

# NAHANT CPA GRANT REQUIREMENTS

All grant recipients are required to accept the Grant and to sign the Grant Contract, the form of which is set forth on Attachment VII-A.

This year the CPC also adopted a requirement that all projects with a cost of \$10,000 or greater will need to comply with certain Procurement Guidelines. The Procurement Guidelines are attached to this report following the Grant Contract.

## Attachment VII-A

### Nahant Community Preservation Committee: Grant Contract

[Town of Nahant Letterhead]

[\_\_\_\_\_, 20\_\_]

[Grant Recipient]

Re: \_\_\_\_\_ (the "Project")

Dear M\_ \_\_\_\_\_:

Congratulations! It is with great pleasure that we inform you that as a result of Town Meeting action at the 20\_\_ Annual/Special Town Meeting the Town of Nahant ("**Town**") has awarded [Grant Recipient] a grant under the Community Preservation Act ("**CPA**") in the amount of \_\_\_\_\_ and 00/00 Dollars (\$\_\_\_\_\_.00) (the "**Grant**").

Please note that the Grant is subject to certain requirements, including the acceptance of the Grant and the execution of this Grant Contract. A copy of the Town Meeting vote awarding the grant and the further requirements are attached to this letter. Please look them over carefully as compliance with the Town

Meeting vote and the requirements is a condition of the Grant.. Please note that the Grant period begins on July 1, 20\_\_ ,and that the project and all deliverables must be completed by \_\_\_\_ \_\_, 20\_\_[ if applicable].

Please confirm your acceptance of this Grant award, and your agreement to comply with any condition referred to above by signing the enclosed acceptance form. Please mail the acceptance form to the Town to the attention of, the Town Administrator by \_\_\_\_ \_\_, 20\_\_. After you have done so, we will mail the contract for you to sign. If you have any questions, please call the office of the Town Administrator at 781.581.9927.

The Town looks forward to the contribution that your project will make to the quality and uniqueness of the Town of Nahant.

Thank you.

Sincerely,

Town of Nahant

CPA Committee

By:\_\_\_\_\_

[Name]

[Title]

**Town of Nahant**  
**Community Preservation Act**  
**Grant Requirements**

**Project:**\_\_\_\_\_

You must follow certain requirements as you carry out your Grant. If you have any questions, please call the Town Administrator, Mark Cullinan, at 781.581.9927.

**Limitation on the use of Grant funds**

- Grant funds may be expended only for project purposes set forth in the proposal as approved or subsequently amended.
- Grant funds are to be disbursed only after required matching funds are expended. Disbursement of Grant funds are to be made as provided in this Grant Contract either in a lump sum after completion of the project and/or upon submission of the Deliverables and Final Report, or as work progresses.
- The Grant Recipient shall promptly refund any unexpended balance of the Grant.

**Other Provisions**

- Preservation Grant Recipients must comply with the Secretary of Interior Standards for the Treatment of Historic Properties.
- A Preservation Grant restriction will be required for all Preservation Grants.
- The Grant Recipient must request extension of Grant period, budget changes or programmatic changes in writing.

**Match**

- The Grant Recipient must match their Grant award in the percentage approved by the Town. Matching funds must be in cash unless the Town has approved in-kind match. Cash matches require that actual money change hands and must be documented with copies of invoices and cancelled checks.
- In-kind matches include goods and services donated by individuals or organizations for which a fair market value can be determined. Identify, document, and value the item and/or service.

The following is a recommended format for valuing and documenting in-kind matches:

**Contributed Time**

Name of Individual

\_\_\_\_\_ hours X \$\_\_ /hour= \$\_\_\_\_\_

**Contributed Materials. and/or. Services .**

Types of Materials and/or Services .	Value
<hr/>	\$ <hr/> ]

### **Grant Accounting Records**

- The Grant Recipient shall maintain adequate and appropriate accounts, records, and other evidence pertaining to all matches.
- The Grant Recipient shall maintain adequate and appropriate accounts, records, and other evidence pertaining to costs incurred under this Grant so that project expenditures can be clearly identified.
- All disbursements by the Grant Recipient shall be supported by copies of invoices, sales slips, cash register receipts, checks, etc.
- Records must be kept on file for a minimum of three years following termination of the Grant period.

### **Publicity**

- The Grant Recipient will acknowledge CPA support in all materials publicizing or resulting from Grant activities. All print and other production materials should include an acknowledgement of CPA Grant support.
- Acknowledgement language should read “This project is funded in part by a grant under the Community Preservation Act”.
- Preservation and Open Space Grant Recipients will prominently display an exterior project sign provided by the Town.

