



Maryland Department of Planning
Division of Historical and Cultural Programs

MARYLAND HERITAGE AREAS AUTHORITY GRANT PROGRAM

**CERTIFIED HERITAGE AREA OPERATING ASSISTANCE
GRANT APPLICATION
(Fiscal Year 2010)**

Information, Procedures, and Forms



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**MARYLAND HERITAGE AREAS AUTHORITY GRANT PROGRAM
OPERATING ASSISTANCE APPLICATION AND INSTRUCTIONS**

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Each applicant shall comply with all applicable Federal, State, and Local laws and Departmental policies and programs regarding drug, alcohol, and smoke free work places, disabled access and equal opportunity in employment, housing, credit practices and prohibiting discrimination on the basis of race, color, creed, religion, national origin, gender, marital status, familial status, or physical and/or mental disabilities in any aspect of the grant project.

Please be advised that in accordance with provisions of Executive Order 01.01.1983.18, if your application contains any information that may constitute personal information as defined below, you should be aware of the following:

1. Any personal information (“personal information” means any information about a natural person or his/her immediate family which identifies or describes any characteristics including but not limited to education, financial transactions or worth, medical history, criminal or employment record or things done by or to that natural person or his/her immediate family) requested by the Maryland Heritage Areas Authority (MHAA) and supplied by the applicant will be used principally for MHAA’s determination of the feasibility of the application;
2. Failure to accurately and adequately supply requested information may seriously jeopardize MHAA approval of the application;
3. MHAA will permit the subjects of any personal information in an application to inspect, amend, and correct such personal information;
4. Any document supplied to or obtained by MHAA may be a public record generally available for public inspection under the Maryland Public Information Act and COMAR 05.01.02; however, under the Maryland Public Information Act trade secrets, information privileged by law, confidential commercial data, and records describing an individual person’s finances may not be disclosed; and,

Personal information supplied to MHAA in an application may be shared with other state, local, or federal government agencies involved with the proposed financing or project.

INTRODUCTION

The Maryland Heritage Areas Authority (MHAA) Grant Program is a source of funding designed to assist and encourage preservation and economic development of heritage areas certified by the Maryland Heritage Areas Authority. Heritage area grant awards are made from the MHAA Financing Fund, a nonlapsing, revolving fund into which up to \$3 million is deposited annually. Regulations governing the program are available on the Internet at www.marylandhistoricaltrust.net under "Forms and Documents." The following is general information about the Heritage Areas Grant Program and instructions for completing an Certified Heritage Area Operating Assistance Grant application package.

ELIGIBLE ACTIVITIES

To be eligible for operating assistance under the Maryland Heritage Areas Authority Grant Program, the proposed activities must be consistent with the goals, objectives, strategies, and actions outlined in the approved Management Plan for the local Certified Heritage Area. Operating assistance may be awarded for the following types of heritage area management entity expenses:

- **Staffing**
- **Rent, Utilities, Equipment, and Supplies**
- **Contractual Services**

In addition, **heritage areas may set aside up to 25%, but not more than \$10,000, of a Certified Heritage Area operating assistance grant for discretionary purposes.** These funds may be used by the heritage area to provide assistance to heritage area partners (for example through a mini-grant program), to support one or more **non-capital** projects, or to pay for other non-capital expenses that support the goals and objectives of the heritage area management plan. **The funds may not be used to pay for capital or marketing activities.** All standard MHAA requirements for matching funds must be met for operating funds utilized for discretionary purposes.

ELIGIBLE APPLICANTS

Eligible applicants include the following:

- **Non-profit organizations and local jurisdictions** that have been identified as **management entities** of Certified Heritage Areas (CHAs).
- **Non-profit organizations and local jurisdictions** to which certified heritage area (CHA) management responsibilities have been delegated by a CHA management entity.

Non-profit organizations must be in good standing, qualified to do business in Maryland, and have the legal capacity and authority to incur obligations under the grant program. CHA management entities that currently receive direct operating support from the State of Maryland specifically for heritage area management activities are not eligible to participate in this grant program.

