



MICHIGAN STATE HISTORIC PRESERVATION OFFICE CERTIFIED LOCAL GOVERNMENT FY2023 GRANT PROGRAM

Planning, Documentation, and Education Projects
Grant Manual and Application Instructions

APPLICATION DEADLINE | WEDNESDAY, FEBRUARY 1, 2023



CERTIFIED LOCAL GOVERNMENT FY2023 GRANT PROGRAM

Planning, Documentation, and Education Projects

IMPORTANT DATES

October 3, 2022	Application round opens
TBD	CLG grant program webinar (optional)
December 9, 2022	Deadline for preliminary review (optional)
February 1, 2023	Application deadline – 5:00 p.m.
Spring 2023	Anticipated notice of award
June/July 2023	Anticipated grant agreement execution
September 30, 2025	Deadline for project completion

APPLICATION ASSISTANCE

SHPO strongly encourages applicants to discuss their project with staff prior to submitting a grant application to ensure the project is eligible for potential grant funding and to preliminarily discuss any questions or concerns regarding the proposed scope. Applicants may also submit preliminary applications to SHPO for feedback in advance of the final deadline.

Please direct all questions to:

Alan Higgins
Certified Local Government Coordinator
Michigan State Historic Preservation Office
HigginsS3@michigan.gov
517.256.4358

A PDF copy of this grant manual, grant applications, and all required forms are also available at www.michigan.gov/CLGgrants or by contacting Alan Higgins at higginsS3@michigan.gov.

This grant program has been financed in part with federal funds from the National Park Service, U.S. Department of the Interior. However, the contents and opinions do not necessarily reflect the views or policies of the Department of the Interior.

This program receives federal financial assistance for identification and protection of historic properties. Under Title VI of the Civil Rights Act of 1964 and Section 504 of the Rehabilitation Act of 1973, and the Age Discrimination Act of 1975, as amended, the Department of the Interior prohibits discrimination on the basis of race, color, national origin, disability or age in its federally assisted programs. If you believe you have been discriminated against in any program, activity, or facility as described above, or you desire further information, please write to: Chief, Office of Equal Opportunity Programs, United States Department of the Interior, National Park Service, 1849 C Street, NW, MS-2740, Washington, DC 20240.

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1. INTRODUCTION

The Certified Local Government (CLG) program is a preservation partnership between local, state, and national governments focused on promoting historic preservation at the local level. The program is jointly administered by the U.S. Department of the Interior, National Park Service (NPS) and the State Historic Preservation Office (SHPO). Participating communities become an active partner in the federal historic preservation program and gain access to exclusive benefits, including annual grant funding opportunities. For additional information on Michigan’s CLG program, please visit www.michigan.gov/CLGgrants.

Every year, funding is provided through the Historic Preservation Fund (HPF), administered by the U.S. Department of the Interior, for projects that identify, document, preserve, and tell the story of historic properties significant in history, architecture, archaeology, engineering, and/or culture. Each SHPO also receives an annual HPF allocation to assist with preservation programming statewide. Federal law requires that at least 10% of each SHPO’s annual federal Historic Preservation Fund (HPF) allocation be set aside for subgranting to CLGs to initiate and support historic preservation activities at the local level. In Michigan, the program is administered by the SHPO pursuant to Public Act 271 of 1913, section 399.1 et seq. of the Michigan Compiled Laws.

This manual describes the application process and requirements of the CLG grant program. Interested applicants are strongly encouraged to read the manual prior to submitting a grant application. Awardees are responsible for complying with all program requirements as outlined in this manual. All project activities must meet the *Secretary of the Interior’s Standards and Guidelines for Archaeology and Historic Preservation*, *Secretary of the Interior’s Standards for Rehabilitation*, and SHPO standards and guidelines.

GRANT PROGRAM BASICS

Who May Apply?	<p>Any local unit of government that has entered the CLG program prior to the grant application deadline (February 1, 2023) may apply for grant funding. CLGs must be in good standing with program requirements to be eligible for consideration. See www.Michigan.gov/CLGgrants for a list of current CLGs.</p> <p>CLGs can also sponsor projects for non-profit organizations and public entities (e.g., arts organizations, schools, land banks, community development organizations, etc.) within their boundaries. For example, a CLG could partner with a historical society to complete an architectural survey or with a Main Street organization to do a façade study for downtown properties. This allows the non-profit or public entity to provide project funding in place of the CLG. When a CLG sponsors an application on behalf of another entity, the CLG is the applicant. If a grant is awarded, the CLG is the grant recipient unless the CLG requests that another party administer the grant and the request is approved by SHPO. A written agreement must exist between the CLG and the partner entity that clearly states the project responsibilities of each party. CLGs wishing to partner with another organization on an application are strongly encouraged to contact SHPO prior to submitting an application.</p>
How Much Funding Is Available?	<p>For fiscal year (FY) 2023, SHPO anticipates that approximately \$200,000 will be available to fund CLG projects.</p>
How Much Funding Can Be Applied For?	<p>The minimum grant award is \$2,500. The maximum grant award is \$100,000. However, most awards will fall within the range of \$2,500-\$50,000. An applicant seeking more than \$50,000 should demonstrate why their project needs additional funding (e.g., the project is particularly complex, urgent, and/or impactful).</p> <p>Applicants are encouraged to carefully consider the scale and scope of their projects to ensure they are feasible and practical. Applicants are also encouraged to get cost estimates from contractors and include them as part of the application.</p>

Is Match Funding Required? There is **NO** match requirement for FY23 CLG grant projects. However, CLGs may opt to include match funding to show community buy-in, which may make the application more competitive.

What Types of Projects Are Funded? Eligible projects include but are not limited to the following. For additional detail, see **Appendix A. Eligible Projects**. Innovative projects, collaborative projects, and projects that can serve as models for other communities are encouraged.

- Preservation Planning
 - Community-wide and neighborhood preservation plans
 - Revitalization plans, reuse studies, and market studies
 - Economic and other planning studies related to preservation
 - Ordinance updates, design guidelines, survey plans, and related materials
- Survey and Designation
 - Historic resource surveys
 - Local Historic District Study Committee reports
 - Historic context studies
 - National Register of Historic Places nominations
 - Archaeological studies
- Educational Activities and Materials
 - Workshops, seminars, lesson plans, and heritage tourism activities
 - Publications (e.g., websites, GIS databases, lesson plans, tours)
 - Hands-on activities such as window repair and trades programs
 - Training for CLG staff and the Historic District Commission

What is the Grant Timeline? Funding is officially awarded through a grant agreement with SHPO. Project costs must be incurred between the date the agreement is executed and the end date specified in the agreement. Costs incurred outside of this period are not eligible and will not be reimbursed. Projects are anticipated to start in **summer 2023**, but the start date is dependent upon receipt of SHPO’s allocation from the Historic Preservation Fund; all work must be complete by **September 30, 2025**, a federally mandated deadline.

