



# Medford Community Preservation Committee

## 2024 Annual Report

## ACKNOWLEDGEMENTS

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For additional information on the CPA statute and how it is being applied in municipalities across the State, visit the Community Preservation Coalition website at [www.communitypreservation.org](http://www.communitypreservation.org).

For information on Medford's Community Preservation activity, visit the City website:

<https://www.medfordma.org/boards-commissions/community-preservation-committee> or [www.preservemedford.com](http://www.preservemedford.com)

All citizens are welcome to attend the Committee's meetings. The times and locations of these meetings are posted at City Hall and on the City website, [www.medfordma.org](http://www.medfordma.org).

Written comments or questions are welcome and may be submitted via email to or directed to the Community Preservation Committee, City Hall, 85 George P. Hassett Dr., Room 308, Medford, MA 02155.

Cover Photo: *Community Preservation Anniversary Celebration*

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The City of Medford Community Preservation Committee is pleased to present an update on its recent activities and a summary of the needs and priorities that will guide the funding round in 2024. This plan was last updated in 2021, and the following is a review that considers the changes in community needs while navigating a post-COVID environment.

## INTRODUCTION

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The Community Preservation Act, M.G.L. c. 44B, (“CPA”) is a Massachusetts law that allows participating cities and towns to create a dedicated fund for important projects that can greatly impact a community’s character and quality of life. Communities raise money locally for the CPA through a small surcharge on property taxes (between 1% and 3%, as selected by the community). In addition to the property tax surcharge, the state provides matching funds between 5% and 100% of the funds raised by the community. The actual percentage of matching grants varies from year to year, depending on the availability of funds in relation to the local contributions of participating communities, and the number of communities participating in the CPA.



### *POMP’S WALL RESTORATION*

Community Preservation Act funds must be used for public community preservation purposes. The CPA requires that communities spend, or set aside for future spending, a minimum of 10% of annual CPA receipts for each of the following concentrations: open space

and recreation, historic preservation, and community housing, with 5% reserved for administrative costs. The remaining 65% of funds may be allocated to any one or a combination of the three main uses at the discretion of the Community Preservation Committee and subject to the approval of the City Council.

Medford adopted the CPA with a 1.5% property tax surcharge at the November 2015 election. The CPA ordinance in Medford exempts the first \$100,000 of residential or commercial property value from the surcharge and offers an additional exemption for “low-income households” and

“low- and moderate-income senior households”, as defined by Section 2 of the Community Preservation Act<sup>1</sup>.

Appointed in May 2017, the nine-member Community Preservation Committee (CPC) has the responsibility to evaluate community needs in the areas for which CPA funding can be used, and to make recommendations to City Council for the use of CPA funds. The City Council must approve the appropriation and distribution of all CPA funds. A description of the projects funded by the CPC in 2023 is provided on the following pages.

The CPC consults with various committees and City staff that are knowledgeable about each of the community preservation program areas and gathers information from the public. The CPC established an application process by which it evaluates proposals submitted by individuals, City boards and commissions, and community groups for use of CPA funds. The CPC developed a Community Preservation Plan and launched applications for the first round of funding in late 2017. After completing the funding decisions for 2023, the CPC undertook a review of the application process, the results of which are summarized in this report.

## **ANNUAL REVIEW PROCESS**

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Annually, the CPC conducts a review period where they consult with city staff, community partners, residents, and other members of the public, to identify changes in community needs and priorities. Methods for consultation include tabling events at prominent public locations, hosting a public hearing, circulating a feedback survey, and other public planning processes.

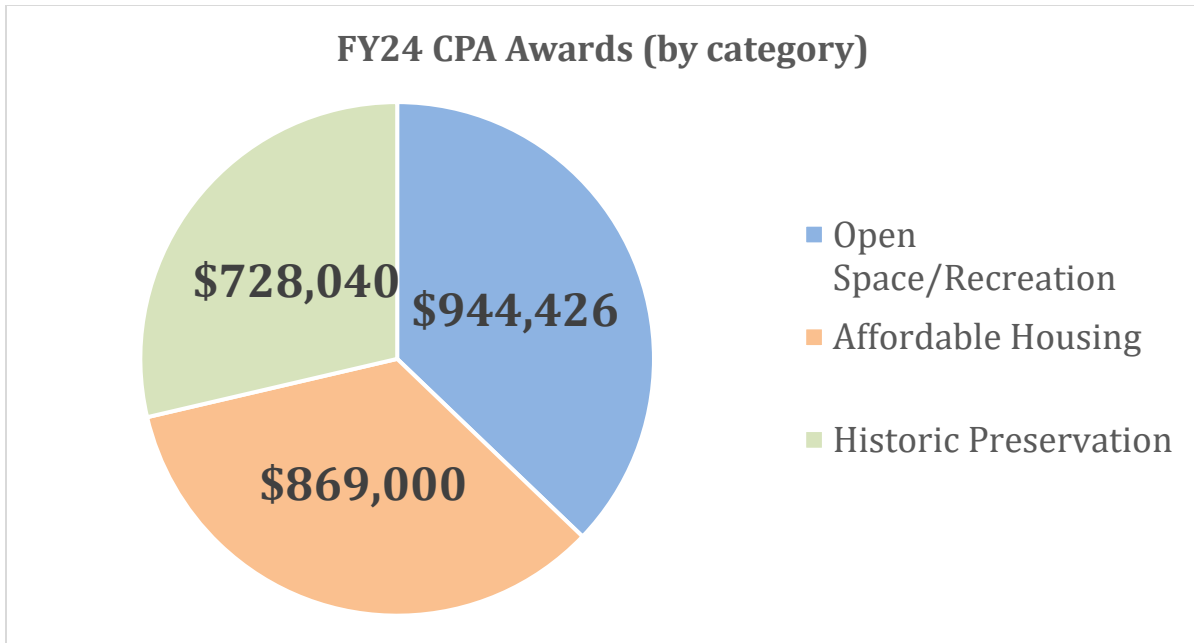
## **2023 ACTIVITY SUMMARY**

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In 2023, Medford’s Community Preservation Committee (CPC) recommended the allocation of CPA funds to 16 projects. The funds for 11 projects that applied through the regular funding cycle were approved by City Council in January and February 2024. Funds were also distributed to three small grants considered on a rolling basis and two off-cycle urgent applications. All but three of the projects that applied in the 2023 funding round were recommended by the CPC and approved by City Council; the three applications not funded were found ineligible.

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<sup>1</sup> Those wishing to apply for an income-based exemption must apply annually through the City Assessor’s office.