GRANT AMOUNTS AND MATCHING REQUIREMENTS

For Fiscal Year 2010 (FY10), eligible Certified Heritage Areas may apply for up to ***\$100,000** in operating assistance grant funds. The previous requirement that a certain percentage of an applicant's match be provided from private sector funds has been ***waived for FY10. [*NOTE: MAXIMUM FUNDING AVAILABLE FOR OPERATING ASSISTANCE GRANTS AND MATCHING FUND REQUIREMENTS ARE SUBJECT TO CHANGE BASED ON THE FINAL FUNDING APPROPRIATION APPROVED BY THE LEGISLATURE].**

All grants must be matched in an amount at least equal to the grant (dollar for dollar match). The match must consist of a **cash match equal to at least 75 PERCENT of the grant amount requested from MHAA** (e.g. if \$100,000 of MHAA grant funds is being requested, a minimum of \$75,000 of the grantees total match must be cash). The balance of project match may consist of in-kind contributions. State of Maryland funds may **not** be used as match.

EVALUATION CRITERIA

The following criteria will be considered by MHAA in reviewing operating assistance grant proposals:

- I) **CONSISTENCY WITH THE HERITAGE AREA MANAGEMENT PLAN**

- Are the activities to be performed by the Certified Heritage Area management entity consistent with the goals, objectives, strategies, standards, and actions outlined in the Certified Heritage Area management plan?
- II) **CLARITY**
- Are activities to be undertaken and the methods to accomplish those activities clearly stated, and is it clear what the products/results will be?
- III) **DESIGN**
- Are the costs outlined in the budget reasonable for the services and products being obtained?
 - Are project personnel (if known) appropriately qualified and experienced?
 - Does the budget provide a detailed breakdown of how grant funds will be expended? For consultant services are products and pay rates/fees clearly specified; for staff time being used as match, is each staff person and their job function listed and the specific number of hours and hourly pay rate for each person provided?
- IV) **LEVERAGE**
- Does the MHAA grant significantly leverage local government and/or private investment; is significantly more match leveraged than the required (required = dollar-for-dollar @ 75% cash, max.25% in-kind); is a majority of the overmatch cash?
- V) **IMPACT**
- Will the proposed activities complete or assist in completing the goals, objectives, and actions outlined in the Certified Heritage Area management plan; will the activities create new heritage tourism products; will the activities help to strengthen heritage area partner organizations and institutions; will activities contribute to the development and sustainability of the Heritage Area management entity?
- VI) **READINESS**
- Is the match firm and clearly documented to be available by the grant start date, or is some or all match not in-hand (e.g. does the application qualify some match as dependent on a non-awarded grant, requested donations, or projected future income)?
- VII) **DEMONSTRATION VALUE**
- Do any proposed activities utilize methods or techniques that are transferable for statewide, regional, or local application?
 - Do any proposed activities have the potential to be a “model” for other Certified Heritage Areas or partner organizations? Will a product unique for quality and innovation be produced?
- VIII) **ADMINISTRATIVE CAPABILITY OF APPLICANT**
- Has the applicant received previous MHAA grants that have demonstrated good administrative capability, or does the applicant have a proven record of successfully administering grants from other agencies/organizations?
 - Does the applicant have other open MHAA grant(s) from previous fiscal years? How and when will these projects be closed out?

GRANT TERMS AND CONDITIONS

All grantees will be required to enter into a grant agreement with the MHAA, which generally contains the following standard terms and conditions:

- **Grant Term**- All grant funds generally must be expended within 24 months of the effective date of the grant agreement, unless the MHAA agrees to a longer term or approves in writing an extension of the grant period.
- **Grantee Reporting Requirements**- The Grantee will submit to the Grantor progress reports of the Project which identify work completed, work still in progress and work newly initiated during the report period. The Grant Agreement will specify when progress reports are to be submitted. The Grantee will also furnish to the Grantor a Final Report of the Project that shall address how funds have been expended.
- **Grant Disbursements**- Disbursement will be made as the project progresses, pro-rated with matching funds. On request of the Grantee, MHAA may approve advance disbursements of grant funds on a case-by-case basis. Disbursements will be made upon request for payment submitted by the Grantee in a form satisfactory to MHAA, and upon fulfillment of the other requirements of the grant agreement. Documentation of all expenditures of MHAA and matching funds must be submitted to MHAA.
- **Nondiscrimination**- Each applicant shall comply with all applicable federal, state and local laws and policies and programs regarding drug, alcohol and smoke free work places, disabled access

and equal opportunity for employment, housing, credit practices and prohibiting discrimination on the basis of race, color, creed, religion, national origin, gender, marital status, familial status or physical and/or mental disabilities in any aspect of the grant project.