GENERAL CONDITIONS

Grant Funding: In accordance with federal requirements, all grant funds are paid on an **EXPENSE REIMBURSEMENT** basis only. The applicant must demonstrate the availability of 100% of project funds as part of the application. The grant recipient will be reimbursed for eligible expenses incurred (up to the grant amount) upon completion of the project. All project work must be complete, all invoices must be paid, all financial documentation must be audited, and all information must be approved by the SHPO before the subgrantee receives any reimbursement.

Project Staff: At least one (1) individual (staff or contractor) working on the grant project must meet the project appropriate Secretary of the Interior’s Professional Qualification Standards (36 CFR 61). See the National Park Service’s [36 CFR 61](#) guidance for additional detail.

Project Readiness: The project must be generally ready to proceed at the time of application and must not be dependent on future funding, actions, or approval from other organizations.

Ineligible Activities:	Activities determined by the U.S. Department of the Interior to be ineligible for funding include but are not limited to: ongoing public education efforts such as operation of a house museum; extensive archaeological work beyond necessary to determine National Register eligibility; curation of objects outside of grant-assisted projects; archival and collections management; operating or overhead support; exhibits; and commemorative markers and plaques. See Appendix B for more information.
Project/Grant Modifications:	All awardees will enter into a grant agreement with SHPO. Once the agreement is executed, no modifications can be made to the project (including scope of work and budget) unless approved by SHPO. It will be at the sole discretion of SHPO to approve or deny any proposed modifications.
Grant Funding Acknowledgments:	In all publications and media, the subgrantee is required to acknowledge financial support by the Certified Local Government program and administration by the National Park Service and the State Historic Preservation Office. The full text acknowledgment to be used will be included in the grant agreement (also see Appendix C).
Project Reporting and Grant Completion:	During a project, the subgrantee will be required to provide brief quarterly reports to SHPO. At the conclusion of the project, the subgrantee will be required to prepare a Completion Report and Reimbursement Request. See <i>Section 5. Project Completion</i> .
Allowability of Federal Costs:	The principles governing allowable direct costs are determined in accordance with federal Management and Budget Circular A 87 and A 102, and the National Park Service's Historic Preservation Fund Grant Manual.
Program Audit Requirements:	Federal Circular A 133 requires that local units of government, non-profits, and educational institutions expending \$750,000 or more in federal funds have a single audit completed annually.
Record Accessibility Retention:	Subgrantees will submit program, financial, or other reports as required by SHPO. Records of the subgrantee and any subcontractor shall be kept for a minimum of three (3) years after funds have been reimbursed to the subgrantee or until all claims or audit findings have been resolved.
Disclosure of Information:	Financial records, supporting documents, statistical records, and all other records pertinent to a grant provided by NPS are subject to disclosure to others under the federal Freedom of Information Act, 5 USC 552. They are also available to the public under the Michigan Freedom of Information Act, 1976 PA 442, MCL 15.231 et seq.
Safety:	The State of Michigan assumes no responsibility with respect to accidents, illnesses, or claims arising out of any work performed under a grant-supported project. The subgrantee is expected to take necessary steps to insure itself and its personnel and to comply with the applicable local, state, or federal standards, including standards established pursuant to the National Occupational Safety and Health Act of 1970.
National Environmental Policy Act (NEPA) Review (<i>archaeological projects only</i>):	Archaeological projects are subject to NEPA review. Following the award of a grant for an archaeological project, SHPO will submit a summary of the environmental impacts on any impacted cultural resources to NPS. This summary must be approved before CLG-funded work can begin. NPS review can take a minimum of three (3) months, which should be accounted for when planning archaeological projects.
Civil Rights Act:	As mandated under Title VI of the 1964 Civil Rights Act and in Executive Directive 1979-4, it is the policy of the State of Michigan to assure that all Michigan citizens receive full and equal access to benefits provided by state-supported programs and services without discrimination based upon race, color, creed, religion, national origin, height, weight, marital status, age, sex, or disability. SHPO requires compliance with

the non-discrimination laws in connection with the use of grant funds. In furtherance of this policy, it is appropriate that SHPO not enter into any contract, nor fund nor serve as a conduit for funding, programs that may have the effect of creating or perpetuating patterns of discrimination. If it is determined that the applicant is not in compliance as established by the Michigan Department of Civil Rights, the project will not be funded.

Coastal Zone Management:

The Coastal Zone Management Act of 1972 prohibits federal assistance to local governments for projects that are inconsistent with the requirements of an approved Coastal Zone Management Plan. Further information is available [here](#).

Hatch Political Activity Act:

No officer or employee whose principal employment is connected with any activity which is financed in whole or in part with grant assistance shall take part in any of the political activity proscribed in the Hatch Political Activity Act, 5 USC 1501 et seq., as amended, with its stated exceptions.

Conflict of Interest:

A conflict of interest in the selection, award, or administration of a grant or contract is prohibited. A grant recipient and any member of the immediate family shall not enter into any contract for the performance of project work whereby the following individuals or immediate family have a financial or other interest in the recipient selected for the award: any current or former employee; officer; agent of the federal and state government; or the grant recipient who has or had authorization to plan, develop, negotiate, accept, approve, or take part in decisions regarding subcontracts, or other agreement in connection with the particular grant.

All subcontracts awarded pursuant to a grant must be accomplished free from bribery, graft, kickbacks, and other corrupt practices. Employees, officers, and agents of the grant recipient shall neither solicit nor accept gratuities, favors, or anything of monetary value from contractors, potential contractors, or parties to subcontracts.

The grant recipient bears the primary responsibility for the prevention and detection of prohibited conduct and shall promptly notify SHPO if such conduct becomes known.

Reimbursement of Grant Expenses:

Grant expenses will be reimbursed to subgrantees by Electronic Funds Transfer (EFT) through SIGMA, the State of Michigan's financial payment system. SHPO will provide subgrantees with instructions for establishing an account in SIGMA if they are not already registered.

2. COMPLETING THE GRANT APPLICATION

GRANT APPLICATION INFORMATION

Grant Manual and Required Forms:	This manual, the grant application, and all required forms are available on the SHPO website at www.michigan.gov/CLGgrants .
Application Due Date and Submission:	Completed applications must be received by SHPO via e-mail no later than 5:00 p.m. on Wednesday, February 1, 2023 . No extensions will be granted. Submit one (1) complete, signed application, inclusive of required exhibits, via e-mail to Alan Higgins at higginsS3@michigan.gov . SHPO will confirm receipt of applications within 48 hours. If needed, SHPO can provide a location for uploading large files.
Application Assistance and SHPO Review:	Applicants are encouraged but not required to discuss their project with SHPO prior to applying for a grant. Applicants may also submit draft applications to SHPO for preliminary review. SHPO will identify omissions and inconsistencies and provide relevant feedback. Requests for draft review of applications must be submitted to Alan Higgins at higginsS3@michigan.gov by December 9, 2022 .
Application Scoring:	Applications are first reviewed for completeness and feasibility by SHPO program staff. Following, applications are competitively scored by an interdisciplinary review panel based on the identified selection criteria. Projects that meet annual funding priorities will receive extra points. For additional detail, see <i>Section 3. Grant Application Scoring</i> .

