

**REQUEST FOR PROPOSALS  
FOR NANTUCKET COMMUNITY PRESERVATION ACT  
FISCAL YEAR 2021 FUNDING**

**I. GENERAL INFORMATION AND SUBMISSION REQUIREMENTS.**

1. Proposals will be accepted in person by the Community Preservation Committee located at 4 Winter Street, Rear (follow the path to the handicapped ramp), Nantucket, MA. The deadline for the receipt of a proposal is 4:00 pm Friday, September 06, 2019 (hereafter referred to as deadline). Eleven (11) bound copies and one (1) flash drive, of the proposal are required (either media must be Windows compatible and the proposal formatted as either/or a combination of files in Microsoft Word or .pdf files in Adobe). **Please note: 10 copies and flash drive will remain in the office and one copy will be date stamped, initialed by a CPC office personnel and returned to the applicant as receipt of delivery.**
2. Award date. Funds will be available to Applicants after July 1, 2020 (Fiscal Year 2021).
3. If any changes are made to this Request for Proposals (RFP), an addendum will be issued. Addenda will be mailed, e-mailed or faxed to all companies, organizations, and individuals on record as having requested the RFP.
4. Questions concerning this RFP must be submitted in writing to: Office Administrator, Community Preservation Committee, 4 Winter Street, Nantucket, MA 02554 before 4:00 pm August 17, 2019. Questions may be delivered, mailed, e-mailed or faxed. Written responses will be mailed, e-mailed or faxed to all companies and individuals on record as having requested the RFP.
5. Responses may be modified, corrected or withdrawn only by written notice received by the Community Preservation Committee prior to the deadline. The modification must reference the original RFP.
6. The Community Preservation Committee reserves the right to reject any and all responses and to waive any minor informality in responses received whenever such rejection or waiver is in its best interest.
7. The Community Preservation Committee will not be responsible for any expenses incurred in preparing and submitting responses. Furthermore, the Community Preservation Committee will not be responsible for any expenses incurred in the preparation and delivery of a deed restriction. (Please refer to the attached Memorandum of Understanding, Paragraph #3.) All proposals shall become the property of the Town of Nantucket. All plans, specifications and other documents resulting from this contract shall become the property of the Town of Nantucket. Unless specifically exempt under the Massachusetts public records law, the Town has the right to disclose information contained in proposals.
8. This RFP is hereby issued in accordance with Massachusetts General Laws - Chapter 30B.
9. Any proposals received after the deadline will not be accepted.

10. Purchases by the Town of Nantucket are exempt from federal, state and municipal sales and/or excise taxes.
11. The Tax Compliance Certification, Certificate of Non-Collusion and Memorandum of Understanding must be included with the proposal. The authorized individual(s) must sign these forms.
12. Unexpected closures. If the Community Preservation Committee Office, located at 4 Winter Street, far rear (follow handicapped ramp) is closed on the deadline, due to uncontrolled events such as fire, snow, ice, wind or building evacuation, the date for project submissions will be postponed until 4:00 PM on the next normal business day. Projects will be accepted until that date and time.
13. The Town of Nantucket is an Affirmative Action/Equal Opportunity Employer. The Town encourages proposals from qualified MBE/DBE/WBE firms.
14. Applicants should be aware that many overnight mailing services do not guarantee service to Nantucket.
15. Responses to the RFP must be prepared according to the guidelines set forth herein. Selection of the successful Applicant(s) will be based upon an evaluation and analysis of the information and materials required under the RFP.

## II. PROJECT OBJECTIVES.

Projects submitted to the Community Preservation Committee for potential funding should meet the requirements from one or more of the following areas

- the acquisition, creation and preservation of open space;
- the acquisition and/or preservation of historic resources;
- the creation, preservation and support of housing for the community (herein referred to as community housing);
- rehabilitation or restoration of such open space; historic resources; land for recreational use and community housing\* that is acquired or created.

