

HISTORIC PRESERVATION CAPITAL GRANT PROGRAM

FISCAL YEAR 2021

GRANT GUIDELINES

*completed grant applications
must be submitted ONLINE by
March 22, 2021 at 11:59 p.m.*

Access the online grant application from:

<http://mht.maryland.gov/grants.shtml>

Contact/Program Administrator:

Barbara Fisher

Capital Grant Administrator

barbara.fisher@maryland.gov

410-697-9574

Maryland Historical Trust

100 Community Place
Crownsville, MD 21032-2023
www.mht.maryland.gov



MARYLAND HISTORICAL TRUST MISSION STATEMENT

The Maryland Historical Trust is dedicated to preserving and interpreting the legacy of Maryland's past. Through research, conservation and education, the Maryland Historical Trust assists the people of Maryland in understanding their historical and cultural heritage.

The Maryland Historical Trust is a unit of the Maryland Department of Planning (MDP).

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General Information

Program Overview

The Maryland Historical Trust's **Historic Preservation Capital Grant Program** (the "Program") promotes preservation of historic properties in Maryland that serve a high public purpose. The Program offers assistance to non-profit organizations, local jurisdictions, business entities, and private citizens.

Individual grant awards will range from a suggested minimum of \$10,000 to a maximum of \$100,000. An applicant entity must only submit one application per property; however, each applicant entity may submit separate applications for individual properties.

Eligible Projects

Capital projects that promote the preservation of historic properties are eligible for assistance. Projects may include:

- Acquisition
- Rehabilitation
- Restoration
- Predevelopment costs such as studies, surveys, plans and specifications, and architectural, engineering, or other special services directly related to a capital project (these are only eligible costs for nonprofit organizations and local government applicants)

Work, or a discrete phase of work, that is already underway or completed is not eligible for grant funding. See Exhibit 3 of this document for a complete list of eligible and ineligible costs.

All projects funded through this program are subject to MHT review before project work commences and must comply with the Secretary of the Interior's Standards for Treatment of Historic Properties (36 CFR 68), found at <http://www.nps.gov/tps/standards.htm> .

See "Project Design Tab" section of this document for more information on eligible projects.

Eligible Properties

- All properties must be eligible for or listed on the Maryland Register of Historic Properties, either individually or as a contributing structure within a district.
- Structures used for religious purposes are generally eligible for assistance only for exterior and structural work and are reviewed for eligibility on a case-by-case basis. Spaces used primarily for religious / worship purposes or elements bearing religious imagery are not eligible for funding.
- The property owner must convey a preservation easement to MHT (for more information, visit <https://mht.maryland.gov/easement.shtml>).
- The property owner must provide written permission to undertake the project and willingness to convey the preservation easement.

See “Property Tab” section of this document for more information on property eligibility.

Eligible Applicants

The following entity types are eligible for this program. All applicants should be aware that the project must have a demonstrated public benefit in order to be competitive.

- Nonprofits
- Local governments
- Business entities
- Individuals

State and federal government entities are eligible to apply as nonprofits. However, projects involving state and federally owned properties cannot comply with the requirement to convey a preservation easement to MHT and therefore are not expected to rank highly enough for funding.

See “Applicant Tab” section of this document for more information on applicant eligibility.

Contact Information and Workshops

Workshops about this grant program will be held across the state in November. See MHT’s website at http://mht.maryland.gov/grants_capital.shtml for more information, including dates, times, and locations. For questions about the program or application process, please contact the program administrator listed on the cover sheet of this document.

Application Process

Grant applications will be due at 11:59 pm on March 22, 2021.

Access the online grant portal at: <http://mht.maryland.gov/grants.shtml>

Applications will be available at this site on February 8, 2021.

- A sample application with all questions is available on the program webpage at https://mht.maryland.gov/grants_capital.shtml on the left hand menu.
- The application is organized in tabs within the online application portal. Information about each tab is detailed in the following pages.
- Please note that all questions with a **red asterisk (*)** require answers. You will not be allowed to submit your application without first answering these questions or uploading the required documents.
- When you have submitted your application successfully, you will see a confirmation message on the screen, and you will receive a confirmation e-mail.
- It is not necessary to submit a hard copy of your application or attachments.
- Please review the Quick Start guide available here: <https://mht.maryland.gov/documents/PDF/grants/Quick-Start.pdf> before beginning your grant application. This document will give you valuable tips on how to use the online application system.
- The application process for FY2021 will NOT require an Intent to Apply Form. Please submit an application between 2/8/2021 and 3/22/2021.

“Project Design” Tab

In this section you will describe the **proposed construction project**. Please describe **ONLY** the construction project in this section. Other sections of the application will provide the opportunity for you to describe your organization, the history of the property, and the urgency of the project.

Grant Project Title – Use the name of the property for the project title. If your property has multiple structures, and the grant project will only involve a limited number of them, please indicate that, for example, Skoog Farmstead – Dairy Barn.

Construction Project Description – describe your overall construction project, including work that will be funded through other sources.

Grant Project Scope of Work – describe **ONLY** work that will be paid for with grant funds or required matching funds.

Please ensure that the proposed project is an eligible project.

