimburse a successful applicant for any expenses incurred before the date of the Award Letter. All plans, specifications, and other documents resulting from this contract shall become the property of the Town of Middleborough.

Project milestones will be established for all approved projects and will guide the release of funds. Periodic Status Reports will be required according to a schedule set forth in the Grant Agreement.

A Final Narrative and Financial Report will be required to be submitted and approved by CPC prior to the final disbursement. A report shall be submitted identifying resources for continued maintenance of the project.

STEP ONE

TOWN OF MIDDLEBOROUGH APPLICATION FOR COMMUNITY PRESERVATION ELIGIBILITY

NOTE: This application step enables the CPC to review the request to ensure eligibility and offer guidance. If eligible, Step 2 - Application for Funding must be completed.

Date: June 29, 2012

Project Title: Historic and Vital Records Preservation

Applicant/Contact Person: Allison J. Ferreira

Name of Organization: Town of Middleborough Town Clerk's Office

Address: 20 Centre Street, Middleborough, MA 02346

Telephone: (508) 946-2415

Email: aferreira@middleborough.com

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

CPA Purpose (check all that apply) Acquire Create
 Preserve Support
 Rehabilitate / Restore

CPA Funding Requested: \$5,150 for Phase one (1) **Total Project Cost:** TBD (\$35,000-\$80,000 estimated)

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

The project I am proposing is a Historic and Vital Records Preservation project for the Town of Middleborough. As the keeper of records for the Town of Middleborough, the Town Clerk's Office is responsible for the filing, storage and preservation of our historic and vital documents dating back to 1669. The maintenance and preservation of these documents is crucial to our history as well as the future of Middleborough. The current climate control, storage, filing and preservation system in use is inadequate at best; documents (most in paper form) are filed in several different areas and manners, many are stored in boxes in basements that are prone to water damage and moisture. The Town's vault has inadequate climate control and storage as well. All of which puts our historic and vital documents at risk to damage, mold and deterioration.

The goal of this project is to provide adequate climate control, filing, storage and microfilm and/or digital formatting of our historic and vital records. The climate control and proper storage will assist us in the preservation. A uniform filing system and microfilm/digital format will allow quick access and afford our citizens and visitors access to these documents.

I am proposing a three (3) phase project. The first phase will be to contract a vendor to conduct an assessment of our current filing and storage system for our historic and vital records. This phase is estimated to be completed in ten (10) days with a detailed description of recommendations. (See attached quote).

Phase two (2) of the project will consist of implementing recommendations based on the initial assessment, and to contract a vendor pursuant to Massachusetts General Laws, Chapter 30B to analyze our current climate control.

Phase three (3) of the project would include the archival, digitizing and microfilming of our historic and vital records and the installation, repair or upgrade of the current climate control system.

I am confident this project is consistent with the goals of the Community Preservation Act (CPA) and the Town of Middleborough's Community Preservation Plan. In March 2006, the CPA statute was amended to include "documents and artifacts" within the definition of historic resources and under that statute I believe this project advances preservation of currently owned Town assets, the project is cost effective and the proposal identifies resources to continue maintenance of the project once completed.

Proposed Time Line: (As a separate attachment, please submit a project implementation schedule including anticipated start and end dates, initiation and completion dates of key milestones, etc.)

(See attached)

Sources of financial sustainability for future maintenance: (As a separate attachment, please submit documentation of financial sustainability including anticipated resources for future maintenance)

The maintenance and ongoing costs of this project would be minimal. It was proposed that an archive supervisor be utilized on an annual basis for two (2) days at a cost of \$560.00 per day, plus expenses. As a result of the archive audit, the Town may have a number of boxes for destruction. A contracted vendor could be utilized to load and transfer the boxes to a recycling facility for destruction at a cost of \$126.00 per hour and \$.16 per pound. To maintain the climate control for the vault in the Town Clerk's it is estimated to cost \$75.00 to service and tune the system, clean evaporator coil and blower fan blade, and check drainage and operation. Funding may be requested through Town budgets or Peirce Trustees.

Other key elements (As a separate attachment, please submit documentation of community support such as endorsements from town permitting boards or commissions, community organizations, abutters, etc)

(See Attached Letters of Support)

Submit 10 copies and one (1) compact disk containing the electronic copy of the application and all supporting documents of the completed eligibility application to:

Community Preservation Committee
Middleborough Town Hall Annex
20 Center Street
Middleborough, MA 02346

STEP 2

Town of Middleborough Community Preservation Committee Application for Community Preservation Funding

A. COVER SHEET

1. PROJECT NAME Historic and Vital Records Preservation

2. APPLICANT INFORMATION

Project Sponsor or Organization: Town Clerk

Contact Person: Allison J. Ferreira

Address: 20 Centre Street,

City: State: Zip: Middleborough, MA 02346

Daytime Phone: Fax: (508) 946-2415

E-mail: Website: aferreira@middleborough.com

Property Owner (if different from Applicant) Town of Middleborough

Contact Name: Charles J. Cristello

Address: 10 Nickerson Avenue

City: State: Zip: Middleborough, MA 02346

E-mail: ccristello@middleborough.com

3. PROJECT INFORMATION

CPA Category (Please check all that apply):

 Open Space # of acres X Historic Preservation
 Recreation # of acres Affordable Housing # of units

Project Location/Address: Town Hall Offices, 10 Nickerson Ave., Bank Building,
20 Centre St., Police Department, 99 North Main St., Fire Department, 125 North Main
St., Middleborough, MA