### **Background**

The Community Preservation Committee (herein referred to as the “CPC” or “Committee”) is a nine member board established in accordance with Massachusetts General Law Chapter 44B, sections 3-7.

The CPC shall study the needs, possibilities and resources of the Town of Nantucket. The Committee shall consult with various agencies, organizations and/or individuals, and particularly those represented on the Committee, in conducting such studies. In order to disseminate information and increase public awareness, the CPC will hold at least one or more public information sessions yearly as part of its annual review process

The Committee shall make recommendations to Town Meeting for:

- the acquisition, creation and/or preservation of open space;
- the acquisition and/or preservation of historic resources;
- the creation, preservation and/or support of housing for the community;
- rehabilitation or restoration of such open space; historic resources; land for recreational use and community housing\* that is acquired or created.

The Committee shall make annual recommendations to Town Meeting for funding community preservation acquisitions, initiatives and administration. The Committee may propose appropriations or reserves from fund financing sources for specific projects or categories of projects, or for other purposes that are consistent with community preservation but for which sufficient revenues are not then available in the Community Preservation Fund.

\* *With respect to housing for the community, the CPC shall recommend, wherever possible, the reuse of existing buildings or construction of new buildings on previously developed sites.*

### **III. FORM OF PROPOSAL**

The Applicant shall submit a proposal which shall be formatted in the order as shown below. The proposal shall include all details as listed that are considered applicable to the project. All submitted pages must be numbered.

#### **SYNOPSIS**

- Project Title
  - Name of Organization
  - CPC Funding Request
  - Synopsis of Project (*one paragraph in length*)
- (Note: The synopsis page is to be only 1 page in length and will be used by the CPC as a description page for various individuals or organizations, press release and/or a potential informational page for Annual Town Meeting.)*

#### **APPLICANT INFORMATION**

- Project Title
- Name of Organization (*Please note if public or private*)
- Address (*both Street and P.O. Box*)
- Location of Project site(s) including Tax Map and Parcel numbers with Site Highlighted, Acreage and Zoning District (each as applicable)
- Telephone
- Fax #
- E-mail
- Website
- Contact Person(s) (*Also list appropriate titles, telephone numbers and e-mail addresses*)
- Federal Tax Identification Number (*if non-profit*)

#### **APPLICANT BACKGROUND**

- Applicant history and resumes of the three (3) highest officers
- Names of governing board, trustees, directors or members
- Description of any established records of comparable projects

#### **PROJECT INFORMATION**

- Scope or Concept of Project
- Project Goal (*List the broad goal(s) of the proposed project*)
- Project Objectives (*List the specific objectives for the project*)
- Describe how the project accomplishes the goals and objectives of the CPA
- Relevance to Community (*Indicate how the project is important and innovative. Also, describe how this project is relevant to the current and/or future needs of the Nantucket Community*)

## **PROJECT PLAN & FINANCES**

- CPC Funding Request (*Total*)
- Proposed schedule (of work) for securing financing, facility design and permitting, construction, implementation of staffing and allocation of units (where applicable). The Applicant should include time-lines, projected required personnel and schedules for completing the project.
- A Financial plan, including project budgets, evidence of interest from potential lenders, statements indicating how CPA funds are to be used by the Applicant, how Applicant intends to bring proposed Nantucket facility to completion, and a “sources and uses of funds” exhibit. The Applicant must detail the time and costs that will be required to complete the project.
- Line item Budget
- Briefly provide justifications of why each type of expense is needed and describe expected project costs (*Personnel (existing and new); operating expenses (e.g. printing, telephone, postage, materials); other expenses*)
- Other Funding Source(s), including private/public/in-kind
- Operation and maintenance plan for proposed Nantucket project
- Project evaluation and maintenance (*Describe how you will monitor progress to identify what works and what needs improvement after the project is completed. Indicate how continuation of the project will be secured after the grant.*)
- Long-term integrity of the project upon completion

## **SUPPORT DOCUMENTS**

- Letters of support from community organizations or other such sources
- References
- Pertinent studies or statistics
- Other relative materials specific to the project
- Copy of most recent Income Tax Form 990
- Copy of last certified audit
- Certificate of Non-Collusion\*
- Tax Compliance Certification\*
- Memorandum of Understanding\*

\* Each as provided herein.

