

BOXFORD RESIDENT GRANT PROGRAM PROCESSING OF A GRANT APPLICATION

INTRODUCTION

This document describes the specific steps for processing an application for a grant under the Boxford Small Repair Grants Trust (Grants Trust) and the associated grant program. This trust was approved by the 2022 Town meeting and authorized by State statute Act (2022) 443.

This application process and the associated grant application were generated in accordance with Section 4 (a)(ii) of the authorization act, which empowers the Trustees to:

“... establish the grant program parameters such as the guidelines, limits, eligibility and residency requirements, eligible uses of funds and any other parameters that it deems necessary to ensure the objectives of the trust.”

PROGRAM

1. The resident will obtain an application and the legal agreement by downloading them from the Town website Grants Trust Page. A copy can also be obtained at the COA office. If need be, the applicant can contact the Assistant Town Administrator for clarification of the application.
2. The resident will submit the completed, signed and notarized application and agreement with supporting documents in a sealed envelope to the administrator's office or the Town Clerk's office if the administrator's office is closed. The Town Clerk's office will notarize the application if needed. The Town administrator shall notify the Chair of the Housing Partnership upon receipt of the application. Because of the confidential nature of some of the information in the application, the application will be kept in the Administrator's office in the home owner's secure file until requested by the BHP or the Trustees.
3. The Housing Partnership Chair (or his/her designee) will review the application for completeness. This will not be done in a public meeting. The right to request verification of the income records using the IRS form(s) 8821 will be reserved but not implemented unless requested by the Trustees. The application shall include:
 - a. Signed application.
 - b. Letter from the home owner stating the need for the work to enable the owner to remain in the house, the amount requested and the method of securing any additional funding required for the contract
 - c. Previous year 1040 showing all reported income. 2% of the net value of the house (assessed value minus loans and liens) will be added to the 1040 reported income to obtain the qualifying income. This total must be less than 100% of the AMI on the Lawrence area at the time of filling. Current numbers will be listed on the Grants Program portion of the Town web site.
 - d. Most current real estate tax statement.
 - e. The applicant must be the titled owner of the property or have written permission from the trust, if it is in one. A copy of a recent tax bill will be sufficient to show ownership.

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- f. A quote from the contractor, including detail description of the work with preconstruction photos.
- g. The contractor must provide proof of insurance, pertinent licenses and his W9 form.
- h. The homeowner shall have secured any required financing above the value of the grant prior to construction.

NOTE: The owner is solely responsible for all aspects of the quote, the details of the work to be done, contractor selection and actual completed work. No assistance will be given by the Town in securing additional financing.

- 4. When completed, the Chair of the Housing Partnership will submit the package to the Trustees of the Grants Trust at their next public meeting.
- 5. The Trustees will review the application at their next scheduled meeting in an executive session, if required, to ensure that it meets the requirements of the grant program, as detailed in the published grant program description. At the end of the meeting, the application will be returned to the Selectmen's office and kept in the home owner's secure file. The Trustees will notify the applicant as to the status of the application in writing.
- 6. Upon receiving approval of the application from the Trustees, the Applicant shall execute the agreement with the Town and submit a notarized copy to the Town administrator.
- 7. Upon receipt of the letter and execution of the agreement, the resident shall notify the contractor that the grant has been awarded. The work shall commence and should be completed within one year. The Town is not responsible for any communication with the contractor or verification of work.
- 8. When the work is satisfactorily completed within the specified 1-year time frame from the date of the award, the homeowner shall supply the following information to the Town Administrator:
 - a. Invoice from the contractor for the work completed, signed by the home owner. This will indicate that the work was done to their satisfaction of the home owner
 - b. Contractor's W9 form
 - c. Reports of any required inspections
 - d. Photos of the completed work

The Town Administrator will place this information in the home owner's secure file and notify the Trustees.

- 9. The Trustees will review the information at their next scheduled meeting and, if satisfactory, request that the Town Treasurer pay the grant amount to the contractor. The bylaw empowers the Trustees to make distributions from the trust fund. The trustees will be responsible for ensuring that any disbursement of the funds will be consistent with any restrictions on those funds.

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The Trustees will provide the following information to the Treasurer:

- a. Name and mailing information of the contractor
- b. Copy of contractor's invoice.
- c. The grant amount.
- d. Copy of vendor W-9 form
- e. The date of meeting in which the authorizing motion was made

The Treasurer action items will include:

- a. Request approval of the town accountant and select board before release of check.
- b. Provide the trust with the date that the check was sent out
- c. Provide the trust with the check number.

Town administrator will monitor details of the fund payment history, current fund commitments and any associated restrictions of the money. This information will be recorded in the minutes of the meeting in which the distribution was authorized. This information will be required for the year end audit.

10. At the end of the project, the documentation for the grant shall be stored in the Selectman's office in the home owner's secure file.
11. Approximately 11 months from the date of the grant award, the chair of the Housing Partnership (on behalf of the Trustees) will send out a return receipt requested letter to the applicant requesting that they respond in writing to confirm that they are still in residence and the house has not been sold or transferred. Once the residency has been verified, the assistant Town administrator (if empowered by the Trustees) shall remove any lien (if it exists) and return the file to the Selectman's office. The return receipt shall be kept in the home owner's secure file along with a copy of tax bill from assessor's office to confirm residency. The assistant Town administrator will report these activities to the Trustees.
12. If there is any violation of the terms of the agreement, the Trustees shall review and determine if there were extenuating circumstances. All documentation shall be stored in the Selectman's office in the home owner's secure file.

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CHECK LIST

THE FOLDER SHOULD CONTAIN THE FOLLOWING DOCUMENTATION

APPLICATION REVIEW BY THE BHP

- Application completed, signed and notarized
- Letter from the home owner stating the need for the work to enable the owner to remain in the house
- Recent 1040 showing all reported income.
- A quote from the contractor, including detail description of the work with preconstruction photos.
- Proof of contractor insurance, pertinent licenses and his W9 form.
- Copy of recent tax bill to show valuation of house
- If house in a trust, written permission to perform the work
- Signed agreement between the Town and the home owner.

REVIEW BY TRUSTEES

- Complete and satisfactory application
- Approval or Denial of application with letter to applicant

REQUEST OF FUNDS FOR TREASURER

Letter to treasurer:

- Name and mailing information of the contractor
- Contractor's invoice
- Vendor's W9 form
- Specify the amount and the account from which it will be drawn
- Date of the authorizing motion in the Trust meeting.

Letter from the treasurer:

- The date that the check was sent out
- The check number

RESIDENCY CONFIRMATION

- Letter to the resident requesting confirmation of residency for one year after award
- Receipt of postal request for signature confirming delivery
- Signed return receipt request
- Copy of tax bill from assessor's office to confirm residency
- Any documentation subsequent to the award