- Acknowledgment - Grant recipients are required to provide appropriate acknowledgment of MHAA assistance for all projects in accordance with requirements outlined in the grant agreement.

GRANT SCHEDULE

Operating Assistance Grant applications are submitted directly to MHAA. FY10 applications must be submitted to MHAA by no later than close of business on **April 3, 2009**. Once submitted, grant applications are first reviewed by MHAA staff for completeness. Complete applications are then forwarded to the MHAA Technical Advisory Committee (TAC) for review and recommendation. The recommendation of the TAC is forwarded to MHAA for review and final action at the Authority's July meeting. Meetings of the TAC and the MHAA are scheduled on an as-needed basis, but will be held, on average, not less than quarterly. Contact Richard Hughes at 410-514-7685 or rhughes@MDP.state.md.us, or visit the "Heritage Tourism" section of the Maryland Historical Trust Internet web site at www.marylandhistoricaltrust.net to learn about upcoming meeting dates and grant deadlines.

MARYLAND CULTURAL DATA PROJECT: REQUIREMENT TO COMPLETE CULTURAL DATA PROFILE

This year MHAA is engaging in a new collaborative partnership of public and private funders throughout the State of Maryland, the Maryland Cultural Data Project (MdCDP) **For FY 2010, MHAA now requires all grant applicants to complete a Cultural Data Profile through the MdCDP Web site (www.mdcdp.org).**

What is MdCDP?

This statewide data collection effort for cultural and arts organizations is designed to provide an easier grant application process through the use of a standardized form for reporting applicant financial and organizational data. Further, applicants applying to more than one of the participating grant-giving programs will only need to complete this form once each year. In addition to creating a streamlined application process, applicants will benefit from this project through an enhanced ability to track their individual data and trends over time and compare how they operate relative to their peers and to the culture and arts sector at large. Uses and potential benefits of the MdCDP project include:

- Information for participating nonprofit organizations for use in benchmarking and capacity-building.
- Information for the cultural sector for the purposes of policy and program development and public relations.
- Information for participating grantmakers for use in their application process.
- Information for elected officials regarding the effectiveness of publicly-funded grant programs

How will my organization's information be used and accessed?

Each organization will have a login and password. You will only be able to view your own organization's information. Aggregate data will be available for the purpose of benchmarking, but it will not identify any specific organization's data. When you submit your information along with an application to one of the participating funders, they will be able to view your information and use it for grantmaking purposes.

How do I complete the MdCDP Profile?

In order to complete the Cultural Data Profile, organizations must first register at the MdCDP Web site (www.mdcdp.org) by creating an organizational login ID and password. After registering, you will have access to online training and can get support from the Help Desk during regular business hours. Applicants are asked to provide two years of financial and organizational data the first time they complete the Cultural Data Profile (Going forward, groups will only need to provide one year of data.). Information for the Cultural Data Profile is organized by fiscal year and data is only entered for completed fiscal years for which an approved financial audit or review exists. Organizations that are not audited or reviewed will enter data based on approved year-end financial statements.

How do I submit my information to MHAA?

Upon completion of the Cultural Data Profile, applicants should go to the "Funder Reports" section of the MdCDP Web site and print the pre-defined report for the Maryland Heritage Areas Authority application. Relevant information from the applicant's Cultural Data Profile will automatically be imported into the report. The printed report must be included with your application materials.

Applicants should direct questions concerning the Maryland Cultural Data Profile to:

Maryland CDP Help Desk:

Toll Free: 1-866-9-MD-DATA (1-866-963-3282)

Email: help@mdculturaldata.org

The Maryland CDP Help Desk is available Monday – Friday from 9:00am – 5:00pm.

