

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: 1/28/2016

Project Title: Oliver House Restoration

Applicant/Contact Person: Jane Kudcey, Director

Name of Organization: Office of Economic and Community Development

Address: 20 Center St., Middleborough, MA 02346

Telephone: (508) 946-2402

Email: jkudcey@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: \$ 39,659-\$59,489 Total Project Cost: \$ 208,334

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.

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.)

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

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)

Submit nine (9) copies plus one (1) electronic copy [PDF or Word Document] of the completed eligibility 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

STEP2

Town of Middleborough Community Preservation Committee Application for Community Preservation Funding

A. COVER SHEET

1. PROJECT NAME Oliver House Restoration

2. APPLICANT INFORMATION

Project Sponsor or Organization: Middleborough Office of Econ & Comm Dev.

Contact Person: Jane Kudcey, Director

Address: 20 Center St.

City: State: Zip: Middleborough, MA 02346

Daytime Phone: Fax: 508-946-2402 508-946-2413

E-mail: Website: jkudcey@middleborough.com

Property Owner (if different from Applicant) Town of Middleborough

Contact Name: Robert G. Nunes, Town Manager

Address: 10 Nickerson Ave.

City: State: Zip: Middleborough, MA 02346

E-mail: RNunes@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: 445 Plymouth Street

Middleborough Assessors Map: 41 Block: Lot: 2867

Brief Project Description: Request for funds to be used as a match for the Mass. Historic Grant Application for repairs to the Oliver House.

4. AMOUNT OF CPA FUNDING REQUESTED: \$ 39,659 - \$59,489

TOTAL PROJECT COST: \$208,334

CPA AS PERCENTAGE OF TOTAL PROJECT COST: 19% - 29%

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:

a. Project Goals: The overall goal of the project is to repair the exterior of the Oliver House and the interior ceilings in order to preserve and protect the building. The OECD is requesting Community Preservation funds to be used towards a match for the Mass. Historical Grant, due March 23, 2016.

b. Description of project activities and outcomes and the property involved and its proposed use: The Oliver Estate renovations include: Repairing and replacing the exterior shingles, trim and gutters, replacing the bulkhead and south entrance threshold, and repairing the chimney in the kitchen ell. *See Attachment 1: Oliver House Project Scope of Work.* The house is in excellent condition structurally and its interior remains intact. The exterior, while in good overall condition is showing signs of wear. The trim and gutters in particular are beginning to show signs of damage from wood rot, which, if not repaired may create leaking and additional interior damage. In order to preserve the building, it is of utmost importance that the exterior envelope be repaired as soon as possible. The Mass Historical Commission's Preservation Program Fund Grant is the best resource available to the community to address these needs. This grant program requires a 50% match of costs. In order to be able to apply for these funds, the Town must have 75% of the funds available to cover the total project cost, to ensure that any cost overruns will be addressed and the project will be completed successfully. The expected outcome is that these proposed renovations will allow for the reuse of the Oliver Estate and will ensure that the property does not fall into disrepair. The Oliver House Committee was created to oversee its renovation and re-use. The Tourism Committee will be offering tours of the property in April to showcase the property and to raise funds to assist with its upkeep and preservation. Once functional, it is expected that the house will be used for further exhibitions, historic demonstrations and tours, which will bring in additional funds. The Oliver Estate Committee will be issuing a Request for Proposal for the lease and re-use of the house and gardens. Proposals have been received for the House to be used as office space, meeting space, educational space, a wedding facility and a bed & breakfast. It is expected that income from these activities will contribute to the updating of the kitchen and upstairs bathrooms as needed.

c. Indicate how the project is eligible for CPC funding: The property is historically significant to the Town. Historic New England holds the historic restriction on this property and must approve all renovations. *See Attachment 2: Historic New England Preservation letter approving project and application.*

d. The project applicant and project partners: The Office of Economic and Community Development is applying for CPC funds as a match to the Mass Historical Commission Application on behalf of the Oliver Estate Committee. The OECD has applied for and received over \$8M of grant funding mainly through the Mass. Department of Housing and Community Development and other funding sources for infrastructure repair, housing rehab, handicapped accessibility and other projects since 1998. The OECD applied for and received \$50,000 of emergency funds from Mass Historical Commission for the repair of the Town Hall Cupola.

