



**CITY OF MEDFORD, MASSACHUSETTS  
COMMUNITY PRESERVATION COMMITTEE  
APPLICATION PACKET  
NOVEMBER, 2017**

The City of Medford will award Community Preservation Act (CPA) funding for the first time in fiscal year 2018 (FY18). This packet contains all of the information an applicant needs to apply for funding, including:

1. An explanation of the application and review process
2. The FY18 Project Eligibility Determination Form, which must be submitted to and reviewed by the Community Preservation Committee (CPC) before an applicant can submit a full application
3. Instructions for submitting a full application for FY18 funding
4. Application Cover Sheet
5. Scoring criteria

**Key dates:**

November 27, 2017 – Introduction Meeting for First Round of CPA funding

January 5, 2018- Eligibility determination forms due (Round 1)

March 2, 2018- Full applications due (Round 1)

April 2018- Applicants present at community meetings (Round 1)

April 13, 2018 – Eligibility determination forms due (Round 2)

July 13, 2018 – Applicants submit funding applications (Round 2)

September, 2018 – Applicants present at community meetings (Round 2)

**CITY OF MEDFORD, MASSACHUSETTS  
COMMUNITY PRESERVATION COMMITTEE  
APPLICATION & REVIEW PROCESS  
FY18 FUNDING CYCLE**

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 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.

<b>Year 1 Timeline</b>		
<b>Step</b>		<b>Approx. Timeline/Deadline</b>
<b>Funding Round 1</b>		
1	Introduction Meeting for first round of CPA funding	November 27, 2017
2a	Applicants submit eligibility determination forms	January 5, 2018 by 12:30pm
2b	CPC responds to eligibility determination forms	January 16, 2018 by 4:30 pm
3	Applicants submit funding applications	March 2, 2018 by 12:30 pm
4	CPC evaluates applications & gathers public input	March-May 2018 <b>(subject to change)</b>
5	Applicants present projects at community meeting	April, 2018
6	CPC submits recommendations to Mayor for submittal to City Council; Council votes on CPC recommendations	Mid May, 2018 <b>(subject to change)</b>
7	CPC issues award letters	June, 2018 <b>(subject to change)</b>
8	Grant agreements executed	Spring & Summer 2018
<b>Funding Round 2</b>		
1	Pre-Application Workshop	March, 2018
2a	Applicants submit eligibility determination forms	December 2017 – April 13, 2018
2b	CPC responds to eligibility determination forms	June 1, 2018
3	Applicants submit funding applications	July 13, 2018
4	CPC evaluates applications & gathers public input	July-August, 2018
5	Applicants present projects at community meeting	September, 2018
6	CPC submits recommendations to Mayor for submittal to City Council; Council votes on CPC recommendations	October, 2018
7	CPC issues award letters	November, 2018
8	Grant agreements executed	Late Fall, 2018

After year 1 the annual funding round will continue to be decided in October, with pre-application workshops beginning in January each year.

## **Year Timeline**

In FY2018 the Community Preservation Committee will make two rounds of funding recommendations to the City Council. The first round will occur in May, followed by a second round in October. All applicants who will seek funding in FY2018 are encouraged to submit a project eligibility determination in by January 5, 2018, even if they will wait until the second round to complete their full application. Applicants may also submit a revised application for the second round if they do not receive funding the first round.

### **Step 1: Determine Project Eligibility**

The Community Preservation Committee (CPC) requires all applicants to submit a Project Eligibility Determination Form as the first step in the application process. The CPC will review Project Eligibility Determination Forms and will inform applicants as to whether their proposed project is eligible for CPA funding.

For Round 1, the CPC will review Project Eligibility Determination Forms and will inform applicants as to whether their proposed project is eligible for CPA funding by 4:30 pm on January 16, 2018. The CPC reserves the right to notify applicants as to their proposal's eligibility for CPA funding after the deadlines established above in the event it requires a legal opinion to definitively determine eligibility.

For Round 2, the CPC will review Project Eligibility Determination Forms as they are received between January and March, and will make a determination on later submissions after the first round of project recommendations have been submitted to the Mayor and City Council, in late May. For Round 2 projects only, an estimated amount of CPA funds to be requested for the October funding round will be used for CPC planning purposes only, and will not be a criterion for project eligibility determination.