*Figure 1: Expenditures by program area during FY 2023*

Summary of funding awards:

- \$2,541,466 total funds committed in 2023 funding round
- 19 full applications received during the regular funding cycle
  - 5 Open Space and Recreation projects
  - 12 Historic Preservation projects
  - 2 Affordable Housing projects
- 3 applications were received for small grants, all of which were funded.
  - 1 Open Space and Recreation project
  - 2 Historic Preservation projects
- There were three projects for which Eligibility Determination Forms were received but either elected not to proceed or were found not to meet criteria for eligibility.

Table 1: CPA-funded projects FY 2024 by program area

Applicant	Project	Program Area	Committed
Parks Department	Tufts Park Basketball Court Resurfacing	Recreation	\$205,525
Parks Department	Capen Park Basketball Court Resurfacing	Recreation	\$106,625
Office of Planning, Development, and Sustainability	Logan Park Natural Play Area	Recreation	\$229,000
Office of Planning, Development, and Sustainability	McGlynn School Universally Accessible Playground	Recreation	\$400,000
Recreation Department	Condon Shell Electrical Upgrade	Recreation	\$3,276
Housing Families	Rental Assistance	Housing	\$69,000
Medford Housing Authority	Walkling Court Pre-Development	Housing	\$800,000
Historical Commission	Thomas Brooks Park Archaeological Cap	Historic Preservation/Recreation	\$5,000
Historical Commission	Cross Street cemetery Conditions Assessment	Historic Preservation	\$4,800
Medford Brooks Estate Land Trust (MBELT)	ADA Parking and Pathways	Historic Preservation	\$98,726
Medford Brooks Estate Land Trust (MBELT)	East Elevation Accessibility Restoration	Historic Preservation	\$99,500
Cemetery Division	Oak Grove Cemetery Buildings Restoration – Phase 1	Historic Preservation	\$200,000
Cemetery Division	Oak Grove Cemetery Access Road Study	Historic Preservation	\$50,000
Dept. of Public Works	Salem Street Burying Ground Restoration Study	Historic Preservation	\$10,000
Shiloh Baptist Church	ADA Accessibility Improvements	Historic Preservation	\$145,000
Royall House & Slave Quarters	Royall Mansion Roof and Gutter Restoration	Historic Preservation	\$115,000

## CPA-FUNDED PROJECTS OVERVIEW

From FY18 – FY24, the Community Preservation Act generated \$10,305,059 in local CPA funds, which have been matched by a total of \$2,514,242 from the State’s Community Preservation Act Trust Fund, for a total of \$12,819,301. The State’s CPA Trust is funded by a portion of real estate transactions captured at Registry of Deeds for the previous fiscal year, as well as any surplus state budget dollars.

For FY25, the Department of Revenue provided guidance that CPA communities should anticipate a lower match due to lack of state budget surplus and reduction in real estate transaction fees in FY23.

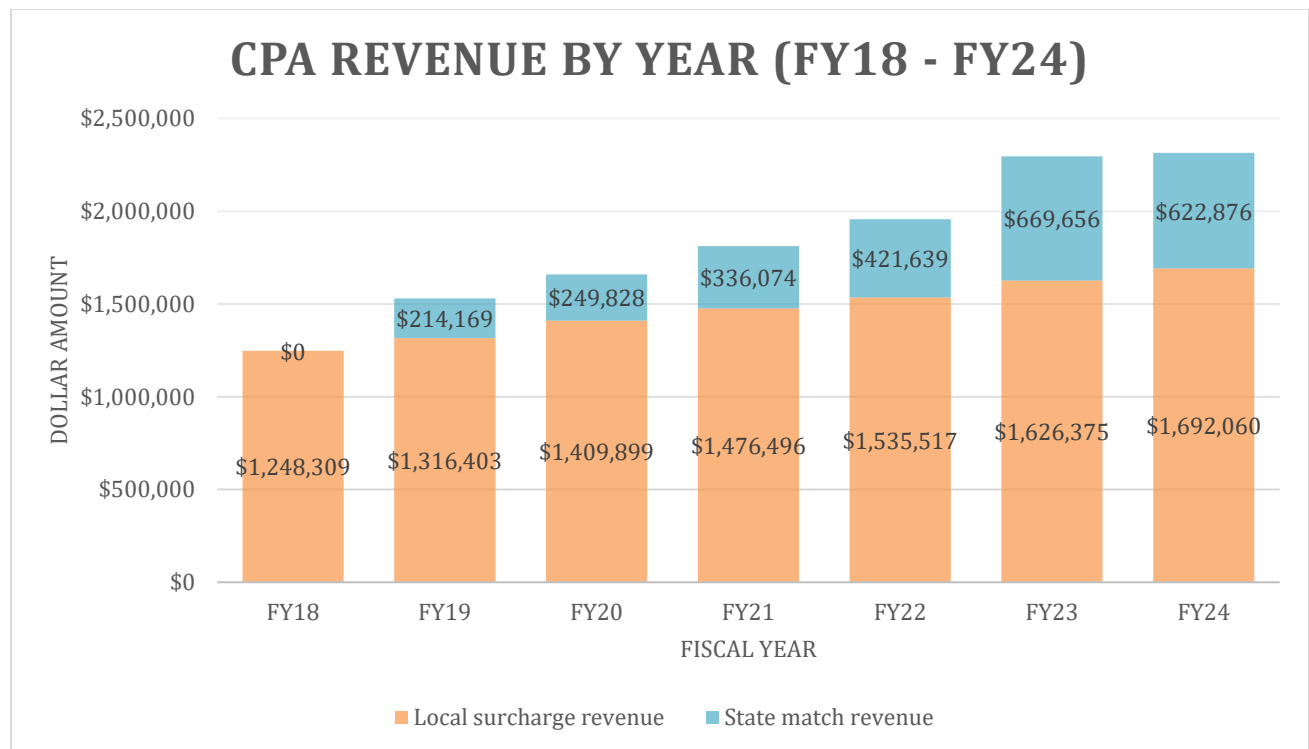


Figure 2: Revenue and State Match funds from FY 2018 - FY 2024

Over this time, these revenues have funded 100 projects in Medford, of which a comprehensive list can be found in Appendix 1. In Figure 2, the locations of each project are mapped and color-



coded to reflect the program area to which the project belongs: green is Open Space/Recreation, blue is Affordable Housing, and orange is Historic Preservation.

