



## SMALL GRANTS PROJECT APPLICATION PROCEDURE 2021 FUNDING CYCLE

To encourage more community participation, applicants seeking grants of up to \$5,000 for projects with a total cost of up to \$10,000 are eligible to apply for Community Preservation Act (CPA) funds through the Small Grants process. A total of \$50,000 will be made available for Small Grants applicants over the funding year and applications will be accepted on a rolling basis. This streamlined funding process is intended for tangible, stand-alone projects that can be easily completed. Categories of projects that will be considered are illustrated in the following table:

| SMALL GRANTS PROJECT ELIGIBILITY TABLE |                                   |            |          |                                   |
|--|-----------------------------------|------------|----------|-----------------------------------|
|  | OPEN SPACE                        | RECREATION | HISTORIC | HOUSING                           |
| ACQUIRE                                | No                                | No         | Yes      | No                                |
| CREATE                                 | Yes                               | Yes        | No       | No                                |
| PRESERVE                               | Yes                               | Yes        | Yes      | Yes                               |
| SUPPORT                                | No                                | No         | No       | Yes                               |
| REHAB/RESTORE                          | Yes, if acquired with CPC funding | Yes        | Yes      | Yes, if acquired with CPC funding |

At least one of the applicants for each project requesting CPA funding must fall in one of three categories:

1. City of Medford department or division
2. Organization legally registered in Massachusetts
3. Individual or other organization proposing a CPA eligible project on property they own themselves

If you are interested in applying for CPA funding but do not fall into one of these categories, you will need to apply with a co-applicant that fits into one of these categories who will be able to manage the project finances. For projects that entail City-owned property, the City must be an applicant or co-applicant.

### Step 1: Read the Medford Community Preservation Plan

The 2017 Community Preservation Plan and annual Plan update provide an explanation of the Community Preservation Act, community goals and objectives, and funding criteria. Plans are available at [www.PreserveMedford.org](http://www.PreserveMedford.org)

### Step 2: Determine Project Eligibility

Small Grants applicants are highly encouraged to consult with the Community Preservation Coordinator to ensure that the project is eligible for funding through the Small Grants application process. For questions or to

make an appointment, send an email to: [devans@medford-ma.gov](mailto:devans@medford-ma.gov).

For projects involving City-owned property, communication with the Mayor's Office is required. Prior to submission of an application, signature approval of the Mayor and cognizant City Liaison as determined by the Mayor is required on the application.

### **Step 3: Submit Small Grants Project Application**

Please submit this electronic form: <https://app.smartsheet.com/b/form/4c52c951c0d344058b718478f689da18>

If you have any questions, contact:

Danielle Evans, Community Preservation Coordinator  
Medford City Hall – Room 308  
85 George P. Hassett Drive  
Medford, MA 02155  
[devans@medford-ma.gov](mailto:devans@medford-ma.gov)

### **Step 4: CPC Evaluation of Applications & Public Comment**

1. **Application review.** The CPC will review all project applications and evaluate them against the priorities established through public input gathered in the process of preparing its Community Preservation Plan. The CPC may request additional information from the applicant during this process and may request that the applicant attend a CPC meeting in addition to the public comment session to respond to questions in person.
2. **Public comment session.** The CPC will also hold at least one session to gather public feedback on proposed projects. Applicants will be informed of the details of the hearing at least one month in advance and will be required to give a brief presentation to the public on their proposed project and to respond to questions from the CPC
3. **Recommendation.** The CPC will submit its final recommendations for funding to the City Council for approval. The CPC may recommend:
  - a. A project as proposed by the applicant
  - b. A modified version of the project
  - c. Partial funding or funding for only a portion or phase of the proposed project.

The CPC may recommend to commit funding on condition that projects receive necessary permits and approvals and funds anticipated from other sources. The CPC also reserves the right to attach conditions, such as conservation or preservation restrictions, to its recommendations and to include any specifications the CPC deems appropriate to ensure CPA compliance and project performance.