Maryland CDP Web site: <http://www.mdculturaldata.org>

APPLICATION FORMAT

MHAA Operating Assistance Grant applications must consist of the following items which are to be submitted as a single package, with hardcopy (paper) items on standard 8 ½" x 11" bond paper. The hardcopy grant application packages must be stapled in the left-hand corner and **include the *Application Cover Sheet (Appendix I)* as the first pages**. Please do not submit hardcopy applications in binders or as spiral bound books.

Hardcopy (Paper) Applications

All applicants must submit **one (1) paper original with original signatures where required, and eleven (11) paper photocopies** of the following materials:

1. **Cover Sheet.** The form and instructions for completing the cover sheet are attached as **Appendix I**. This form must be attached to the front of the application package. Please print out just the completed fill-in form pages, not the entire application form, and attach to all other application materials.
2. **Narrative Description.** Please refer to the outline shown in Appendix II.
3. **Budget.** The budget form and instructions for completing it are attached as Appendix III.

In addition, all applicants must submit **two paper copies only** of the following supporting documentation (**it is not necessary to submit electronic/digital versions** of the following supporting documentation):

4. **Resumes of key project personnel.** Include the resumes of management entity staff and, if known, people such as consultants and project monitors who will perform key activities under the grant.
5. **Proof of matching funds.** This may consist of a financial statement, commitment letter, or other proof that the applicant has matching funds or in-kind contributions dedicated for the project.
6. **Proof of nonprofit status (if applicable) and SDAT Standing.** If the management entity is a non-profit organization, proof of non-profit status must be submitted in the form of a copy of the applicant's Articles of Incorporation, By-laws, and Internal Revenue Service 501 (C)(3) approval letter (**copies do not need to be submitted if the materials were previously submitted and no changes have been made**).

In addition, the applicant organization must be in good standing with the State of Maryland Department of Assessments and Taxation (SDAT); MHAA will verify the applicant's current status prior to disbursement of grant funds. Applicants must verify their current standing at the Maryland Department of Assessments and Taxation's website at www.dat.state.md.us/ [select "Business Data Search," then from the Main Menu select "Business Entity Information (Charter/Personal Property)"]. Print out the displayed page and attach it to the completed grant application form.

7. **Letters of support.** At least three letters of support for the application for operating assistance must be submitted, including at least one letter of support from each of the following: a State Senator, State Delegate, and local governmental entity from within the Certified Heritage Area. Additional letters of support are welcome and taken into consideration by MHAA.
8. **Heritage Area Management Entity Letter of Authorization.** If the applicant is a non-profit organization or local jurisdiction that has been delegated responsibility for implementation of all or some of the heritage management plan, a letter from the official Certified Heritage Area management entity authorizing submission must accompany the application.

Electronic/Digital Application

Two electronic/digital copies of Items 1, 2, and 3 only must also be submitted on a CD-R (Compact Disc-Recordable) disk. Use Microsoft Word® or another program readable by Microsoft Word® to produce the electronic version. If preferred, the Project Budget may be submitted as a Microsoft Excel® or another program readable by Microsoft Excel® file. Each CD-R disk must contain a copy of this application form with all applicable fill-in form sections completed, please assign the file a new descriptive file name (e.g. AnacostiaOperatingFY10.doc). Also include any other supporting files you created for your application (e.g. photographs, scanned documentation, etc.).

APPLICATION ASSISTANCE

An MHAA Operating Assistance Grant Application Cover Sheet (Appendix I), Operating Assistance Narrative Description (Appendix II) and Operating Assistance Budget (Appendix III) are attached. For your convenience, this application is also available on the Internet at www.marylandhistoricaltrust.net/ under “Forms and Documents.” For questions regarding the preparation of your application, please contact Richard Hughes at 410-514-7685, rhughes@MDP.state.md.us or Amanda Murphy at 410-514-7612, amurphy@mdp.state.md.us .

APPLICATION SUBMITTAL

Applications must include the **paper** and **electronic/digital** materials specified above in the “**APPLICATION FORMAT**” section. Please mail or deliver MHAA grant application packages to:

**Richard Hughes, Administrator
Maryland Heritage Areas Authority
Maryland Historical Trust
100 Community Place
Crownsville, MD 21032-2023**

SAMPLE

READ THIS FIRST!



**Instructions for FY 2010 Electronic Application Fill-In Forms
(Appendices I, II, III, IV, V, and VI)**

The following Appendices are Microsoft Word fill-in form documents. Save this file to your computer **using a different file name** that is descriptive of your project, e.g. Pin Oak Trail Signage.doc. To read this file on your computer use your mouse and the scroll bar on the right of the screen to scroll up and down. Clicking anywhere in the file will automatically take you to the fill-in forms portion of the document. It is recommended that you print a copy of this form so you can have it available while completing the fill-in forms below.

All items on the electronic forms that require a response from the applicant are represented by **gray squares** or [brackets]. If you do not see gray squares or brackets in your document, you may have to turn on “Bookmarks.” Go to “Help” or “?” and search on “Bookmarks” for instructions on how to turn on bookmarks in your word processing program. The gray squares or brackets should now appear in the form section of the document. Clicking on a gray square or area in the brackets will enable you to insert a response to a question. The text areas are expandable. As you type, the text areas will expand to allow for text to run beyond the visible space.

For your required **hardcopy paper copies**, please print out just the completed fill-in form pages, **not the entire application form**, copy and attach to any other required materials.

For the required **two electronic/digital copies**, save a copy of this application form with all applicable fill-in form sections completed, please use a different descriptive file name (e.g. Jones House Rehab.doc). Also include any other supporting files you created for your application (e.g. photographs, scanned documentation, resumes, etc.).

APPENDIX I: OPERATING ASSISTANCE GRANT COVER SHEET INSTRUCTIONS

I. CERTIFIED HERITAGE AREA INFORMATION

1. Indicate the name of the certified heritage area for which operating assistance is being requested.
2. Indicate the year in which the heritage area was certified.
3. Please provide the name of each county in which the heritage area is located.

II. APPLICANT INFORMATION

1. Indicate the legal name of the applicant heritage area management entity or the organization(s) or local jurisdiction(s) to which heritage area management responsibilities have been delegated by the CHA management entity.
2. Indicate the mailing address of the applicant identified #1 above. Indicate the street address of the applicant if different from the mailing address.
3. Indicate the name and title of the individual who will serve as the applicant's contact person for the grant. The contact person should be someone very familiar with the application.
4. Indicate the phone number(s) of the contact person where they may be reached during business hours.
5. Indicate the e-mail address of the contact person.
6. Indicate the fax number of the contact person.
7. Indicate the applicant's EIN number (federal employer identification number). This nine-digit number is assigned by the Internal Revenue Service and usually begins with 52-_____.
8. Indicate the state legislative district(s) & sub-district(s) included in the Certified Heritage Area. It is important that correct legislative district information is provided. If you are unsure of the district or districts in the Certified Heritage Area, please contact your local library for this information, or visit the Maryland General Assembly Website at <http://mlis.state.md.us> ;or see <http://mdelect.net/> .

III. DESCRIPTION OF ACTIVITIES

1. Briefly summarize what types of activities and expenses the operating assistance award will be used to cover. **PLEASE DO NOT ADD PAGES TO THE BRIEF SUMMARY.** Be as specific as possible about the types of activities you will undertake and the products you will produce in the upcoming year. *You can describe activities in more detail later in your Operating Assistance Narrative.*