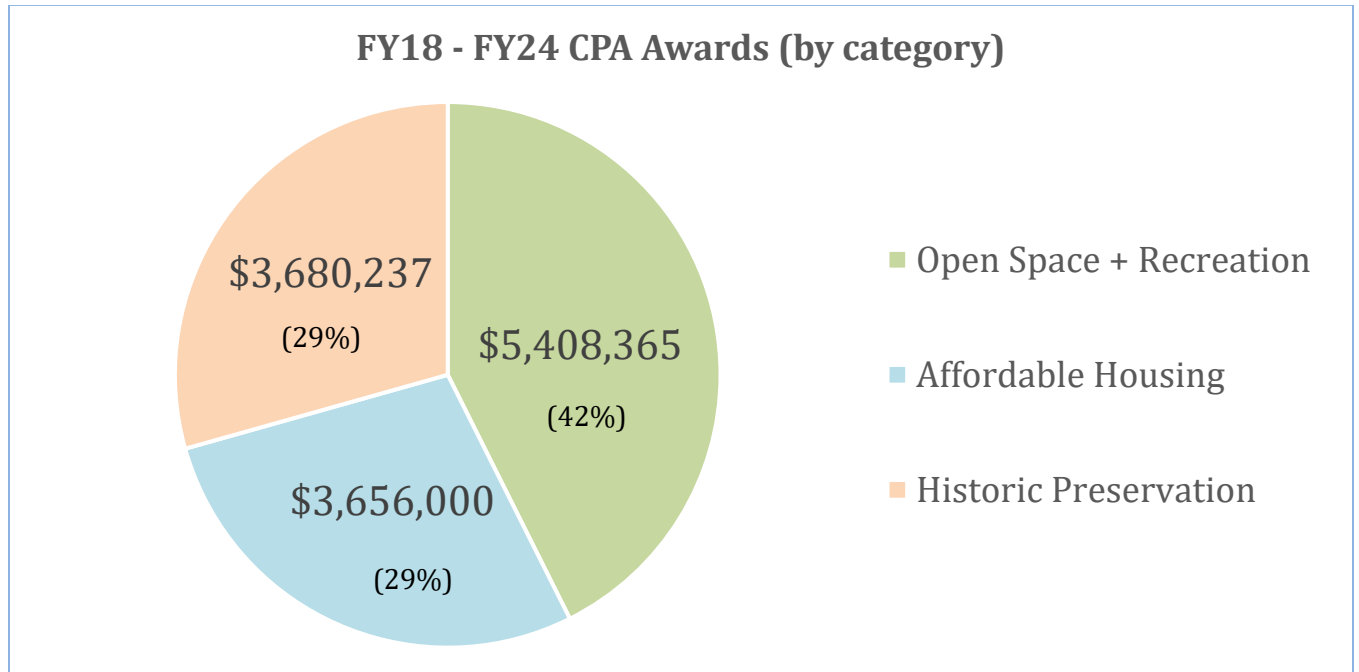


Figure 3: Expenditures by program area, FY2018 - FY2024

Of the program areas, funding supporting Open Space and Recreation may go to the greatest variety of projects. In review of existing projects, a few categories emerge. Several projects have addressed rehabilitation of existing parks, playgrounds, and recreation spaces like the ongoing renovation of Gillis Park and Hickey Park. Other projects involve facilities improvements via irrigation and stormwater drainage installation, procurement of new benches, playground resurfacing, and other facility or trails renovations or restorations. Some projects focus on the removal of invasive plant species, and nurturing Medford’s tree canopy. CPA funding has also been granted to projects that create or renovate public athletic facilities, which include improvements to Tufts Pool, Hormel Stadium Street Hockey Rink, various playground elements, and the upcoming Carr Park pickleball courts, to name a few.



affordability of housing and sustain tenants at risk of homelessness, which is an expanding issue locally and nationally.

CPA funds have been used on various Historic Preservation projects. Restoration has ranged from decorative detailing to structural undertakings, projects restoring entryways, windows, trim, roof, and addressing accessibility challenges in public buildings. Recently, Shiloh Baptist Church was one such recipient, utilizing CPA funding to install an elevator and improve accessibility for visitors. This improvement project has several benefits, but importantly will result in allowing the space to be eligible for a childcare provider. Childcare is an immediate and urgent need in the Medford family community.

Further, funding has been used to both implement and develop rehabilitation plans across different historic spaces in Medford.

### **FY25 Funding Available**

<b>Category</b>	<b>FY25 Allotment</b>	<b>Percent of Total Budget</b>
Open Space/Recreation	\$193,293	10%
Affordable Housing	\$289,940	15%
Historic Preservation	\$193,293	10%
General Reserve	\$1,159,762	60%
Administrative	\$98,750	5%
<b>Total for FY25</b>	<b>\$1,932,934</b>	

*Figure 5: Chart of estimated FY25 budget*

The projected FY25 CPA funding available is an estimated total of \$1.93 million, which can be appropriated to CPA projects. This includes \$1,692,060 in local surcharge revenue and \$380,713 in state match funds, which are conservatively projected to be 15% of Medford’s surcharge revenue from 2023. As shown in Figure 5, 10 percent of the projected revenue is reserved for Historic Preservation and Open Space/Recreation, 15 percent is reserved for Affordable Housing, and up to 5 percent can be used for administration. The remaining \$1.15 million General Reserve funds may be spent in any program area.

## REVIEW OF COMMUNITY NEEDS AND PRIORITIES BY PROGRAM AREA

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### Open Space and Recreation



*Figure 6: Completed Riverbend Labyrinth*

In 2019, the City of Medford completed its Open Space and Recreation Plan Update, covering the planning horizon of 2019-2026. There is a significant overlap of the goals and priorities outlined in this Plan versus those identified in the CPA Plan, mutually reinforcing their importance.

The Open Space and Recreation Plan describes four overarching community priorities, which in turn inform the goals and objectives it details. These priority areas include (1) climate change resilience, (2) maintenance and capital improvements, (3) management of City open spaces, and (4) public awareness and stewardship. The Plan specifies the following goals:

1. Serve the active recreation needs of all residents throughout Medford by expanding its open space resources and upgrading the conditions of existing facilities.
2. Establish connections to and along the City's natural resources.
3. Expand / diversify recreational programming for the City within the existing open space resources.
4. Improve the ecological quality of the City.
5. Develop a system for park facility management / maintenance.
6. Strengthen Medford's climate change resilience through park and open space design and preservation.

The OSRP helped to prioritize projects in the queue for park and open space improvements. **Since 2020, the City has completed nearly 40 park projects, with an additional 27 in progress.** Of the completed, 13 projects were partially or fully funded by CPA, as shown in Figure 7 below. These projects range from small enhancements, such as electrical improvements at Condon Shell to large-scale renovation projects, like the fieldstone wall restoration along Thomas Brooks Park/Brooks Estate, and the cleanup of environmental contamination in Riverbend Park along the Clippership Connector. Active park projects with CPA funding range from small enhancements, such as the upcoming Dugger Park tennis/lacrosse bounce back wall, to large-scale renovation projects, like the Carr Park redevelopment, Gillis Park renovations, and the McGlynn School Universally Accessible playground. The impact of CPA-funded park improvements can be seen in neighborhoods across the city.

