



Project: Pop-Up Medford Program Guidelines

*City of Medford
Office of Planning, Development and Sustainability*

This is a generalized Program Guidelines document based on previous programs. There are no current programs planned.

A. Program Summary

Project: Pop-up Medford is an assistance program that provides eligible business owners with a short-term, subsidized retail storefront in Medford. The program aims to support business owners as they test operating a retail storefront, test new products, collaborate with other business owners, and grow their customer base in a lower-risk setting compared to traditional retail. The program will support microenterprises – businesses with 5 or fewer full-time employees, including owners.

Project: Pop-up Medford typically activates one storefront as a retail incubator for up to three (3) months and up to three (3) microenterprise business owners can apply and participate in the program.

Initial applications will be submitted to UpNext which will evaluate applicants for eligibility, retail readiness, and concept viability. Applications will open and be accepted on a rolling basis.

This program is funded through the U.S. Department of Housing and Urban Development's (HUD) Community Development Block Grant (CDBG). The program is subject to the availability of CDBG funding from HUD and to the continued eligibility of the City to receive such funds. Review and acceptance of applicants will be subject to applicable HUD regulations.

B. Program Definitions

1. *Program:* Project Pop Up: Medford offered by the City of Medford in partnership with UpNext LLC.

2. *Program Participants*: The microenterprise businesses selected to participate in the Program.
3. *Program Staff*: Economic Development Planner, Kayla Myros, who will administer and manage the Program, and Laurel Seigel, CDBG and Grants Manager, who will manage all tasks related to CDBG funding.
4. *Applicant*: An eligible business owner seeking to participate in a short-term retail pop-up.
5. *Potential Participant*: *applicants who are semi-finalists, they will be selected to submit income-verification documentation to the City of Medford and will be evaluated for success in the program.*
6. *Program Participant*: the business owner who has approved income-verification documents and was selected by UpNext and City staff for their qualifications, attitude, and readiness to succeed in the Program.
7. *Retail Pop-up*: A retail lease arrangement that is short-term by design, accommodates one or more microenterprises within a physical storefront, and provides a good or product.
8. *Microenterprise*: A business having 5 or fewer Full Time Equivalent employees, including the business owner(s).
9. *Area Median Income (AMI)*: The Area Median Income for the City of Medford, as such income limits are promulgated from time to time by HUD or its successor.
10. *Low- to Moderate-Income (LMI)*: Incomes at or below 80% of the Area Median Income.

C. Program Details:

Physical Space: The City of Medford partners with UpNext to provide a retail storefront, which will be available to Program Participants for the duration of the Program. The storefronts are located in Medford, and the rental and utility costs will be paid. UpNext will design and build out the space to accommodate a variety of business types. Program Participants will have access to a free of charge and turnkey space for the duration of the program.

Business Development Resources: UpNext will provide Program Participants with educational resources to help to prepare them to launch a successful pop-up. These resources include:

- **The Pop-Up Playbook:** a comprehensive online course that takes founders step-by-step through the pop-up process. The Pop-Up Playbook includes six video-based modules and a 150+ page workbook. This course will take each participant through planning, executing, and the daily operations of running their own brick and mortar shop. Many of the resources provided in this course will also be beneficial to microenterprises if they decide to open their own permanent storefront.
- **Pop-In Strategy: A Crash Course:** a mini-course to help microenterprises learn how to offset rent and increase revenue for a worry-free pop-up or brick and mortar

retail experience. This course can be utilized during the pop-up experience or to offset rent as microenterprise owners transition from a pop-up model to a permanent storefront.

- **Retail Marketing Foundations: A Crash Course + Social Media Launch Calendar:** a bundle of resources including a 4-week pop-up launch calendar, digital marketing campaign ideas, and an overview of how to promote your storefront.
- **Seed Stipend & Growth Potential:** participating brands will receive a stipend to be used at the business owner's discretion to support any aspect of their business including compensation, staffing, operations, marketing, etc. UpNext will work with City partners to nurture the retail incubation funnel and facilitate opportunities for brands to find permanent/ongoing storefront space nearby.
- **The Retail Playground:** participating brands will be invited to join an online community platform, where they can interact and brainstorm with fellow entrepreneurs and founders from across Massachusetts and beyond, access the UpNext team and strategic guest experts. Brands will have a two-year membership to the Retail Playground platform.