Middleborough Assessors Map: 50P / / 6189/ / / , 50P / / 6249/ E / / , 50Q / / 5549/ / / , 50Q / / 5574/ / /

Block: Lot:

Brief Project Description:

The project being proposed is a Historic and Vital Records Preservation project for the Town of Middleborough. As the keeper of records for the Town of Middleborough, the

Town Clerk's Office is responsible for the filing, storage and preservation of our historic and vital documents dating back to 1669. The maintenance and preservation of these documents is crucial to our history as well as the future of Middleborough. The current climate control, storage, filing and preservation system in use today is inadequate at best; historic and vital documents (most in paper form) are filed in several different locations and methods, making it extremely difficult to research and access. A majority of these documents are stored in cardboard boxes in basements that are prone to water damage and moisture, exposing them to damage and rapid decay. The climate control system in the Town vault, located in the Town Clerk's Office, is inoperable which is exposing our most vital documents to moisture and decay.

The goal of this project is to thoroughly survey and analyze various Town records, implement a central archival database program to manage our Town archives and records, provide adequate climate control, filing, storage and microfilm and/or digital formatting of our historic and vital records. The climate control and proper storage will assist us in the preservation of our most vital records. A uniform filing system and microfilm/digital format will allow quick access, reducing staff hours and afford our citizens and visitors easy access to these documents.

I am proposing a three (3) phase project. The first phase will be to contract a vendor to conduct an assessment of our current filing and storage system for our historic and vital records. This phase is estimated to be completed in ten (10) days with a detailed description of recommendations.

Phase two (2) of the project will consist of implementing recommendations based on the initial assessment, and to contract a vendor pursuant to Massachusetts General Laws, Chapter 30B to analyze our current climate control.

Phase three (3) of the project would include the archival, digitizing and microfilming of our historic and vital records and the installation, repair or upgrade of the current climate control system.

I am confident this project is consistent with the goals of the Community Preservation Act (CPA) and the Town of Middleborough's Community Preservation Plan.

4. AMOUNT OF CPA FUNDING REQUESTED: \$ 5,150 for Phase one (1) of the project, Phase two (2) and Phase three (3) costs to be determined after initial assessment.

TOTAL PROJECT COST: To be determined. Received approximate quote from vendor referencing costs to other municipalities: smaller town archival projects averaged \$35,000 - \$40,000; larger town archival projects averaged \$75,000 - \$80,000.

CPA AS PERCENTAGE OF TOTAL PROJECT COST: _____

For CPC Use

Date Received _____

Funding Recommendation

Date Application Deemed Complete _____

Public Hearing _____

B. PROJECT NARRATIVE

To assist the CPC in reviewing your application in a fair, equitable, and efficient manner, please provide a thorough project description, addressing each of the following points in the order indicated. Use separate sheets as needed and number each point to correspond with the section headings below.

1. Goals and Description: Provide a detailed project description, including but not limited to:

a. Project goals;

The goal of this project is to thoroughly survey and analyze various Town records, implement a central archival database program to manage our Town archives and records, provide adequate climate control, filing, storage and microfilm and/or digital formatting for our historic and vital records. The climate control and proper storage will assist us in the preservation of our most vital records. A uniform filing system and microfilm/digital format will allow quick access and research ability, reducing staff hours and afford our citizens and visitors easy access to these documents.

b. Description of project activities and outcomes and the property involved and its proposed use;

I am proposing a three (3) phase project. The first phase will be to contract a vendor to conduct an assessment of our current filing and storage system for our historic and vital records in the Town Hall Offices, Bank Building, Town Clerk's Office and vault, Police Department and Fire Department. This phase is estimated to be completed in ten (10) days with a detailed description of recommendations.

Phase two (2) of the project will consist of implementing recommendations based on the initial assessment, and to contract a vendor pursuant to Massachusetts General Laws, Chapter 30B to analyze our current climate control.

Phase three (3) of the project would include the archival, digitizing and microfilming of our historic and vital records and the installation, repair or upgrade of the current climate control system.

c. Indication of how the project is eligible for CPA funding;

In March 2006, the CPA statute was amended to include "documents and artifacts" within the definition of historic resources. Since that time, many communities have used CPA funds for document preservation projects, including document conservation and restoration projects and improvements to storage systems, such as installing climate controls. This project meets all of these requirements and is not only worthwhile but necessary to protect our historic and vital records.

d. Description of the project applicant and any project partners.

As the keeper of records for the Town of Middleborough, the Town Clerk's Office is responsible for the filing, storage and preservation of our historic and vital documents dating back to before 1669. After presenting this project to various departments at a department head's meeting, several department heads expressed a strong interest and support for this project. I currently have partnered

with Lance Benjamino, Fire Chief, Bruce Gates, Police Chief, Barbara Erickson, Assessor/Appraiser, Steven Dooney, Town Accountant to expand this project to their departments as well. (See attached letters of support)

- 2. Community Need:** Indicate what community need(s) the project will address and how these are consistent with Town policy and plans. Refer specifically to the Community Preservation Plan, existing Town plans, and/or other publicly vetted priority-setting planning documents. Describe the ways that the project will benefit the Town.

As indicated in the Town of Middleborough Community Preservation Plan, historic resources contribute to our understanding of the historical development of our unique heritage, culture and character. Historic preservation seeks to recognize, restore, preserve and enhance the historic character and heritage of Middleborough.

- 3. Community Support and Outreach:** Describe the nature and level of support for this project. Show how the project will foster long-term stewardship and generate a community ethic through citizen involvement. Provide information on the methods that will be used to disseminate information on the project and how it will endeavor to encourage and/or serve as a model for other local projects. Submit at least 3 letters, petitions, or other documentations of support.