GRANT APPLICATION INSTRUCTIONS

GENERAL INSTRUCTIONS

- Please read this manual and the application instructions with care. If you have questions, please contact SHPO prior to applying for funding. Applications that are incomplete or not completed correctly may be penalized or ineligible for scoring.
- Make sure you are using the most current and correct version of the application—Planning, Documentation, and Education Projects ([available here](#)). Complete and sign the application electronically.
- Prepare required exhibits and supporting documentation electronically in accordance with the provided instructions. **Note that some exhibits may take time to gather. Applicants are encouraged to start gathering materials early in the grant application process.**
- Applicants are encouraged to be succinct but clear in their applications so that the review committee has a full understanding of the project. Applicants should not assume that they will have the opportunity to clarify or provide additional information following initial SHPO review.

COMPLETING YOUR APPLICATION

1. Project Information

- *Certified Local Government*: Identify the CLG that is submitting the application (e.g., “City of Lansing”).
- *Project Name*: Provide a brief, descriptive name for the project (e.g., “Downtown Commercial District Historic Resource Survey”).
- *Project Type*: Identify which type of project is being proposed, including the specific type (e.g., historic resource survey, design guidelines, or trades workshop).

- *Project Summary:* Provide a brief (1-2 sentence) summary statement for the project that describes its general focus and goal(s). For example, “The [name of CLG] will hire an architectural historian to complete a survey of the downtown commercial district, which includes approximately 40 properties. This survey will help inform future planning decisions and facilitate future National Register of Historic Places designation.”

2. Grant Funding Request

- *CLG Grant Request:* Identify the amount of funding being requested from SHPO.
- *CLG Match:* There is **NO** match required for FY23 CLG grants. However, applicants may opt to include cash or in-kind match to show community buy-in, which may make the application more competitive. If match is being included, identify the amount.
- *Total Project Amount:* This field will automatically calculate based on the grant request and match.
- *Project Funding Source and Kind:* Because all grant funds are paid on an expense reimbursement basis in accordance with National Park Service requirements, applicants must demonstrate the availability of 100% of project funds. Briefly describe the source (e.g., city, non-profit, private donor) and kind (e.g., general fund, cash, in-kind services) of the total project funding, inclusive of any match provided.

3. CLG Information

- *Federal ID Number:* Provide the local unit of government’s EIN (federal employer identification number).
- *UEI Number:* Provide the Unique Entity Identifier (UEI) number for the local unit of government.
- *CLG Street Address, City, and Zip Code:* Provide the primary mailing address for the CLG.
- *Project Coordinator Name:* Identify the CLG point of contact who will be responsible for project coordination. This person should be able to answer any questions about the grant application and project.
- *Primary Telephone Number:* Provide the primary telephone number for the CLG project coordinator.
- *E-mail:* Provide the primary e-mail address for the CLG project coordinator.
- *Project Coordinator Street Address, City, and Zip Code:* If different than the primary mailing address for the local unit of government, provide the mailing address for the CLG project coordinator.

4. Legislative Information

SHPO sometimes shares news of preservation awards with elected officials. Using websites such as www.usa.gov/elected-officials, provide the community’s legislative information.

- *U.S. Congressional Representative:* Provide the district number of your U.S. representative.
- *State Senator:* Provide the district number of your State Senator.
- *State Representative:* Provide the district number of your State Representative.

5. CLG Sponsorship Applicant Information (if applicable)

Only complete this section if the CLG is applying on behalf of a non-profit (e.g., historical society) or public entity (e.g., land bank) within its boundary. Otherwise, leave all fields blank.

- *Non-profit or Other Public Entity:* Provide the name of the entity on behalf of which the CLG is applying.
- *Federal ID Number:* Provide the EIN for the identified entity.
- *UEI Number:* Provide the UEI number for the identified entity.
- *Contact Name:* Provide the name of the primary contact for the identified entity.
- *Primary Telephone Number:* Provide the primary telephone number for the contact person.
- *E-mail:* Provide the primary e-mail address for the contact person.
- *Contact Street Address, City, and Zip Code:* Provide the mailing address for the contact person.

6. Project Information

This is the most important section of the application. It is the applicant’s opportunity to provide the grant review committee with a complete and accurate understanding of project need and goals, as well as the steps necessary to successfully complete the project. If the project is selected for award, this information will form the basis of the grant agreement and procurement (i.e., consultant bidding) documents.

- *Project Goals:* Succinctly identify the major goals of the project.
- *Scope of Work:* Describe the major tasks necessary to successfully complete the project. This may include, for example, project management, consultant selection, public meetings, fieldwork, research, document production, and deliverable reviews. While all applications must generally detail the tasks to be completed, specific guidance for each project type is provided in **Appendix A**.
- *Deliverables:* Based on the project type, identify the draft and final reports, publications, and/or other items that will be produced. Guidance for each project type is provided in **Appendix A**.
- *Project Personnel:* Identify if tasks will be performed by staff, volunteers, and/or a qualified consultant that will be hired. Note that any consultants must be hired according to state and federal procurement standards after grant award (see *Section 4: Project Implementation* for more information).
- *Project Need:* Explain why the project is needed by describing the issues, deficiencies, or challenges the project will address. Also address what would happen if grant funding were not received (i.e., would the project still move forward without a grant award).
- *Project Benefit:* Describe the anticipated impact/benefit of the project. For example, identify if the project will support decision-making about important historic places in the community, facilitate the ability of property owners to take advantage of preservation incentives, or support local revitalization activities.
- *Project Considerations:* All applications, regardless of project type, must respond to the following prompts:
 - Is the project related to one or more of the CLG’s goals and priorities as identified in the CLG’s last three annual reports and/or most recent program evaluation? If so, describe.
 - Is the project related to one or more of the goals identified in the [Michigan Statewide Historic Preservation Plan, 2020-2025](#)? If so, describe.
 - How will the project contribute to the CLG’s ability to identify, plan for, protect, and/or celebrate important historic places in the community?
 - Are there other entities or partnerships that will benefit from the project? For example, will the project benefit a Main Street organization or enhance partnerships with city planning staff?
 - How will the value of historic preservation be articulated through the project and how will the public be informed about the project?

7. Project Budget

Provide a project budget that reflects the activities necessary to successfully complete the project as described in the scope of work. Common allowable and unallowable costs are described in **Appendix B**. SHPO will review and may make changes to budget line items prior to executing a grant agreement to ensure eligibility of included costs. The final budget, as approved by SHPO, will become an attachment to the grant agreement.

Example budget:

WORK ITEMS	CLG FUNDS	CASH MATCH	IN-KIND MATCH	TOTAL
Hire a 36 CFR 61-qualified architectural historian to complete a survey of 100 properties in the Broadmoor neighborhood	\$20,000	\$0	\$0	\$20,000
Hire a videographer to produce an educational video on the history of the neighborhood	\$5,000	\$0	\$0	\$5,000
Total Costs	\$25,000	\$0	\$0	\$25,000

IMPORTANT! While not required, applicants are **strongly encouraged** to include estimates or quotes (not formal bids) from consultants/vendors, or other such data, as supporting material with their application to demonstrate the reasonableness of the projected costs.

