



**SMALL GRANTS PROJECT APPLICATION PROCEDURE
FY18 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 \$25,000 will be made available for Small Grants applicants in each funding round. 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 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.

Year Timeline

In FY2018 the Community Preservation Committee (CPC) 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. After year 1 the annual funding round will continue to be decided in October, with pre-application workshops beginning in January each year.

Year 1 Timeline		
Step		Approx. Timeline/Deadline
Funding Round 1		
1	Introduction Meeting for first round of CPA funding	November 27, 2017
3	Small Grants Application Due	March 2, 2018 by 12:30 pm
4	CPC evaluates applications & gathers public input	March-May 2018 (subject to change)
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 (subject to change)
7	CPC issues award letters	June, 2018 (subject to change)
8	Grant agreements executed	Spring & Summer 2018
Funding Round 2		
1	Pre-Application Workshop	March, 2018
3	Small Grants Application Due	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

Step 1: Read the Medford Community Preservation Plan

Available at www.PreserveMedford.org

Step 2: Consult with Community Preservation Coordinator

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.

Step 3: Submit Small Grants Project Application

Small Grants Project applications are 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

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.

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. **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.

Step 5: 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 6: 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 7: 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;
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. 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.
-) 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:

Narrative	Excellent	Good	Fair	Poor
Complete application	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
Alignment with CPC goals and priorities	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
Support of outside groups, relevant city boards, and public	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.
Project type	Project clearly restores, preserves or repairs existing resources	New development project		
Benefit to the City	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
Budget	Excellent	Good	Fair	Poor
Due Diligence	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.
Non-burden to the city	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
Sources of funding	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.



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 Medford City Hall – Room 108
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 Medford, MA 02155
devans@medford-ma.gov

1. Applicant Information	
Applicant Name/Primary Contact:	
Co-applicant Name (if applicable):	
Property Owner:	
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 <i>(Attach documentation)</i> No <i>(Project will be deemed ineligible for this applicant)</i>	
Organization (if applicable):	
Mailing Address:	
Phone #:	Fax #:
E-mail:	
Applicant Signature:	
Co-Applicant Signature:	
Date Submitted:	

2. Project Information

Project Name:

Project Location (address and assessor parcel id #):

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

Open Space/ Recreation	Historic Resources	Community Housing

For Historic Resources Projects:

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

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

Yes No

3. Budget Summary

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

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.

4. Project Details (*attach additional pages if necessary*)

a. Please provide a brief description of the project:

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

c. How does this project serve the public? What community need(s) does this project serve?

d. What are the goals of the project? How will success of the project be measured?

e. 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.

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

g. 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.

h. For Historic Resources Rehabilitation Projects:

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.

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