This project was presented to the members of the Historical Commission on August 21, 2012 where the Commission voted to unanimously support the project. The implementation of this project will provide the residents and visitors in the Town of Middleborough with quick access to our various records and archives and will preserve our vital records which are significant to the Town. This project will serve as a model for other local projects by allowing our Town offices to maintain our records in a more organized fashion and serve our residents in a more efficient manner.

- 4. Credentials:** Identify the members of the project team and their roles, qualifications, and technical expertise. Explain how the project applicant and any partners are qualified to conduct the scope and scale of the proposed project and indicate prior experience with similar projects. Identify the professional standards that will be followed if construction, restoration, or rehabilitation is proposed. Note that historic preservation proposals must include the services of a qualified credentialed preservation professional to oversee all preservation and restoration activity and ensure compliance with Massachusetts Historic Commission standards.

The Town Clerk acts as the Keeper of Records for the Town of Middleborough. The Town Clerk's Office is responsible for the filing, storage and preservation of our historic and vital documents dating back to 1669. The Assessor/Appraiser maintains a variety of documents, maps, index cards and books that hold vital historic significance. The Police and Fire Departments maintain confidential documents and are responsible for the filing of various Town records. The Town Accountant is responsible for maintaining financial data for the Town. The contracted vendor for the project will work with the Town Clerk to assist with the statutory requirements pertaining to the Massachusetts Statewide Retention Schedule under the statutory provisions of Massachusetts General Laws Chapter 4, § 7(26), c. 30 §42, and c. 66, §§ 1, 8 and 9.

- 5. Maintenance and Ongoing Costs:** If ongoing maintenance or other ongoing costs are required for the project, indicate how it will be funded. If no costs are anticipated, the application should include this information.

The maintenance and ongoing costs of this project would be minimal. It was proposed that an archive supervisor be utilized on an annual basis for two (2) days at a cost of \$560.00 per day, plus expenses. As a result of the archive audit, the Town may have a number of boxes for destruction. A contracted vendor could be utilized to load and transfer the boxes to a recycling facility for destruction at a cost of \$126.00 per hour and \$.16 per pound. To maintain the climate control for the vault in the Town Clerk's it is estimated to cost \$75.00 to service and tune the system, clean evaporator coil and blower fan blade, and check drainage and operation. Funding may be requested through Town budgets or Peirce Trustees.

6. Success Factors: Describe how the project's success will be measured. Indicate the specific method(s) that will be used to evaluate each project outcome. Identify any significant barriers to complete the projected outcomes and specify how these would be addressed.

The success will be measured by the easy access and preservation of our historic and vital records by the use of a uniform filing system and climate control system.

7. Project Permits & Approvals: Provide documentation as required:

- a. Control of Site: Provide documentation that the applicant has control over the site, such as a Purchase and Sales Agreement, option, or deed. If the applicant does not have site control, explain how public benefits will be protected in perpetuity. If the applicant is not, or will not be, the owner of record, submit a certification of project approval by the owner.

The sites are property of the Town of Middleborough, see Assessor's Map numbers 50P // 6189/ //, 50P // 6249/ E //, 50Q // 5549/ //, 50Q // 5574/ //.

- b. Deed Restrictions: Identify the present owner and attach a copy of the deed up to present owner. In addition, identify the entity that will be holding rights to enforce the restriction. In order for a project's funding to be distributed fully, an applicant must have filed with the CPC a copy of the appropriate deed restriction
- c. Hazardous Materials: Provide evidence that the proposed project site is free of known hazardous materials, or if there are known hazardous materials please indicate the proposed plan for remediation.

Once an initial assessment is completed by a contracted vendor, the Town will be informed of any hazardous materials. At this time, we do not anticipate any known hazardous materials to be present.

d. Environmental Concerns: Identify all known wetlands, floodplains, and/or any natural resource limitation that occur within the project boundaries.

None

e. Evidence of Historic Significance [for historic preservation projects]: An applicant must provide evidence that the historic resource is listed or eligible for listing on the Massachusetts State Register of Historic Places or obtain a letter from the Middleborough Historic Commission [“MHC”] that the historic resource is locally significant. The applicant must also obtain a letter from the MHC indicating the MHC has reviewed and endorsed the proposal. The applicant should submit a draft project proposal to the MHC in order to be reviewed at a monthly MHC meeting prior to submission to CPC.

This project was presented to the members of the Historical Commission on August 21, 2012 where the Commission voted to unanimously support the project. (See attached letter of support)

f. Permitting: Indicate any further actions that will be required to complete the project, such as environmental assessments, zoning or other approvals, agreement on terms of any required conservation, affordability, or historic preservation restrictions, and any other known barriers to moving forward. Present evidence that the project does not violate any zoning ordinances, covenants, restrictions, or other laws or regulations and that the project will expeditiously meet environmental and other permitting requirements, so that on-the-ground activities will begin within the first 12 months after the project’s start date. Evidence of consultation with the Conservation Commission, DPW, Park Dept., Planning Board, Historical Commission, Select Board, etc. where applicable, is strongly recommended.

None

List below any permits needed for the project. Provide copies of permits already acquired. (Applicants are responsible for all costs associated with permitting, including, but not limited to abutter mailings and advertising.)