IV. OPERATING ASSISTANCE BUDGET

1. Provide the amount of grant funds requested from MHAA. *Keep in mind that a maximum of \$100,000 is available per Certified Heritage Area for Certified Heritage Area operating assistance. **[*SUBJECT TO CHANGE BASED ON FY 2010 APPROPRIATION].**
2. Provide a breakdown of the amounts of required cash and in-kind match. MHAA grants require a minimum dollar-for-dollar match (i.e. the amount of required cash and in-kind match must equal the total amount of grant funds requested from MHAA). *NOTE: If additional cash or in-kind funding is being used to complete the project, those additional amounts should be reported on Lines 3a and 3b.
 - a. Provide the amount of required cash match the applicant will provide for the project. Remember that **cash match** must comprise **at least 75%** of the minimum required dollar-for-dollar match, although it may be any amount between 75% and 100% of the required match. For example, if \$100,000 of MHAA grant funds is requested, cash match must equal at least \$75,000, but can be up to \$100,000. (*NOTE: **State funds may not be used as match, including funds annually granted to DMOs through the MD Office of Tourism Development's County Cooperative Grants Program.**)
 - b. Provide the amount of in-kind contributions the applicant will provide. Remember that in kind contributions may comprise **no more than 25%** of the required dollar-for-dollar match.
 - c. Provide the total amount of **all required** cash and in-kind match the applicant will provide (add Lines 2a and 2b). **This total amount must equal the amount being requested from MHAA on Line 1.**
3. If applicable, provide the amount of additional cash and in-kind funding that is being used for Heritage Area management entity operating activities. This includes cash and in-kind contributions **in excess of the amount being requested from MHAA (Line 1) and the total required cash and in-kind match (Line 2c).**
 - a. Provide the amount of additional cash funding being utilized.
 - b. Provide the amount of additional in-kind contributions being utilized.
 - c. Provide the total amount of **all additional** cash and in-kind funding being utilized (add Lines 3a and 3b).

4. Provide the Total Project Cost (the sum of Lines 1+2c+3c).

V. PUBLIC INFORMATION DISCLOSURE

MHAA intends to make information available to the public regarding grant requests under the MHAA Grant Program. Information contained in this application may be confidential under Maryland's Access to Public Records Act. If you consider your information confidential and do not want it made available to the public, you must indicate so in writing and attach your objection to this application. By signing on the space indicated, you agree that not attaching an objection constitutes your consent to the information being made available to the public and a waiver of any rights you may have under the Act regarding this information.

SAMPLE

APPENDIX I: MHAA OPERATING ASSISTANCE GRANT APPLICATION COVER SHEET

I. CERTIFIED HERITAGE AREA INFORMATION

- 1. Name of Certified Heritage Area: _____
- 2. Date of Certification: _____
- 3. County(ies) included in Certified Heritage Area:

II. APPLICANT INFORMATION

- 1. Full Legal Name of Applicant Organization:

- 2. Mailing Address: _____
City, State, Zip Code: _____
Street Address (if different from above): _____
- 3. Contact Person: _____ Title: _____
- 4. Telephone: (Office) _____ (Other Telephone) _____
- 5. Email Address: _____ 6. Fax Number: _____
- 7. Applicant's Federal Employer Identification Number (normally 9 numbers beginning with 52, e.g. 52-1234567):

- 1. State legislative district(s) & sub-district(s) included in the Certified Heritage Area (e.g. 1, 1A, 2B, 3, 3C).
Please ensure accuracy. (Information is available online at <http://mdelect.net/> and <http://mlis.state.md.us/>):

+III. NARRATIVE DESCRIPTION

- 1. Brief narrative describing the how the operating assistance funds will be used and proposed activities that will be undertaken (use this space only):

IV. OPERATING ASSISTANCE BUDGET

- 1. **Amount requested from MHAA** \$ _____
- 2. **Required Match**
 - a. Applicant's cash match (*Must equal at least 75% of Line 1) \$ _____
 - b. Applicant's in-kind match (may be no more than 25% of Line 1) \$ _____
 - c. Total of Cash & In-kind match (*Sum of Lines 2a+2b must equal Line 1) \$ _____
- 3. **Additional Operating Funding, if applicable** (*Above minimum required dollar-for-dollar match)
 - a. Applicant's Additional Cash Project Funding \$ _____
 - b. Applicant's Additional In-Kind Project Funding \$ _____
 - c. Total of Additional Applicant Cash & In-kind Project Funding (Sum of Lines 3a+3b) \$ _____

6. **TOTAL OPERATING COST** (Sum of Lines 1+2c+3c)

\$ _____

MHAA intends to make available to the public certain information regarding projects for which an application has been submitted under the MHAA Grant Program. The information available to the public will include the information in this grant application as supplemented or amended. This information may be confidential under Maryland's Access to Public Records Act. If you consider this information confidential and do not want it made available to the public, please indicate so in writing attached to this application. You agree that not attaching an objection constitutes your consent to the information being made available to the public and a waiver of any rights you may have under the Act regarding this information.

