

**Town of Monterey**  
**Proposal for use of American Rescue Plan Act (ARPA) funds – Form**

- Completed forms are due no later than Thursday October 13<sup>th</sup>, 2022.
- Please use as many words and images as you feel necessary to describe accurately your proposal. Do not be limited to this document and feel free to attach supporting documents as appropriate.
- Please reach out with any questions to the Select Board at [selectboard@montereyma.gov](mailto:selectboard@montereyma.gov) or mail to Town of Monterey Select Board / Post Office Box 308 / Monterey, MA 01245.

**Requestor information**

Name of requesting entity (public body, Town department, individual citizen, etc.):  
Monterey Historical Society.

Contact information for submitter:

Name: Barbara B. Swann

Phone number: 413-528-5612

Email: [barbara\\_swann@hotmail.com](mailto:barbara_swann@hotmail.com)

Mailing address: P.O. Box 381, Monterey, Massachusetts 01245

**Date request is submitted October 12, 2022**

**Funding information**

*Amount of request:* \$10,500.00

*Will additional funds be required to complete the project?* Yes, since federal funds cannot be used as matching funds for planning grants through the Mass Historical Commission.

*If yes, where will those funds be obtained?* If we are invited to submit an application to the Mass Historical Commission's Board for consideration of our proposed Monterey Village as part of the National Historic Place Registry, we can apply for matching funds to complete planning and survey portions of that application. Those funds will be requested through private foundations and through a Town-wide fundraising effort.

*If so, how will maintenance be funded?* Operating expenses in a line-item budget in annual Town Meeting for municipal buildings might be needed (or regular replacement or maintenance to be added to a capital plan for municipal buildings), A line item for 50% matching funds would be needed when repair or renovation is required, assuming we are successful in our District application for the National Historic Places Register.

## **Proposed project**

*What is the proposed use of these funds?* The funds will be used to prepare full photographic documentation of buildings in our proposed Monterey Village Historic District, as well as research and formatting information for an application by the Monterey Historical Commission to the Mass Historical Commission for their consideration of our proposed District in both in a letter of intent and application to request nomination of the District to the National Register of Historic Places. The Monterey Historical Commission would be responsible for filling out the letter of intent and the final application if the Massachusetts Historical Commission offers us that privilege. Currently our Historical Commission has no matching funds and could not use ARPA federal funds for a match. Groundwork for our nomination request will be a major component of the commitment by the Historical Society for proper use of ARPA funds. In addition, both the Society and Commission will benefit by research on the proposed District and full photography of the District. Funds will be also be used to reach out again to all homeowners in the proposed District for their agreement or disagreement with the creation of a District (a prerequisite for nomination). The Historical Society would use any remaining funds from this grant to develop talks on the District for all Montereyans, in order to amplify the history of those who developed the District in the mid-19<sup>th</sup> Century and provide highlights of this past century in buildings no longer extant. All work for which ARPA funds are requested would be completed by the fall of 2023. Accounting for the funds will be separate from other Society income and expenses and will be reported through a professional accountant.

*Please be as complete and thorough as possible, include drawings, plans, estimates, and anything else you believe will be helpful in our evaluation of the project. Please also include an expected timeline for the project, once potential funds are secured.*

## **Statement of benefits**

*How will this project benefit the residents of Monterey?* We all know the emotional pull of our Village area, the architectural beauty of this townscape, and its personal meaning in our lives. If the Town were to secure listing in the National Register of Historic Places, both businesses and municipally owned buildings in the district could benefit from matching federal tax and other financial incentives offered through the Mass Historical Commission as tax rebates and grants. This money would thus be used to advance recognition of Monterey's unique downtown, its history, and highlights of its development.

*Who in the community will be most directly served?*

The Town of Monterey and income-producing properties situated in the District will benefit from recognition for the District's unique architecture and the potential for Tourism and Economic Development of the Town as a whole. The designation we seek is primarily honorary for residences in the District and would have no effect on Monterey's single-rate tax structure.

## Relevance to the purpose of the American Rescue Plan Act

*How will this project fulfill the purpose of ARPA?*

During the pandemic, from 2019 to 2022 and continuing, the Historical Society was unable to maintain memberships, request funds, and generally had to deal with having our collection removed temporarily from the proposed Monterey Village Historic District. Members did continue their interest in Monterey's past and impact of that past on the present, but the Society did not hold large gatherings or fundraise against the need for future matching funds. We believe the Monterey Select Board will recognize both the work of the Historic District Study Committee and the commitment of the Monterey Historical Society to this project, as well as the supporting recommendation of our Historical Commission.