8. Work Schedule

Provide an anticipated work schedule that includes the major milestones associated with successful completion of the project. Projects cannot start until a grant agreement has been executed with SHPO. For the purposes of the work schedule, applicants should assume a grant agreement date of July 1, 2023. All project work must be completed and invoiced by September 30, 2025. Grant funds cannot be used to reimburse work completed or costs incurred prior to execution of a grant agreement or after the end date specified in a grant agreement.

The schedule must include anticipated dates for submission of work products (e.g., reports, studies, and publications) to SHPO for review and account for sufficient SHPO review time. If a grant is awarded, the applicant's proposed schedule will become an attachment to the grant agreement, but SHPO will work with the awardee during the project to verify the ongoing feasibility of the projected timeline. Modifications may only be made by mutual agreement of SHPO and the awardee.

9. Application Checklist

Complete the application checklist to verify that that the necessary exhibits and attachments are included.

10. Certified Local Government Authorized Signatory

The completed grant application must be signed and dated by the authorized signatory of the CLG. Unsigned applications will not be accepted. If the CLG is applying for a grant on behalf of another party, the application must also be signed by an authorized signatory of that entity.

EXHIBIT INSTRUCTIONS

EXHIBIT A. FINANCIAL CERTIFICATION (REQUIRED FOR ALL APPLICATIONS)

1. Verification of Availability of Funds

Because this is a reimbursable grant program, the grant recipient must pay, in full, all project costs as they become due and payable. As such, the availability of funds to pay for 100% of the project cost must be documented and verifiable at the time of application. Certification may be a statement from a banker that funds are available, a copy of a recent bank statement or ledger (within 30 days) showing adequate financial resources, a resolution from the governing body setting aside specific funds, or similar verification. The verification should specify the amount and source of the funding and that the funds are earmarked for the project. Any changes in the availability of project funds must be approved by SHPO.

Project funds may include the following:

- Private Funds
- Local Government Funds
- State Funds
- Federal Community Development Block Grant (CDBG) funds. *Note that provisions of the Davis-Bacon Act apply if CDBG funds are used.* No other Federal sources can be used with CLG grants.
- Paid Staff Time: Compensation for CLG staff during the project period—including wages, salaries, and supplementary compensation and benefits—are allowable costs, but additional materials must be submitted with the CLG grant application. These additional materials include:

- A current resume of the project personnel demonstrating that they meet or exceed the professional requirements as stated in 36 CFR 61.
 - A current earnings statement from the project personnel reflecting the hourly rate of pay.
 - Fringe benefits for paid or in-kind employees in the form of employer's contributions to social security, life and health insurance plans, unemployment insurance coverage, worker's compensation plans, and pension plans are allowable, provided costs are distributed equitably to grant costs and other activities.
- Volunteers: Volunteer time may be accounted for as **project match only**. All volunteer services must be substantiated at the conclusion of the project by time sheets that show the actual hours worked and the specific duties performed. If volunteer time is being shown as match as part of the grant application, the application must include a written justification of the volunteer rates used:
 - If a volunteer is a professional (e.g., an architectural historian meeting 36 CFR 61 qualifications) and is performing duties corresponding to their profession, their normal rate of pay is acceptable as long as it does not exceed the allowable federal maximum.
 - For all other volunteers, time is valued at \$28.35/hour, which is the value assigned to volunteer time in Michigan by the [Independent Sector](#) as of 2021.

2. Financial Management

Submit a letter from your organization's financial manager that an adequate accounting system with appropriate internal controls is in place to assure accuracy and reliability of accounting data. A letter template is available [here](#). The financial management system must:

- Provide accurate, current and complete disclosure of the financial results of each grant;
- Provide records that identify the source and application of funds for grant supported activities;
- Compare actual and budgeted amounts for the grant;
- Establish procedures for determining reasonableness, allowability, and allocability of costs in accordance with the provisions of the applicable cost principles and grant agreement;
- Support accounting records by source documentation such as canceled checks, paid bills, payrolls, and subcontract documents. Separate project records must be established and identified by the grant name and number.

EXHIBIT B. RESOLUTION (REQUIRED FOR ALL APPLICATIONS)

Submit a resolution from the local unit of government authorizing acceptance of the grant under the conditions attached thereto and designating all authorized contract signatories. The resolution must include the name(s)/title(s) of the individual authorized to sign the grant agreement and any necessary amendments, the grant manager, the amount of the authorized grant request, and acknowledgement that this is a reimbursable grant program. Applicants are strongly encouraged to use the template available [here](#).

IMPORTANT! If the CLG is sponsoring an application for another party, the application must include two resolutions—one from the CLG and one from the sponsored entity—and an executed Memorandum of Understanding (MOU).

1. The two resolutions must include the following:
 - The sponsored entity's project contact name, title, and contact information
 - The applicant's (CLG) project contact name, title, and contact information
 - The roles of each organization relative to the grant project
 - Authorization of the MOU
2. The MOU between the CLG and sponsored entity must describe the following:
 - The roles of each organization relative to the grant project
 - The fiscal and administrative relationship of the organizations
 - The organization that will provide the project funds
 - The organization that will administer the grant project
 - The organization that will pay vendors

An example MOU is available [here](#).

EXHIBIT C. SUPPORT LETTERS

1. Submit a letter from the CLG's Historic District Commission supporting the grant application (required).
2. Additional support letters from other groups (e.g., business owners, homeowner's association, Main Street organization, historical society, etc.) may be provided as determined appropriate by the applicant.
3. For *National Register nominations for individual properties only*, submit a letter from the property owner indicating that they are the legal owner of the property and support the grant application and nomination.

EXHIBIT D. PHOTOGRAPHS, MAPS, AND SUPPORTING DOCUMENTATION

1. Photographs

- Photographs illustrating the specific or representative properties to be included in a project must be included for all survey, designation, and planning projects. Photographs should be accompanied by a caption sheet. Use the following as general guidance:
 - Survey: 5-10 photographs of representative properties and streetscapes
 - Study Committee reports: 5-10 photographs of representative properties and streetscapes
 - National Register nominations: 5-10 photographs for nominations of individual properties and 10-15 photographs for historic districts
 - Planning projects: 5-10 photographs of representative properties/streetscapes to be addressed in the planning study, design guidelines, revitalization plan, or other such project
 - Archaeological studies: 3-5 photographs showing conditions at the property
- Photographs are not required for education projects, except for the following:
 - Hands-on Trades: If the project will include work on a building as part of a hands-on trades activity, include 5-10 photographs of the property
 - Heritage tourism materials (driving tours, web tours, etc.): 5-10 photographs of representative properties to be included in the materials
- Photographs may be taken on a camera, phone, or tablet so long as they meet the below requirements:
 - Clear, well-composed, and at least 2000x3000 pixels
 - Submitted electronically in JPEG or TIFF format with the grant application
- Note that photographs may be used by SHPO or the National Park Service for promotional purposes.

