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## **Opportunity Zone Program Application**

**Introduction:** The recently passed U.S. Tax Cut and Jobs Act of 2017 created the Opportunity Zone Program as a way to incentive investment in low income communities throughout the country. An Opportunity Zone is a designated geographic area, in which individuals can gain favorable tax treatment on their capital gains, by investing those funds (through a privately-created Opportunity Fund) into economic activities in the area. The Governor of each state is able to nominate up to 25 percent of its low-income census tracts (LICs) to be designated as Opportunity Zones. Based on the applicable Census data, Massachusetts has 550 eligible census tracts, and the Commonwealth may nominate up to 138 Opportunity Zones. While the program is a tool for development and growth, it is important to note that the designation itself does not bring any guarantee of funding to a zone. Additional information can be found at: [U.S. Treasury/CDFI Fund](#).

**Nomination Process:** The Baker/Polito Administration has directed EOHED to coordinate the nomination of LICs for the Commonwealth. EOHED has led the effort to engage municipal leaders and key stakeholders to develop the state's approach to the program. The Commonwealth seeks to nominate the maximum allowable number of tracts and to get designations in all regions of the state. EOHED will evaluate applications and make selections based on the following focus areas: **Demographics** – includes high poverty rate, higher than average unemployment, lost jobs due to company closings, etc., **Planning Efforts** – the extent to which the community has developed strategic plans, implemented best practices, instituted zoning changes to encourage development, etc., and **Opportunities** – the extent to which the community can identify investment opportunities, such as investor interest in blighted properties, established incubator and/or collaborative workspaces, downtown plans that have engaged business owners seeking growth, etc.

**Instructions:** This application has been created to enable eligible communities to nominate LICs that they wish to be designated. Complete all of the sections/questions in the spaces provided. Please keep responses to narrative questions to 250 words or less. **Application deadline is Thursday, March 22, 2018 at 5 p.m.** For assistance or program questions, please email to [opportunityzonesma@gmail.com](mailto:opportunityzonesma@gmail.com)

Applicant Information	
Region: Berkshires, Cape & Islands, Central, Greater Boston, Northeast, Pioneer Valley, or Southeast	
Municipality	
Municipal CEO Name & Title:	
Mailing Address:	
City/State/Zip	
Email Address:	
Telephone #:	

Does this municipality have a Community Compact with the Commonwealth? ☐ Yes ☐ No

## **NOMINATION OF TRACTS**

As outlined above, communities should prioritize eligible census tracts, with demonstrated need, that exhibit significant opportunities for investment, and a high level of planning and preparation. A mapping tool, to help identify eligible tracts, can be found at [U.S.Treasury/CMIS](#). In order to achieve regional equity and ensure diversity in the types of communities selected, EOHEd will limit the nominations from eligible communities, as follows:

- Communities with 15 or more eligible census tracts, may nominate up to 20 percent of those tracts.
- Communities with less than 15 eligible tracts, may nominate up to 2 census tracts.
- Up to 10% of the designations will be allocated to rural communities with populations less than 10,000.

**Type in full 11-digit GeoID (FIPS number) for each census tract(s) that you are nominating (add rows, as needed).**


Describe the tract(s) you are nominating, including (but not limited to) demographic breakdown; percentage of residential, commercial, industrial and open space uses; quality of life; major property owners and their relationships in the district; level of civic engagement and a brief history of the tract(s):

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<b>Program, Zoning, or Asset</b>	<b>Number Within Municipality</b>	<b>Number Within Nominated Tracts</b>
Approved 40R District or 40R Starter-Home District		
Urban Center Housing Tax Increment Financing		
Approved Housing Development Incentive Program Zone		
Valid, unexpired, Housing Production Plan		
Approved Urban Renewal Plan		
Approved Tax Increment Financing District		
43D Expedited Permitting District		
Master Plan		
Economic Development Plan		
Multi-family zoning by-right		
Mixed-use / cluster zoning		
Commercial zoning by-right		
Business Improvement District, Main Street program, or similar		
Collaborative workspace, incubator, or accelerator		
Federal Choice Neighborhood		
State or Regional Priority Development Area		

Outline any planning and programming efforts made by the municipality or other stakeholders to attract investment in the community as a whole and in the low income census tract(s) being nominated. Use the chart below to indicate specific strategies/planning that your community has undertaken. Check if your community has implemented an item in general, and then in how many of the nominated tracts.\*

Detail specific opportunities for investment that exist in your nominated tract(s), including specific properties, business incubators and other avenues for business and personal property:

Summarize recent investments that have taken place in the last 5 years, or investments that have been proposed but unable to be secured, and explain why those proposals were not successful:

What has inhibited investment in general in your nominated tract(s) and how will Opportunity Zone designation help you overcome that?

Are there regional opportunities that will benefit from investments made in your nominated zone? For example, if there is a large vacant commercial building in the nominated zone, will residents of neighboring tracts or communities benefit if that building is occupied? Why are those regional benefits important?

If you are applying for a contiguous zone designation (which requires income eligibility and is limited to 5% of the Commonwealth's overall designations), please describe why the zone should be so considered, and, because such a designation requires a contiguous eligible low income census tract to also be designated, describe why the designations of both zones instead of just the one is important.

Application deadline: Tuesday, March 27, 2018, 5 p.m. Submit to [opportunityzonesma@gmail.com](mailto:opportunityzonesma@gmail.com).