Marketing: For the duration of the Program, UpNext will market the program through their website, email newsletters, and on social media platforms. In addition to the listed marketing efforts, UpNext will help coordinate influencer visits and campaigns to help amplify the store's local reach.

Growth: UpNext will work with the City of Medford to nurture the retail incubation and facilitate opportunities for the Program Participants to find local, permanent storefront space, if interested.

D. Program Eligibility Criteria:

Interested applicants must meet the following eligibility criteria:

1. **Microenterprise:** An applicant's business must have 5 or fewer Full Time Equivalent employees, including the owner(s).
2. **Residency:** The owner of an applicant business must be a Medford resident.
3. **Income Restriction:** The total family income of all members of the applicant's family residing in the Applicant's household (including all persons aged 18 and over) must be equal to or less than 80% of Medford's Area Median Income.
 - a. *To find current income limits*, please reach out to Laurel Siegel at lsiegel@medford-ma.gov or review the Community Development Block Grant webpage at www.medfordma.org/departments/planning-development-sustainability/community-development-block-grant-cdbg-program.

Applicants will be asked to provide documentation on the total income for their family, including, but *not limited to*, tax returns, pay stubs, unemployment benefit statements, etc.

Program Staff reserve the right to reject any income verification documentation they may find to be insufficient for meeting minimum qualifications, in their sole discretion.

4. **Conflicts of Interest:** The City of Medford must follow the regulations outlined in Massachusetts General Laws, Chapter 268A, and the standards in 24 CFR 92.356 concerning conflicts of interest. Individuals who currently hold or have previously held roles related to activities supported by CDBG funds, or who have the ability to participate in decision-making processes or access privileged information regarding these activities, are prohibited from obtaining any financial interest or benefit from a CDBG-assisted activity. They are also prohibited from having an interest in any contract, subcontract, or agreement related to such activities or their proceeds, either for themselves or for individuals with whom they have family or business ties, during their tenure or for one year after.

E. Application Process

1. Applicants must apply on UpNext's webpage.
2. Applicants will be reviewed by UpNext for their business plan, ability to succeed in a short-term retail environment, compatibility with other microenterprise business owners, and availability.
3. UpNext will provide a short-list of **Potential Participants** to Program Staff.
4. **Potential Participants** will be contacted by the Economic Development Planner with instructions for program eligibility verification. **Potential Participants** will be required to submit documents for verification and will have 5 business days to submit all documentation. If an applicant does not submit the requested information within 5 business days, the review process will be terminated.
5. After the determination of eligibility is completed, Program Staff will provide UpNext with a list of verified, eligible **Potential Participants**.
6. UpNext will select the best and most responsible applicants. UpNext and each Program Participant will enter into an agreement for participation in the Program.

Applicants must be comfortable working with UpNext staff and Program Staff. Applicants must be willing and able to provide current and legal income documentation to comply with the City's grant reporting requirements.

F. Program Process

- Once selected as a **Program Participant**, the business owner will work with UpNext to launch the Program.

- The Program Participant will meet with their fellow Pop-up Cohort. The Program allows for up to 3 different business owners to co-occupy the pop-up space. Successful pop-ups rely on collaboration and coordination with fellow cohort members.
- Program Participants will set the store hours and finalize operational tasks amongst themselves. Store hours must conform with the lease agreement and local ordinances. Should they require additional help or mediation, they are able to contact UpNext representatives or Program Staff.
- Program Participants should complete pre-popup workbooks and training modules provided by UpNext.

If you have any questions or would like additional information about the *Project: Pop-Up Medford* program, please contact Kayla Myros at kmyros@medford-ma.gov or 781-393-2480.

If you need reasonable accommodation in order to complete your application, please contact Frances Nwajei at (781)-393-2439 or fnwajei@medford-ma.gov. While the municipality will do its best to accommodate you, certain accommodation requires the hiring of outside contractors who may not be available if requested immediately before the application is due.