#### **IV. PROPOSAL EVALUATION PROCEDURE**

The Community Preservation Committee will evaluate proposals according to the quality requirements contained herein. Proposals failing to comply with one or more of the quality requirements stated on the following page shall be disqualified from further consideration.

Proposals that comply with the quality requirements will be further evaluated based on the comparative criteria detailed. Each proposal will be assigned a rating for each comparative criterion and a composite rating.

Finalists will be identified from the evaluation of comparative criteria. The CPC will rank these finalists. The CPC reserves the right to reject any and all proposals if such rejection is in its best interest.

**Community Preservation Committee  
Proposal Evaluation Sheet**

Name of Project: \_\_\_\_\_

Evaluator: \_\_\_\_\_

Please assign the project a relative score in each criterion, 1 being the least, 5 being the best.  
Then tally the total score for the project at the bottom.

<b>Criteria</b>	<b>Score</b>	<b>Comments / Questions</b>
Relevant experience of the Applicant		
Relevant experience of Applicant's staff		
Support Services		
Quality of written materials		
Diversity of programs/services offered		
Participation rates in comparable programs		
Experience working with municipalities		
Implementation plan		
Applicability to goals and objectives of the Community Preservation Act		
Benefit / Risk Analysis of project as it relates to the current and future needs of Nantucket		
<b>Total Score</b>		

## **V. RULES FOR AWARD.**

Each project submitted to the Community Preservation Committee (CPC) will be reviewed between the application deadline and approximately November 2, 2019. Projects accepted for funding by the Community Preservation Committee will be notified during December 2019 . The Community Preservation Committee will then draft a Citizens Warrant Article (herein referred to as the Article) for Annual Town Meeting 2020 (ATM '20). Upon successful passage of the Article at ATM '20 applicants will be assigned a liaison (herein referred to as the ( Project Manager) from the CPC. The Project Manager and Applicant will be required to oversee the project. Physical work may commence on a project after the ratification of the Article at ATM (ratification is generally performed at the close of ATM). Any project expenses incurred prior to the ratification of the Article at ATM are the sole responsibility of the applicant. Disbursements for funding of projects will initially be available at the end of July 2, 2020.

In order for funding to be distributed all Applicants must have filed with the CPC a copy of either an appropriate historic preservation restriction, community housing restriction or conservation restriction running in favor of an entity authorized by the Commonwealth to hold such restrictions, meeting the requirements of Chapter 184 of the General Laws pursuant to section 12 of the Community Preservation Act. Funds for creating, implementing and monitoring the deed restriction may not be derived from CPC funds. The deed restriction must be completed by no later than the time that up to 50% of allocated funds have been utilized. In a case whereby a project is believed to be exempt from such a deed restriction, the Applicant must provide proper documentation supporting this exemption. It is the ultimate decision of the Committee to accept or reject this exemption from the deed restriction.

For disbursements from the Project funds, the Applicant in conjunction with the CPC Project Manager must complete a Project Status Report (PSR – see attachment). The Project Manager will then be required to present all pertinent information to the CPC at a regularly scheduled meeting. During these meetings, the Committee members of the CPC will review the PSR and make a determination of eligibility for fund distribution to the Applicant.

The Request for Payment – Guidelines is attached for your information.



## CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

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Signature of person signing bid or proposal

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Print Name

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Title

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Name of Organization / Business

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Date

## TAX COMPLIANCE CERTIFICATION

Pursuant to M.G.L. 62C, §49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

\_\_\_\_\_  
Federal Employer ID Number

\_\_\_\_\_  
Name of Corporation

By: \_\_\_\_\_  
President's Signature

\_\_\_\_\_  
Print Name

By: \_\_\_\_\_  
Treasurer's Signature

\_\_\_\_\_  
Print Name

Date: \_\_\_\_\_

## MEMORANDUM OF UNDERSTANDING (page 1 of 2)

1. Funds may only be spent on items listed on the submitted budget in the application. All changes to budgets must be approved by the CPC in advance, otherwise funding may not be distributed.
2. Funding from the CPC may not be used to replace, or free up for any other use, alternate funds or revenue sources.
3. All projects (unless otherwise exempted) must have a deed restriction appurtenant to the CPC Town Meeting Article. Funds for creating, implementing and monitoring the deed restriction may not be derived from CPC funds. The deed restriction must be completed by no later than the time that up to 50% of allocated funds have been utilized. In a case whereby a project is believed to be exempt from such a deed restriction, the Applicant must provide proper documentation supporting this exemption. It is the ultimate decision of the Committee to accept or reject this exemption from the deed restriction.
4. Applicants must make themselves available in a timely fashion to CPC Commissioners. This may include spot checks on and reviews how CPC money is being spent.
5. Applicants must submit digital photographs of the progress on their project to the CPC. Any photographs submitted are to remain the property of the CPC and may be used to show others the benefits of the Community Preservation Act.
6. **Applicants must note the CPC as a funding source for their project. This notation must appear on any materials involving this project (i.e. press releases, brochures, television ads, signage at project sites ). *Repetitive failure of the applicant to adhere to this guideline may lead to denial or revocation of funds.***
7. **All town agencies must inform the Town Administrator and Board of Selectmen before submitting a project proposal to the CPC.**
8. Upon submission of this application to the CPC, the signatory acknowledges that they and their organization have reviewed and understand Massachusetts General Laws Chapter 30B and Chapter 44B. Furthermore, this acknowledges that all projects are subject to current and ongoing state and local laws, rules & regulations.
9. Upon submission of this application to the CPC, the signatory acknowledges that the CPC may utilize opinions from the Massachusetts Community Preservation Coalition and other such sources it deems necessary in reviewing the ongoing status of a project.
10. The applicant authorizes the CPC to perform background checks.
11. The signatory of this document indicates that they have the right to enter into contracts for the Applicant.
12. The Applicant understands that violation of any of these rules and regulations may be grounds for the CPC to delay or deny payment of funds (up to the full amount awarded to the project) on said project.

**MEMORANDUM OF UNDERSTANDING (page 2 of 2)**

\_\_\_\_\_  
Signature of person signing proposal Title

\_\_\_\_\_  
Print Name Date

\_\_\_\_\_  
Name of Organization / Business

## **REQUEST FOR PAYMENT - GUIDELINES**

1. Each Request for Payment must be accompanied by a PROJECT STATUS REPORT (PSR). The PSR is to be completed by the CPC Project Manager with the Applicant's assistance (Fed ID #'s are in CPC File) and signed by the Applicant's authorized representative and CPC Project Manager.
2. A Cover Invoice, from the Applicant to the CPC on the agency's letterhead, must be attached under the Project Status Report and over the other supporting documents, including invoices, receipts, and cancelled checks. The Cover Invoice should include line by line the annexed invoices (from vendors) and listed in the exact same order as the attached substantiating invoices. Payments will be made directly to the Applicant unless the Applicant is a Town of Nantucket department.
3. When an invoice has been paid by your agency and you are requesting reimbursement, please have a copy of the cancelled check attached to that invoice and PAID stamp and an authorized signature on that invoice, so that the CPC knows to reimburse your organization. If invoices contain items for both project and non-project related items, the invoice should be highlighted to easily reference the items that are project related.
4. State Law prohibits reimbursement for sales tax. Please adjust invoices appropriately to reflect this.
5. Expenses incurred during periods unrelated to an approved project shall not be permitted. All expenses must relate strictly to the project as approved.
6. Phone bill expenses require documented minutes related to the project. Receipts for reimbursable office expenses are required.
7. If payments are for contracted services, a copy of the signed contract should accompany the request. Additionally, we require a detailed report of billable hours (if applicable).
8. If charges are for newspaper ads, tear sheets must be provided. If this is not available, a copy of the advertisement showing the date of publication is required.
9. Fees for meetings and conferences may be reimbursable if they fall within the scope of a project. Official documentation of the meeting, seminar, etc. must be provided.
10. If charges are for travel, receipts are required (tickets, parking vouchers, food) as well as documentation regarding reason for travel (i.e. program, agenda, registration form). Such charges must relate directly to the project. Mileage charges are subject to the standard reimbursement rate applied by the Town of Nantucket.
11. The meals allowances established by the Town shall apply to all reimbursement requests. Gratuities are included within these limits. These limits are strictly adhered to by the CPC. No allowance is permitted for alcoholic beverages.