2. Maps

At least one (1) aerial or parcel map indicating the project boundaries must be included for the following types of projects. Parcel maps created from online municipal databases and aerials from websites such as Google Maps and Bing Maps are acceptable.

- Historic resource surveys
- Local Historic District Study Committee Reports
- National Register of Historic Places nominations
- Preservation plans, revitalization plans, and design guidelines
- Archaeological studies

3. Other Supporting Documentation

- Applicants are strongly encouraged to include estimates or quotes (not formal bids) from consultants/vendors, or other such data, to support their funding request
- If the grant application is to update an existing document (e.g., design guidelines or preservation plan), submit an electronic copy of the current document with your application. Additionally, if you have mock-ups or models you intend to use for a project or other relevant background information that will help the review committee understand your project, submit an electronic copy.

3. GRANT APPLICATION SCORING AND SELECTION

Applications are first reviewed for completeness and feasibility by SHPO program staff. Following, applications are competitively scored by an interdisciplinary review panel based on the selection criteria identified below. The review panel's scores will be averaged, and recommendations will be made to the State Historic Preservation Officer for funding. **Projects that meet SHPO's FY23 funding priorities may receive extra points.** For FY23, SHPO's funding priorities are as follows (presented in no certain order):

- Community preservation plans that help guide long-term local preservation activities
- Design guidelines for local historic districts
- Implementation of digital initiatives (e.g., survey methodologies, phone or web applications, archaeological studies, etc.) that can serve as models for other CLGs
- Trades training and hands-on preservation workshops
- Commissioner training that can have regional benefit (e.g., NAPC CAMP workshop)
- Projects that promote partnerships with community organizations (e.g., Main Street, DDA, schools, etc.)
- Survey of resources in CLGs underrepresented in statewide survey program
- Rehabilitation and rehabilitation planning projects that promote investment in threatened and/or underutilized National Register properties

SHPO may elect to offer a full award, a partial award, or no award to applicants. Depending on the number of applications received and amount of funding requested, additional non-scored criteria may be used in the selection if necessary. These include, for example, equitable geographic distribution of funds, optional match, demonstrated local support, and past CLG performance with grant funds.

Broadly speaking, each application will be evaluated in the categories of project scope, need, impact, and feasibility. The narrative components of the application are the applicant's opportunity to fully describe the potential positive impacts of a project. Applicants are encouraged to be succinct but clear in their applications so that the review panel has a full understanding of the project and the anticipated or potential outcomes. Applicants should not assume that review committee knows anything about their project or that they will have the opportunity to clarify or provide additional information prior to the review panel's project selection.

**MICHIGAN STATE HISTORIC PRESERVATION OFFICE
 FY23 CLG GRANT PROGRAM
 PLANNING, DOCUMENTATION, AND EDUCATION PROJECTS
 SCORING CRITERIA**

	Criteria	Available Points	Points Awarded
Project Scope (25 pts)	Application materials, including supporting documentation, are complete and satisfactorily provide a complete understanding of the project	5	
	Project goals and scope are clearly defined and will result in a meaningful project with demonstrable benefits	10	
	Project methodology and associated tasks meet applicable standards and are appropriate, realistic, and achievable	5	
	Deliverables are appropriately explained and consistent with expectations	5	
Project Need (20 pts)	Project need is well demonstrated, and the project is shown to be an appropriate solution to the identified need	10	
	Funding is critical to the applicant's ability to complete the project (i.e., the project likely wouldn't be completed without a grant)	5	
	Project is related to one or more community goals identified in the CLG's annual reports and/or four-year evaluations	5	
Project Impact (35 pts)	Project meets one or more of goals identified in Michigan's Statewide Historic Preservation Plan, 2020-2025	5	
	Project will increase the capability and effectiveness of the CLG in addressing historic preservation needs and issues	10	
	Project has the potential to benefit multiple audiences (e.g., residents, commissioners, community organizations, etc.)	5	
	Project has the potential to lead to concrete future preservation activities to document, protect, and celebrate historic resources in the community (e.g., National Register nominations, local district designations, public education projects, tax credit applications, revitalization strategies, etc.)	10	
	Project will have a demonstrated public benefit and includes a defined approach to making information accessible to the public	5	
Project Feasibility (20 pts)	Project budget is sufficient to successfully complete the project	10	
	Project work schedule is appropriately detailed and provides sufficient time to complete the project	5	
	Project personnel (staff, contractors, etc.) are documented and appropriately considered in relation to identified tasks	5	
	Subtotal	100	
	Project meets one or more of SHPO's funding priorities for FY23	10	
	Total Points	110	

4. PROJECT IMPLEMENTATION

GRANT TIMELINE

In general, the following timeline is anticipated for FY23 CLG grant project selection and award. However, the start of work is ultimately dependent on SHPO's receipt of its allocation from the federal Historic Preservation Fund. All specific dates applicable to awarded projects will be detailed in the grant agreement executed with SHPO.

February 3, 2023:	Applications due to SHPO
February 2023:	Applications scored by SHPO review panel SHPO requests clarifications/resolution of deficiencies from applicants
March 2023:	Applicants submit clarifications, as necessary Funding recommendations made to State Historic Preservation Officer
April 2023:	SHPO provides letter of intent for projects selected for award
May 2023:	SHPO drafts grant agreements
June 2023:	SHPO executes grant agreements with subgrantees
July 2023:	Project Work begins
September 30, 2025:	All Project Work must be completed and reimbursement requests made

AWARD NOTIFICATIONS

Once projects are selected and approved for funding, SHPO will send selected applicants a notice of intent to award letter identifying the anticipated funding amount. Awardees will be required to respond to SHPO and formally accept the grant offer, or to let SHPO know that the applicant does not wish to accept the award, in which case SHPO will make alternate arrangements with another applicant.

Alongside the notice, SHPO will provide the applicant with a grant recipient packet including helpful guidance and forms that will must be completed prior to the execution of the grant agreement. These forms include:

- *Assurances—Non-Construction Projects*
- *W-9 Request for Taxpayer Identification Number and Certification*

THE CLG GRANT AGREEMENT

All projects—regardless of size, dollar amount, or complexity—require a fully-executed grant agreement. Grant agreements will be executed electronically via DocuSign.

IMPORTANT! The grant is formally awarded at the time the grant agreement is executed by all parties. No work—including soliciting bids from or executing contracts with consultants—can proceed until the agreement is fully executed. Any work done prior to the execution of the grant agreement with SHPO is not eligible for reimbursement as part of the grant expenditures, and any procurement actions taken in advance of the grant agreement may have to be redone before project work can begin.