	Completed Projects since 2020	Active Projects
Number of projects	40	27
Projects funded with CPA	13	14
Funding Source (% of all park projects)		
CPA	35%	44%
CDBG	27%	15%
ARPA	5%	19%
Other State/Federal Grants	19%	43%

As an urban community within the Greater Boston area, Medford’s recreation space is one of our most-prized community amenities. With increasing need to provide denser housing and other development, the CPC recognizes the importance of improving parks to meet the changing and growing needs of residents. The City has taken the community’s feedback on expanding and improving our public facilities, with thoughtful design and modernization.

Residents have identified numerous desires, needs, and opportunities for Medford. Examples include an interest in:

- **expanding bike and pedestrian paths with greater connection to existing active transit networks and green space,**
- an environmental need to increase tree canopy and provide outdoor cooling amenities, as we face a changing climate with extreme weather
- **expand the inclusivity of recreational spaces and programming to better accommodate Medford community members of all abilities and ages**
- **The protection of existing and creation of new community “third spaces” - places for community members to gather beyond their home or work**

“My kid loves splash pads, I wish we had more of those in the city. Playstead would be a great spot for one (this is my home park)” – **Survey Participant**

Medford residents recognize the City’s open space and recreational spaces as community assets to be preserved, celebrated, and expanded. Many have advocated for continuing to extend access to these resources, particularly for communities historically underserved. **The CPC can leverage its application process to ensure that applicants seek expert input regarding accessibility during project design and/or before construction.**

“[I’d like to] see more dog parks. The only one [in the city] is not easy to get to.” – **Survey Participant**

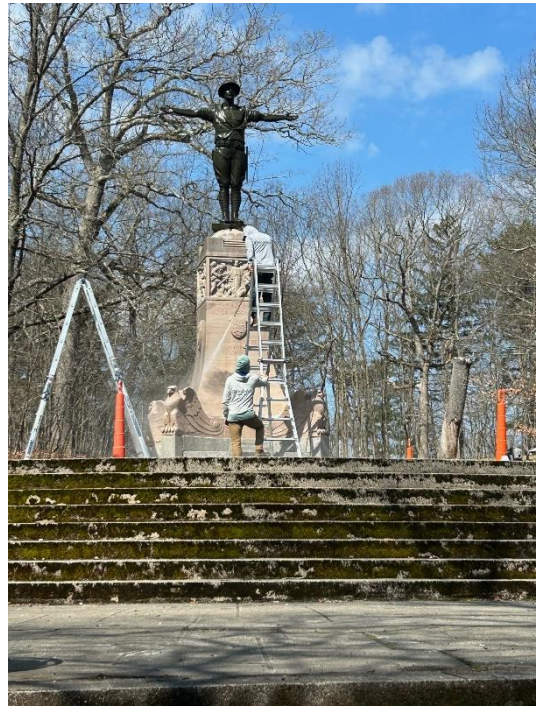
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### **Historic Preservation**

Historic preservation goals and priorities remain consistent with those of previous years. CPA can fund projects that preserve historic buildings and sites protect, restore, and enhance public access to historical records and artifacts, and increase public awareness about local history. Historical sites and projects made up 29% of allocated CPA funding in 2023.

Medford has many sites which are recognized on the National Register of Historic Places which are historically significant but do not have any effective protection. Local historic districts offer some degree of regulatory protection. Three sites in Medford have been designated as local historic districts: Hillside Avenue Historic District, Marm Simonds Historic District, and King House Historic District, all of which are under the jurisdiction of the Medford Historic District Commission (MHDC), who has oversight over all exterior changes to the properties within the Districts.

In the last few years, several local historic districts have been proposed. The MHDC intends to create a series of single-house Historic Districts to ensure that Preferably Preserved historic buildings are protected in perpetuity as important cultural and architectural resources. In 2017, the MHDC created the first single-house Historic District at King House (21 Touro Avenue). Two additional Historic Districts have been proposed by MHDC at the Haskell-Cutter House (another single-house Historic District) and Forest Street. In late 2023, a South Street Historic District was presented to the public and is currently in the approval process with the City Council. "The Office of Planning, Development, and Sustainability and Economic Development team is reviving the Medford Square Revitalization Plan, known as Transforming the Square which will be considering the generation of a Medford Square Historic District.



*Figure 7: WWI Memorial at Oak Grove Cemetery*

In addition, the Historical Commission has surveyed several areas of Medford to identify historic resources that merit protection. Recent projects included the completion of survey work in neighborhoods which are high priority for documentation and preservation through historic districts. These include properties along Forest Street, within the Hall-Bradlee Estates behind Medford Square, and the Winter Hill and Brickyards neighborhoods. The Commission is currently completing a survey of the Fulton Heights neighborhood.

In recent funding rounds, CPA funds used for the preservation of privately-owned buildings were granted with the condition that the properties be placed under Preservation Restrictions to permanently protect the historical integrity of buildings or other assets in which CPA funds are invested. A PR is an interest in ownership held by a separate organization or government entity that helps to ensure that a property's historic value will be preserved by restricting the alteration of its historic features. Similar to the LHD, major changes to buildings with PRs would have to be reviewed by the commission that has jurisdiction over PRs that the City holds.

As part of the annual review process in 2023 the CPC hosted a conversation with City Department Heads, Cemetery Trustees and staff to explore potential projects centering the preservation of Medford’s historic public buildings as a part of its 2023 Review Process. Discussion of opportunities and challenges identified several sites for further consideration, including: three historic fire stations, the Curtis Tufts school, City Hall (especially the basement, bathrooms, and water fountains), and the continued restoration efforts at Oak Grove Cemetery. In addition, there has been discussion of developing an archive for Medford historic records and artifacts as there is currently no designated City space for these items. This past fiscal year, the City hired its first Facilities Director, who has been working with administration on prioritizing restoration of historic city-owned buildings.



*Figure 8: Chevalier Theater*

One recent historic preservation project worth highlighting is the condition assessment and ADA improvements at Shiloh Baptist Church, a historic shingled church nestled in West Medford. Church buildings have long served needs for community services and functions. Shiloh Baptist, like many religious organizations, has experienced changes in its community which make it challenging to keep up with the costs of operating its large, historic building. With CPA funding, the church will be outfitting their structure with an elevator; this helps bring the space into ADA compliance so that a childcare provider can occupy the building. By leveraging CPA dollars strategically, the Committee was able to help address two community concerns: accessible community space for all abilities and the growing demand for additional childcare options.