The Oliver Estate Committee was chosen by the Town Moderator to oversee the renovation and re-use of the historic Oliver Estate. Members include: Chair: Leilani Dalpe, Secretary: Mary Dawson. Other members include Jane Lopes, Tom Dexter, Ed Bennett, Kathy Foye and Paulette Lilla. Many members of this committee have been involved in other committees. Leilani Dalpe is also Vice Chair of the Board of Selectmen and Chair of the Tourism Committee. It is a goal of the Tourism Committee to showcase the Oliver Estate as an historic treasure to increase visitors to the Town. Jane Lopes is also the Chair of the Historical Commission. Jen Goldson, of JM Goldson Planning will be applying for the Mass Historic Funds in March with assistance from the OECD.

2. Community Need: Town Meeting overwhelmingly approved the purchase of the Oliver Estate in 2015 and the use of Community Preservation funds for its purchase. The residents of Middleborough understand the importance of this property to the history of Middleborough and its role in the American Revolution. In its current state, the Oliver House remains vacant and hidden from the public. The longer the house remains vacant, the more it is at risk of deterioration and vandalism. The OECD is making every effort to obtain grant funding for the renovation and reuse of the house, however, only a few grants will pay for historic renovations and all require a cash match. In December, the OECD submitted an application to the Cultural Facilities Fund for a permanent handicapped accessible ramp and to renovate the bathroom in the kitchen to make it accessible and bring the septic system into compliance. In March, the Mass. Historical Commission Grant funding round is available. Mass Historical is the best opportunity the Town has to receive a significant amount funding to pay for these needed repairs. However, this grant requires a 50% match. Moreover, in order to apply, the Town must be able to show that it will fund up to 75% of the total project cost, to cover any potential cost overruns, to ensure that the project is completed. Without this match, the Town will be unable to apply for these funds and the Oliver Estate risks sinking into disrepair and disuse.

3. Community Support and Outreach: The project has already received endorsement and Support from: State Representatives Susan Gifford, Thomas Calter and Keiko Orrall, Plymouth County Convention & Visitors Bureau, the Oliver Estate Advisory Committee, the Middleborough Board Of Selectmen, Town Manager Robert Nunes, the Middleborough Historic Commission and the Middleborough Tourism Committee. *See Attachment 3: Support Letters.* Through the Plymouth County Convention & Visitors Bureau, the Tourism Committee in Middleborough has excelled in marketing the Town, which was evident in the over whelming attendance at the Herring Festivals held in 2014 and 2015. They intend to incorporate the Oliver Estate in all their marketing campaigns on the new website, social media, town brochures distributed to all major tourism info destinations, and the MOTT and Destination Plymouth international websites. The Herring Festival was featured on MOTT's site last year and brought us visitors from NJ to Maine as well as Europe and Canada. The Tourism Committee plans on especially emphasizing the importance of the property in the American Revolution and has outreached to other historic sites to expand its potential audience.

4. Credentials: John A. Saari is the Rehabilitation Consultant overseeing the creation of the Scope Work and Estimate. He has over 30 years' experience in building and renovation projects funded through governmental agencies. *See Attachment 4: JA Saari Resume.*

Historic New England holds the Historic Preservation Restriction on the house and has reviewed the Scope of Work. Historic New England is the oldest, largest, and most comprehensive regional heritage

organization in the nation. It was founded in 1910 to preserve and present the cultural and architectural heritage of New England, from historic properties to humble necessities, from art and artifacts to gardens and furniture.

Jane Kudcey, Director, OECD has applied for \$8M of funds and has managed the Housing Rehabilitation Program since 2006, overseeing the repair of over 70 properties. *See Attachment 4 Jane Kudcey Resume*

Contractors providing estimates for the project have experience completing numerous housing rehab projects in the past with the OECD and John Saari, or were recommended by Historic New England. If funds are awarded through the Mass Historic Commission, the project will go out for bid, in accordance with MGL 30B. All contractors will need to provide licenses and evidence of insurance before proceeding.

