



CITY OF MEDFORD, MASSACHUSETTS
COMMUNITY PRESERVATION COMMITTEE
APPLICATION PACKET
2019

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

1. An explanation of the application and review process
2. Scoring Criteria
3. Project Eligibility Determination Instructions
4. Project Eligibility Determination Form
3. Instructions for submitting a full application for FY19 funding
4. Application Cover Sheet

2019 Timeline		
	Step	Approx. Timeline/Deadline
1	Informational Meeting for 2019 CPA funding round	February 2019
2a	Applicants submit eligibility determination forms	April 26, 2019
2b	CPC responds to eligibility determination forms	May 24, 2019
3	Applicants submit funding applications	September 20, 2019
4a	Applicants present projects at community meeting	November, 2019
4b	CPC deliberates and votes on recommendations	December, 2019
5	CPC recommendations submitted for City Council approval	January, 2020
6a	CPC issues award letters	January, 2020
6b	Grant agreements executed	February, 2020
7	Review Community Needs and Application Process	February-April, 2020

CITY OF MEDFORD, MASSACHUSETTS
COMMUNITY PRESERVATION COMMITTEE
APPLICATION & REVIEW PROCESS

Step 1: Pre-Application Informational Meeting

A public meeting will be held to explain 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.

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 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 \$50,000 will be made available for Small Grants in 2019 and applications will be accepted on a rolling basis.

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

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. The Project Eligibility Determination Form is due no later than 12pm on Friday, April 26, 2019. (Note: for projects involving City-owned property, communication with the Mayor’s Office is required, and strongly recommended by Friday, March 29, 2019. Prior to submission of an EDF, signature approval of the Mayor and cognizant City liaison as determined by the Mayor is required on the EDF.) The CPC will review Project Eligibility Determination Forms and will inform applicants as to whether their proposed project is eligible for CPA funding based on the information provided in the EDF.

Step 3: 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 12pm on Friday, September 20, 2019. 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

Step 4: CPC Evaluation of Applications & Public Comment

1. **Application review.** The CPC will review project applications and evaluate them against the priorities established through public input gathered in the process of preparing its Community Preservation Plan and annual update. 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. **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. 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.

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 submits funding recommendations to 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

The Community Preservation 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 entity 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. 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 7: 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.

**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 the applicant or a co-applicant, and a staff liaison must be designated by the Mayor prior to submission of the EDF.
3. Open space or historic resources must be permanently protected, such as with a conservation restriction or historic preservation restriction.
4. Public access must be maintained (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.

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. 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.
- 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 to use 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 minimal 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	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, 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
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
Project Feasibility	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.
Coordination	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.
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.

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

PROJECT ELIGIBILITY DETERMINATION INSTRUCTIONS

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

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.

Type of Project

Projects must fit into one of the allowable use categories shown on the Community Preservation Act Funding Allowable Uses table. Please describe specifically how the project matches the definitions of eligible assets and activities.

Ownership

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 *Acquisition* or *Support*.) Evidence must be provided to demonstrate ownership.

For projects in which the City of Medford is an applicant or co-applicant, a signature on the Eligibility Determination Form is required by the Mayor and a City staff member designated by the Mayor to be a liaison for the project. It is highly recommended that draft Project Eligibility Forms be submitted to the Mayor by Friday, March 1, in order to ensure sufficient time for consultation with the Mayor and the assigned liaison.

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 Historical Commission to be significant in the history, archeology, architecture, or culture of the city. (You can check designation at mhc-macris.net)

Community Preservation Act Funding Allowable Uses				
	Open Space	Recreational Land	Historic Resources	Community Housing
	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.	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.
Acquisition 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.	Yes	Yes	Yes	Yes
Creation To bring into being or cause to exist. Seideman v. City of Newton, 452 Mass. 472 (2008).	Yes	Yes	No	Yes
Preservation Protect personal or real property from injury, harm or destruction.	Yes	Yes	Yes	Yes
Support 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.	No	No	No	Yes
Rehabilitation and Restoration 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.	Yes , if acquired or created with CPA funds	Yes	Yes	Yes , if acquired or created with CPA funds