## Affordable Housing



*Figure 9: Rendering of Walking Court Redevelopment*

Community Preservation Act funds can be used to acquire, create, or support affordable housing, or to rehabilitate affordable housing units which were created using CPA funds. CPA funds can only be used for the purposes of housing that is affordable to households earning up to 100 percent of Area Median Income (AMI). To be included in the Subsidized Housing Inventory (SHI) that is maintained by the Massachusetts Department of Housing and Community Development, housing units must have a long-term deed restriction to ensure that they will be affordable to households earning up to 80 percent of AMI and must be sold or rented through a lottery following a Fair Housing Marketing Plan. There is not a requirement that CPA funds be used to create SHI units, so long as they are used for a purpose which is eligible under CPA.

To date, Medford's CPA program has supported two major housing construction projects. The CPA-supported Walking Court Redevelopment will generate nearly 100 additional deeply-affordable units and construction is nearly complete for the Fellsway West housing development, bringing 3 affordable units to the Fulton Heights neighborhood. The CPA program has also contributed funding to programs that support renters accessing housing they can afford. In May of 2020 Medford was one of the first communities to respond to the Covid-19 emergency by establishing a CPA-funded emergency rental assistance program administered through ABCD. Medford has also partnered with Housing Families Inc to provide ongoing support paying rental arrears for families receiving legal assistance to prevent evictions.



*Figure 10: Fellsway West housing development*

Also on Medford’s horizon are several non-CPA funded potential developments that may result in the addition of new affordable housing units. The City adopted an Inclusionary Housing Ordinance in 2019 which requires projects with over ten (10) units to set aside 10-15% of the units as affordable in accordance with the Commonwealth’s Local Initiative Program. The City has also fully approved one 40B project that will bring an additional 350 units; two more 40B projects representing an additional 650 units are beginning the permitting approval process.

In 2023, the City finalized its Housing Production Plan (HPP), which assesses the City’s housing needs and puts forth goals and priorities for meeting the state’s 10% affordable housing standard. Following a robust engagement and research effort, the plan details the following community five-year goals:

- Address local housing needs and meet production goals. Work to meet the 40B goals and then continue to promote initiatives to address local housing needs.
- Promote a welcoming, diverse, intergenerational, and inclusive city with an ideal mix of housing choices that offer diverse options to residents with varying needs and preferences.
- Foster safe, well-designed, and sustainable housing. Ensure new homes of all types are sensitive and compatible in scale, siting, and design to neighborhood context.

- Integrate affordable and diverse housing options throughout the city at a scale that is compatible with the built environment.
- Preserve the affordability of existing affordable homes.
- Expand local capacity to implement housing initiatives.
- Promote transparency and engagement and increase awareness of fair housing issues.

The HPP establishes what the CPC priorities will be for housing in the next 5 years, with respect to recommendations that align with CPA criteria for funding eligibility.

Medford’s housing needs, as summarized in the HPP:

- **Rising housing and living costs, static income:** Medford has seen some of the highest price increases of any community in Massachusetts, a rate exasperated by the post-pandemic effects. About 42 percent of Medford households (over 9,000 households) may be eligible for subsidized housing, but there are only 2,116 units listed on the City’s SHI.
- **Constrained housing supply:** Throughout the state, rising housing prices are exacerbated by a limited housing supply. Medford has had low overall housing growth in recent decades and vacancy rates are significantly lower than the thresholds considered “healthy” for a stable housing market.
- **Need for small households:** While two-thirds of Medford’s households are one or two people, only 16 percent of housing units are studios or one-bedroom units.
- **Geographic inequity:** Medford’s multifamily and rental options are primarily concentrated in the City’s southern neighborhoods which also include Environmental Justice (EJ) populations. These neighborhoods also tend to be nearer to industrial development and areas prone to environmental hazards such as flooding.
- **Development concerns and considerations:** Maintaining the City’s open space and natural resources and its historic and scenic assets is important to the character of the community. As an urban-suburban community with many impermeable surfaces, controlling harmful stormwater runoff and maximizing neighborhood-level open space is an ongoing priority.

The HPP, in mapping city capacity and resources, reviews Medford’s local housing partners, which include the municipal Community Development Department, Medford Housing Authority, the CPC, nonprofit Medford Community Housing, and advocacy group Housing Medford. Housing Medford is a grassroots resident group established in late 2018 that advocates for addressing housing needs. The group was established with assistance through CHAPA’s Municipal Engagement Initiative.

Given the limited capacity of Medford-based nonprofit organizations to support or construct affordable housing, partnership with regional nonprofits could help to address local housing needs. To date, two organizations, Housing Families Inc. and ABCD have used CPA funds to provide rental assistance to Medford residents. Aside from an unsuccessful bid by the Somerville Community Corporation to convert properties owned by the Catholic Diocese to affordable housing (awarded CPA funds in 2017 but subsequently canceled and returned), there has not been any affordable housing constructed or acquired by regional nonprofit organizations in Medford in recent decades.

Affordable housing projects tend to be more costly and complex than other types of CPA projects, as market volatility is at a historic high. Due to the nature of affordable housing development, the city may expect to see requests for affordable housing funds less frequently but in higher amounts than other CPA program areas. To ensure that CPA funds are available at increments needed to support affordable housing projects, the CPC may opt to transfer additional funds to the Housing Reserve (beyond the required 10 percent) if there are no affordable housing projects within a funding round. In the 2019 funding round, for example, the CPC recommended the transfer of \$250,000 additional funds to the Affordable Housing reserve.

In April 2023, the City Council passed an ordinance that would allow for the establishment of an Affordable Housing Trust (AHT) - one of the key strategies to address housing issues identified within the HPP. The AHT could enable the City to pool CPA funds together with funding from other sources to enhance local coordination of affordable housing initiatives. As of May 2024, the City is in the process of appointing a Board to serve the AHT, which is anticipated to be fully functioning by summer 2024.

There has been much recent community discussion around the sources that would fund the AHT. CPA funds may contribute a significant source of funding for the AHT (as to be determined by the CPC and City Council). According to state law, between 10% and 75% of Medford's CPA revenues could be dedicated to affordable housing (reserving 5% needed for program administration). However, even at the highest allowable proportion, CPA would not be impactful as a stand-alone funding source for the AHT. Meanwhile, maximizing the CPA distribution to affordable housing would reduce the resources available to meet other priority community needs, limiting the benefits of CPA for the broader community. The CPC must continue to strike a balance in funding to meet community needs in each of the program areas. Meanwhile, additional funding sources beyond what CPA can provide must be identified and supported to make substantial impacts in tackling affordable housing.