Name of Permit	Filed (Y/N)	Date Filed	Date Obtained
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<u>None</u>			
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C. PROJECT BUDGET, FUNDING, & TIMELINE

- 1. Project Budget:** State the total budget for this project, and how CPA funds will be spent. Applicants are reminded that they must adhere to the Commonwealth of Massachusetts’s Procurement Policy. All non government applicants should review the draft Grant Agreement to ensure that all potential project costs are eligible for CPA funding, e.g. CPA funds may not be used for maintenance.

Provide a detailed itemization of all project expenses, such as personnel, consultants, contracted services, equipment, and supplies. For each item, specify in parentheses how the expense was calculated, e.g. (# of hrs. x cost/hr.) Applicants should obtain quotes for project costs when possible; if not, indicate where cost estimates have been used. For each item, identify whether CPA funds or other funding will be used, and note where applicant and/or partner in-kind contributions will cover non-CPA fundable expenses such as administration.

Use table below or include as a separate attachment.

Expense Item	Total	CPA	Other
<u>Assessment (King Information Systems, Inc.)</u>		<u>\$5,150</u>	<u>\$5,150</u>
<u>Climate Control System</u>	<u>\$7,400</u>	<u>\$7,400</u>	
<u>Filing System and Filing</u>			
TOTAL	<u>\$35,000 - \$80,000</u>		

- 2. Other Funding:** Describe efforts to secure other funding. Indicate what additional funding sources are available, committed or pending. Include commitment letters, if available. Complete the table below and include applicant and/or partner in-kind contributions.

Source of other funds	Amount	Funding requested	
Funding secured		(Y/N)	(Y/N)
<u>PeirceTrustees</u>		<u>N</u>	<u>N</u>

3. Total Project Funding:

If the proposal is part of a multi-phase project, please indicate below the projected project costs and funding sources for the additional phases to completion.

Fiscal Year Funding	Total Project Cost	CPA Funds to be Requested	Other
2013	\$5,150	\$5,150	
2014	\$40,000	\$40,000	
2015			
2016			
TOTAL	\$45,150	\$45,150	

4. Timeline and Grant Disbursement Schedule: Provide a detailed schedule for project implementation, including all activities and key milestones. Indicate the total funding as well as CPA and other funding that will be required to complete each activity or milestone.

Project start date: November or December 2012

Use table below or include as a separate attachment.

Activity Other	Date Completed	Total Funding	CPA
<u>See attached proposed timeline</u>			

D. SUPPORTING DOCUMENTS & APPLICANT CERTIFICATION

1. Supporting Documents: Check off all attachments included:

A. Minimum Submission Requirements

All Projects

- Support letters [three or more]
- Names and addresses of project architects, contractors, and/or consultants
- For projects on Town property: Letter of approval from Town Manager and/or appropriate department head
- Non-CPA funding commitment letters

Historic Preservation Projects

For Historic Preservation Projects:

- Evidence property/site is on State Register of Historic Places or is eligible for the State Register, OR
- Middleborough Historic Commission (MHC) letter of certification of significant historical, archeological, architectural, and/or cultural value.
- Letter from the MHC indicating the project proposal has been reviewed and endorsed by the MHC.

Projects that include acquisition and/or rehabilitation of land, buildings, and other real property

- Evidence of Site Control [Purchase and Sales Agreement, Option, Deed, License, Lease, etc.]
- Appraisal [for acquisitions]
- Assessor's map showing location of the project
- Permits already obtained

B. Additional Supporting Documents

- Photographs, renderings, or design plans, if applicable
- Preliminary architectural plans and specifications for new construction or rehabilitation, if applicable
- Historic structure report or existing condition reports
- Other information or documents. Please list.

2. Applicant Certification

I hereby certify that the foregoing and attached information is true and accurate to the best of my knowledge. I further certify that I have reviewed the attached Community Preservation Fund Appropriation Payment, Accounting & Procurement Policy and for non-government applicants, the attached draft Grant Agreement and hereby affirm that if the foregoing application is funded, the applicant is prepared to execute and abide by the terms of these documents.

Applicant's Name Allison J. Ferreira

By Authorized Representative

Allison J. Ferreira

Date: September 13, 2012

E. CERTIFICATE OF AUTHORITY & LIST OF OFFICERS AND DIRECTORS

GRANT AGREEMENT #:

APPLICANT:

I hereby certify that I am the Clerk/Secretary of:

(Print Name of Corporation)

and that _____

is the

(Print name of Officer who signs the Grant Agreement)

duly elected of said corporation;

(Print title of Officer who signs the Grant Agreement)

and that _____ on at a duly authorized meeting of the Board of Directors

(date of Meeting)

of said Corporation, at which a duly authorized quorum of the Directors were present and acting, or waived notice, that

(Print name and title of Officer signing Grant Agreement)

of this corporation be and hereby is authorized to execute contracts and bonds in the name and on behalf of said corporation, and affix it Corporate Seal thereto, and such execution of any contract of obligation in this corporation's name on its behalf, with or without the Corporate Seal, shall be valid and binding upon this corporation; and that the above vote has not been amended or rescinded and remains in full force and effect as of the date set forth below.

Attest:

(Signature of Clerk/Secretary)

Name:

(Printed or typed name of Clerk/Secretary)

Date: _____

NOTE: THE DATE OF THE VOTE AUTHORIZING OFFICER TO SIGN GRANT AGREEMENT MUST BE BEFORE THE DATE THE OFFICER ACTUALLY SIGNS THE GRANT AGREEMENT. THIS CERTIFICATE MUST ALSO BE EXECUTED BEFORE THE OFFICER SIGNS THE GRANT AGREEMENT. PLEASE ATTACH A LIST OF OFFICER AND DIRECTORS OF THE CORPORATION

- This Form is to be used by corporations, trusts and associations who are applying for CPA Funds.