- **To be eligible, work must consist of construction-related costs with an expected useful life of at least 15 years.**
 - Rehabilitation or restoration work on a historic structure.
 - Acquisition of a historic property or archaeological site.
 - Pre-development costs that are part of a construction project (non-profit organizations and local government applicants only), for example:
 - historic structure reports
 - architectural plans, specifications, and construction documents
 - archaeological investigations necessary for the conduct of a capital project
 - Examples of ineligible costs: staff salaries, new construction, additions, landscaping, legal fees, insurance premiums, appraisal fees, master planning, and feasibility studies. **See Exhibit 3 for a more in-depth list of eligible/ineligible costs.**
- **Work must adhere to the Secretary of the Interior’s Standards for the Treatment of Historic Properties (36CFR Part 68).**
 - If your application describes a project that does not substantially conform to the Secretary’s Standards, your application will be deemed ineligible and not evaluated for funding.
 - The Standards are available on the National Park Service website:
<http://www.nps.gov/tps/standards/rehabilitation/rehab/stand.htm>
- **Grant funds may only be used for a new phase of work**, NOT for work that is already underway or complete.

- Projects for which funding has been received from the Program may seek funding again in subsequent fiscal years provided that funding is sought for a different phase of the overall project. Funding of any phase of a project does not guarantee funding in any future phase of the project. Contact the program administrator if you need help describing a discrete phase of work.
- **Notes on special property types:**
 - **Structures used for religious purposes** may be eligible for grant assistance generally for exterior / structural work only and will be reviewed for eligibility by MHT on a case by case basis. Spaces or objects used primarily for religious purposes are not eligible for funding. Interior work on spaces that are not worship spaces may be eligible for funding. Contact the program administrator for feedback on eligibility.
 - **Cemeteries** may be eligible for grant assistance under specific circumstances.
 - Cemeteries generally do not rank highly for funding unless their exceptional significance is clearly demonstrated, i.e. association with significant individuals, distinctive design features, association with historic events, or importance of the information they impart. The applicant must make a compelling case for the exceptional significance of the cemetery. See National Park Service guidance: <https://www.nps.gov/subjects/nationalregister/upload/NRB41-Complete.pdf>
 - Eligible capital expenses for a cemetery may include pre-development costs, grave marker cleaning and repair, or repairs to historic cemetery features such as walls.
 - Applicants with cemetery-related projects should ensure that the owner(s) of the cemetery can be identified and will express their support of the project in the letter required under the "Property & Regulations" tab.
 - Applicants with cemetery-related projects should pay special attention to MHT's easement requirement, which may be a condition of the grant award. Often the easement requirement cannot be met if individual burial plots are individually owned.
- **Please contact the program administrator if you are unsure whether your proposed work will be eligible.**

Key Steps and Timeline – provide bullet points of the major steps in the project. Be sure to indicate which steps will be paid for with grant funds.

- You will need to demonstrate that you will be able to complete the project within the two-year window for the grant.
- **See Exhibit 1 for the grant evaluation and administration schedule.** This document will help you understand an approximate time frame for your grant but should not be used as an exact basis for your project-specific timeline.
- Please enter your timeline in the space provided on the application, using list form rather than narrative form. **See Exhibit 2 for a sample timeline.**

Scoring criteria applicable to this section:

- **PROJECT SCOPE & PRIORITIZATION:** Does the proposed project contribute to or assure long-term preservation of the resource or of Maryland’s culture and heritage? Does the project provide concrete action to protect the resource(s)? Does the project address the most pressing needs and assure continued viability of the resource(s)? Will the project provide a complete product? (If one phase of a multi-year project, this refers to the completeness of this year’s phase alone.) Will this be the final phase of a project that is nearing completion? Will the project design minimize long-term maintenance costs?
- **PROJECT GOALS & LEVEL OF PRESERVATION:** Are project goals and scope consistent with the mission and goals of the Maryland Historical Trust? Does this project focus on preservation or repair of important historic features or materials, rather than modernization? Will this project allow the public to experience or access the site, or will the project assist the grantee with pandemic recovery?
- **PROJECT SCHEDULE:** Is the project ready to begin when indicated? Will the grant schedule align with the project schedule (i.e. depending on grant-related paperwork, funds are unlikely to be available until late summer or early fall at the earliest). Can the proposed work be completed within two years? Has a realistic sequence with appropriate work steps been developed?

“Budget” Tab

On this tab, you will be asked to describe the **budget for your grant project in detail**. Make sure that the line items in your budget spreadsheet match the project narrative you described on the “Project Design” tab.