### **Step 2: Submit Funding Application**

Applicants whose projects are deemed eligible for CPA funding will be invited to submit a full application. The completed funding application is due no later than 12:30 pm on Friday, March 2, 2018. Applicants must submit an electronic copy of the application and 11 paper copies to:

Danielle Evans, Community Preservation Coordinator  
Medford City Hall – Room 108  
85 George P. Hassett Drive  
Medford, MA 02155  
[devans@medford-ma.gov](mailto:devans@medford-ma.gov)

### **Off-Cycle Applications**

Under highly extraordinary circumstances, the CPC may vote to accept applications that, because of market opportunities or other deadlines, require consideration outside of the normal funding cycle. 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 in each funding round.

### **Step 3: 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. **Notification.** The CPC will notify applicants once it has decided which projects to recommend to the City Council for funding. The CPC will strive to do so by mid-May, but the timeline will depend on the number and complexity of project proposals received.
4. **Recommendation.** The CPC will submit its final recommendations for funding to the Mayor, who must submit them 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 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. Please note it is the practice of the CPC to require all applicants who receive funding for the historical preservation or rehabilitation of a building to place a preservation restriction on the building as a condition of receiving CPA funding. The CPC also has the practice of requiring a public access agreement where relevant. All land acquired with CPA funds must be perpetually preserved for the purpose for which it was acquired.

### **Step 4: Grantee Review of Recommended Funding and Conditions**

The Community Preservation Coordinator will share the funding recommendation of the CPC with the applicant before it goes before the Mayor and the City Council to ensure that the conditions are acceptable to the applicant. Any substantial changes requested to the funding recommendation will need to be approved by the CPC.

### **Step 5: Mayoral Submission and City Council Vote**

The Mayor will submit the CPC's recommendations to the City Council. Projects must receive approval from the 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 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.



## PROJECT ELIGIBILITY DETERMINATION FORM

**Due by 12:30 pm Friday, January 5, 2018** to: Danielle Evans, Community Preservation Coordinator, [devans@medford-ma.gov](mailto:devans@medford-ma.gov)

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

PROJECT LOCATION: \_\_\_\_\_

APPLICANT(S) NAME / ORGANIZATION: \_\_\_\_\_

CO-APPLICANT(S) NAME / ORGANIZATION: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

MAILING ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

*Please indicate (X) all categories that apply to this project (at least one). For more detailed information on these categories, refer to the "Community Preservation Act Funding Allowable Uses" chart.*

**PROPERTY OWNERSHIP:**

Legal Property Owner of Record (if applicable):  
\_\_\_\_\_

	Open Space	Recreation	Historic Resources	Community Housing
Acquisition				
Creation				
Preservation				
Support				
Rehabilitation/ Restoration				

Is the owner the applicant?                      Yes      No

If No, does the applicant have site control or written consent of the property owner to submit an application? City of Medford must be co-applicant on all projects on City property.

Yes (Attach documentation)

No (Project will be deemed ineligible for this applicant)

**FOR HISTORIC RESOURCES PROJECTS:**

Is the resource in a Local Historic District and/or listed on the State Register of Historic Places?      Yes      No  
(you can check designation at [mhc-macris.net](http://mhc-macris.net))

If no, has the Medford Historical Commission made a determination that the resource is significant?      Yes      No

**PROJECT SUMMARY:**

**PROJECT STATUS** (What community need is this trying to address and what level of planning has already been undertaken to inform the proposed project?):

**Anticipated Funding Round for FY2018:** May \_\_\_\_ October \_\_\_\_

(For October applicants only) Estimated CPC funding request for project: \_\_\_\_\_

**FOR CPC USE:** Date Received \_\_\_\_\_ Date Reviewed \_\_\_\_\_ Date Applicant Notified \_\_\_\_\_

Eligible

Potentially Eligible

Not Eligible

More Information Needed

**COMMENTS:**

<b>Community Preservation Act Funding Allowable Uses</b>				
	<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 salt water 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 or 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</b> , if acquired or created with CPA funds	<b>Yes</b>	<b>Yes</b>	<b>Yes</b> , if acquired or created with CPA funds





## APPLICATION INSTRUCTIONS FY18 FUNDING CYCLE

- 1. Read the entire CPA Application Packet and the Medford Community Preservation Plan.**
  - 2. Complete the Project Application Cover Sheet.**
  - 3. Please include in your submission concise narratives that respond to all prompts in the order they appear below.**
- **Project Description**
    1. Describe the project, including the project location and the property involved.
    2. Why is this project needed? How does it preserve and enhance the character of Medford? How does the project benefit the public? What population(s) will it serve?
    3. 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?
  - **Measuring Success**
    1. What are the goals of this project?
    2. How will the success of this project be measured?
  - **Financial**
    1. Describe all successful and unsuccessful attempts to secure funding and/or in-kind contributions, donations, or volunteer labor for the project. Describe any cost-saving measures to be implemented.
    2. How was the total CPA funding request determined?
    3. Will the project require funding over multiple years? If so, please provide annual funding requirements?
    4. How will the project be affected if it does not receive CPA funds or does not receive the full amount requested?
  - **Project Management**
    1. Describe the applicant. Are they 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.
    2. If a community organization is applying with a government entity as a co-applicant, describe

how the two organizations will work together, how finances will be managed, and how the work will be continued after the conclusion of CPA funding.