5. Maintenance and Ongoing Costs: *See Attachment 5: Maintenance Plan* Maintenance and ongoing costs are shared by several organizations: As a Town owned building, the Town has overseen the filling in of the pool, the connection to the water main, winterization and plumbing and HVAC inspection, along with other maintenance and oversight. The Oliver Estate Committee has created a donation account and has received several pledges for assistance with cleaning, donation of furniture and a recent bequeath from the estate of a deceased resident. Once operable, the property may also be leased to provide a consistent funding stream for its maintenance and upkeep. The Tourism Committee has pledged \$10,000 from tours for the Oliver Estate. *See Attachment 6 Letter from Tourism, Tourism Plan and Tourism Tour Poster.*

6. Success Factors: There are several organizations working together towards the goal of the successful renovation and reuse of the Oliver Estate. Historic New England, JA Saari and the OECD have a long history of successful rehabilitation of many properties, thereby ensuring the successful oversight and completion of this rehabilitation project. The Oliver Estate Committee will be ensuring that the building and grounds will be restored and reused in a way that benefits the community. The Tourism Committee plans to integrate the property into its already successful events and tours including the Herring Festival, Octoberfest, Ghost Tours and Festival of Lights.

7. Project Permits & Approvals: Provide documentation as required: As this project is for a renovation of an existing building, with no change to the foot plan, no environmental assessment or zoning is necessary. The contractor will be responsible for obtaining the permit from the Building Department and approval from the Historical Commission before proceeding.

- a. Control of Site: *See Attachment 7: Deed, P&S, Plot Plan, Historic New England Approval of Project Specifications*
- b. Deed Restrictions: See above
- c. Hazardous Materials: See above
- d. Environmental Concerns: See above
- e. Evidence of Historic Significance [for historic preservation projects]: The OECD will submit a Project Notification Form to the Mass Historic Commission upon approval for the MHC grant application, expected in June.

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.

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
Building Permit	N		

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. *See Attachment 8: Project Budget*

Expense Item	Total	CPA	Other
TOTAL			

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 (Y/N)	Funding secured (Y/N)
Mass Historical grant	\$39,659	N	N
Tourism Committee	\$10,000	Y	N
Town Capital Budget	\$20,000	Y	Y
Town	\$67,880	Y	Y
Cultural Facilities Fund	\$31,135	Y	N

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	Total Project Cost	CPA Funds to be Requested	Other Funding
2013			
2014			
2015			
2016	\$208,334	\$59,489	\$148,875
TOTAL	\$208,334	\$59,489	\$148,875

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: June, 2016

Use table below or include as a separate attachment. *See Attachment 9: Timeline*

Activity	Date Completed	Total Funding	CPA	Other

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 - *PAL Report previously sent*
- Other information or documents. Please list.
Estimates from Contractors

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 Jane M Kudcey, BECD

By Authorized Representative Jane M Kudcey

Date: 1/28/16

E. CERTIFICATE OF AUTHORITY & LIST OF OFFICERS AND DIRECTORS

N/A

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.

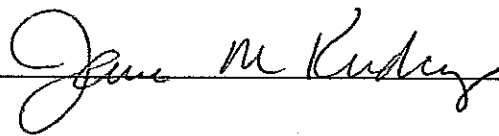
F. STATE TAX CERTIFICATION

GRANT AGREEMENT #:

APPLICANT:

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

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

Signature: 

Name of Recipient: _____

Federal Tax ID # or Social Security #: 046-001-221

Date: 1/28/16

G. AFFADAVIT

GRANT AGREEMENT #:

APPLICANT:

I, Jane M Rudceg, under the penalties of perjury do hereby state and affirm that:

1. On 1/28/16, 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 Middleboro (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?
- (b) In what department?

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 Jane M. Kudcey, Director, Middleborough OECD

PRINT OR TYPE NAME Jane Kudcey, Director, Middleborough OECD

ADDRESS 20 Center St., Middleborough, MA 02346

TELEPHONE # (508) 946-2402

WITNESS Virginia A. McDonald

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.