F. STATE TAX CERTIFICATION

GRANT AGREEMENT #:
APPLICANT:

Pursuant to Massachusetts General Laws Chapter 62C, Section 49A, I certify under the penalties of perjury that, Allison J. Ferreira, Town Clerk
(name of Recipient receiving the Grant)

all to the best of my knowledge and belief, has filed all Massachusetts tax returns and paid
Massachusetts and Town of Middleborough Taxes and Fees as required under law.

Signature: Allison J. Ferreira

Name of Recipient: Allison J. Ferreira, Town Clerk

Federal Tax ID # or Social Security #: 046-001221

Date: September 13, 2012

G. AFFADAVIT

GRANT AGREEMENT #:

APPLICANT:

I, Allison J. Ferreira, under the penalties of perjury do hereby state and affirm that:

1. On September 13, 2012, I signed the attached Project Submission & Application For Funding (hereinafter “the Application”) seeking funding from the Town of Middleborough’s Community Preservation Fund as the Authorized Representative of

Town of Middleborough (hereinafter “the Applicant”); and

2. Neither I, nor the Applicant, nor any person or entity who would receive funding as a result of the Application has ever been convicted of:

- (a) a crime involving the willful and malicious setting of a fire, or
- (b) a crime involving the aiding, counseling, or procuring of a willful and malicious setting of a fire, or
- (c) a crime involving the fraudulent filing of a claim for fire insurance;

and

3. Neither I, nor the Applicant, as of this date, owe the Town of Middleborough any monies in the form of previously incurred real estate taxes, water/sewer charges, motor vehicle excise taxes, personal property taxes, parking tickets or any other indebtedness, or

4. I owe \$ 0.00, (please state dollar amount and source of indebtedness - if nothing owed insert \$0.00), and if delinquent,

- I have filed in good faith, an application for an abatement of such amount which is pending, or
- a petition before the Appellate Tax Board is pending, or
- an Installment Payment Agreement with the treasurer of the Town which is current and not in default; and

5. Neither I, nor the Applicant, nor any person who would gain equity as a result of funding of the project described in the Application, has ever been convicted of violating any code, statute or bylaw regarding conditions of human habitation within the last three (3) years; and

6. Neither I, nor the Applicant, nor any person who would gain equity as a result of funding the project described in the Application, has ever been the owner of any property in the Town of Middleborough for which the Town has foreclosed the right of redemption as a result of failure to pay real estate taxes, water/sewer charges or any other indebtedness

7. Neither I, nor the Applicant, nor any person who would gain equity as a result of funding the project described in the Application nor any person who would gain equity in the project described in the Application, is employed by the Town, or a member of a Board or Commission of the Town of Middleborough or if so:

(a) In what capacity? I am employed by the Town of Middleborough as the Town Clerk.

(b) In what department? Town Clerk's Office

I understand that in the event any of the foregoing statements are untrue, all CPA funding of the project described in the attached Project Submission & Funding Request will be forfeited and if any monies have been distributed pursuant to Town Meeting approval of this Funding request, then all such sums shall be immediately due and payable to the Town of Middleborough.

The undersigned swears under the penalties of perjuries that this Affidavit is complete and accurate in all respects.

SIGNATURE Allison J. Ferreira

PRINT OR TYPE NAME Allison J. Ferreira, Town Clerk

ADDRESS 20 Centre Street, Middleborough, MA 02346

TELEPHONE # (508) 946-2415

WITNESS

Roger Chynette

- This Affidavit must be signed by the individual(s) or organizations(s) applying for Community Preservation Funding. If this form is signed on behalf of a corporation or other legal entity, it must be signed by a duly authorized representative of that corporation or legal entity.

H. MEMORANDUM OF UNDERSTANDING

GRANT AGREEMENT #:

APPLICANT:

I understand that there are certain conditions and responsibilities involved in receiving CPA funding.

My signature below indicates that I have read the following conditions and agree to follow them if my application is recommended to and approved by Town Meeting:

1. I understand that the funding process follows procedures described in the Community Preservation Act, M.G.L. Ch. 44B and that this places certain restrictions on how payments may be made.
2. In order to acknowledge the Community Preservation Act, and thus the contributions of the Middleborough taxpayers, I will:
 - Order, pay for and place a temporary “Community Preservation Works” sign or banner in front of the project. The Community Preservation Committee will provide the approved design. Approximate cost for the banner is generally \$250 - \$300.
 - Acknowledge the contributions of the Community Preservation Act in all press releases, newsletters, and other publicity.
 - Include recognition of the Community Preservation Act if a permanent plaque or sign is placed on the project.
3. If requested, I will supply the Community Preservation Committee with quarterly financial up-dates on the project.
4. I acknowledge that a deed restriction may be required. If needed, I will assist in the process of obtaining the required deed restriction to help protect the property in perpetuity.

Allison J. Ferreira

Print Name

Signature *Allison J. Ferreira*

Date *9/13/2012*



MIDDLEBOROUGH FIRE DEPARTMENT

125 North Main Street
Middleborough, Massachusetts 02346

LANCE M. BENJAMINO
Fire Chief

Tel: 508-946-2461
Fax: 508-946-2464

Jane Lopes - Chair
Community Preservation Committee
Middleborough Town Offices
20 Centre Street
Middleborough, MA 02346

August 30, 2012

Dear Madam Chair,

I am writing to your committee to express my support of the Historic and Vital records Preservation project presented by the Town Clerk.