Project Budget Information You Will Provide

- **Upload a budget spreadsheet using MHT’s form.**
 - The spreadsheet can be downloaded within the application, or from the MHT website in the left-hand menu at https://mht.maryland.gov/grants_capital.shtml
 - The downloadable spreadsheet contains a sample budget, a blank form, and instructions for filling out the form.
- **Application questions:**
 - **Grant Funds Requested**
 - Individual grant awards are expected to range from a minimum of \$10,000 to a maximum of \$100,000.
 - Grant requests should be in an even increment of \$1,000.
 - Some expenses that may be incurred by the grantee in the course of the grant project (insurance; utility bills; legal fees; etc.) CANNOT be reimbursed out of the grant funds. **See Exhibit 3 for a table which describes eligible and ineligible costs.**
 - **Cash and In-Kind Match**
 - All applicants **except for non-profit organizations** are required to provide 1:1 match and documentation of that match. See below for additional instructions.
 - Non-profit organizations should leave this section blank.
 - **Other Project Funds**
 - Document any **non-state funds that are committed** to the grant project above and beyond the required match. Identify the source and amount of these funds, and also include them in the “Other Project Funds” column of the budget spreadsheet.
 - Non-profit organizations should include any additional non-state funds in this category, rather than as match.
 - **Other Financial Components**
 - If you have received state funds that will be used for this grant project, describe them here. Examples include MHAA grants, AAHPP grants, CORE funds, or bond bill funds.
 - If you are seeking additional funds but have portions of the project that are currently unfunded, describe those efforts and needs here.

Matching Fund Requirements (for applicants required to provide match)

- **Required match can be any combination of cash or in-kind services/donations.**
- **Eligibility of match**
 - See Exhibit 3 for a detailed table of eligible and ineligible match.
 - State funds are ineligible as match.
 - Funds may not be match for any other state or federally assisted program.
 - The cost to acquire a property may not be used as matching funds unless the grant project is exclusively for acquisition purposes.
 - Match must be necessary and reasonable for proper and efficient accomplishment of the grant project.
 - Match must be verifiable (see documentation requirements below).
 - Match must be incurred and contributed within the grant period, as defined by the Grant Agreement.
 - Match must be provided for in the scope of work of the Grant Agreement.
- **Documentation of match**
 - **Match must be documented as in-hand/committed at the time of application.**
Failure to provide all proposed matching funds may result in a reduction or forfeiture of grant award funding.
 - Match documentation may consist of one or more of the following. If you have any questions or situations which are not covered here, please contact the program administrator:
 - A bank statement or official treasurer's report showing cash in hand.
 - Letters from donors; the letter needs to show clearly that the intended donation may be used toward the grant project and must be signed.
 - Award letters for non-state grants; documentation must be included to demonstrate that the grant may be used toward the grant project.
 - Loan commitment letters; documentation must be included to demonstrate that the loan proceeds may be used toward the grant project.
 - For donated materials, a signed statement or receipt / invoice from the donor attesting to the value of the materials.
 - For a government entity, a budget document clearly showing the line item(s) from which match is committed – highlight the relevant sections.
 - For volunteered time or donated services, a signed statement from the donor stating the number of hours expected to be donated, the hourly rate, the total amount of the donation, and a description of the services.
 - Use the current hourly rate of volunteer time set for the state of Maryland by the organization Independent Sector:
http://www.independentsector.org/volunteer_time
 - Donated professional or construction services may count as in-kind match and should be calculated based on the individual's customary hourly rate.
 - Members of your organization's board may use their professional rate only if donating professional services to the project (e.g. architectural services) but should use the Maryland volunteer rate for board time spent on the grant project (e.g. meetings).

Scoring criteria applicable to this section:

- **PROJECT BUDGET:** Is the overall budget realistic for the proposed project? Are the costs reasonable and necessary? Are all costs eligible?
- **FINANCIAL CAPABILITY:** Does the applicant provide any funds above and beyond those required by match (\$0 for non-profit organizations, 1:1 match for all other applicants)? Are there sufficient funds to complete the phase of work that will be funded by the grant?

“Significance & Urgency” Tab

On this tab you will describe **the property, its history and significance, the current importance of the property, and the urgency of the project.**

Occupant Significance – What role does the property have in helping the site occupant/steward organization meet its mission?

Community Significance – What role does the property play in the local community today? Will this project improve the relevance of the property to the local community?

Property Historical Significance – Provide a concise description of the historical significance of the site. Does it have important associations or special historical or architectural features?

History of Construction/Alterations – If known, please provide the approximate date of construction of the property, as well as the dates of any significant alterations or additions completed in the past.

Urgency – What are the most urgent needs of the property? If the property has other urgent needs, have they been addressed? Does this project provide a unique, time-limited opportunity?

Scoring criteria applicable to this section:

- **SIGNIFICANCE OF THE PROJECT:** To what extent will the project acquire, rehabilitate, or restore sites, buildings, or objects significant in the prehistory, history, archaeology, architecture, engineering, or culture of the State of Maryland and listed on or eligible for the Maryland Register of Historic Places? Does the property demonstrate a high level of integrity of historical features and materials? Is the property unique? Is the property an excellent example of its kind (e.g. use, architectural style, era)? How is the property important to the mission of the occupant organization and to the local community?
- **URGENCY:** Is the resource imminently endangered (e.g., by development pressures, erosion, neglect) or is there a unique window of opportunity to complete the proposed project?

“Public Benefit & Impact” Tab

On this tab you will discuss the **public benefit, educational value, and public access of your property and project**. You will also describe **partnerships and impact of your organization and property**.

Describe the benefit and objectives of the completed project to the general public

- How does (or will) the site serve the public and local community?
- Public benefit can be broadly defined, but special emphasis should be placed on public benefit related to MHT’s mission and the history of Maryland.