12. Please DO NOT STAPLE or PAPERCLIP anything in the Request for Funds packet. Whenever possible make sure copies are on 8-½ x 11 paper (i.e. a copy of a cancelled check for a bank statement should be copied onto a standard sheet of paper, not cut out and attached as is).
13. Requests for Payment are voted on by the CPC at a monthly meeting (usually the third Tuesday of each month). All Requests for Payment and supporting documentation are to be submitted to your Project Manager. It is imperative that the Project Manager and applicant have jointly reviewed the Request for Payment before it is submitted to the Committee by the CPC Project Manager.
14. Completed requests must be at the CPC Office by no later than one week before a scheduled CPC monthly meeting.
15. NEVER hesitate to contact either the office Administrator or Chair if you have questions about how to submit a Request for Payment (508-325-6682 or [nantucket.cpc@verizon.net](mailto:nantucket.cpc@verizon.net)).

### MEALS ALLOWANCE

MEAL	MAXIMUM ALLOWANCE*	APPLICABLE PERIOD
Breakfast	Eight Dollars (\$8)	on work status before 7:00AM
Lunch 5:00PM	Twelve Dollars (\$12)	on work status from 8:30 AM to
Dinner	Twenty-two Dollars (\$22)	on work status after 7:00 PM

\* Maximum Allowance Includes Gratuity



# Community Preservation Committee

## PROJECT STATUS REPORT

**Approved / Denied**

Project Title: \_\_\_\_\_ Date: \_\_\_\_\_

CPC Project Manager: \_\_\_\_\_ Federal Tax ID #: \_\_\_\_\_

Deed Restriction:      On File       Pending       Exempt

Project Representative: \_\_\_\_\_

Address \_\_\_\_\_ + \_\_\_\_\_

Phone / Fax / E-aIl: \_\_\_\_\_

Description of Request / Project Phase:

\_\_\_\_\_  
\_\_\_\_\_

Project Timeline / Schedule:

\_\_\_\_\_  
\_\_\_\_\_

Issues / Comments / Concerns:

\_\_\_\_\_  
\_\_\_\_\_

Total Amount Approved:      \$ \_\_\_\_\_ for FY \_\_\_\_

Balance Forward:      \$ \_\_\_\_\_

Disbursement Amount Requested:      \$ \_\_\_\_\_

Balance Due:      \$ \_\_\_\_\_

**Applicant Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

CPC Project Manager Signature: \_\_\_\_\_ Date: \_\_\_\_\_

CPC Chairperson Signature: \_\_\_\_\_ Date: \_\_\_\_\_

# of Attachments: \_\_\_\_\_

**Next Contact Date:** \_\_\_\_\_

## PROPOSAL CHECKLIST

In order to simplify the evaluation process and obtain the maximum degree of comparison between proposals, the Community Preservation Committee has prepared this checklist for all responders to use in compiling proposals.

- Community Preservation Act – Request for Proposal
- Copy of most recent Income Tax Form 990
- Copy of last certified audit
- Certificate of Non-Collusion.
- Tax Compliance Certification.
- Memorandum of Understanding

2002

Approved: June,

2003

Approved: June,

2004

Approved: June,

2005

Approved: July,

March, 2009

Approved: July,  
2008

Approved:

March, 2016

Approved: