



**CITY OF MEDFORD, MASSACHUSETTS**  
**COMMUNITY PRESERVATION COMMITTEE**  
**APPLICATION PACKET**  
**2022**

This packet contains all the information an applicant needs to apply for the City of Medford’s Community Preservation Act (CPA) funding, including:

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2022 Timeline	
June, 2022	2022 Applications Available
July 29, 2022	Submit Eligibility Determination Forms * Coordinate with Mayor’s Office for City Projects.
September 30, 2022	Full Applications Due * Communicate with Coordinator and CPC to determine if supplemental information or changes are needed.
November, 2022	Applicants present projects at community meeting
December, 2022	CPC deliberates and votes on recommendations
January, 2023	CPC recommendations submitted for City Council approval
February, 2023	Grant agreements executed
March-May, 2023	Review Community Needs and Application Process

If you have any questions, contact:

Danielle Evans, Community Preservation Coordinator  
 781-475-5631, [devans@medford-ma.gov](mailto:devans@medford-ma.gov)

## PART 1: MINIMUM ELIGIBILITY CRITERIA

### Is my project eligible for funding?

All proposed projects must be eligible for CPA funding according to the requirements set forth in the CPA legislation, Chapter 44B. First, Projects must fall within one of the categories shown in Table 1. More specific descriptions of the program areas and activities can be found on Table 2.

Summary of CPA Eligibility Categories				
Program Areas > Activities	Open Space	Recreational Land	Historic Resources	Community Housing
Acquisition				
Creation				
Preservation				
Support				
Rehabilitation/ Restoration				

In addition, the following requirements must be met for all projects to be approved for funding:

1. For projects on City property, an appropriate City department, board, or committee must be the applicant or co-applicant, and a staff liaison must be designated by the Mayor;
2. For projects that entail acquisition, the City must acquire the property;
3. There must be some form of public access or other public benefit;
4. For projects related to housing development or rehabilitation, CPA funds can only be used to support the creation of units that are affordable to income-eligible households.

### Type of Applicant

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

- A. City of Medford department or division
- B. Organization legally registered in Massachusetts
- C. Individual or other organization proposing a CPA eligible project on property they own themselves

**SMALL GRANTS**

Projects which meet the Minimum Eligibility Criteria and are requesting up to \$5,000 CPA funds may apply through the Small Grant process. See Section 5 for details and instructions.

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.

### Historic Resources

To be eligible for CPA funding, historic resources must be listed on the State Register of Historic Places or be determined by the Medford Historic Commission to be significant in the history, archeology, architecture, or culture of the city. (Designation may be checked at [mhc-macris.net](http://mhc-macris.net) or contact a member of the Historic Commission for more information.)

### Protecting CPA Investments

A deed restriction, easement, and/or public access agreement may be required in order to ensure that improvements funded by CPA are preserved for the purpose of the CPA category under which they were funded, and that the public will benefit from the investment of CPA funds. The requirement for a restriction or agreement will be negotiated on a case-by-case basis, depending on the amount of CPA funds requested and the prior existence of protection through regulation or legal instrument.

**Table 2: Community Preservation Act Funding Allowable Uses**

	<b>Open Space</b>	<b>Recreational Land</b>	<b>Historic Resources</b>	<b>Community Housing</b>
	Land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and saltwater marshes and other wetlands, ocean, river, stream, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use.	Land for active or passive recreational use including, but not limited to, the use of land for community gardens, trails, and noncommercial youth and adult sports, and the use of land as a park, playground, or athletic field.  Does not include horse or dog racing or the use of land for a stadium, gymnasium, or similar structure.	Building, structure, vessel, real property, document, or artifact listed on the state register of historic places or determined by the Medford Historic Commission to be significant in the history, archeology, architecture or culture of the city.	Housing for low and moderate income individuals and families, including low or moderate income seniors.  Moderate income is less than 100%, and low income is less than 80%, of US HUD Area Wide Median Income.
<b>Acquisition</b>  Obtain property interest by gift, purchase, devise, grant, rental, rental purchase, lease or otherwise. Only includes eminent domain taking as provided by G.L. c. 44B.	<b>Yes</b>	<b>Yes</b>	<b>Yes</b>	<b>Yes</b>
<b>Creation</b>  To bring into being or cause to exist. Seideman v. City of Newton, 452 Mass. 472 (2008).	<b>Yes</b>	<b>Yes</b>	<b>No</b>	<b>Yes</b>
<b>Preservation</b>  Protect personal or real property from injury, harm or destruction.	<b>Yes</b>	<b>Yes</b>	<b>Yes</b>	<b>Yes</b>
<b>Support</b>  Provide grants, loans, rental assistance, security deposits, interest-rate write downs or other forms of assistance directly to individuals and families who are eligible for community housing, or to entity that owns, operates or manages such housing, for the purpose of making housing affordable.	<b>No</b>	<b>No</b>	<b>No</b>	<b>Yes</b>
<b>Rehabilitation and Restoration</b>  Make capital improvements, or extraordinary repairs to make assets functional for intended use, including improvements to comply with federal, state or local building or access codes or federal standards for rehabilitation of historic properties.	<b>Yes, if acquired or created with CPA funds</b>	<b>Yes</b>	<b>Yes</b>	<b>Yes, if acquired or created with CPA funds</b>

## PART 2: PROJECT ELIGIBILITY DETERMINATION INSTRUCTIONS

Please ensure that the project meets the minimum eligibility requirements listed in Part 2.

The EDF form is available online at <http://preservedmedford.org/applyforfunding>. **Applicants are encouraged to prepare all narrative application questions in advance in a separate document before copying them into the online form, as the online application platform does not currently allow progress to be saved.** The Eligibility Determination form includes the following questions:

<b>Project Identification</b>	You will be required to enter the name of the Project, Applicant and Co-Applicant (if any), and contact information.
<b>Estimated CPA Funding Request</b>	If possible, please provide a “ballpark” estimate of the amount of CPA funds that will be requested. A detailed budget is <b>not</b> required for the EDF.
<b>CPA Program Area</b>	Projects must fit into one of the allowable use categories shown on Table 1.
<b>Ownership</b>	<p>For projects that relate to preservation, rehabilitation, restoration, or would otherwise result in capital improvements on real property, the owner of the property must be an applicant or co-applicant. (Ownership requirement does not apply in cases of <i>Acquisition or Support</i>.) Evidence must be provided to demonstrate ownership.</p> <p>For projects in which the City of Medford is an applicant or co-applicant, the <b>City Authorization Cover Sheet</b> is required, which must be signed by the Mayor and a City staff member designated by the Mayor to be a liaison for the project. The Mayor’s signature is also required for projects that involve Acquisition. It is highly recommended that draft Project Eligibility Forms be submitted to the Mayor by Friday, July 16, in order to ensure sufficient time for consultation with the Mayor and the assigned liaison.</p>
<b>Narrative Questions</b>	<ol style="list-style-type: none"> <li>1. Project Summary: Provide a brief description of the project.</li> <li>2. Project Status: What community need is this project trying to address, and what level of planning has been undertaken to inform this application? If this is an off-cycle application, please indicate the reason for the expedited funding request.</li> <li>3. Eligibility: Please describe specifically how the project matches the definitions of eligible assets and activities.</li> </ol>
<b>Additional Attachments</b>	Please attach anything that will aid in the review of your eligibility determination. This may include photos, documentation of property ownership and/or property owner’s support, Historical Commission determination of significance, and/or City Authorization Cover Sheet, if needed.



## CITY AUTHORIZATION COVER SHEET

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 15.**

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Signature of Mayor

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Signature of Staff Liaison

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Printed Name of Staff Liaison

### PART 3: COMPARATIVE EVALUATION CRITERIA

Projects which are deemed to be eligible will be invited to submit a full application, in which applicants will be asked to provide more detailed information about the proposed project scope and budget, feasibility, timeline, and the organizational structure of the entities who will be carrying out the project.

Projects will be recommended for funding following an evaluation of the merits the proposal. If the requests for funding exceed the amount of funds available, projects will be compared with one another to determine which projects, if any, would earn CPC recommendation. The CPC may also consider recommending less than the amount of funding that is recommended for individual projects. All recommendations and actual awards are subject to the availability of CPA funds and approval by the City Council.

The CPC will apply the following criteria in evaluating the merits of each proposed project:

- Proposals should be consistent 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.
- Proposals that address more than one CPA eligible purpose; leverage additional funding, involve collaboration of more than one agency, organizations, board or committee; or otherwise show a comprehensive, community centered, multidisciplinary approach, will be given highest consideration.
- Applications that present a thorough description of the project with as many details as possible, have significant support from other City Boards/Committees, have gathered public input and endorsements, and present a comprehensive, well described and reasonable budget will have the greatest likelihood of success. For applications that take place on City property, substantive coordination with the City staff liaison and/or other departments who may be involved in the implementation of the project will help to ensure a complete application.
- ) Budget requests must be thorough and include a contingency for unforeseen costs, because there will not be an opportunity to change the budget amount after the CPC makes its funding recommendation.
- ) Historic Preservation projects are required to comply with the Secretary of Interior Standards for Historic Preservation. More information here: <https://www.nps.gov/tps/about.htm>
- ) When a proposal meets the statutory requirements, the CPC may rate projects using the factors shown in Table 3. The final decision of the CPC on whether to fund a project is based on the vote of the committee, using these criteria as a guide.
- ) 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.

#### Links to Related Planning Documents

[Community Preservation Plan 2017](#)

[2021 CPA Annual Report](#)

[Open Space and Recreation Plan](#)

[Housing Production Plan](#)

[Climate Action and Adaptation Plan](#)

**Table 3: Comparative Evaluation Criteria**

<b>Narrative</b>	<b>Excellent</b>	<b>Good</b>	<b>Fair</b>	<b>Poor</b>
<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
<b>Budget/Scope</b>	<b>Excellent</b>	<b>Good</b>	<b>Fair</b>	<b>Poor</b>
<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.

## PART 5: FULL APPLICATION INSTRUCTIONS

The Full Application Form is available online at <http://preservedmedford.org/applyforfunding>. Please answer the narrative prompts as thoroughly as possible. The Full Application Form includes the following questions:

**Applicants are encouraged to prepare all narrative application questions in advance on a separate document before entering them into the online form, as the platform does not currently allow progress to be saved.**

<b>Project Name and Location</b>	
<b>Applicant Information</b>	Name(s) and Contact Information
<b>CPA Funding Request</b>	
<b>Project Summary</b>	Provide a brief description of the project.
<b>Project Description</b>	<ol style="list-style-type: none"> <li>1. <u>Description</u>: Describe the project, including the project location and the property involved.</li> <li>2. <u>Purpose</u>: Why is this project needed? How does the project benefit the public? What populations will it serve? Has there been a public process, capital improvement plan, or site evaluation to document the needs or goals for this project? Is there community support for the project?</li> <li>3. <u>CPA Objectives</u>: How does the project meet the general and category-specific priorities outlined in the Medford Community Preservation Plan, including how the project incorporates sustainable practices and design? How does the project meet the specific criteria in the Community Preservation Act Funding Allowable Uses table?</li> </ol>
<b>Scope and Budget</b>	<ol style="list-style-type: none"> <li>1. <u>Project Scope</u>: Provide a detailed outline of the tasks that will be carried out as part of this project. If the project has multiple funding sources, describe the tasks that will be carried out with non-CPA funds as well.</li> <li>2. <u>Cost Estimate</u>: How was the total CPA funding request determined? Please attach documentation, including CPA Budget form and any cost estimates obtained from vendors. Please attach a completed CPA Application Budget Summary Form along with a detailed budget table.</li> <li>3. <u>Funding Sources</u>: Describe all additional funding and/or in-kind contributions, donations, or volunteer labor that will contribute to completion of the project. Describe other grants to which you have the intention of applying to supplement CPA funds, as well as any unsuccessful attempts to secure outside funding. Also describe any cost-saving measures to be implemented.</li> <li>4. <u>Anticipated Future Funding</u>: How will the project be affected if it does not receive funding from the CPA or other anticipated funding sources in this annual funding round? Can the project be delayed, reduced in scale or phased over multiple years? Do you anticipate that the project will require CPA funding over multiple years? If so, please provide a ballpark estimate of the funding needed to complete the entire project. (The CPC does not commit to funding projects over</li> </ol>

	<p>multiple years. If multiple years of funding is necessary, the applicant will need to submit a new application for funding each year). Is the project going to result in a requirement for ongoing maintenance? If yes, please explain how this will be managed. (CPA funds cannot be used for maintenance.)</p>
<p><b>Project Management</b></p>	<ol style="list-style-type: none"> <li>1. <u>Applicant Description:</u> Describe the applicant. Is the applicant a public, private non-profit, private for-profit, an individual, a partnership, or another type of entity? What is their history and background? Provide any additional relevant information. Demonstrate that the applicant has successfully completed projects of similar type and scale or has the ability to complete the project as proposed. Note if the applicant has previously received CPA funds and if so, a concise summary of the impact of previous CPA project(s).</li> <li>2. <u>Project Coordination:</u> Identify and describe the roles of all known participants, including the project manager. If the proposal entails multiple co-applicants, describe the process of coordination between co-applicants in planning for the project application, as well as how the organizations will work together to carry out the project. Indicate who will have responsibility for managing the finances, and overseeing completion of the project scope, as well as who will have responsibility for maintaining the asset after the conclusion of CPA funding.</li> <li>3. <u>Timeline:</u> When will the project ideally begin, and how long do you anticipate it will take to complete? Please indicate if a specific timeline is required either for the commitment of funds or for completion of the project.</li> </ol>
<p><b>Feasibility and Compliance</b></p>	<ol style="list-style-type: none"> <li>1. <u>Project Feasibility:</u> List and explain all further actions or steps that will be required for completion of the project, such as environmental assessments, zoning or other permits and approvals, agreement on terms of any required conservation, affordability, or historic preservation agreements, subordinated agreements, and any known or potential barriers or impediments to project implementation.</li> <li>2. <u>Compliance with Standards:</u> Describe how the project will comply with <a href="#">Americans with Disabilities Act/MAAB</a> regulations, and for historic preservation projects, how the project will comply with the <a href="#">U.S. Secretary of the Interior's Standards for Rehabilitation</a>, as required by the CPA Legislation. . Describe how the applicant will ensure compliance with these standards as the project is ongoing, including an identification of who will make historic preservation determinations.</li> <li>3. <u>Required Restrictions:</u> Please identify any existing deed restrictions and the parties who hold these restrictions. If a Conservation Restriction (CR) or Preservation Restriction (PR) will be required, identify the entity who will hold the restriction. If the project entails a privately-owned asset, describe how the public can enjoy the proposed CPA-funded improvements. If historic preservation, are the improvements visible to the street? Can the public currently enter the building or property? Can public use be expanded or ensured? Note, a public access agreement may be required as a condition of a grant.</li> </ol>
<p><b>Attachments</b></p>	<p>Include the following attachments, if applicable and available:</p> <ol style="list-style-type: none"> <li>1. CPA Application Budget Summary Form_(required)</li> <li>2. Itemized budget of all project costs, including the proposed funding source for each cost (required)</li> <li>3. Written quotes for project costs. If quotes cannot be secured, detailed cost estimates may be used with an explanation of how the estimates were derived.</li> <li>4. Visual materials: photographs, renderings or design plans</li> </ol>

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|  | <ol style="list-style-type: none"><li>5. Massachusetts Historic Commission Historic Inventory sheet or finding of Historic Significance by Medford Historical Commission</li><li>6. Existing conditions report</li><li>7. Names and addresses of project architects, contractors, and consultants</li><li>8. Documentation that you have control over the site, or explanation of how the proposed project will proceed in the absence of site control</li><li>9. Letters of support sufficient to document clear endorsement by community members and groups, and, where appropriate, by municipal boards and departments</li><li>10. Evidence that appropriate professional standards will be followed if construction, restoration or rehabilitation is proposed</li><li>11. Record plans of the land</li><li>12. Natural resource limitations (wetland, flood plain, etc.)</li><li>13. Zoning (district, dimensional and use regulations)</li><li>14. Inspection reports</li><li>15. Environmental assessment reports or evidence that the proposed site is free of hazardous materials or that there is a plan for assessment and/or remediation in place</li><li>16. Any other information useful for the committee in considering the project</li></ol> |
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## CITY OF MEDFORD CPA APPLICATION BUDGET SUMMARY