Education and interpretation

- How does (or will) the site contribute to increase public awareness and understanding of Maryland’s history?
- Does your site offer interpretation or education about any of the following themes:
 - The history of the site or local community?
 - History of underrepresented communities, for example, women’s history, Hispanic history, African American history, Asian history, Native American history, or LGBTQ history?
 - Broader historical themes, for example, industrial history or agricultural history?

Property use

- Include a brief explanation of how the property is currently used.
- If the grant project will cause a change in use, or a major change is anticipated in the near future, please also briefly describe that here.

If this is a religious site, please explain whether it is actively used for worship or has been converted for secular use. See the previous “Project Design” section for information on project eligibility for religious sites.

Public Access

- When/how often is the property open to the public?
- What amenities are available to the public at the site?
- What provisions exist or will be made for physical or programmatic access by individuals with disabilities?

Impact

- Will this project use unique or innovative techniques that may be a model for other projects?
- Does this site support community groups or is it used to promote unique partnerships or community opportunities?
- Will the project stimulate other preservation projects?

Scoring criteria applicable to this section:

- **PROJECT GOALS:** Are project goals and scope consistent with the mission and goals of the Maryland Historical Trust?
- **PUBLIC BENEFIT:** What is the planned use of the project and what are its benefits to the general public? What level of public access will be provided? Will the property be accessible to individuals with disabilities?
- **EDUCATIONAL & DEMONSTRATION VALUE:** How permanent and far reaching is the educational component of the project? Does the property offer interpretation of the site, heritage, or resource? Does the project have the potential to be a model or an innovator?
- **LEVERAGE:** Will the project stimulate or prompt other preservation projects or programs throughout the community and/or professional preservation support?

“Support” Tab

On this tab you will provide information about **letters of support** for your project.

Please submit or request to be submitted at least two letters of support. One of these should be from an elected official from your project’s local jurisdiction. Others may be from community leaders or state representatives.

- Electronic letters are preferred.
- If you have a **SIGNED** copy of a letter of support, you may upload it with your application (please do not upload unsigned letters).
- Your supporters may email signed letters to: barbara.fisher@maryland.gov
- Your supporters may mail signed letters to the address below:

Barbara Fisher
Capital Grant Administrator
Maryland Historical Trust
100 Community Place, 3rd Floor
Crownsville, MD 21032

Scoring criteria applicable to this section:

- **LOCAL COMMITMENT:** Is the project supported by Legislative, County, and local government representatives? Is there other community support for the project?

“Project Management” Tab

On this tab you will address the **ability of your organization to administer projects and grants** of this type.

- **Your organization’s experience**
 - Have you successfully managed other grant projects, or similar projects requiring reporting and financial documentation?
 - Has your organization successfully managed a construction or renovation project?
- **Future maintenance:** What are your plans for maintaining the site in the future?
- **Administrative capability:** Identify up to three individuals in your organization who will be involved in managing the project and provide either a short resume or narrative paragraph explaining their relevant expertise.
- **Consultants and partners**
 - Are there professionals outside of your organization who have provided assistance with developing your project? For example, architects, contractors, or archaeological consultants?
 - Provide a brief resume for each, if possible.
 - Optional: you can upload ballpark estimates in the “Attachments” tab of the application if an architect or contractor has provided you with information to help inform your project or budget.
 - ***Please note that once a grant is awarded, all contractors or consultants whose services are to be paid out of the grant funds must be selected through a competitive procurement process acceptable to MHT. For the purposes of this grant application, it is acceptable for you to obtain a cost estimate from a single firm for planning purposes; however, please be aware that competitive procurement will need to be conducted once a grant is awarded.***

Scoring criteria applicable to this section:

- **ADMINISTRATIVE CAPABILITY:** Do the project sponsor and administrative personnel demonstrate the capability to successfully administer grant monies, meet project deadlines, and follow established procedures? Does the project sponsor have the capability to maintain the project over time?
- **PROFESSIONAL CAPABILITY:** Has the applicant sought advice from personnel with the necessary training, education, and experience to carry out specific project goals (i.e., recognized in field, does high quality work, experience applicable to the subject)?

“Applicant” Tab

On this tab you will enter information about the **organization that is applying for the grant**. MHT uses this information to confirm your organization’s eligibility to receive a grant.

Non-profit organizations (state and federal government entities may apply as nonprofits) and **local jurisdictions**, as defined in COMAR 34.04.09, are eligible to apply for Program funding. **Private individuals** and **business entities** may also sponsor grants; however, they should be aware that the selection criteria typically favor the selection of projects and properties owned or sponsored by non-profit organizations and local jurisdictions. In order to be competitive, projects sponsored by private individuals and for-profit business entities must involve a predominantly “public purpose” use, rather than a private benefit.