The grant agreement for each project will specify:

- Project Work to be accomplished with the grant award
- Method of and requirements for the disbursement of funds
- Period for the completion of the project
- State and Federal statutes, regulations, and requirements that must be followed

Attachments to the agreement will include:

- Detailed scope of work and deliverables (based on the scope of work included in the application)
- Work schedule detailing major project milestones (based on work schedule included in the application)
- SHPO approved budget (based on the budget included in the application)

PROJECT BIDDING AND PROCUREMENT

Because projects are funded through federal monies, all projects must use procurement processes that are conducted in a manner that provides open, transparent, and free competition. In addition, before contracts can be executed, all contractors/consultants must be approved by SHPO to verify they have the necessary qualifications to successfully complete the project. This includes making sure any consultants used in the project meet the appropriate professional qualification standards ([36 CFR 61 qualifications](#)) for their respective field (e.g., architecture, history, architectural history), as appropriate. **Project bidding and procurement cannot begin until after the grant award is executed.**

Subgrantees are required to select contractors/consultants through one of the two processes below, which is determined by the total project cost (not the grant amount). Note that SHPO will provide additional information to awardees following grant award and work closely with them to help make sure that the procurement process and project are successful

IMPORTANT! If the CLG's local procurement standards require a more stringent or alternative process than what is outlined, SHPO will work with you to identify an appropriate process.

FOR PROJECTS TOTALING LESS THAN \$100,000

A subgrantee that has a total project cost of less than \$100,000 can use small purchase procedures to solicit and secure a contractor or consultant. These procedures include soliciting bids from at least four (4) qualified contractors/consultants. The required steps are as follows:

- **Invitation to Bid:** Subgrantees must develop an invitation to bid describing the scope of work, schedule, and necessary qualifications, which will be sent directly to prospective contractors/consultants. Subgrantees must also prepare a list of qualified contractors/consultants that they anticipate contacting about the project. At least four (4) qualified parties must be identified and contacted.

All documents related to the invitation to bid must be submitted to SHPO for review and approval prior to their release/use. This includes, at minimum, the following:

- Draft and final copies of the invitation
- List of prospective contractors/consultants and copies of letters or emails to be sent to prospective contractors/consultants with the invitation to bid
- **Bid Solicitation:** Once the materials are approved by SHPO, the subgrantee may send the invitation to bid to identified contractors/consultants. Contractors/consultants should be given sufficient time to respond, at least twenty (20) to thirty (30) days. Following the subgrantee's review of bids, the following

must be provided for SHPO review and approval so that SHPO can confirm that the selected contractor/consultant has the qualifications necessary to successfully complete the project:

- Copies of responses received
 - The name of the awardee's preferred contractor/consultant
 - Brief description of the justification for the identified contractor/consultant
 - Signed copy of the awardee's bid tabulation sheet (template available [here](#))
 - Copy of the draft subcontract for the project
- **Subcontract Execution:** Once SHPO has approved the subgrantee's contractor, the subgrantee may move forward with executing a contract with them. All professional service subcontracts must include or state:
 - All work as outlined in the grant agreement with SHPO
 - That work is accomplished in accordance with contract specifications
 - That the terms of all negotiated contracts meet contract specifications
 - Provisions or conditions that will allow for administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as may be appropriate

Including the grant agreement as an attachment to the subcontract is recommended. At minimum, a copy of the grant agreement must be made available to all contractors/consultants to assure that work meets the contractual requirement. All parties have the responsibility to review the terms of the grant agreement and assure compliance with all state and federal requirements. A copy of the executed contract must be returned to SHPO.

FOR GRANT PROJECTS TOTALING \$100,000 OR MORE

Activities associated with a project having a total cost of \$100,000 or more must use competitive negotiation procedures to solicit and secure a contractor/consultant. These procedures include issuing a publicly advertised request for proposals (RFP) and receiving sealed bids. The required steps are as follows:

- **Request for Proposals:** Subgrantees must develop a comprehensive Request for Proposals (RFP) that includes a detailed scope of work and all criteria and requirements that must be addressed in a bid proposal. The RFP must also include the required federal credits/disclaimers, which will be supplied in the grant agreement.

All documents related to the RFP process must be submitted to SHPO for review and approval prior to their release/use. This includes, at minimum, the following:

- Draft and final copies of the RFP
 - List of prospective contractors/consultants and copies of letters or emails to be sent to prospective contractors/consultants (if also doing direct mailings/email notifications)
 - List of locations where the RFP will be advertised (see below)
- **Bid Solicitation:** All work must be formally advertised for bids either three (3) times in one (1) advertising source of general circulation (e.g., newspaper, physical or online) or one (1) time in at least three (3) different advertising sources of general circulation. Posting the RFP at one (1) or more online posting services such as Builders Exchange or Dodge Reports is allowable. Sufficient time must be given for prospective contractors to prepare and submit bids, at least thirty (30) days.

Formally advertised procurements must use sealed bids, public opening of bids, and fixed-price type subcontracts. Solicitation materials must include a declaration of the date, location, and time of the public

opening. Documentation of the solicitation process must be submitted to SHPO at each stage. This documentation includes:

- A copy of the publisher's affidavit, as relevant
- A copy of the online advertisement posting, as relevant
- A confirmation of the time and location for the RFP's posting

Following the subgrantee's review of bids, the following must be provided for SHPO review and approval so that SHPO can confirm that the selected contractor/consultant has the qualifications necessary to successfully complete the project:

- Copies of all bid responses received
 - The name of the preferred contractor/consultant
 - Brief description of the justification for the identified contractor/consultant
 - Signed copy of the awardee's bid tabulation sheet (template available [here](#))
 - Copy of the draft subcontract for the project
- **Subcontract Execution:** Once SHPO has approved the subgrantee's contractor, the subgrantee may move forward with executing a contract with them. All professional service subcontracts must include or state:
 - All work as outlined in the grant agreement with SHPO
 - That work is accomplished in accordance with contract specifications
 - That the terms of all negotiated contracts meet contract specifications
 - Provisions or conditions that will allow for administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as may be appropriate

Including the grant agreement as an attachment to the subcontract is recommended. At minimum, a copy of the grant agreement must be made available to all contractors/consultants to assure that work meets the contractual requirement. All parties have the responsibility to review the terms of the grant agreement and assure compliance with all state and federal requirements. A copy of the executed contract must be returned to SHPO.

IMPORTANT! The cost of supplies necessary to carry out the grant work is allowable. Purchases under \$5,000 made specifically for the grant work shall be charged at their actual prices after deducting all cash discounts, trade discounts, rebates and allowances received by the grant recipient; they do not need to be bid out, but backup documentation (e.g., invoice, receipt, etc.) must be retained for reimbursement. Supplies exceeding \$5,000 must be competitively bid per the above policies. Required documentation of the competitive bid process should be determined in consultation with SHPO.

5. PROJECT COMPLETION

PROGRESS REPORTS

SHPO staff will remain engaged with subgrantees throughout the duration of their projects to help ensure successful completion. In addition, the subgrantee is required to provide brief quarterly progress reports that provide a snapshot of the project’s status, any issues encountered, proposed changes (if any), and a budget update showing any expenditures and their relationship to the total anticipated cost. Reports are due regardless of activities completed or dollars spent.

Reporting Period	Report Due
January 1 – March 31	April 15
April 1 – June 30	July 15
July 1 – September 30	October 15
October 1 – December 31	January 15

The quarterly progress report template is available [here](#).

FINAL COMPLETION REPORT AND REIMBURSEMENT REQUEST

Grant funds will be disbursed to the grant recipient only on an expense reimbursement basis once the project is complete. No advances will be made under any circumstances. All documents and supporting entries on the accounting records must be available for inspection by authorized representatives of SHPO.

To receive reimbursement, the subgrantee must submit a Completion Report and Reimbursement Request Form to SHPO at the end of the project. Generally speaking, the reimbursement request should be submitted no later than September 1 of the year in which the grant agreement terminates. This report includes a final discussion of the project, the methodology employed, and the results of the project. The final report also requests a discussion of any issues encountered and how they were resolved during the project, as well as a final list of project expenditures and backup documentation. The form must be signed by the individual who signed the grant agreement or the chief financial officer. Payment cannot be processed until the report is completed in whole.

A blank copy of the required Completion Report and Reimbursement Request is available [here](#).

Requests for reimbursement that include staff and/or volunteer time must be appropriately documented:

- Time spent must be documented using SHPO’s Historic Preservation Project Timesheet, available [here](#).
- Time spent must be supported by daily time and attendance records that indicate the date, a description of the work performed, and the time worked (in hours).
- The timesheet must be signed by both the person completing the work and their supervisor.

The Completion Report and Reimbursement Request form are submitted via e-mail to Alan Higgins, CLG Coordinator, at HigginsS3@michigan.gov.

APPENDIX A. ELIGIBLE PROJECT TYPES

The following types of projects are eligible for CLG grant funding. Projects that meet one (1) or more of SHPO's funding priorities for FY23 CLG grants may receive extra points during the scoring process. Innovative projects and projects that have the potential to serve as a model for other CLGs are also encouraged. If you have any questions about the eligibility of your project, please contact SHPO's CLG Coordinator prior to submitting an application.

Please pay special attention to the Scope of Work and Deliverables requirements for each project type as these must be addressed in the grant application.

HISTORIC RESOURCE SURVEYS

Historic resources surveys focus on the identification, documentation, and evaluation of buildings, structures, objects, landscapes, and historic districts. There are three types of survey, each of which is eligible for funding. For more information, see [SHPO's Above-Ground Survey Manual](#).

- **Reconnaissance Survey** identifies the general distribution, location, and character of historic resources in a specific area to collect data to identify which resources warrant future investigation and inform future survey and planning activities.
- **Intensive Survey** provides in-depth documentation of resources in a specific area to determine eligibility for the National Register of Historic Places and/or designation as a local historic district.
- **Thematic Survey** is the same as intensive-level survey except that the study focuses on a specific property type (e.g., lighthouses) or one theme (e.g., agriculture in Lapeer County from 1830 to 1945).

Scope of Work Instructions:

All surveys must comply with [SHPO's Michigan Above Ground Survey Manual](#) and *The Secretary of the Interior's Standards and Guidelines for Archaeology and Historic Preservation*.

- Identify the survey type (reconnaissance, intensive, or thematic), number of resources, and estimated acreage.
- Describe the geographic area to be surveyed and explain how the boundaries were chosen. Briefly summarize the area's history and characteristics. *For thematic surveys only:* describe the significance of the property type and/or context to be studied and include a list of resources anticipated to be surveyed.
- Describe the survey methodology and identify who will be responsible for work (e.g., staff, volunteers, and/or consultants). At minimum, describe the fieldwork and research to be completed and address how properties will be evaluated (e.g., National Register Criteria). Describe themes to be included in the historic context portion of the survey report and identify known sources of information that may be useful in completing the project. Confirm that the survey report will comply with all SHPO requirements.

Required Deliverables:

- Survey Report Outline in electronic (Word or PDF) format
- First and revised draft survey reports in electronic (Word or PDF) format
- Draft inventory forms
- One (1) bound hardcopy and two (2) electronic copies (Word and PDF) of the final report and forms.
- One CD/DVD or flash drive with digital images
- GIS shapefile or KMZ of surveyed resources
- At least two public meetings, one at the beginning and one at the end of the project

Local Historic District Study Committee Reports

A local historic district is a historically significant area that is protected by a local historic district ordinance established under Michigan's Local Historic Districts Act, Public Act 169 of 1970, as amended. The act outlines the process a community must follow to establish a local historic district, which includes preparation of a Study Committee report that discusses the character and integrity of the area being studied, evaluates the area's significance, and presents recommendations for the establishment of a historic district. A summary of this process is available at www.michigan.gov/shpo. CLGs may use grant funds to support preparation of a Study Committee Report and associated ordinances.

Scope of Work Instructions:

All procedures for establishing a local historic district as outlined in Section 399.205 of PA 169 of 1970, as amended, must be followed, and reports must be prepared in accordance with SHPO guidance for study committee reports.

- Describe the area to be studied, including a summary of the area's history, character, and significance. Summarize the number and types of resources in the boundary, and explain how the boundaries were chosen.
- Summarize previous studies or efforts to designate and/or protect the area, and summarize any previous surveys or information available to support development of the study committee report. Identify additional work that will be necessary to meet the requirements of PA 169.
- Describe the methodology in consideration of the requirements of PA 169.
- Summarize any public support and outreach the CLG has already initiated regarding the proposed study.
- Provide a copy of the resolution from the local unit of government authorized the creation of the Study Committee and provide a list of the names of the Study Committee members and a short description of their history or preservation affiliation.

Required Deliverables:

- Preliminary Study Committee Report in electronic (Word or PDF) format
- One (1) bound hardcopy and two (2) electronic copies (Word and PDF) of the final Study Committee Report
- One CD/DVD or flash drive with digital images
- GIS shapefile or KMZ of district
- Public meetings in accordance with PA 169, at minimum

National Register Nominations

The National Register of Historic Places is the federal government's official list of districts, sites, buildings, structures, and objects deemed worthy of preservation for their historical, architectural, and/or cultural significance. It is a planning tool that serves as a research resource; provides for recognition of designated properties; and forms the basis for tax credit projects and economic revitalization. The following activities are eligible for grant funding:

- New nominations for individual resources, archaeological sites, urban or rural historic districts, and rural or cultural landscapes. The property to be nominated must have an "Eligible" determination on file with SHPO prior to August 1, and such determinations must have been provided within the last ten (10) years. Applicants are **strongly encouraged** to confirm resource eligibility with SHPO prior to applying.
- Amendments for existing historic districts to update documentation to comply with current standards, revise district boundaries, and/or update counts of contributing and non-contributing resources.
- Preparation of a Multiple Property Documentation Form (MPDF), which is used to facilitate listing of related properties (e.g., mid-century bank buildings). MPDFs describe related historic contexts, define the property types associated with the contexts, and establish registration requirements for nominating such properties to the National Register. Applicants interested in applying for a grant for development of a MPDF must contact SHPO prior to submitting an application to discuss project appropriateness and eligibility.