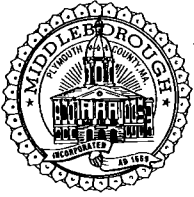
As you may or may not know, in 2009 the Central Fire Station suffered a severe flood in the basement due to a water main break that damaged many of our historic documents and equipment. I believe that if the documents were properly filed and stored we would have suffered far less damage than experienced. Recently, I had the opportunity to consult with Allison Ferreira, Town Clerk and Paula MacDonald from King Information Systems (vendor) regarding the proposed project and how this project would impact our ability to preserve, file, store and access our historic and vital records. It is my opinion that this project is not only worthwhile but necessary for any of the town departments that retain historic and vital records.

I hope you look favorably upon the request.

Respectfully,

A handwritten signature in cursive script that reads "Lance Benjamins".

Lance Benjamins
Chief of Department



Assessor's Office

10 Nickerson Avenue
Middleborough, Massachusetts 02346

Telephone (508) 946-2410

Fax (508) 946-4430

Community Preservation Committee
Middleborough Town Hall Annex
20 Center Street
Middleborough, MA 02346

August 21, 2012

Dear Members,

The Board of Assessors gives its heartfelt support to the efforts of Allison Ferreira toward applying for and receiving funding for the preservation of the town's vital historical records. This project will benefit the town and many of its departments, and Allison has given her own time and effort to organize it and to guide us all through the process. We fully support her in this important endeavor.

It is our understanding that this project will begin with an assessment to survey and analyze the various records of the Town Clerk, Board of Selectmen, Town Manager and the Assessors' Office, along with the Fire and Police Departments. Then, using the results of the assessment, King Information Systems Inc. will formulate specific recommendations for the itemization, microfilming, scanning and digitization of records. The town departments that participate would be able to preserve a wide variety of documents, maps, index cards and books that hold vital historic significance to Middleborough's current and future residents. We believe that the support of the vital records preservation project is a fundamental part of our obligation as public servants and we stand behind it one-hundred percent.

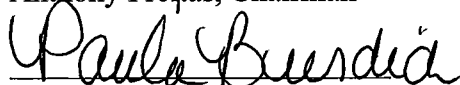
In addition to our support of the request for funding the preservation of these important records, we are strongly in favor of the development and maintenance of a central archival system. This system will provide safe, dry storage and allow easy access to records that have previously been stored, often haphazardly, in cardboard boxes in the basements and attics of the town's buildings. Historic records, especially those that are digitized, are easier to retrieve without the fear of damage or destruction because when these fragile items are handled, they can inadvertently be torn, stained or even misplaced and the information contained in them is lost forever.

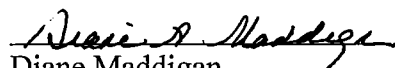
We hope the town and its representatives join us in support of this worthwhile project. We all need to participate in the preservation of this precious historic data while the records are still in good condition.

Our Department Head, Barbara Erickson is available to answer any questions you might have regarding the scope of the project as it pertains to our office's records. Please contact her and she will be happy to assist you.

Sincerely,


Anthony Freitas, Chairman


Paula Burdick


Diane Maddigan

AF/j

Town of Middleboro
OFFICE OF THE TOWN ACCOUNTANT
20 CENTRE STREET
MIDDLEBOROUGH, MA 02346-2252

September 4, 2012

Dear Allison J Ferreira, Town Clerk

I am writing regarding the centralized archival system project, proposed by King Information System. I'd like to express my support for this project.

Supporting this project means My Department will . . .

- 1) Have easier access to files and pertinent information*
- 2) Destruction of files and information will become more manageable*
- 3) Lack of storage space will no longer be a growing concern*
- 4) Important information will no longer be subject to damage and or loss*

Sincerely,

Steve Dooney
Town Accountant
Town of Middleborough



KING INFORMATION SYSTEMS, INC.

Main Office: 3 Edgewater Drive • Norwood, MA 02062 • Tel (781) 762-6477 • Fax (781) 769-1236
Branch Office: 2701 Boston Road • Wilbraham, MA 01095 • Tel (413) 599-1377

REVISED

August 6, 2012

Town of Middleborough
Bank Building
20 Centre Street
Middleborough, MA 02346

Attn: Allison J. Ferreira

Dear Allison:

This letter is written as a result of our meeting in your office on August 3, 2012.

Our intention is to spell out a potential course of action regarding the town records, the cost, and the benefits that you can expect.

In addition to a suggested approach, we have included some references and appropriate comments. We are so very proud of the quality of our work that we sincerely urge you to call some of our customers. You will get ringing endorsements from all of them!

We look forward to being of service to you.

Very truly yours,
KING INFORMATION SYSTEMS, INC.

Paula R. Macdonald
Account Representative

PRM/cb
Attachments
cc: Patricia M. Tigue
President

GENERAL INFORMATION

King Information Systems, Inc. has been in business since November of 1972. The founder of the company had worked (as a bank specialist) for another firm for eight years prior to that date.

Our focus over the past 37 years has been solving records management problems for banks and credit unions. It is only recently that we have begun to add to our customer base by calling on local town governments. We have had a number of successes and have found that town government recordkeeping problems are very similar to our bank customers' recordkeeping problems.