Required Applicant Information

- **Legal Name** – non-profits and business entities must be registered to do business with the Maryland State Department of Assessments and Taxation (SDAT):
<https://egov.maryland.gov/BusinessExpress/EntitySearch>
 - The name you provide must match EXACTLY the legal name as registered with the Maryland State Department of Assessments and Taxation (SDAT). Check your organization’s legal name to confirm. If MHT cannot find your organization in SDAT, you may be deemed ineligible.
 - If your organization is not already registered, contact SDAT to register, allowing time to ensure the registration process can be completed before the application deadline.
 - Your organization must be in good standing with SDAT. When looking up your organization on the website, clicking on the “Department ID” next to your organization’s name will show the status. “Active,” “Revived,” or “Incorporated” means your organization is in good standing. “Forfeited” or “Dissolved” means you must contact SDAT to resolve any outstanding issues.
 - Your SDAT information must be up to date – make sure the Resident Agent is correct.
- **TAX ID / Federal Employer Identification Number (EIN)**
 - Non-profits, businesses, and government agencies will have a 9-digit number.
 - Individuals / private owners will use their social security number.
- **Proof of Non-Profit Status (if applicable)**
 - Upload a copy of your IRS determination letter.
 - If your tax-exempt status is through a larger organization, you will need what the IRS calls an umbrella letter that documents your permission to use the larger organization’s status. This is particularly common for churches and fraternal organizations.
- **Organizational Documents** – non-profits and businesses must upload organizational documents like bylaws and articles of incorporation. If you have applied for an MHT grant within the last 5 years, you do not need to submit these again unless they have changed.
- **Project Contact** – The project contact you designate in your application will receive ALL correspondence and notifications regarding the grant application and award status. Be sure to keep this information up to date with MHT.

“Property & Regulations” Tab

On this tab you will enter legal information about the **property for which you are seeking grant assistance**.

Required Information

- **Address of the project property**
 - This should be the physical address of the property where the grant project will be undertaken, NOT your organization’s address. Please include the full street address **and city**.
 - If there is no street address, please attach a map showing the exact location of the property. Be sure there are identifying landmarks on the map, like street names. Upload the map on the “Attachments” tab of the application.
- **Property Owner Information**
 - Provide the name and address of the property owner.
 - Briefly describe the relationship between your organization and the property owner – are you a fiscal sponsor, a lessee of the property, the property manager?
- **Property Owner Consent**
 - You **MUST** provide a letter of property owner consent, even if the owner and applicant are the same. This letter **MUST** include the language in the sample letter in Exhibit 5. You can download a template of this letter at: https://mht.maryland.gov/grants_capital.shtml
 - Without this letter indicating the property owner’s willingness to allow the project and to convey a preservation easement to MHT, your application will **NOT** be considered for funding. MHT must be able to confirm that the individual or organization identified in the letter of property owner consent is the correct legal owner of the property or your application will not be considered for funding.

MHT will use the property listing in the Maryland State Department of Assessments and Taxation (SDAT) to confirm the name of the property owner. MHT will also compare this information with what is provided in the letter of property owner consent. If MHT cannot find your property on the SDAT website, or the information does not match what you have provided, your application will not be considered for funding. Please check here to ensure there are no issues: <https://sdattax.dat.maryland.gov/RealProperty/Pages/default.aspx>

“Release & Consent” Tab

This tab includes disclosures for your response as well as an electronic signature. If you have any questions about the content of this tab, please contact the program administrator.

“Attachments” Tab

This tab allows you to upload documents in support of your application.

- Instructions on how to upload documents are included near the bottom of the tab.
- Photographs and photograph descriptions are REQUIRED. It is recommended that you paste your photos into a single Word document or submit them as a single PDF.
- Other documentation is OPTIONAL but may strengthen your application. Other documents may include structural reports, historic structures reports, archaeological reports, ballpark estimates, etc.
- Please only include documents which are referenced on the "Attachments" tab and which are directly relevant to the grant application.

Grant Terms and Conditions

All applicants awarded grants through the Program will be required to enter into a Grant Agreement with MHT, which generally contains the following standard terms and conditions:

- Easement / Preservation Agreement
 - An easement must be conveyed to MHT on any historic real property awarded a grant through this program. A preservation agreement must be conveyed to MHT on any historic property OTHER THAN real property that is awarded a grant through this program.
 - For more information, see "Property Owner Consent to Project and Consent to Easement" in Exhibit 5.
- Project Scope & Budget
 - Award of grant funds does not mean automatic approval of your project scope and budget. After award, minor adjustments may be made by MHT to ensure that only eligible expenses and eligible work are paid for through grant or matching funds. Do not commence work on this phase of the project without contacting your project monitor.
- Grant Disbursements
 - Grant funds will not be disbursed "up front." Disbursements will be made as the project progresses, proportionate with expenditure of matching funds and other project funding.
 - Grant disbursement will occur based upon Requests for Payment submitted by the grant recipient in a form satisfactory to the Trust and upon fulfillment of the other requirements of the grant as provided in the Grant Manual.
 - Please note that all contractors, architects, craftspeople, etc. whose services are to be paid for (or partially paid for) with State funds will need to be selected by a process approved by the Trust. This requires those services to be publicly advertised or widely solicited. *It is not expected that grant applicants have already conducted competitive procurement at the time of application.*
- Insurance
 - The Grant recipient will be required to insure the assisted property against loss or damage by fire, flood, or other hazards, casualties, and contingencies as may be required by MHT, in amounts satisfactory to MHT and with MHT as named additional insured. Similarly, General Liability Insurance will be required for all construction efforts.
- Standing with SDAT
 - Your organization must maintain good standing with the State Department of Assessments and Taxation before MHT will execute a grant agreement and must maintain good standing throughout the course of the project. To verify your organization's standing, please check here:
<https://egov.maryland.gov/BusinessExpress/EntitySearch>

Exhibit 1: Application Evaluation & Grant Administration Schedule

*****All dates are approximate and subject to change*****

The application and selection process will follow a prescribed cycle, outlined below. Please be sure to take this schedule into consideration when developing your schedule for the grant application.