I have read and understand I have waived confidentiality of information as described above.

Applicant's Signature

Date

SAMPLE

APPENDIX II: OPERATING ASSISTANCE NARRATIVE DESCRIPTION

Please address all items listed in the following narrative description completely and concisely on 8 ½" x 11" bond paper. **Two (2) electronic/digital copies** of the full application must also be submitted on two separate CD-R (Compact Disc-Recordable) disks; label the disks with the heritage area name, Fiscal Year grant being applied for, and the program used to create the files (e.g. Microsoft Word 2003). Use Microsoft Word® or another program readable by Microsoft Word® to produce the electronic version.

ACTION PLAN

I. Overview

Describe the operating assistance needs for management of the heritage area, providing background information on the management structure and funding of the applicant. How will MHAA funding enhance the heritage area? Briefly discuss (additional information will be provided in Section "VIII. Sources of Funds" below) what major non-MHAA sources of funding currently are being utilized to support the Certified Heritage Area's operations (e.g. County support, fundraising events, memberships, donations, etc.), and what efforts the heritage area is making to secure additional funding from sources other than MHAA.

II. Methodology

Describe the activities for which operating assistance funding is being requested and describe how they are consistent with the goals and objectives of the Heritage Area management plan. Outline each step you will use to accomplish those activities.

III. Timetable

List specific deadlines (month/day/year) for each element of your funding request, as applicable. For example:

Activity	Anticipated Completion Date
Produce and mail quarterly newsletter and e-newsletter	Quarterly
Hold Board training workshop	Complete by August 31, 2009
Advertise Mini-Grants	By September 30, 2009
Design and print Heritage Area nature trails brochure	By November 30, 2009
Oversee design, production, installation of wayfinding signage	By December 15, 2009
Update Heritage Area web site	December 15, 2009
Submit Mid-Project Progress Report to MHAA	By December 31, 2009
Award Mini-Grants	By January 15, 2010
Complete RFP for Fundraising Plan development	By March 15, 2010
Hold grants workshop	By March 31, 2010
Prepare two grant applications for Maryland Day events	By April 30, 2010
Consultant submits Fundraising Plan	By May 31, 2010
Provide technical assistance to MHAA project grant applicants	Ongoing
Submit Final Report, Financial Documentation, and Disbursement Request to MHAA	By June 30, 2010

INSERT TIMETABLE:

IV. Products

What tangible products will you generate, if any (e.g. heritage area brochures, newsletters, guidebooks, studies, signage, etc.)?

PERSONNEL

VI. Coordination

Who will staff your organization's heritage area activities and who will be responsible for the various components of the heritage area's operations? Describe the qualifications of the staff and attach resumes of potential staff members and consultants.

VII. Grants Management

Describe your organization's administrative and financial experience and ability to manage a grant of this type. List the name, title, address, daytime phone number, email address, and fax number of the individual(s) who would manage this grant.

FINANCIAL SUPPORT

VIII. Sources of Funds

- A. Identify and describe the source, type, and amount of funds your organization currently has in hand for this grant. Documentation that these funds are in hand must be submitted as part of this application.

- B. Identify and describe the source, type, and amount of funds for which your organization has commitments to support heritage area operations prior to the start of the grant. Provide the names, addresses, and daytime phone numbers of these sources.

IX. Other Support for the Project

Identify and describe support for the heritage area by state, county, or local governments, private, non-profit preservation organizations, or other heritage area partners. A letter of authorization from the certified heritage area management entity must accompany the application if the applicant is not the heritage area management entity.