3. Demonstrate that the applicant has successfully completed projects of similar type and scale or has the ability to complete the project as proposed.
4. Identify and describe the roles of all known participants, including the project manager.
5. Describe the feasibility of the project and how it can be implemented within the timeline and budget included in this application
6. Describe any known or potential barriers to the successful on-time commencement and completion of the project, including any permits or inspections required.
7. Describe any ongoing maintenance and programming required and who will be responsible for it.
8. 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.
9. Note if the applicant has previously received CPA funds and if so, a concise summary of the impact of the previous CPA project.

) **Accessibility Requirements**

1. Describe how the proposed project complies with all ADA/MAAB Regulations.

) **Historic Resources Rehabilitation Projects**

1. Describe how the proposed project complies with the U.S. Secretary of the Interior's Standards for Rehabilitation, as required by the CPA legislation under the definition of rehabilitation.
2. 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.

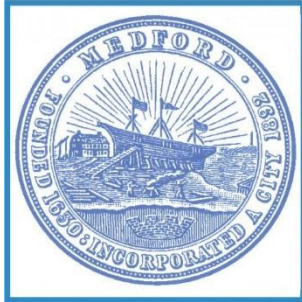
**4. Include the following attachments, if applicable and available:**

- ) Complete itemized budget of all project expenses, including the proposed funding source for each expense.
- ) Record plans of the land
- ) Natural resource limitations (wetlands, flood plain, etc.)
- ) Inspection reports
- ) 21E Reports and other environmental assessment reports
- ) Massachusetts Historic Commission Historic inventory sheet
- ) Historic structure report or existing condition reports
- ) Existing conditions report
- ) 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
- ) Evidence that appropriate professional standards will be followed if construction, restoration or rehabilitation is proposed

- ) 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
- ) Evidence that the proposed site is free of hazardous materials or that there is a plan for assessment and/or remediation in place
- ) 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 Committee in considering the project

5. **Applicants must number all pages in the application and submit an electronic copy and 11 paper copies to:**

Danielle Evans, Community Preservation Coordinator  
Medford City Hall – Room 108  
85 George P. Hassett Drive  
Medford, MA 02155  
[devans@medford-ma.gov](mailto:devans@medford-ma.gov)



## PROJECT APPLICATION COVER SHEET

I: Project Information	
Project Name:	
Project Location:	
Project Summary:	
Estimated start date: _____ Estimated completion date: _____	
CPA Program Area (check all that apply):	
Open Space	Community Housing
Historic Preservation	Recreation

II: Applicant Information	
Applicant Name/Primary Contact:	
Co-applicant Name (if applicable):	
Property Owner:	
Organization (if applicable):	
Mailing Address:	
Phone #:	Fax #:
E-mail:	

III: Budget Summary	
Total budget for project:	
CPA funding request:	CPA request as percentage of total budget:

**Applicant Name:** \_\_\_\_\_ **Signature** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Co-Applicant Name:** \_\_\_\_\_ **Signature** \_\_\_\_\_ **Date:** \_\_\_\_\_

**CITY OF MEDFORD, MASSACHUSETTS**  
**COMMUNITY PRESERVATION COMMITTEE**  
**Project Requirements & Selection/Scoring Criteria**

All proposed projects must be eligible for CPA funding according to the requirements set forth in the law before further consideration can be given.

**Requirements for all 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.
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 housing development or rehabilitation, CPA funds can only be used to support the creation of 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. When there are multiple project proposals submitted in the same funding cycle, projects will be compared with one another in order to determine which projects, if any, would earn CPC recommendation. All recommendations and actual awards are subject to the availability of CPA funds and approval by the City Council.
- 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 and present a comprehensive, well described and reasonable budget will have the greatest likelihood of success. Budget requests must be thorough because there will not be an opportunity to change the budget amount after submission to 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:

<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 input.	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	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</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 documented.
<b>Non-burden to the city</b>	The project will very likely have no burden on the city	There may be limited burden to the city	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.