To increase funding available for each of the program areas, Medford could consider adopting an increase in the CPA surcharge. Currently, the surcharge is 1.5% of collected property taxes; an increase to 3% could double the surcharge revenue and make Medford eligible for a larger state match distribution. The increase in revenue would expand the CPA program’s flexibility with respect to supporting affordable housing alongside other program area needs. This change would be a ballot-initiative, meaning that it would have to be approved by voters in a general election.<sup>2</sup>

## GOALS AND PRIORITIES

### Funding Distribution

The distribution of CPA funds should be balanced flexibly but evenly among the three categories, Open Space and Recreation, Historic Preservation, and Affordable Housing.

### Overall Goals for CPA Funding

1. Projects should be highly visible and accessible, generating broad benefits to the community.
2. As appropriate, the application should demonstrate public input or gathering of support.
3. Projects must not replace funding from the City budget or other sources.
4. Priority is given to projects that leverage funding from other sources and/or fill a gap where other sources are not available.
5. Projects should demonstrate cost-sensitivity both in the short-term use of CPA funds, and the long-term maintenance or lifespan of the resource for which the funds are used.
6. Priority is given to projects with a public sector or non-profit applicant or co-applicant above private individuals or for-profit applicants.

Goals	Priorities
<b>Open Space + Recreation</b>	
<ul style="list-style-type: none"> <li>● Expand and enhance open space as distinguishing features of Medford’s landscape, especially along the Mystic River and other bodies of water.</li> <li>● Make Medford Square and neighborhoods greener and more attractive.</li> <li>● Protect neighborhoods and natural resources from the impacts of flooding and climate change.</li> <li>● Improve access to open space and recreational resources for all Medford residents.</li> <li>● Expand bicycle and pedestrian paths, connecting neighborhoods and recreational/community resources</li> <li>● Provide diverse recreation opportunities, serving residents of all ages</li> </ul>	<p><b>First:</b> Enhance open space as a land use asset, while improving connectivity, access, safety and function.</p> <p><b>Second:</b> Support resiliency through open space.</p>

<sup>2</sup> As a note, based upon single family homes in 2024, the average Medford household pays less than \$100 annually in CPA surcharge and exemptions are available for low-income households.

Affordable Housing	
<ul style="list-style-type: none"> <li>● Preserve Medford’s income and demographic diversity through sustaining and increasing Medford’s supply of affordable housing for families, seniors, individuals, and people with disabilities.</li> <li>● Facilitate investments in affordable housing that preserve and complement the character of Medford’s neighborhoods.</li> <li>● Support low and moderate income households in accessing housing that they can afford.</li> </ul>	<p><b>First:</b> Increase supply of affordable housing</p> <p><b>Second:</b> Provide support for households to access affordable housing.</p>
Historic Preservation	
<ul style="list-style-type: none"> <li>● Preserve historic buildings and sites.</li> <li>● Protect, restore and enhance public access to historical records and artifacts.</li> <li>● Increase public awareness about local history and historical sites.</li> </ul>	<p><b>First:</b> Preserve City-owned historic resources</p> <p><b>Second:</b> Preserve non-City owned historic resources</p>

## PROCEDURES

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A procedures document was created in 2019 in consultation with CPC members, city staff, and prior applicants. This document outlines committee rules, procedures, and the CPA application process. The document has evolved each year, with minor changes to the application process and rules being made and recorded to address situations as they arise.

2024 Community Preservation Committee Timeline	
Step	Approx. Timeline/Deadline
Submit recommended applications to City Council for appropriation approval	January 2024
Discuss annual review and plan for public engagement	February 2024
Annual Public Hearing to gather input on community needs	March 2024
Review findings, finalize annual report	April 9, 2024
Approve Application forms and instructions	May 14, 2024
Informational Meeting about fund availability	June 11, 2024
Eligibility Determination Forms Due (Short form to determine whether projects are eligible)	July 31, 2024
Full Applications Due	September 6, 2024
Review Full Applications (Long form with complete project description, scope, and budget)	September 10, 2024
Applicants presentations and Q&A (typically 2 meetings)	October 8 & 22, 2024
CPC deliberates and votes on recommendations	November & December

Table 3: CPC FY25 Timeline

Application details as well as project eligibility and scoring criteria are outlined in the Application Packet, of which a copy of the 2024 version is included in Appendix 3. Applications are now only available to be submitted through an online form. Applicants who are unable to access the online form can contact the Community Preservation Manager for assistance with completing an online application.

#### 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 Manager to discuss the possible submission of an off-cycle application.

#### Small Grant 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. Applications for small grants are accepted on a rolling basis. Applicants may submit up to four small grant applications per fiscal year, with 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.

#### FY25 Updates

The CPC strives to be consistent with the funding process year over year; however, there are a few updates applicants should consider:

- 1) Addition of listening sessions, for applicants to address any questions on CPA’s application or funding process
- 2) Introduction of a claw back provision in funding agreements, which would apply to CPA-funded projects that are demolished or otherwise taken out of the public inventory. This provision would have an associated depreciation schedule, as determined on a project-by-project basis by the CPC.

## ANNUAL REVIEW PROCESS

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Each year the Community Preservation Committee undergoes a review process with the goals of disbursing information about the CPC and gathering input from the community to inform an annual plan update. The review process consists of several elements: several community outreach/tabling events, an annual public hearing, a survey, and consultation with City staff and stakeholders.

Throughout the year, the Community Preservation Committee coordinated with various City staff, elected officials, other boards and committees, and stakeholder organizations to facilitate a successful process of developing funding recommendations and oversee the management of CPA funds. The CPC also advertised information about meetings and prospective funding proposals and invited public inquiries and comments. Throughout the year, the CPC reviewed community needs and priorities and the application process. They solicited input through the following activities:

- Tabling events:
  - Circle the Square – June 2023
  - Oktoberfest – September 2023
  - Harvest Your Energy Festival – October 2023
  - Medford Public Library March 20, 2024
  - Medford Senior Center March 26, 2024
- Online and hardcopy survey – March 2024
- Targeted outreach and discussion to City Department Heads regarding application process feedback March 7<sup>th</sup>, 2024
- Virtual listening session – March 10, 2024
- Targeted outreach and discussion to City Facilities Director and Diversity, Equity, and Inclusion Director regarding prioritized public building historic preservation projects April 3, 2024
- Annual Public Hearing - April 9, 2024
- Monthly Park project planning meetings (ongoing/continuous)

In April 2023, the City expanded the city staff member role from part-time to a full-time position. The CPA Manager has more time in which to manage projects, assist in finding alternative funding sources for program, etc. The focus of the new CPA Manager has been to increase public awareness and engagement in the funding process. In 2024, the CPC hopes to produce additional ways to reach residents by engaging in social media efforts and increasing print materials around the community. An effective way to engage with the community is by



“going to where they are” - whether that is YouTube or while walking around their neighborhoods.