Our capabilities include the following:

1. Consulting - We can analyze records problems and offer solutions and recommendations.
2. Implementation - Our trained staff will set up new records systems or convert outdated methods to current and modern procedures.
3. Microfilm - Our laboratory is capable of doing any kind of microfilm work.
4. Equipment - We sell and service a complete line of mechanized files, fireproof containers of all types, standard steel vertical and lateral file cabinets, rotary file units, storage boxes and cartons, microfilm cameras, readers, reader-printers, scanners, etc.
5. Storage - We can provide off-site storage to satisfy all of your needs.
6. Supplies - We sell a total range of index guides, file folders, labels, "OUT" guides, document dividers, and other filing and finding aids.
7. Systems - We are totally conversant with the latest in color-coding, indexing, miniaturization, optical technology, *as well as* the various alphabetical, numerical, geographical, and subject methods of filing.

The most important attribute that we offer to our customers is "objectivity". Because we are involved in all types of records control and filing systems, and because we can profit from all of them, we have *no* reason to recommend or suggest anything except what is right.

Our goal is to **solve** records problems for our customers.

REVISED

original - 2 days

- 3 -

RECOMMENDATION

To get started on a Records Management project, a consulting approach should be used. Under this arrangement, our fee is \$515.00 per day, plus expenses. Based on the size of the Town Clerk's office, the vault, and the archives, which are located in the Bank Building, it is our estimate that three days would be required to thoroughly survey and analyze the various records. We estimate an additional three days to analyze the assessor's, the town manager's, and the Board of Selectmen's old records that are at the Town Hall. The Fire Department's old records will require one day, and the Police Department an additional three days, for an estimated total of 10 days to analyze all the various records. We will then formulate specific recommendations that would include the following:

→
\$ = 1,545
= \$1,545
= \$515
= \$1545
Total = \$5150

1. A records inventory - the number of files, papers, cards, folders, etc.
A total volume count would be provided.
2. Categorization of records by title.
3. Frequency of reference.
4. How references are made (alphabetically, numerically, geographically, etc.).
5. Where references originate (telephone request, mail, other departments, etc.).
6. Statutory requirements, directives, etc. We will consult with counsel, if necessary.
7. Feasibility of any updated techniques, such as microfilm or optical imaging.
8. If pertinent, suggestions on purging, new equipment, new supplies, procedural changes, filing system adjustments, personnel requirements, color-coding, etc. Price quotes would be included.
9. A detailed plan of action. Included would be timetables, how many people would be necessary, cost estimates, etc.

Needless to say, the consulting approach requires the cooperation and availability of your employees to answer our questions, show us around, and so on.

The success of the project depends on such cooperation.

NOTE: After 30 days, any price changes that have taken place will become effective.

MODUS OPERANDI

It should be stressed that a consulting fee in exchange for a detailed report and set of suggestions will **not** end our involvement. King Information Systems, Inc. is fully prepared to implement whatever decisions you make.

We will provide staff for physical interfiling of records; we will perform whatever conversions, moves, or installations that are selected. And most emphatically, we will provide any new equipment or supply items that become necessary.

Finally, but perhaps most importantly, we will *follow through* after the conversion to assist you with re-orders, expansions, modernization, training of new employees, etc.



KING INFORMATION SYSTEMS, INC.

Main Office: 3 Edgewater Drive • Norwood, MA 02062 • Tel (781) 762-6477 • Fax (781) 769-1236

Branch Office: 2701 Boston Road • Wilbraham, MA 01095 • Tel (413) 599-1377

August 6, 2012

Town of Middleborough
Bank Building
20 Centre Street
Middleborough, MA 02346

Attn: Allison J. Ferreira

Dear Allison:

Maintenance
would be archive audits.

This letter is written as a result of our meeting in your office on August 3, 2012. During that meeting we discussed the need for archive audits after the system is implemented.

The archive system and database need to be audited and updated to ensure that the system is still in **compliance**, that it accurately reflects all of the town's records, all procedures are up to date, and that all departments are participating in the program.

We propose that we send our archive supervisor in for two days on an annual basis to perform an audit and review at a cost of \$560.00 per day, plus expenses. The \$1120 yearly following tasks will be performed:

- 1) Verify that boxes are being destroyed per your schedule
- 2) Add new boxes to the database (if necessary)
- 3) Adapt regulation changes affecting your retention schedule
- 4) Add record titles for new records
- 5) Identify potential microfilm candidates, as space constraints dictate
- 6) Audit the archives for accuracy (box number, location, etc...)
- 7) Audit the database

destruction - hannapaper in Taunton

As a result of an archive audit, the town may have a number of boxes ready for destruction. We would send a man and van, at a cost of \$126.00 per hour, and \$84.00 per hour for an additional man, if needed, to load and transfer the boxes to the recycling facility for destruction. The cost to destroy the paper contents is \$.16 per pound

We feel that this is the best way to protect the investment of a proper archive system.

Very truly yours,
KING INFORMATION SYSTEMS, INC.