### **Deliverables and Final Report**

- [ If Grant funds are to be disbursed as work progresses, the Grant Recipient shall submit such documentation as may be required in this Grant Contract as a condition to such periodic disbursements.]
- Annual and Final Report: At the end of each calendar year and at the end of the project period, the Grant Recipient shall submit a report of activities undertaken and an evaluation of their effectiveness in attaining the goals of the project. The grantee shall also submit final documentation of matching funds expended, and a final budget report.
- [ If applicable, All deliverables should be completed by \_\_\_\_\_, 20\_\_]

### **Exhibits and Schedules**

The following Exhibits and Schedules are attached to this Grant Contract and are incorporated herein and made a part hereof for all purposes:

1. Town Meeting Vote
2. Procurement Guidelines
- 3.

**IMPORTANT- PLEASE KEEP THIS DOCUMENT FOR REFERENCE.**

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

The undersigned, having read and understood the Town of Nahant Community Preservation Act Grant award letter dated \_\_\_\_\_, 20\_\_, agrees to accept the Grant award and comply with all of the requirements related thereto as applicable.

**‘[Grant Recipient]**

**BY:**\_\_\_\_\_

**Authorized Signature**

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

The undersigned is not able to accept the Grant Award offered by the Town of Nahant under the Community Preservation Act.

**‘[Grant Recipient]**

**BY:**\_\_\_\_\_

**Authorized Signature**

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

## **PROCUREMENT GUIDELINES FOR CPA GRANT RECIPIENTS**

The following procurement requirements are for all non-municipal community preservation grant recipients. These requirements pertain to all contracts, other than real property transactions, that exceed \$10,000.00. All municipal contracts are subject to Chapter 30B and must be approved by the Town's Chief Procurement Officer.

These bidding procedures are intended to award contracts to responsive and responsible bidder who offer the best price. Your objective is to obtain the best value by establishing evaluation criteria that will ensure you obtain the quality from a bidder who will perform, as you require.

### **STEP 1      Prepare the invitation for bids (IFB)**

Your invitation for bids should provide bidders with the information necessary to prepare and submit a responsive bid. An IFB consists of the following major components.

- **Bid Submission Requirements:** This should include information about how, when and where bid forms are filled out and submitted, etc.
- **Description of Services:** This section should provide a complete description of the type of services you are looking for (Planning Contracts), construction specifications (construction contracts) or scope of services (Design Contracts)
- **Evaluation Criteria:** This section should describe such things, as relevant experience, staffing requirements, certifications, etc.
- **Standard Forms:** The following forms should be made part of all contracts
  - Price Proposal Form
  - Tax Compliance Statement
  - Disclosure of Beneficial Interest

### **STEP 2      Provide Public Notice.**

Public notice of an IFB should be published at least once, 2 weeks before bids are due in a newspaper of general circulation, and posted in the Town Hall. You may wish to search/encourage-qualified bidders to bid, or publish in other journals or publications. Your public notice should contain the following information

- Where and when bidders can obtain the IFB.
- A brief description of the service, i.e. planning, design, construction.
- A notice that you reserve the right to reject any and all bids.
- The estimated duration of the contract and estimated cost

### **STEP 3      Record Keeping**

A log must be kept on all vendors who received the IFB package. If you later issue an addendum to the IFB you must send the addendum to all those who have already received the IFB.

### **STEP 4      Evaluate Bids and Award Contract**

You must evaluate bids using only the criteria identified in the IFB. The evaluation should address the responsiveness of the bid and the responsibility of the bidder, and the price. You must award the contract to the qualified bidder who offers you the best price. Both parties should sign all the necessary contract documents.

### **STEP 5      Retain Records**

At a minimum the following records should be retained:

- Copy of the IFB package
- Copy of the Public Notice
- Log of all bidders
- Copy of all bids
- Any notice of bid rejection or cancellation
- Copy of the contract.



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**STATE TAX COMPLIANCE**

I certify under the penalties of perjury that I, to my best knowledge and belief, have filed all state tax returns and paid all state taxes required under law.

\_\_\_\_\_  
\* Signature of Individual or  
Corporate Name (mandatory)

\_\_\_\_\_  
By: Corporate Officer or Partner  
(mandatory, if applicable)

\_\_\_\_\_  
\*\* Social Security or Federal  
Identification Number

\* Approval of a contract or other agreement will not be granted unless the proposer signs this certification clause.

\*\* Your social security number will be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Providers who fail to correct their non-filing or delinquency will not have a contract or other agreement issued, renewed, or extended. Improperly stated information shall be grounds to forfeit the proposal deposit in favor of the Town. This request is made under the authority of MGL C.62C §49A.

**CERTIFICATE OF NON-COLLUSION**

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

\_\_\_\_\_  
(Name of person signing proposal)

\_\_\_\_\_  
(Name of business)

\_\_\_\_\_  
(Authorized signature)

\_\_\_\_\_  
(Date)