Conversations with various stakeholders, including past applicants and city staff, lead to some slight updates to the CPA grant Application Materials for the upcoming FY25 and are hereby incorporated herein by reference. The updates were minute but will facilitate a more streamlined application process for applicants.

### Overall Funding Priorities



*Figure 10: Hickey Park Athletic Court Ribbon Cutting*

The survey wasn't heavily responded to, but the responses received were substantive. The survey opened by asking the respondent to identify which park or public space they had visited previously, of a list of CPA-funded projects. The most popular destinations included Condon Shell, Wright's Pond, and Dugger Park.

We amended the survey's flow to include a question about personal experience utilizing housing assistance, whether the respondent had personally used this service or knew of someone who had. Knowledge about personal experience as it relates to housing helps inform the Committee on community needs, for a first-hand account. Of the respondents, only 20% indicated that either themselves or someone they knew benefited from housing assistance resources.

The next section asked respondents to rank, in level of priority, where they would like to see CPA funds directed, by program area. Historically, the annual survey has indicated a mid-range support for Affordable Housing, with Open Space and Historic Preservation projects typically trading off for first rank. This year, a sharp increase in Affordable Housing support was strongly indicated through the survey, as well as rankings collected during tabling sessions. The question was worded to allow for open-ended answers:

- 1) Twenty (20%) of respondents supported directing the funds evenly across the three program areas.
- 2) An overwhelming 70% of respondents indicated to prioritize Affordable Housing more heavily than the other two program areas.
- 3) One respondent suggested dedicating half of the CPA budget to Affordable Housing, then split the remaining funds amongst Open Space/Recreation and Historic Preservation.
- 4) One suggestion on dividing the budget was to select one area of concentration per year and to divert the majority of the budget to that area (ie: one year focus on Historic Preservation, the next would be Open Space//Recreation, then Affordable Housing and cycle through).The rationale behind this was so that recipients could plan and balance their future projects accordingly.

Overall, the responses collected correlate with local and national Affordable Housing commentary and show strong support for shifting a larger allocation of the CPA budget towards housing development efforts. Open Space and Recreation projects were also heavily favored, especially by the large number of families with young children.

## APPENDIX 1, TABLE OF CPA-FUNDED PROJECTS

Project	Year	Program Area	Grant Amount	Project Status
Harris Park Rehabilitation Phase 1	2017	Open Space/Recreation	\$300,000	Complete
Brooks Estate-Access Drive Design	2017	Historic Preservation	\$90,000	Complete
Brooks Estate-Invasive Plant Removal	2017	Open Space/Recreation	\$3,000	Complete
Brooks Estate-Restoration of East Entryways	2017	Historic Preservation	\$50,000	In-Progress
Condon Shell renovation and restoration	2017	Open Space/Recreation	\$80,265	Complete
Medford Community Housing: Early Construction Tasks-3 affordable housing units	2017	Affordable Housing	\$250,000	In-Progress
LaPrise Village Natural Gas Conversion	2017	Affordable Housing	\$452,000	Complete
Medford Community Housing: Pre-development costs: 3 affordable housing units	2017	Affordable Housing	\$30,000	In-Progress
Preserve textile collection at the Medford Historical Society Museum	2017	Historic Preservation	\$9,110	Complete
Rehabilitate Medford Historical Society Museum HVAC system	2017	Historic Preservation	\$82,817	Complete
Roberts Elementary School Playground surface replacement	2017	Open Space/Recreation	\$109,540	Complete
St Clement School/St. Clare convent creation of affordable housing	2017	Affordable Housing	\$200,000	Canceled
Brooks Estate Stone Wall restoration	2017	Historic Preservation	\$45,000	Complete
Brooks Estate Third Floor Trim restoration	2017	Historic Preservation	\$63,000	Complete
Brooks Estate trail restoration	2017	Open Space/Recreation	\$10,000	Canceled
Chevalier Theater Air Conditioning	2018	Historic Preservation	\$300,000	Complete
City of Medford Bocce Courts	2018	Open Space/Recreation	\$51,825	Complete
Gillis Park Improvements	2018	Open Space/Recreation	\$22,500	Complete
Harris Park Design PH2	2018	Open Space/Recreation	\$121,900	Canceled
Hickey Park Canopy Gathering Area	2018	Open Space/Recreation	\$5,000	Complete

Oak Grove Cemetery Landscape Rehabilitation	2018	Historic Preservation	\$16,000	In-Progress
Thomas Brooks Park and Old Slave Wall Rehabilitation Plan Development	2018	Historic Preservation/Recreation	\$25,000	Complete
Wrights Pond Beautification	2018	Open Space/Recreation	\$5,000	Complete
Chevalier Theater Window Restoration Phase I	2019	Historic Preservation	\$88,000	Complete
North Riverbend Park Remediation Phase 1	2019	Open Space/Recreation	\$138,743	Complete
Royall House Slave Quarters Window Restoration	2019	Historic Preservation	\$45,000	Complete
Brooks Estate Electrical Upgrades	2019	Historic Preservation	\$16,000	Complete
Brook Estate Porte Cochere Copper Roof restoration	2019	Historic Preservation	\$129,921	Complete
Brooks Estate Interior Rooms restoration	2019	Historic Preservation	\$19,000	Complete
Brooks Schoolyard Restoration	2019	Open Space/Recreation	\$125,429	Complete
Missituk School Playground Restoration	2019	Open Space/Recreation	\$107,432	Complete
McGlynn Elementary School Playground design	2019	Open Space/Recreation	\$40,000	Complete
David Osgood House Window/door/exterior restoration	2019	Historic Preservation	\$132,800	Complete
Medford Library Local History Room	2019	Historic Preservation	\$296,074	Complete
Grace Episcopal Exterior Door Restoration	2019	Historic Preservation	\$15,000	Complete
North Riverbend Park Remediation Phase 2	2019	Open Space/Recreation	\$147,306	Complete
Oak Grove Cemetery WWI Monument restoration study	2019	Historic Preservation	\$50,000	Complete
Riverbend Community Garden Fence Improvements	2019	Open Space/Recreation	\$8,064	Complete
Stone Wall Restoration Phase 2	2019	Historic Preservation	\$42,000	Complete
City Parks tree plantings	2019	Open Space/Recreation	\$84,800	In-Progress
Wrights Pond Irrigation Installation/ Invasive plant removal	2019	Open Space/Recreation	\$45,000	Complete
Medford Historical Society electrical upgrades	2019	Historic Preservation	\$4,000	Complete
Duggar Park Benches	2019	Open Space/Recreation	\$3,000	In-Progress
Emergency Rental Assistance	2019	Affordable Housing	\$250,000	Complete