APPENDIX III: OPERATING ASSISTANCE BUDGET

Use the attached budget sheet to prepare a budget. You may use the attached budget sheet as a template if you prefer to create your budget in a word processing, spreadsheet, or other computer program. **You must also submit an electronic/digital version of your budget, please provide a copy on CD-R or 3.5" floppy disk with your application** (you may put your budget and project narrative on the same CD-R or floppy disk); please label the disk(s) with the heritage area name, and the names of all files and the programs used to create them. The budget should specify such expense categories as personnel, travel, equipment, supplies, rental costs, etc. The following sample budget is provided to illustrate both the process and format MHAA grant budgets must follow.

1. First, calculate your total cash needs for operation of your heritage area responsibilities. In this example, cash is required for Executive Director and Office Manager salaries and benefits, telephone/internet service, copier use, travel, office supplies, and contractual services.
2. Calculate the available in-kind match. In this example, office space and furniture has been donated for the heritage area's use. The time spent by the heritage area management entity's volunteer steering committee members is also included.
3. Add the total cash needs and available in-kind match together to find the total operating budget.
4. Enter the line items on the budget page provided. Items should be organized by cost category so that similar costs are grouped together, regardless of whether they are cash or in-kind items. Rates of pay or similar cost breakdowns should be included in each line item. Attach any estimates you have obtained to support your budget.
5. Finally, identify the sources of matching funds and in-kind match.

LINE ITEMS	MHAA GRANT	CASH MATCH	IN-KIND MATCH	TOTAL
PERSONNEL				
Executive Director (Full-time, Annual Salary)	\$22,000	\$20,310		\$42,310
Office Manager (\$16/hr X 25 hrs/week X 50 weeks)	\$10,000	\$10,000		\$20,000
Benefits (18%)	\$5,600	\$5,600		\$11,200
Steering Committee (\$20/hr X 175 hrs)			\$3,500	\$3,500
MATERIALS				
Telephone/Internet	\$2,000			\$2,000
Copier (annual rental)		\$800		\$800
Office Supplies		\$790		\$790
Office Space (Rental @ \$500/month X 12 months)			\$6,000	\$6,000
Furniture/Equipment (Rental @ \$250/month X 12 months)			\$3,000	\$3,000
Travel: <ul style="list-style-type: none"> • Assoc. of National Heritage Areas meeting, Phoenix, AZ Nov. 12-14 (Airfare \$400; Hotel \$350; Meals \$200; Registration \$150) • Governor's Annual Tourism Conference, Ocean City, MD Oct. 11-13 (Hotel \$350; Meals \$200; Registration \$175) • Mileage to meetings, site visits (\$0.55/mi. x 681 miles) 	\$2,200			\$2,200
Training Workshops X 2 (Facility rental; refreshments; copying/printing materials)		\$550		\$550
CONTRACTUAL SERVICES				
Newsletters (4 issues X 5,000 copies per issue X \$0.10/per copy)	\$2,000			\$2,000
Annual Report (400 copies X \$3.00/per copy)	\$1,200			\$1,200
Web hosting (\$200/month X 12 months)	\$2,400			\$2,400
DISCRETIONARY FUNDS				
Mini Grant Program (Minimum award = \$500, Max. award = \$2,500)	\$10,000	\$5,000		\$15,000
TOTALS	\$57,400	\$43,050	\$12,500	\$112,950

Identify source(s) of non-state matching funds and in-kind match. If more than one organization is providing support, identify each organization and the kind and amount of support.

Donor: Local Government ABC
Source: Operating Budget
Kind: Cash
Amount: \$30,000
Date Available: July 1, 2006

Donor: Local Government XYZ
Source: Donated Materials
Kind: In-Kind
Amount: \$9,000 (office space and furniture)
Date Available: Now

Donor: Various
Source: Fundraising
Kind: Cash
Amount: \$13,050
Date Available: July 1, 2006

Donor: Steering Committee Members
Source: Donated Time
Kind: In-Kind
Amount: \$3,500
Date Available: Now

SAMPLE

MHAA OPERATING ASSISTANCE GRANT BUDGET

SAMPLE

Identify source(s) of matching funds and in-kind contributions. If more than one organization is providing support, identify each organization and the kind and amount of support. Use additional pages if needed to identify all sources of matching funds.

Donor:
Source:
Kind:
Amount:
Date Available:

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