PROJECT NAME: \_\_\_\_\_ APPLICANT: \_\_\_\_\_

<b>SUMMARY OF PROJECT COSTS</b>								
<i>In addition to this form include a complete itemized budget of all project expenses, including the proposed funding source for each expense, in your submission.</i>								
PROPOSED SOURCE		EXPENSES						
		STUDY	SOFT COSTS <sup>(1)</sup>	ACQUISITION	CONSTRUCTION <sup>(2)</sup>	CONTINGENCY <sup>(3)</sup>	SIGN <sup>(4)</sup>	TOTAL
1	Medford CPA						\$250	
2								
3								
4								
5								
<b>TOTAL PROJECT COSTS</b>								

(<sup>1</sup>) Soft costs include design, professional services, permitting fees, closing costs, legal, etc.  
 (<sup>2</sup>) Construction includes new construction, preservation, rehabilitation, restoration work, and/or accessibility related expenses.  
 (<sup>3</sup>) A 15% contingency is strongly recommended for all construction projects.  
 (<sup>4</sup>) Budget needs to include cost of permanent CPA dedication sign if requesting construction funds. Provide estimate or use \$250 as default cost.

<b>EXPLANATION OF FUNDING SOURCES</b>			
<i>Please explain the status of each funding source (i.e., submitting application on X date, applied on X date, received award notification on X date, funds on hand, etc.). For sources where funding has been awarded or funds are on hand, please attach documentation from the funding source (e.g., commitment letter, bank statement).</i>			
	SOURCE	SECURED? (YES/NO)	STATUS OF FUNDING SOURCE
1			
2			
3			
4			
5			

## PART 5: SMALL GRANT APPLICATION INSTRUCTIONS

The Small Grant Application Form is available online at <http://preservedmedford.org/applyforfunding>. Applicants are encouraged to prepare all narrative application questions in advance on a separate document before entering them into the online form, as the platform does not currently allow progress to be saved. The Small Grant Application Form includes the following questions:

<p><b>Applicant Information</b></p>	<p>You will be required to enter the name of the Project, Applicant and Co-Applicant (if any), and contact information.</p> <p>If the property owner is not the applicant, submit evidence that the applicant has permission of the property owner to carry out the project. For any project involving City-owned property or acquisition, the <b>City Authorization Cover Sheet</b> is required, which must be signed by the Mayor and a City staff member designated by the Mayor to be a liaison for the project.</p>
<p><b>Project Information</b></p>	<p>Provide the name and location of the project.</p> <p>Select the program area(s) that best matches your project. Projects must fit into one of the allowable use categories shown on Table 1.</p>
<p><b>Budget Summary</b></p>	<p>Indicate the total project budget, and the amount of CPA funds requested (up to \$5,000), and the % of the total budget that CPA funds will provide (50-100%).</p> <p>Describe how the CPA funds will be used.</p> <p>Download and attach a Budget Supplemental Form.</p>
<p><b>Project Details</b></p>	<ol style="list-style-type: none"> <li>1. Provide a brief description of the project.</li> <li>2. How does the project meet general and category-specific priorities outlined in the Medford Community Preservation Plan?</li> <li>3. How does this project serve the public? What community need(s) does this project serve?</li> <li>4. Is ongoing maintenance and upkeep required? If yes, explain how this will be accomplished.</li> <li>5. 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.</li> </ol>
<p><b>Attachments</b></p>	<p>Include the following attachments, if applicable and available:</p> <ul style="list-style-type: none"> <li>) Authorization Cover Sheet (required if City property or acquisition)</li> <li>) Budget Supplemental Form (required)</li> <li>) Documentation that you are the property owner or have permission from the property owner to carry out the project.</li> <li>) Massachusetts Historic Commission Historic Inventory sheet or finding of Historic Significance by Medford Historical Commission</li> <li>) Visual materials: photographs, renderings or design plans</li> <li>) Names and addresses of project architects, contractors, and consultants</li> <li>) Letters of support sufficient to document clear endorsement by community members and groups, and, where appropriate, by municipal boards and departments</li> <li>) Any other information useful for the committee in considering the project Record plans of the land</li> </ul>

## **PART 6: APPLICATION & REVIEW PROCESS**

### **Step 1: Pre-Application Workshop**

At its June meeting, the Community Preservation Committee will present information and answer questions about the application process, eligibility requirements, and the goals/priorities and evaluation criteria that the Community Preservation Act Committee (CPC) will use in determining whether to recommend projects for funding.