October 2020 Official announcement of Grant availability and workshop schedule.

November 2020 Grant workshops held state-wide.

February 8, 2021 Application available on the MHT website.

March 22, 2021 Grant Application must be submitted ONLINE by 11:59 p.m. Submission must include a completed application and all required attachments.

May 2021 Award recommendations are considered by the MHT Board of Trustees and forwarded to the Secretary of Planning. See Exhibit 4: Scoring Criteria.

Late May – early July 2021 Grant award announcements.

Approximately July 2021 Grant agreements are mailed out by MHT and are then signed by Grantees and returned to MHT. MHT submits grant agreements to the Board of Public Works for approval. MHT will schedule an Organizational Meeting with each grantee and distribute the Manual of Program Requirements (outlining all required steps of the process before funds may be drawn down).

Approximately June 1, 2023 Deadline for completion of project. If a time extension is needed, the grantee must obtain an extension of the grant from MHT before this date or the grant will automatically expire.

Exhibit 2: Sample Timeline

The text below is a sample of the kind of project timeline you might enter into the appropriate box in the "Project Design" tab on the application. Please note that while the grant-funded work must begin no earlier than June 2020 and must be complete by June 2022, your timeline may include project benchmarks before and after those dates, particularly if you have a complex, multi-phase project with other funding sources. Please show dates outside of the two-year project period or outside the scope of this grant request in [brackets] for clarity. Not all of the work steps shown in this example will necessarily apply to your project.

- [January 1, 2021: scheduled date for settlement on purchase of the Smith County Rosenwald School]
- [April - May 2021: Phase One: Structural analysis of building using our own funds]
- June 2021: Notification from MHT regarding grant award
- July - August 2021: Review MHT-provided grant agreement and provide necessary grant and easement documentation to MHT.
- [July - October 2021: Phase Two: Hire an architect to develop plans and specifications for the work to be funded from the potential MHT grant. The architectural services will be paid out of a grant from the Smith County Preservation Society and donated time by the architect. Submit architectural plans and specifications to MHT for review. Submit architectural plans and specifications to County for review by Historic Preservation Commission.]
- October 2021: receive MHT easement approval for scope of work
- October - December 2021: Conduct RFP for contractor to undertake the work. Submit plans and specifications for building permits.
- January 2022: Contractor begins work on Phase Two: Exterior Rehabilitation to be funded through this MHT grant.
- January 2022 - March 2022: Phase Two construction is ongoing and MHT grant funds are being drawn down.
- March 2022: Phase Two construction is completed. Submit final report to MHT and close out the current grant.
- [March - October 2022: Continue into Phase Three: Interior Rehabilitation if funds are available.]
- [October 2022: Target date for completion of rehabilitation project and grand opening of the Smith County Rosenwald School Museum.]

Exhibit 3: Ineligible Expenditures for Grant & Match

Grant Funds CANNOT be used to pay for:	Items which CANNOT be counted as match:
<ul style="list-style-type: none"> Expenditures outside the grant period as defined in the grant agreement 	<ul style="list-style-type: none"> Expenditures outside the grant period as defined in the grant agreement
<ul style="list-style-type: none"> Expenditures outside the scope of the grant agreement 	<ul style="list-style-type: none"> Expenditures outside the scope of the grant agreement
<ul style="list-style-type: none"> Non-capital expenses such as research, studies, or predevelopment activities that are not part of a capital project 	<ul style="list-style-type: none"> Non-capital expenses such as research, studies, or predevelopment activities that are not part of a capital project
<ul style="list-style-type: none"> Insurance 	<ul style="list-style-type: none"> Insurance
<ul style="list-style-type: none"> Appraisals 	<ul style="list-style-type: none"> Appraisals
<ul style="list-style-type: none"> Equipment that is not inherent to the capital project 	<ul style="list-style-type: none"> Equipment that is not inherent to the capital project
<ul style="list-style-type: none"> Indoor or outdoor exhibits with an expected useful life of less than 15 years 	<ul style="list-style-type: none"> Indoor or outdoor exhibits with an expected useful life of less than 15 years
<ul style="list-style-type: none"> Meetings (venue rentals, food, etc.) 	<ul style="list-style-type: none"> Meetings (venue rentals, food, etc.)
<ul style="list-style-type: none"> Maintenance 	<ul style="list-style-type: none"> Maintenance
<ul style="list-style-type: none"> Landscaping that is not related to necessary work scope 	<ul style="list-style-type: none"> Landscaping that is not related to necessary work scope
<ul style="list-style-type: none"> General office expenses 	<ul style="list-style-type: none"> General office expenses
<ul style="list-style-type: none"> Accounting or audit costs 	<ul style="list-style-type: none"> Accounting or audit costs
<ul style="list-style-type: none"> Property tax or personal property tax 	<ul style="list-style-type: none"> Property tax or personal property tax
<ul style="list-style-type: none"> Employee salaries 	<ul style="list-style-type: none"> Other state funds (bond bill, etc.)
<ul style="list-style-type: none"> Project / grant management, if it can be reasonably included in staff job duties 	<ul style="list-style-type: none"> Funds which have been used as match for any other state assisted program
<ul style="list-style-type: none"> Legal fees, including legal fees involved in conveying an easement to MHT 	<ul style="list-style-type: none"> Costs to acquire a property, unless the grant is for acquisition
<ul style="list-style-type: none"> Work to any area of a site or building, or a building element, that is used for religious purposes (i.e. interior of worship space, Sunday School classroom), unless the work is required to make repairs to the building structure 	
<ul style="list-style-type: none"> Any work that is not properly bid (see separate information on procurement process for design and construction services). Contracts to be paid out of grant funds CANNOT be sole-sourced. 	
<ul style="list-style-type: none"> Some permit or approval fees 	
<ul style="list-style-type: none"> Reimbursing volunteer time 	