*(Information from the Commonwealth of Massachusetts and KP Law about the ARPA program can be found on the Select Board website*

*<https://www.montereyma.gov/select-board/pages/american-rescue-plan-act-arpa>  
or upon request at Town Hall)*

## Additional comments

*Is there anything else that the Select Board should know while considering this proposal for use of ARPA funds?*

Monterey has been preparing for District nomination ever since the National Register of Historic Places was announced as a program of the federal government in the 1960s. In 1974 the Town established our Historical Commission, which necessarily worked in concert with the Historical Society (which was established in 1964). In 1979 the Society together with the Commission began the process of listing historic structures in the town, adding to the Mass Historical Commission's MACRIS (Massachusetts' Cultural Resource Information System) compendium of historic sites in the Commonwealth. Nineteen years later in 1998, together, they asked Professor Bonnie Parsons, Architectural Historian and now UMass faculty specialist to help them write an application for a National Historic District for the Town of Monterey. Professor Parsons recommended the precise District we propose to honor, particularly for its architectural integrity, but the application was turned down for lack of photos of all buildings. Twenty-two years later, an Historic District Study Committee was formed, a successful initial survey of many homeowners in the District was undertaken, and members of that Study Committee were then appointed members of our Historical Commission. Also important for the Select Board to bear in mind is the fact that development of this area of Monterey (the Village Center) was both timely and critical in defining the center for the new Town of Monterey in 1847. Both the Church and our Village School House were built to meet requirements of Massachusetts' Great and General Court (the Legislature) for the establishment of any new town center, and were completed between 1845 and our foundational year of 1847.

Additional supportive material:

1. Recommendation of the Monterey Historical Commission.
2. Certification from Internal Revenue Service for 501c.3 status
3. Certificate of Solicitation from the Mass Department of Revenue

Friday, October 7th, 2022  
Monterey, Massachusetts

To whom this may concern,

This letter is to advise that the Historical Commission of Monterey supports the application of the Monterey Historical Society to pursue much needed funds from the American Rescue Plan Act (ARPA).

Sincerely,



The Historical Commission of Monterey  
Barbara Swann, Kate Lascar, Maureen McFarland, Stephanie Sloane, Suzie Leon.

Barbara Swann



Kate Lascar



9:54a.m. 10-07-2022

Maureen McFarland



3:34p.m. 10-08-2022

Stephanie Sloane

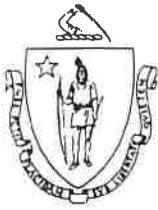


3:30p.m. 10-08-2022

Suzie Leon



11:13a.m. 10-08-2022



MAURA HEALEY  
ATTORNEY GENERAL

THE COMMONWEALTH OF MASSACHUSETTS  
OFFICE OF THE ATTORNEY GENERAL  
ONE ASHBURTON PLACE  
BOSTON, MASSACHUSETTS 02108

(617) 727-2200  
(617) 727-4765 TTY  
[www.mass.gov/ag](http://www.mass.gov/ag)

MONTEREY HISTORICAL SOCIETY, INC.  
PO Box 381  
Monterey, MA 01245

**Certificate for Solicitation**

This certificate has been issued to the organization listed below because it is current in its filings with the Attorney General's Division of Non-Profit Organizations/Public Charities. This registration in no manner constitutes endorsement or approval by the Commonwealth of Massachusetts of the named organization.

Name of organization: MONTEREY HISTORICAL SOCIETY, INC.  
Certificate End Date: 05/15/2023  
Attorney General's Account Number: 068587

Issued By  
The Division of Non-Profit Organizations/Public Charities



Department of the Treasury  
Internal Revenue Service  
Tax Exempt and Government Entities  
PO Box 2508  
Cincinnati, OH 45201

Date: **MAY 28 2020**

MONTEREY HISTORICAL SOCIETY, INC.  
PO BOX 356  
MONTEREY, MA 01245-0356

Employer ID number:  
04-3050885  
Person to contact / ID number:  
Ms. Repenning  
ID# 1528848  
Contact telephone number:  
1-877-829-5500  
Form 990/990-EZ/990-N required:  
Yes

Dear Applicant:

In your letter dated January 13, 2020, you requested reclassification of foundation status as a public charity.

Our records indicate you are classified as a private operating foundation. You claim you're erroneously classified as a private foundation and are requesting correction of the error.

Based on the information you provided, we determined you meet the requirements for classification as a public charity described in IRC Sections 509(a)(1) and 170(b)(1)(A)(vi) and updated our records.

Because your tax-exempt status wasn't under consideration, you continue to be classified as an organization exempt from federal income tax under IRC Section 501(c)(3).

This letter could help resolve questions on your foundation status. Keep it for your records.

Sincerely,

Stephen A. Martin  
Director, Exempt Organizations  
Rulings and Agreements