### **Step 5: City Council Vote**

The CPC's recommendation for funding will be submitted via the Mayor's office to the City Council. Projects must receive approval from the City Council to obtain funding from Medford's Community Preservation Act Fund. The Council has the authority to approve a CPC-recommended project, approve the project at a reduced funding level, or reject the project. Should the Council vote to reduce funding for or reject a recommended project, the CPC will have an opportunity to respond and/or to adjust the scope or terms of the project prior to a final

decision by the Council, as established in the Medford Community Preservation Committee Ordinance.

#### **Step 6: Grant Agreement, Disbursement and Monitoring of Funds**

##### Non-City Organizations

The CPC, acting through the City, will execute a grant agreement with each non-City organization that is awarded CPA funds ("Grantee"). The grant agreement will govern the use and disbursement of the funds. It will be tailored to each project but will include the Standard CPA Grant Agreement General Conditions. The applicant will need to submit an up-to-date Certificate of Good Standing, 501(c)(3) certification, and proof of insurance as applicable as attachments to the grant agreement. The City's Community Preservation Coordinator will monitor project progress and compliance and will coordinate disbursement of CPA Funds according to the CPA Funds Disbursement Guidelines. The City can establish a phased disbursement system with the Grantee to forward fund project phases with the exception of the final 10% of the project funds, which will be released upon completion of the project.

##### City Departments

The CPC will execute a Memorandum of Agreement (MOA) with each City department that is awarded CPA funds. The MOA will govern Departments' use of the funds.

#### **Small Grants Project Requirements & Selection/Scoring Criteria**

All proposed projects must be eligible for CPA funding according to the requirements set forth in the law and within the limitations of the Small Grant process as outlined in Small Grant Process Eligibility Table.

##### **Requirements for Small Grants Projects:**

1. Consistency with the Community Preservation Plan, Open Space and Recreation Plan, and other planning documents related to community preservation that have undergone a public planning process;
2. For projects on City property, an appropriate City department, Board, or Committee must be a co-applicant with a project liaison appointed by the Mayor;
3. Open space or historic resources must be permanently protected, such as with a conservation restriction or historic preservation restriction;
4. Public access (if applicable to project);
5. For projects related to support of affordable housing, CPA funds can only be used to support units that are affordable to income-eligible households and units must be deed restricted in perpetuity.

##### **Comparative Evaluation Criteria**

- Projects will be recommended for funding following an evaluation of the merits of both the proposal and its proposed costs. All recommendations and actual awards are subject to the availability of CPA funds and approval by the City Council.
- Applications that present a thorough description of the project with as many details as possible, have significant support from other City Boards/Committees and present a comprehensive, well described and reasonable budget will have the greatest likelihood of success. Where the City is a co-applicant, the proposed scope and budget must be prepared in coordination with the assigned project liaison. Budget requests must be thorough because there will not be an opportunity to increase the budget amount after a recommendation is advanced by the CPC.
- When a proposal meets the statutory requirements, the CPC may rate projects using the following factors. The final decision of the CPC on a project is based on the vote of the committee, and such

rating criteria are a guide for the committee in its decision making:

| Narrative  | Excellent  | Good  | Fair   | Poor  |
|--|--|---|--|---|
| <b>Complete application</b>  | All answers are provided and all required documentation provided   | 1 question or 1 document is missing   | A few questions or documents missing.  | Multiple documents or questions missing   |
| <b>Alignment with CPC goals and priorities</b>                     | Strong alignment with specific CPC goals and priorities  | General alignment with CPC goals and priorities   | Alignment with CPC goals and priorities is weak  | There is no alignment with CPC goals and priorities   |
| <b>Support of outside groups, relevant city boards, and public</b> | Multiple letters of support, positive public comment, and project planning involved broad public process.  | Multiple letters of support and positive public comment but reflects limited public   | At least one letter of support. Public comments are mixed but on balance supportive.   | No letter(s) of support. More public comments opposing the project.   |
| <b>Project type</b>  | Project clearly restores, preserves or repairs existing resources  | New development project   |  |   |
| <b>Benefit to the City</b>   | Strong, immediate benefit to the city that improves quality of life, tax base  | Benefit likely to be realized in the future   | Benefit may not be realized by many people   | The argument for benefit is not convincing  |
| Budget/Scope   | Excellent  | Good  | Fair   | Poor  |
| <b>Due Diligence</b>   | Applicant has done exceptional due diligence to obtain estimates and provide a detailed explanation.   | Due diligence is clear and documentation is adequate.   | Due diligence information provided is not clear or is lacking detail.  | Budget funds are not backed up by any credible detail or due diligence is not   |
| <b>Project Feasibility</b>   | The applicant demonstrates capacity, and has obtained the approvals, funding, or other resources so that with CPA funding the project is ready to proceed.                         | Resources, funding, and approvals are likely to be put in place after or as a result of CPC funding commitment.                                 | It is not clear whether the applicant will be able to obtain the resources and approvals needed to complete the project.                     | It appears unlikely that the applicant has the resources or will be able to obtain the funding and approvals necessary to complete the project. |
| <b>Coordination</b>  | Where applicable, application shows substantive coordination and planning involving City departments or other entities that will have involvement in the execution of the project. | Applicant notifies all City departments or other entities that will have involvement in the project but does not show evidence of coordination. | Applicant identifies applicable City departments or entities that will have involvement in the project but does not communicate with them.   | Applicant does not identify applicable City departments or entities that will have involvement in the project.                                  |
| <b>Non-burden to the city</b>                                      | The project will very likely have no burden on the city  | There may be limited burden to  | Risk of burden to the city   | Considerable burden to city   |
| <b>Sources of funding</b>  | CPA fills a partial funding gap or provides a local funding match that would not otherwise be available, enabling a project which leverages funds from other sources.              | CPA funds enable a project for which other funding sources are not available.   | CPA funds contribute toward a project for which other sources of funds are available and which utilizes funds from at least one other source | CPA is the sole source of funding for a project for which other sources of funds may be available.  |

- Additional criteria will be taken into consideration on a case-by-case basis, including project

feasibility/readiness to proceed, lifetime cost or environmental impact, and the amount of funding requested relative to the CPA funds available.



**CITY OF MEDFORD, MASSACHUSETTS  
COMMUNITY PRESERVATION COMMITTEE**

**SMALL GRANTS PROJECT APPLICATION**

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If you have any questions, contact:

Danielle Evans, Community Preservation Coordinator  
Medford City Hall – Room 308,  
85 George P. Hassett Drive,  
Medford, MA 02155  
[devans@medford-ma.gov](mailto:devans@medford-ma.gov)

## Applicant Information

**Applicant Name / Primary Contact \***

**Co-Applicant Name**

**Property Owner \***

**Is the Owner the Applicant? \***

**Is the applicant a City department? \***

All City departments must coordinate with the Mayor's office and receive authorization to apply for CPA funds. If yes, please attach a signed City authorization cover sheet and attach to this application.

Link: <http://preservedford.org/sites/default/files/CPA%20City%20Authorization%20Cover%20Sheet.pdf>

**Organization (if applicable)**

**Mailing Address \***

**Phone Number \***

**Email Address**

## Project Information

**Project Name \***

**Project Location \***

Address and Assessor Parcel Id#

**CPA Program Area (check all that apply) \***

## Budget Summary

**Total budget for project (not to exceed \$10,000) \***

Please attach a completed Budget supplemental form at the bottom of this application.

Link here: <http://preservedmedford.org/sites/default/files/Medford%20CPA%20Application%3A%20Budget.pdf>

**CPA funding request (not to exceed \$5,000) \***

**CPA request as percentage of total budget \***

**Please specify how the total CPA funds request was determined. \***

Describe how CPA funds will be spent and itemize all projected expenditures. Attach additional pages if necessary.



## Project Details

Attach additional pages/documentation if necessary.

**Please provide a brief description of the project \***

**How does the project meet the general and category-specific priorities outlined in the Medford Community Preservation Plan? \***

**How does this project serve the public? What community need(s) does this project serve? \***

**If applying with a government entity as a co-applicant, describe how they will work together, how finances will be managed, and the work will be continued after the conclusion of CPA funding.**

**Is ongoing maintenance and upkeep required? If yes, please explain how this will be accomplished. \***

**Describe any permits, approvals, Massachusetts Architectural Access Board (MAAB) variance requests, or restrictions that are required for the project to go forward and the status for each. \***

### **File Upload**

Every Applicant must include a completed Budget supplemental form: <http://preserve.medford.org/sites/default/files/Medford%20CPA%20Application%3A%20Budget.pdf>

Include the following attachments, if applicable and available:

- Documentation that you have control over the site, such as Purchase and Sale agreement, option, or deed; or explanation of how the proposed project will proceed in the absence of site control
- Description/documentation of site conditions or limitations relevant to the proposed project, including natural resources (wetlands, flood plain, etc.) or hazardous materials
- Massachusetts Historic Commission Historic inventory sheet or letter of historic determination from Medford Historical Commission
- Visual materials: Photographs, renderings or design plans of the site, building, structure or other subject for which the application is made
- Names and addresses of project architects, contractors, and consultants
- Letters of support sufficient to document clear endorsement by community members and groups, and, where appropriate, by municipal boards and departments
- Any other information useful for the CPC in considering the project
- City Authorization Cover Sheet (if you are applying from a City department): <http://preservedmedford.org/sites/default/files/CPA%20City%20Authorization%20Cover%20Sheet.pdf>
- Authorization Cover Sheet (if your project is on City property): <http://preservedmedford.org/sites/default/files/CPA%20City%20Property%20Cover%20Sheet.pdf>

Drag and drop files here or [browse files](#)



## Medford CPA Application: Budget

### Budget Summary

| Total Project Cost | CPA<br>Funds Requested | Other Funds Total | Other Funds: % of Total |
|--------------------|------------------------|-------------------|-------------------------|
| \$                 | \$                     | \$                | %                       |

Equipment is generally defined as an item with a useful life expectancy of more than one year.

Supplies are defined as an item with a useful life of less than one year.

Construction means all types of work done on a particular property or building including erecting, altering or remodeling.

### Budget Categories (Leave any category blank if not applicable to your project)

|              | CPA<br>FUNDS | OTHER<br>FUNDS | TOTAL |
|--------------|--------------|----------------|-------|
| Personnel    |              |                |       |
| Equipment    |              |                |       |
| Supplies     |              |                |       |
| Contractual  |              |                |       |
| Construction |              |                |       |
| Other        |              |                |       |
| TOTAL        |              |                |       |

### Budget Other Funds

Identify the amount of other (non-CPA) funds for this project. Sources include private, federal, state or local government, or any other sources.

| Organization | Item | Amount | Type (cash, in-kind, etc.) |
|--------------|------|--------|----------------------------|
|              |      |        |                            |
|              |      |        |                            |
|              |      |        |                            |
|              |      |        |                            |
|              |      |        |                            |



**CITY OF MEDFORD, MASSACHUSETTS COMMUNITY PRESERVATION COMMITTEE**

Projects involving City-owned property require coordination with the Mayor's Office and her designated liaison; for City-related EDF's, communication with the Mayor's Office is strongly recommended by Friday, July 31.

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Signature of Mayor

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Signature of Staff Liaison

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Printed Name of Staff Liaison



**CITY OF MEDFORD, MASSACHUSETTS COMMUNITY PRESERVATION COMMITTEE**

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Signature of Mayor

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Date