Eligible Match

Items which CAN be counted as Match:	Items which CAN be counted as In-Kind Match:
<ul style="list-style-type: none"> Expenditures within the grant period as defined in the grant agreement 	<ul style="list-style-type: none"> Expenditures within the grant period as defined in the grant agreement
<ul style="list-style-type: none"> Expenditures within the scope of the grant agreement 	<ul style="list-style-type: none"> Expenditures within the scope of the grant agreement
<ul style="list-style-type: none"> Cash 	<ul style="list-style-type: none"> Volunteer time (with documentation) calculated at the current rate of volunteer time set by the organization Independent Sector (see "Project Design" section)
<ul style="list-style-type: none"> Cash purchases such as materials 	<ul style="list-style-type: none"> Donated professional or construction services (with documentation) calculated based on the individual's customary hourly rate (see "Project Design" section)
<ul style="list-style-type: none"> Funding from a loan that is NOT from the state government 	<ul style="list-style-type: none"> Donated materials (with documentation) (see "Project Design" section)
<ul style="list-style-type: none"> Services which have not been bid through the appropriate procurement process 	<ul style="list-style-type: none"> Discounted materials (clear breakdown of market price and applicable discount must be provided)
<ul style="list-style-type: none"> Employee salaries if the employee will be directly performing work on the grant project (e.g. construction, management of the grant project); non-capital expenses (e.g. research, legal services) may NOT be included in this calculation 	
<ul style="list-style-type: none"> Permits 	
<ul style="list-style-type: none"> Legal fees which are directly related to the grant or the requirements of the grant (i.e. easement) 	

Exhibit 4: Selection Criteria

- In accordance with the Project Selection Criteria, as provided for in COMAR 34.04.09.06, grant proposals will be reviewed using criteria outlined under five general headings listed below. For the process and timetable of application evaluation, please see Exhibit 2: Application Evaluation & Grant Administration Schedule.
- The selection criteria correspond to the "tabs" on the online application. These criteria are also listed in this guidelines document along with the guidance for each "tab".

SCORING CRITERIA

I. PROJECT SCOPE AND DESIGN

- PROJECT SCOPE & PROTECTIVE VALUE:** Does the proposed project contribute to or assure long-term preservation of the resource or of Maryland's culture and heritage? Will this project result in an MHT easement? Does the project provide concrete action to protect the resource(s)? Does the project address the most pressing needs and assure continued viability of the resource(s)? Will the project provide a complete product? (If one phase of a multi-year project, this refers to the completeness of this year's phase alone.) Will this be the final phase of a project that is nearing completion? Will the project design minimize long-term maintenance costs?
- PROJECT GOALS:** Are project goals and scope consistent with the mission and goals of the Maryland Historical Trust? Does the proposed work conform to the Secretary of the Interior's Standards? The Standards can be found at the following site:
<http://www.nps.gov/tps/standards.htm>.
- PROJECT SCHEDULE:** Can the project begin when indicated, i.e. does the applicant reflect an awareness of when grant funding will be available? Can the work be completed within 2 years? Has a realistic sequence with appropriate work steps been developed?
- PROJECT BUDGET:** Is the overall budget realistic for the proposed project? Are the costs reasonable and necessary? Are all costs eligible? If the project is for a church, are expenditures on spaces used for religious activities excluded from the grant funding request?
- FINANCIAL CAPABILITY:** Does the sponsoring group provide any other documented (i.e. accompanied by commitment letter, bank statement, etc.) project funding? How much cash and/or in-kind commitment is being offered by the sponsor? [Note: Projects sponsored by local jurisdictions, business entities, and individuals **must** provide a full 1:1 cash or in-kind match.] Has the applicant documented that the full cash and/or in-kind commitment will be in hand when the grant is awarded? Is the in-kind match eligible per grant requirements? Does the applicant demonstrate financial commitment to maintaining the project for at least 15 years?

