

HISTORIC PRESERVATION CAPITAL GRANT PROGRAM

FISCAL YEAR 2023

GRANT GUIDELINES

*completed grant applications must be submitted ONLINE by
March 15, 2023, at 11:59 p.m.*

Starting February 1st, access the online grant application from:

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

Contact/Program Administrator:

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Capital Grant Administrator

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Maryland Historical Trust
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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 <https://www.nps.gov/orgs/1739/secretary-standards-treatment-historic-properties.htm> .

See "Project Description 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 if awarded grant funds (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. The [Property Owner Consent Letter Template](#) is available for download from the program website.

See “Property Information 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 to be competitive.

- Nonprofits
- Local governments
- Business entities
- Individuals

State and federal government entities are eligible to apply as nonprofits.

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 virtually and in-person in December 2022 and January and February 2023. See MHT’s website at https://mht.maryland.gov/grants_capital.shtml for more information, including dates, times, and previous webinar slide decks and recordings. 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 15, 2023.

Starting February 1st, applications will be available through the grants portal at:

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

- The application process for FY2023 will NOT require an Intent to Apply Form. Please submit a full application between 2/1/2023 and 3/15/2023.
- 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.
- Word counts for each question vary but are generally either 250 or 500 words or less.
- Save your answers frequently. We recommend typing up your answers in a Word document and then copying and pasting to the application.
- Hard copies of applications are not accepted.
- 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.

“Project Description” 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.

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 requested grant funds or required matching funds.

Project Urgency – Describe the most urgent needs of the property. If the property has other urgent needs, discuss if they have been addressed. Note if there is a unique window of opportunity or limited timeframe to complete the proposed project.

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.

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, condition assessments
 - 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: <https://www.nps.gov/orgs/1739/secretary-standards-treatment-historic-properties.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 for any phase of a project does not guarantee funding for 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 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. If eligible, building elements that feature religious imagery, such as stained-glass windows, will be divided by structural component or window sash. 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 Information" tab (also see Exhibit 4).
 - Applicants with cemetery-related projects should pay special attention to MHT's easement requirement, which is a condition of the grant award. Often the easement requirement cannot be met if individual burial plots are individually owned.
 - Applicants requesting funds for a ground penetrating radar (GPR) or magnetometry survey (or something similar) should reach out to the program administrator for further guidance.
- **Please contact the program administrator if you are unsure whether your proposed work will be eligible.**

- **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:

- **LEVEL OF PRESERVATION:** Will the project protect historic sites, spaces, buildings, or elements? Will the project comply with the *Standards*, or can it be adjusted to comply with the *Standards*?
- **URGENCY:** Is the resource imminently endangered (e.g., by development pressures, erosion, flooding, neglect) or is there a unique window of opportunity to complete the proposed project? Does this project address an urgent public need?
- **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 fall at the earliest)? Can the proposed work be completed within two years? How quickly can the project begin?
- **PROJECT PRIORITIZATION & COMPLETION:** Is the project focused on a discrete phase of work or will it provide a complete product? (If one phase of a multi-year project, this refers to the completeness of this year's phase alone.) Has a realistic sequence with appropriate work steps been developed? Will this be the final phase of a project that is nearing completion?

“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 Description” 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 with instructions and a blank budget table for filling out. Only upload the budget table for your project to the application and not the sample budget. **Please upload as an Excel file.**

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 even increments 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.**
- **Matching Funds**
 - 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 are not required to provide match and 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.
 - If you have received other 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 all applicants except for non-profits)

- **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 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 used 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:** Are there sufficient funds to complete the phase of work that will be funded by the grant? Is there demonstrative financial commitment to the project over at least the next 15 years? Have efforts been made to identify other sources of funding for this project?

“Public Benefit” Tab

On this tab you will discuss the **public benefit, educational value, interpretive focus, and public access of your property and project.**

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 Description” tab section for information on project eligibility for religious sites.*

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

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

Public Education

- Explain how the site does (or will) contribute to increase public awareness and understanding of Maryland’s history.

Interpretation

Does your site offer interpretation about any of the following themes?

- The history of the site or local community
- History of underrepresented communities, for example, women’s history, Latino history, African American history, Asian history, Native American history, or LGBTQ history, etc.
- Broader historical themes, for example, industrial history, maritime heritage, or agricultural history, etc.

Public Access

- Describe what provisions exist or will be made for physical or programmatic access by individuals with disabilities (in-person and/or virtually).
- Note when and how often the property is open to the public.

Scoring criteria applicable to this section:

- **PUBLIC BENEFIT:** Is the site primarily private or does it provide a public benefit? What is the general public benefit of the site or project as it relates to Maryland's culture and history? Does the site provide a strong public benefit to the local community?
- **INTERPRETATION AND EDUCATION:** How permanent and far reaching is the educational component of the project/property? Does the property offer interpretation of the site, heritage, or resource? Does the property or project highlight the history of underrepresented communities?
- **PUBLIC ACCESS AND ADA ACCESSIBILITY:** What level of public access is or will be provided? When is the property open to the public? Does the project allow the public to access a previously inaccessible property (e.g., addressing long-term neglect of a vacant property that was recently acquired)? Does the property have physical or programmatic access for the public, and specifically, for individuals with disabilities? Will the property be accessible or increase accessibility to individuals with disabilities?

“Impact” Tab

On this tab you will discuss **partnerships and the impact of your organization and property.**

Impact

- Tell us how this project will help your organization to fulfill its mission and/or lead to other projects.
- Discuss how the site supports community groups or is used to promote unique partnerships or other community opportunities.
- Describe if this project uses unique or innovative techniques that may be a model for other projects or if this project could stimulate other preservation projects.

Scoring criteria applicable to this section:

- **LEVERAGE:** Will the project stimulate or prompt other preservation projects or programs throughout the community and/or professional preservation support? Does the project engage with or stimulate other activities, programs, or partnerships throughout the community? Does your site support other community groups? Has your organization formed unique partnerships or provide other opportunities to the community?
- **MODEL:** Does the project use creative preservation techniques or be used to educate the public/professionals about preservation techniques? Does the project have the potential to be a model or an innovator?

“Significance” Tab

On this tab you will describe the **property’s historical, cultural, archaeological, and / or architectural significance, and the current importance of the property, including what the property means to the local community today.**

Property Historical/Cultural Significance – Provide a concise description of the historical significance of the site. Describe if the site has important associations or special historical or architectural features. *(Attaching the property’s MIHP form or National Register nomination to the application is not necessary as they are readily accessible by staff.)*

Community Significance – Explain the role the property plays in the local community today and how this project improves the relevance and importance of the property to the local community.

Occupant Significance – Describe the role the property has in helping the site occupant/steward organization meet its mission.

Scoring criteria applicable to this section:

- **SIGNIFICANCE OF THE PROPERTY:** 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? Does the property retain historic features and materials? Is the property a unique or important example of its kind (e.g., use, architectural style, era, culturally, socially)?
- **COMMUNITY SIGNIFICANCE:** What does the property mean to the local community today? To what extent will the project improve the importance and relevance of the site to the local community? How is the property important to the mission of the occupant organization?

“Property Information” Tab

On this tab you will enter **locational and legal information about the property for which you are seeking grant assistance and upload photographs of the property.**

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 no physical address is available include the nearest crossroads.
- 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.

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.

Property Owner Information

- Provide the legal name and address of the property owner or owner entity.
- Briefly describe the relationship between your organization and the property owner – are you the owner, 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 [Property Owner Consent Letter Template](#), available to download from the program website.
- 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.*

Photographs and photograph descriptions.

- Please include 10 or more photographs. The best way to submit photos is to create a Word document and paste the photos into it and either submit this or convert this to a PDF and submit that. Please include brief photo captions or descriptions of photos.

*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://sdat.dat.maryland.gov/RealProperty/Pages/default.aspx>

Scoring criteria applicable to this section:

- **GEOGRAPHIC DISTRIBUTION:** Compares each county's share of MHT capital grant funds awarded from FY2018-FY2022 to each county's share of historic properties listed in the National Register of Historic Places.

“Project Management” Tab

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

Project Management and Administrative Capability:

- Describe if your organization have successfully managed other grant projects, or similar projects requiring reporting and financial documentation.
- Describe if your organization successfully managed a construction or renovation project.
- Identify key individuals in your organization who will be involved in managing the project and provide a short narrative paragraph explaining their relevant expertise.

Consultants and Partners

- Note if professionals outside of your organization have provided assistance with developing your project (e.g., architects, contractors, or archaeological consultants)
- Estimates are not required but very helpful to understanding your application. If you have more than 3 ballpark estimates from an architect or contractor, to help inform your project or budget, you can upload these additional estimates in the “Attachments” tab at the end of the application.
- ***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 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 34.04.01, 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. 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.

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 that do not have an EIN or other tax identifier, enter N/A. DO NOT ENTER A 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.

“Support” Tab

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

Please submit 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, they will not be accepted).
- 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/or local government representatives? Is there other community support for the project? Applicants are requested to submit two letters of support, with at least one of those letters from an elected local official.

“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 additional documents in support of your application.

- Other documentation is **OPTIONAL** but may strengthen your application. Other documents may include structural engineering reports, historic structures reports, archaeological reports, ballpark estimates, etc. In your application, please reference page numbers in these reports that you would like to bring to the attention of reviewers.
- 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 the [Property Owner Consent Letter Template](#), which is available to download from the program website.

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.

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. Insurance coverages shall be provided by a company that is registered with the Maryland Insurance Agency and authorized to transact business in the State.

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.

November 2022 Official announcement of Grant availability and workshop schedule.

December 2022 - February 2023 Grant webinars and workshops held state-wide or virtually.

February 1, 2023 Application available on the MHT website.

March 15, 2023 Grant Application closes. Application must be submitted ONLINE by 11:59 p.m. Submission must include a completed application and all required attachments.

May 2023 Award recommendations are considered by the MHT Board of Trustees and forwarded to the Secretary of Planning.

May – July 2023 Grant award announcements.

July - August 2023 Grant agreements are sent 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 Initial 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, 2025: 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 Description" tab on the application. Please note that while the grant-funded work must begin no earlier than June 2023 and must be complete by June 2025, 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, 2023: scheduled date for settlement on purchase of the Smith County Rosenwald School]
- [April - May 2023: Phase One: Structural analysis of building using our own funds]
- June 2022: Notification from MHT regarding grant award
- July - August 2023: Review MHT-provided grant agreement and provide necessary grant and easement documentation to MHT.
- [July - October 2023: 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 2023: receive MHT easement approval for scope of work
- October - December 2023: Conduct RFP for contractor to undertake the work. Submit plans and specifications for building permits.
- January 2024: Record easement and submit final documentation to MHT. Contractor begins work on Phase Two: Exterior Rehabilitation to be funded through this MHT grant.
- January - March 2024: Phase Two construction is ongoing and MHT grant funds are being drawn down.
- March 2024: Phase Two construction is completed. Submit final report to MHT and close out the current grant.
- [March - October 2024: Continue into Phase Three: Interior Rehabilitation if funds are available.]
- [October 2025: 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 Description" 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 Description" 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 Description" 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:

Maryland Department of Natural Resources Project Information Form

If your project will take place on land owned by the Maryland Department of Natural Resources (DNR) (regardless of your property management arrangement with DNR), you must obtain approval for your proposed project prior to submission of your application. The following information is required – see below for full instructions on completing this form, and how to submit to DNR. An [electronic version](#) of this form is available for download on the program website.

Project Name:

Project Number:

Applicant Name:

Applicant Address:

Land Unit:

County:

Region:

Project Lead:

Project Type: Project Review

Customer Type:

Request Type:

Critical Area:

Master Plan:

Date Prepared:

Prepared By:

Contact Phone:

Contact E-Mail:

Review Due:

Project Description:

General Site Conditions:

Project Considerations:

Detailed Instructions for Submitting Projects for Internal Review

Internal Project Review - Project Information Form: Applicants should fill out the highlighted areas on the Maryland Department of Natural Resources (DNR) application as indicated; DNR Project Information Form (PIF). The top part is information we need for the DNR electronic database. It allows us to generate reports and track our workload.

Project Description: This is the “who, what, where, when, why, and how” of the project. It should include information such as: How long the project will last? Where is the project located? How are you proposing to access the site, and how often? Who will be involved? Are there environmental impacts? Is the project temporary or permanent? Is a public right-of-way or construction easement needed? And most importantly, why is the project needed?

General Site Conditions: Describe the existing physical features of the site such as topography, soils, vegetation, drainage, etc. This will help our reviewers to get a “feel” for the site and surrounding area as well as locate it on our own mapping system in order to document land use changes. If there are known sensitive environmental areas (e.g., wetlands, floodplain, streams, creeks, rivers, etc.), please let us know on the form. Is the project site on (or eligible for) the National Register of Historic Places? Etc.

Project Considerations: Include anything else that a reviewer might need to know: Is there a special event planned and the project must be completed by a certain date? Is there a local official pushing for it or a “friends” group that is involved? Will an outside entity be doing the work (contractor), and if so, who is it? Is this project mandated (i.e., a consent order or other legal requirement to complete the project)?

Location Map or Vicinity Map: This should be a map of the general area or vicinity with some specific landmarks, such as major and minor roads and towns. It can be an ADC Map, a Google Map, a street map, with a circle on it, or map generated from a State GIS system such as MERLIN: <http://dnrweb.dnr.state.md.us/MERLIN/>. We need to know how to get to the site from locations outside of the immediate property boundaries. Some reviewers may not be familiar with every DNR property, so please include a complete street address with zip code on the map or PIF. If there is no street address, provide a note and give the address of a nearby location.

Site Plan: This is a plan view drawing of the project showing the specific project site. It is very helpful if it is drawn to scale. It should match what is written in the PIF as far as dimensions, connections to other infrastructure, and impacts to the landscape as far as clearing, grading, etc. It should have a North arrow. It can include notes as needed to make things clear. If a researcher is setting up a net or trap structure, a drawing or photo of the equipment is helpful. If infrastructure work is planned, please include specifications.

The project review process generally takes 30 to 60 days. If you have questions regarding this process, contact Shane Johnston, Project Review Gatekeeper, at 410-260-8387 or by email at: Shane.Johnston@maryland.gov.

Please submit all three documents to the appropriate manager of the Land Unit where the project will occur. Please carbon copy Shane Johnston at Shane.Johnston@maryland.gov.