Emergency Rental Assistance	2019	Housing	\$20,000	Complete
Dugger Park Tennis Courts	2020	Open Space/Recreation	\$293,000	Complete
Library Exterior Space	2020	Open Space/Recreation	\$275,000	Complete
Playground Surfacing at Tufts, Capen, and Cummings parks	2020	Open Space/Recreation	\$15,000	Complete
Playstead Basketball Court	2020	Open Space/Recreation	\$76,000	Complete
Riverside Ave. Stormwater Improvement	2020	Open Space/Recreation	\$40,000	Canceled
Tufts Pool Improvements	2020	Open Space/Recreation	\$322,000	Complete
Carr Park Master Plan	2020	Open Space/Recreation	\$100,000	Complete
Gillis Park Master Plan	2020	Open Space/Recreation	\$100,000	Complete
Rental Assistance	2020	Affordable Housing	\$10,000	Complete
Medford Move-in Project	2020	Affordable Housing	\$60,000	Complete
Thomas Brooks Park Phase 1 Implementation	2020	Historic Preservation/Recreation	\$300,000	Complete
Oak Grove Cemetery Tree Survey	2020	Historic Preservation/Recreation	\$3,500	Complete
Medford Historical Society and Museum Electrical Upgrade	2020	Historic Preservation	\$4,000	Complete
Markey Memorial	2020	Historic Preservation	\$2,385	Complete
Brooks Estate Grove Street Wall Restoration	2020	Historic Preservation	\$30,000	Complete
Royall House + Slave Quarters Roof and Chimney Restoration	2021	Historic Preservation	\$80,000	Complete
Medford Community Housing: Pre-development costs: 3 affordable housing units (increased appropriation)	2021	Affordable Housing	\$355,000	In-Progress
Fire Station 4 Roof Restoration	2021	Historic Preservation	\$120,000	Complete
Medford Housing Authority: Walkling Court Pre-design	2021	Affordable Housing	\$350,000	Complete
Chevalier Theater ADA Improvements	2021	Historic Preservation	\$54,000	Complete
Riverbend Remediation Phase II (additional funds)	2021	Open Space/Recreation	\$148,000	Complete
Fire Stations 4, 5, and 6 Window Study	2021	Historic Preservation	\$75,000	In-Progress
Shepherd Brooks Manor East Elevation Restoration	2021	Historic Preservation	\$100,000	In-Progress
Oak Grove Cemetery WPA Garage Study	2021	Historic Preservation	\$50,000	Complete
Oak Grove Cemetery WWI Memorial	2021	Historic Preservation	\$400,000	In-Progress

Restoration				
Memorial Park Equipment Storage/Concession Stand	2021	Open Space/Recreation	\$17,000	In-Progress
McNally Community Garden Expansion	2021	Open Space/Recreation	\$20,000	Complete
Hickey Park Tennis/Basketball Court Rehabilitation	2021	Open Space/Recreation	\$187,400	Complete
Capen Park Splash Pad Restoration	2021	Open Space/Recreation	\$75,000	Complete
Chevalier Theater Façade Restoration	2021	Historic Preservation	\$100,000	Complete
Hormel Street Hockey Rink	2021	Open Space/Recreation	\$238,000	Complete
Wright's Pond Aeration System	2021	Open Space/Recreation	\$76,000	In-Progress
Brooks Estate Landscape Restoration	2021	Open Space/Recreation	\$24,000	In-Progress
Brooks Estate Invasive Plant Removal PH2	2021	Open Space/Recreation	\$22,000	In-Progress
Thomas Brooks Park Fieldstone Wall (additional funds)	2022	Historic Preservation	\$65,500	Complete
Brooks Schoolyard Element Replacement	2022	Open Space/Recreation	\$5,000	Complete
Roberts Schoolyard Element Replacement	2022	Open Space/Recreation	\$5,000	Complete
Shiloh Baptist Church Building Assessment and Window Restoration (non-religious)	2022	Historic Preservation	\$150,000	In-Progress
Housing Families' Homelessness Prevention Program	2022	Affordable Housing	\$10,000	Complete
Carr Park Pickleball Court Construction	2022	Open Space/Recreation	\$402,000	In-Progress
Gillis Park Fitness and Picnic Area Construction	2022	Open Space/Recreation	\$96,864	Complete
COVID Memorial Grove Design	2022	Open Space/Recreation	\$28,000	In-Progress
Dugger Park Tennis Bounceback Wall	2022	Open Space/Recreation	\$9,000	Complete
Walkling Court Predevelopment	2022	Affordable Housing	\$800,000	Complete
Isaac Hall House Building Assessment and Window Restoration	2022	Historic Preservation	\$85,000	In-Progress
Brooks Estate Access Drive Design PH2	2022	Historic Preservation	\$35,000	In-Progress
Oak Grove Cemetery Caretaker's Quarters Study	2022	Historic Preservation	\$50,000	Complete
McGlynn Middle School Accessible Playground Construction	2022	Open Space/Recreation	\$500,000	In-Progress
Hickey Park Dugout Shelter Construction	2022	Open Space/Recreation	\$90,000	In-Progress
Thomas Brooks Park Archaeological Cap	2023	Historic Preservation	\$5,000	In-Progress
Condon Shell Electrical Upgrade	2023	Open Space/Recreation	\$3,276	Complete
McGlynn Accessible Playground PH2	2023	Open Space/Recreation	\$400,000	In-Progress
Walkling Court Pre-development PH2	2023	Affordable Housing	\$800,000	Complete
Tufts Park Basketball Court Resurfacing	2023	Open Space/Recreation	\$106,625	In-Progress

Capen Park Basketball Court Resurfacing	2023	Open Space/Recreation	\$205,525	In-Progress
Shepherd Brooks Manor – East Elevation PH2	2023	Historic Preservation	\$45,000	In-Progress
Logan Park Natural Play Area	2023	Open Space/Recreation	\$229,000	In-Progress
Housing Families’ Homelessness Prevention Program	2023	Affordable Housing	\$69,000	In-Progress
Oak Grove Cemetery Access Road Study	2023	Historic Preservation	\$50,000	In-Progress
Oak Grove Cemetery Building Restoration PH1	2023	Historic Preservation	\$200,000	In-Progress
Royall House Roof and Gutter Restoration	2023	Historic Preservation	\$115,000	In-Progress
Shiloh Baptist Church ADA Improvements	2023	Historic Preservation	\$145,000	In-Progress

To view all CPA-funded projects across Medford, please view our map of all project sites at:  
[https://www.google.com/maps/d/viewer?mid=1hg1tscemDGCBs7iDdxUO\\_NYwVO4nkhg&usp=sharing](https://www.google.com/maps/d/viewer?mid=1hg1tscemDGCBs7iDdxUO_NYwVO4nkhg&usp=sharing)