II. SIGNIFICANCE AND NEED

- a. **SIGNIFICANCE OF THE PROJECT:** To what extent will the project acquire, rehabilitate, or restore districts, sites, buildings, or objects significant in the prehistory, history, upland or underwater archeology, architecture, engineering, or culture of the State and listed in or eligible for listing in the Maryland Register of Historic Properties? How is the property important to the mission of the occupant organization and to the local community?
- b. **URGENCY:** Is the resource imminently endangered (i.e., by development pressures, erosion, neglect) or is there a unique window of opportunity to complete the proposed project?

III. PUBLIC BENEFIT AND LOCAL SUPPORT

- a. **PUBLIC BENEFIT:** What is the planned use of the project and what are its benefits to the general public? What level of public access will be provided? How will information about the project be made available to the public? Will the project be accessible to individuals with disabilities?
- b. **EDUCATIONAL & DEMONSTRATION VALUE:** Is there an education component to your project? If so, how permanent and far reaching is it? Does the project offer interpretation of the site, heritage, or resource? Does the project have the potential to be a model or an innovator?
- c. **LEVERAGE:** Will the project stimulate or prompt other preservation projects or programs throughout the community and/or professional preservation support?
- d. **LOCAL COMMITMENT:** Is the project supported by legislative, county, and local government representatives?

IV. PROJECT MANAGEMENT

- a. **ADMINISTRATIVE CAPABILITY:** Do the project sponsor and administrative personnel demonstrate the capability to successfully administer grant monies, meet project deadlines, and follow established procedures? Does the project sponsor have the capability to maintain the project over time?
- b. **PROFESSIONAL CAPABILITY:** Has the applicant sought advice from personnel with the necessary training, education, and experience to carry out specific project goals (i.e., recognized in field, does high quality work, experience applicable to the subject)?

- V. **GEOGRAPHIC DISTRIBUTION:** This is completed by MHT staff and compares: Each county's share of historic properties listed on the National Register --to-- each county's share of MHT historic preservation grant funds.

Exhibit 5: Property Owner Consent to Project and Consent to Easement

Background Information, Instructions, and Sample Letter from Property Owner

General Considerations for the Property Owner Consent Letter

- Owner consent to the project and commitment to a preservation easement or preservation/maintenance agreement is required for the project to be eligible for a grant. **Failure to submit the required letter with the necessary language will result in your application being ineligible for consideration.** Using the sample text provided on the following page, attach a letter indicating the willingness of the property owner(s) to support the project and to convey to MHT a preservation easement or a preservation agreement on the project property.
 - Insert the physical address of the property (not your mailing address).
 - Identify any less-than-fee simple interests in the property, such as existing mortgages, leases, or mineral rights.
 - Have an authorized representative of the property owner sign the letter.
- If MHT already holds an easement on the property, you must still attach a letter confirming willingness to execute a modification to the existing deed of easement.

Info for Properties Requiring Conveyance of a New Easement or Modification of an Existing Easement

- Detailed information about MHT's easements can be found here: <http://mht.maryland.gov/easement.shtml>
- An easement is a legal document executed between the owner of the property and MHT and is recorded in local land records.
- The easement must be completed before capital improvements begin and before any grant funds can be released.
- Legal documents required for the conveyance or modification of an easement are not eligible for reimbursement out of grant funds. Required documents may include a boundary survey; metes and bounds description; and Title Insurance or Certificate of Title acceptable to MHT, certifying the owner's title to the easement real property. In addition, an update of the title work will be due after the recordation of the Deed of Preservation Easement but prior to the disbursement of grant funds.

**Johnnytown Historical Society
P.O. Box 1
Johnnytown, MD 00000**

February 1, 2021

Barbara Fisher
Capital Grant Administrator
Maryland Historical Trust
100 Community Place, 3rd Floor
Crownsville, MD 21032

Dear Ms. Fisher,

As the owner(s) of the property located at **[insert property's physical address including street number/name, city, and zip code]**, for which a state grant is being sought, I/we confirm my/our willingness to support the project and convey to the Maryland Historical Trust or other eligible entity a preservation easement or easement modification on the property or enter into a preservation/maintenance agreement. I/we understand that my/our confirmation is a requirement of the grant application and that the preservation easement or preservation/maintenance agreement imposes a financial obligation upon the property owner(s) and a legal encumbrance/lien upon the easement property.

[The letter must also identify all less-than-fee simple interests (mortgages, leases, mineral rights, reversionary interests, etc.) in the property. Your letter MUST include ONE of the two paragraphs below:]

I/we hereby confirm that there are no less-than-fee simple interests (mortgages, leases, mineral rights, reversionary interests, etc.) in the property.

OR

I/we hereby confirm the following less-than-fee simple interests in the property:

- Loan from Bank of Johnnytown, \$5,000
- Lease agreement with Johnnytown Toy Museum

[The letter must be signed by an authorized officer of the property owner organization; substitute their mailing information for the sample below.]

Sincerely,

Johnny Q. Johns
President, Board of Trustees
Johnnytown Historical Society