Attendance at the pre-application workshop is not a requirement for those who wish to apply for CPA funds. Regardless of attendance at the workshop, all applicants are encouraged to be in contact with the CPA Coordinator early in the process, prior to submitting Project Eligibility forms.

All application forms can be found on the CPC website at: <http://preservemedford.org/applyforfunding>

#### Off-Cycle Applications

Under extraordinary circumstances, the CPC may vote to accept applications that require consideration outside of the normal funding cycle. To be considered as an off-cycle application, projects must be considered “high priority” and must be driven by an external deadline such as a real estate transaction or matching grant opportunity. Applicants who believe their circumstances call for such unusual action may contact the Community Preservation Coordinator to discuss the possible submission of an off-cycle application.

#### Small Grants Applications

Applicants seeking grants of up to \$5,000 for projects with a total cost of up to \$10,000 should use the Small Grants Combined Eligibility and Application form.

A total of \$25,000 will be made available for small grants. Applications for small grants are accepted on a rolling basis. In order to ensure that small grant funds are available to diverse applicants, the CPC will accept up to four small grants per year from a single applicant, and no more than one application per Quarter.

While Off-Cycle Applications and Small Grant Applications may be submitted throughout the year, funding requests may not be approved by City Council between July 1 and September 30. Exceptions may be made in extraordinary cases if sufficient funds are available from prior years’ reserves.

### **Step 2: Determine Project Eligibility**

The CPC requires all applicants to submit a Project Eligibility Determination Form (EDF) as the first step in the application process. 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 16.

EDFs will be reviewed by staff to determine project eligibility. Applicants are also encouraged to bring questions about their project conception to the Committee or the CPA Coordinator at any time to obtain input on the concept or design of the project and the information that the Committee will look for in their application.

### **Step 3: Submit Funding Application**

Applicants whose projects are deemed eligible for CPA funding will be invited to submit a full application electronically.

In preparing a Scope and Budget for the full application, provide a detailed list of the tasks that will be completed as part of the project and description of how the cost estimate was obtained. Please ensure that the cost estimate is thorough and includes sufficient contingency to cover unexpected expenses, as additional requests for funds cannot be guaranteed approval. Costs such as multilingual communication for public outreach or staffing for grant management may be included in project budgets, as long as CPA funds are used to supplement and not supplant existing staffing.

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

1. **Application review.** The CPC will review project applications for completeness. The CPC may request additional information from the applicant prior to the public presentation session.
2. **Public presentation session.** The CPC will hold at least one session to gather public feedback on proposed projects. Applicants will be required to give a brief presentation on their proposed project and to respond to questions from the CPC and members of the public in attendance.

#### **Step 5: Deliberation.**

After reviewing the applications and receiving input via the public comment session, technical assistance, or other written comments, the CPC will deliberate in an open meeting to determine whether to recommend each project for funding. Deliberation will take into consideration the evaluation criteria and priorities expressed in the Community Preservation Plan and most recent Annual Update. 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 Committee 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 to its recommendations, such as conservation or preservation restrictions or public access agreements, and to include any specifications the CPC deems appropriate to ensure CPA compliance and project performance. All land acquired with CPA funds must be perpetually preserved for the purpose for which it was acquired. Historic preservation projects must be in compliance with the Secretary of Interior Standards for Historic Preservation, where applicable. Applicants should coordinate with the CPA coordinator to be aware of conditions that may be applicable to their projects.

If the applicant wishes to request substantial changes to the conditions placed on the funding recommendation, this will need to be reviewed and approved by the CPC prior to submission to City Council.

#### **Step 6: Mayoral Submission and City Council Vote**

The CPC's recommendations will be submitted to the City Council via *Communications from the Mayor*. Projects must be approved by City Council to receive 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 7: Grant Agreement, Disbursement and Monitoring of Funds**

The CPA Coordinator will notify grantees of their award and will oversee implementation of the conditions and requirements for the disbursement 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 City’s Community Preservation Coordinator will monitor project progress and compliance and will coordinate disbursement of CPA Funds. The City can establish disbursement guidelines and 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.

### **Step 8: Annual Review**

After the completion of each funding round, the CPC will review the community needs, goals, and priorities, to update the Community Preservation Plan as needed. The Committee will also review the application process, application materials, and the evaluation criteria to determine if the process can be improved. The CPC will invite input from other boards and committees and City staff, and may hold a public meeting as part of the review.