Paula R. Macdonald
Account Representative

PRM/cb
cc: Patricia M. Tigue
President

TOWN REFERENCES

1. Town of Kingston
26 Evergreen Street
Kingston, MA 02364
Mary Lou Murzyn
781-585-0500
2. Town of Wellesley
525 Washington Street
Wellesley, MA 02482
Sandy Hobson/Laurie Lizak/Chris Connelly
781-431-1019
3. Town of Plaistow
145 Main Street
Plaistow, NH 03865
Nikki Carr
603-382-8469
4. Town of Meredith
41 Main Street
Meredith, NH 03253
Brenda Vittner
603-279-4538
5. Town of Newbury
937 Route 103
Newbury, NH 03255
Dennis Pavlicek
603-763-4940
6. Town of Littleton
125 Main Street
Littleton, NH 03561
Tony Mincu
603-444-3996
7. East Greenwich Police Department
175 First Ave.
East Greenwich, RI 02818
Thomas Coyle
401-884-2244

8. Town of Hopkinton
18 Main Street
Hopkinton, MA 01748
Geri Holland
508-497-9700
9. East Bridgewater Public Schools
11 Plymouth Street
East Bridgewater, MA 02333
Maureen Tucker
508-378-5830
10. Town of Whitman
53 South Avenue
Whitman, MA 02382
Pam Martin
781-618-9710
11. Worcester Police Department Credit Union
400 Grove Street
Worcester, MA 01605
Julie Holden
508-752-1122
12. Hanscom Federal Credit Union
Hanscom Air Force Base
Bedford, MA 01730
David Sprague
781-274-6335
13. Lincoln Police Department
100 Old River Road
Lincoln, RI 02865
Liz Gagnon
401-333-8483
14. Town of Acushnet
122 Main Street
Acushnet, MA 02743
Pam Labonte
508-998-0215
15. Town of Eastham
2500 State Highway
Eastham, MA 02642
Sue Ficher/Lillian Lamperti
508-240-5919

16. The Steamship Authority
One Railroad Avenue
Woods Hole, MA 02543
Robert B. Davis, Mark Anderson
508-548-5011

17. Town of Easton
136 Elm Street
Easton, MA 02356
Jeremy P. Gillis
508-230-0530

18. Town of Hanson
542 Liberty Street
Hanson, MA 02341
Sandra Harris
781-293-2772

19. Town of Grafton
30 Providence Road
Grafton, MA 01519
Maureen Clark/Nancy Hazen
508-839-5335 x195

20. Town of Plymouth
11 Lincoln Street
Plymouth, MA 02360
Laurence R. Pizer
508-747-1620

21. Martha's Vineyard School District
4 Pine Street
Vineyard Haven, MA 02568
Dr. James H. Weiss
508-693-2009

22. Town of Merrimack
6 Baboosic Lake Road
Merrimack, NH 03054
Evelyn Gillis
603-424-3531

23. Town of West Tisbury
1059 State Road
West Tisbury, MA 02575
Jen Rand/Kristina West
508-696-0102 - 508-696-0101

24. City of Quincy
1305 Hancock Street
Quincy, MA 02171
Joseph Shea
617-376-1130

25. Town of Pembroke
100 Center Street
Pembroke, MA 02359
Lisa Cullity
781-709-1409

26. Swansea Public Schools
One Gardners Neck Road
Swansea, MA 02777
Randi Arruda
508-675-1197

EASTON, MASSACHUSETTS



OFFICE OF THE TOWN CLERK
136 ELM STREET, EASTON MA 02356
www.easton.ma.us
508-230-0530



Jeremy P Gillis, CMC/CMMC Town Clerk
Lucia Longhurst, Principal Clerk
Teressa Wooding, Principal Clerk

July 2, 2012

To Whom It May Concern:

In 2008, King Information conducted both an audit, and organization of the Town of Easton's record storage area. They were professional, courteous and knowledgeable. Through their efforts they transformed a disorganized, catch all records storage area into a true Archives/Records management center that is clean, organized and searchable. I continue to use King for various Records Management projects and audits, and remain completely satisfied with their company.

I do not hesitate to recommend King Information for any municipal records management project, and wholeheartedly endorse their products and services.

Respectfully Yours

A handwritten signature in black ink that reads "Jeremy P Gillis".

Jeremy P Gillis, CMC/CMMC
Town Clerk of Easton

Allison Ferreira

From: Laurence Pizer <LPizer@townhall.plymouth.ma.us>
Sent: Monday, July 02, 2012 10:45 AM
To: Allison Ferreira
Subject: King Info Systems

You asked about my experience with King Info Systems. The Town of Plymouth through its Town Clerk's Office hired King Info Systems for a two phased process. In year one, they evaluated our collections, which allowed them to present a proposal for work in culling the collections and organizing what remained. We were pleased with their proposal and hired them for phase two to perform necessary work. We had a certain sum of money available for the work, and King Info worked with us to use those funds most effectively. The staff that performed the work were excellent. They were knowledgeable, capable, and personable. We were very much impressed with the results. The software we purchased has allowed us to maintain and expand upon their work.

I can recommend King Info without reservation.

Laurence R. Pizer, Town Clerk
11 Lincoln Street
Plymouth, MA 02360
508-747-1620
lpizer@townhall.plymouth.ma.us

**PROPOSED TIME LINE
FOR
HISTORIC AND VITAL RECORDS PRESERVATION PROJECT**

The proposed time line for the first phase of the Historic and Vital Records Preservation project would be as follows:

- 1) Include the first phase of the Historic and Vital Records Preservation project on the warrant as an article for the Fall Special Town Meeting in October of 2012;
- 2) Hire contracted vendor (pursuant to Massachusetts General Laws Chapter 30B) to conduct assessment in November or December of 2012 and provide a detailed analysis to the Town of Middleborough by February of 2013;
- 3) Application to be submitted to Community Preservation Committee in June of 2013 for phase two (2) of the Historic and Vital Records Preservation project to request the implementation of the phase one (1) assessment and to contract a vendor (pursuant to Massachusetts General Laws Chapter 30B) to analyze our current climate control system.
- 4) Application to be submitted to the Community Preservation Committee in June of 2014 to implement phase three (3) of the project including the archival, digitizing and microfilming of our historic and vital records and the repair to upgrade of the current climate control system.