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

PROJECT ELIGIBILITY DETERMINATION FORM

Due by 12:00pm Friday, April 26, 2019 to: Danielle Evans, Community Preservation Coordinator, devans@medford-ma.gov

PROJECT NAME: _____

PROJECT LOCATION ADDRESS: _____

APPLICANT(S) NAME/ORGANIZATION: _____

CO-APPLICANTS(S) NAME/ORGANIZATION: _____

CONTACT PERSON: _____

APPLICANT MAILING ADDRESS: _____

PHONE: _____ EMAIL: _____

ESTIMATED CPA FUNDING REQUEST

CPA PROGRAM AREA (CHECK ALL THAT APPLY):
 Open Space Community Housing
 Historic Preservation Recreation

PROPERTY OWNERSHIP:

Legal Property Owner of Record (if applicable): _____

Is the owner the applicant/co-applicant? Yes No

If No, does the applicant/co-applicant have site control or written consent of the property owner to submit an application?

Yes (Attach documentation) No (Project will be deemed ineligible for this applicant)

City of Medford must be co-applicant on all projects on City property.

Signature of Mayor

Signature of Staff Liaison

Printed name of Staff Liaison

FOR HISTORIC RESOURCES PROJECTS:

Is the resource in a Local Historic District and/or listed on the State Register of Historic Places? Yes No

If no, has the Medford Historical Commission made a determination that the resource is significant? Yes No
(Documentation of Historical Commission determination must be provided in full application.)

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?):

Eligibility (How does this application meet the specific criteria described in the matrix of Community Preservation Act Funding Allowable Uses):



APPLICATION INSTRUCTIONS FY19 FUNDING CYCLE

Prior to submitting this application, please read the entire CPA Application Packet and the Medford Community Preservation Plan. Applicants are encouraged to contact the CPA coordinator at any time throughout the process.

1. Complete the Project Application Cover Sheet.

If the City is a Co-applicant, the Co-applicant signature is to be the assigned Project Liaison.

2. Please include in your submission concise narratives that respond to all prompts in the order they appear below.

) **Project Narrative**

1. Describe the project, including the project location and the property involved.
2. Why is this project needed? How does the project benefit the public? What population(s) 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?
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?
4. Is the project going to result in a requirement for ongoing maintenance? If yes, please explain how this will be managed.

) **Scope and Budget**

1. Please provide a description of the specific tasks that will be undertaken for this project using CPA funds. Indicate whether additional tasks are planned which will utilize funding from other sources, volunteers, or in-kind donations.
2. Provide a detailed description of the project budget, including materials, services, acquisition, etc. specifying where CPA funds will be applied vs. funding from other sources. All items of expenditure must be clearly identified. Include project quotes, or show why this is not appropriate or feasible. List any additional funding sources, either committed or under consideration. Include commitment letters if available. If the application submission is for a community housing project, please submit a development budget and a sources and uses budget.

3. 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.
4. Will the project require funding over multiple years? If so, please provide anticipated future funding requirements.
5. How will the project be affected if it does not receive CPA funds or does not receive the full amount requested?

) **Timeline**

Explain the various steps of the project and when they will be completed.

) **Feasibility**

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. **If the project is for open space acquisition, a Conservation Restriction or Agricultural Preservation Restriction is required. A third party holder of the CR or APR must be identified.**

) **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 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.
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.

) **Accessibility Requirements**

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.
2. Describe how the applicant will ensure compliance with these standards as the project is ongoing.

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

-) Record plans of the land
-) Natural resource limitations (wetlands, flood plain, etc.)
-) Zoning (district, dimensional and use regulations as applies to the land)
-) Inspection reports

-) 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
-) Massachusetts Historic Commission Historic inventory sheet
-) 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
-) 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

4. **Application Format**

-) Be sure to number pages throughout the application, wherever possible.
-) Submit electronically the complete application, including the above sections 1, 2, and 3. and
-) Submit 11 paper copies of sections 1 and 2, **and a list of attachments included in the complete application.**
-) Applications may be submitted to:

Danielle Evans, Community Preservation Coordinator
 Medford City Hall – Room 108
 85 George P. Hassett Drive
 Medford, MA 02155
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: _____