Scope of Work Instructions:

National Register nominations must be prepared in accordance with National Register Bulletin 16A: Guidelines for Completing National Register of Historic Places Forms and all Michigan SHPO standards, guidelines, and documentation requirements, which are available at <http://www.michigan.gov/NRHP>.

- Describe the nomination(s), including the type (individual, district, or MPDF) and the number and types of resources to be nominated. Identify if it is a new nomination or an updated nomination.
- Summarize resource(s) to be nominated, including current conditions and significance. For historic districts, describe the boundaries and explain how they were chosen.
- Describe the methodology, including documentation to be completed and research to be undertaken. Identify the area(s) of significance that will be addressed in the historic context, Section 8 of the nomination, and identify known sources of information that may be useful in completing the nomination.
- Summarize previous determinations of eligibility, previous efforts to nominate and/or preserve the property, and any known changes since the determination of eligibility (or previous listing for updates).
- *For historic districts only:* summarize efforts to engage property owners and known support for or opposition to the nomination. Letters of support may be included.

Required Deliverables:

- A complete draft nomination and related materials as outlined SHPO's "National Register of Historic Places Nomination Submission Checklist," available at www.michigan.gov/NRHP.
- A complete final nomination and related materials as outlined SHPO's "National Register of Historic Places Nomination Submission Checklist."
- The nomination must be completed for presentation at a meeting of the State Historic Preservation Review Board prior to the end of the grant cycle.

Archaeological Studies

Archaeological projects may include, for example, surveys that involve the identification, documentation, and evaluation of archaeological resources; geophysical studies; nomination of archaeological sites to the National Register; predictive models; and development of management plans for protection of archaeological sites.

Applicants must contact SHPO prior to preparing an application for an archaeological project to ensure eligibility and verify the appropriateness of the scope of work.

Scope of Work Instructions:

Work must be conducted in accordance with the *Secretary of the Interior's Standards and Guidelines for Archaeology and Historic Preservation* and all SHPO requirements and guidelines.

- Specify if the project is for survey, testing, or planning and the research, management, and/or planning need.
- Describe the area to be studied, including a summary of the area's history, character, and significance. Identify the number of acres and number of sites anticipated, as appropriate.
- Describe the research design, including methods and techniques to be used. Sampling methodology, the use of shovel testing and test interval, the use of specialized equipment such as use of sonar equipment for underwater work, and similar topics should be discussed, as applicable. Mention any documentary research to be conducted (e.g., site file searches and historical records). Describe any other sources of information such as oral history, informant interview, and collections study. Types of records to be compiled for the project (e.g., site forms, photographs, USGS maps) should be specified.
- Specify the repository for project collections and records. The repository must meet the *Secretary of the Interior's Standards and Guidelines for Archaeology and Historic Preservation*.

Required Deliverables:

- To be coordinated with SHPO during pre-application discussion

Preservation Planning Projects

Preservation planning projects are intended to move forward the local preservation programs and enhance the ability of the CLG to effectively plan for, protect, celebrate, and incentivize historic resources in the community. Preservation planning activities are most effective when coordinated with other community planning, development, and revitalization activities. As such, collaborations with other community entities (e.g., Main Street organizations, planning and zoning staff, etc.) are strongly encouraged. Innovative projects are encouraged.

Preservation planning projects are diverse and eligible activities may include but are not limited to the following list. If you have questions about the eligibility of your project, contact SHPO's CLG Coordinator.

- Community-wide and neighborhood/corridor preservation plans that provide long-range guidance for a community's historic resources. Preservation plans may be prepared as a standalone document or as a component of a municipal or county master plan.
- Historic context statements that provide the foundation for making informed decisions related to the identification and evaluation of a specific category of historic resources. Context statements may be based on one or more themes, periods of significance, property types, and/or geographic areas.
- New or updated local historic district ordinances or conservation district ordinances.
- New or updates design guidelines, which provide the basis for review of projects in a designated area.
- Studies on social, economic, legal, environmental, or other factors affecting historic preservation efforts in the local community or the social, fiscal, or other impacts of historic preservation activities.
- Studies and research supporting the development of revitalization plans, market studies, feasibility studies, and related activities for historic commercial corridors or residential neighborhoods.
- Information management and technology projects that facilitate a CLG's ability to collect, manage, utilize, and distribute information about historic resources in the community.

Scope of Work Instructions:

Preservation planning studies must be conducted in accordance with the *Secretary of the Interior's Standards and Guidelines for Archaeology and Historic Preservation* and in coordination with SHPO.

- Describe the type of planning activity (e.g., preservation plan, economic impact study, etc.) being pursued.
- Identify if the project is to produce a new study or update an existing study. If the project is to update an existing study, describe the issues to be addressed by the current project (e.g., data is no longer current) and include a copy of the current document.
- Identify local stresses, threats, or weaknesses in the local preservation program that will be addressed.
- Describe the targeted audience(s) and how the project is appropriate for them.
- Identify the boundaries and/or types of resources to be covered by the project, as applicable.
- Describe the methodology and anticipated content of your study.
- Describe the project's relationship, if any, to other planning or community development activities.
- Describe anticipated public outreach and engagement activities associated with the project.
- Describe the anticipated outcome and benefits of the project.

Required Deliverables:

- Study outline in electronic (Word or PDF) format
- First and revised draft studies in electronic (Word or PDF) format
- One (1) bound hardcopy and two (2) electronic copies (Word and PDF) of the final study and materials.
- Preservation planning projects must include a substantial public outreach/participation component. The applicant should define these components in consideration of the project being pursued.

Educational Activities

Like preservation planning projects, educational projects are diverse and should be tailored to the needs and goals of the CLG and its efforts to raise awareness of historic resources and/or the importance of historic preservation. Projects may relate to heritage tourism activities, training for historic district commissioners and/or staff, hands-on training for the community, and more. Innovative projects are encouraged.

Eligible activities may include but are not limited to the following list. If you have questions about the eligibility of your project, contact SHPO's CLG Coordinator.

- Design, research, and printing of publications designed to enhance the knowledge and appreciation of historic preservation. Such topics could include, for example, local historic district designation and property owner requirements; the history of the community; and weatherization and energy efficiency.
- Creation of videos, websites, e-Learning programs, and other audio-visual materials that provide access to information and educate the public about preservation-related subjects, issues, and/or techniques.
- Teaching with Historic Places lesson plans that teach students about historic resources in the community.
- Heritage tourism programs and materials such as brochures, guidebooks, videos, and mobile applications for tours of historic districts, byways, cultural districts, heritage trails, and more
- Conferences, seminars, or workshops that discuss preservation-related subjects or issues and increase the knowledge, skills, and abilities of a specific audience (e.g., historic district commissioners, planning staff, realtors, contractors, property owners, etc.). Such workshops can be provided by the Michigan Historic Preservation Network, National Alliance of Preservation Commissions, or other such organizations.
- Development of mobile applications and other information technology that makes information about local historic resources available to the public.
- Hosting a "how-to" or trades workshop on topics such as window repair or property maintenance.

Scope of Work Instructions:

As appropriate, educational activities must be conducted in accordance with the *Secretary of the Interior's Standards and Guidelines for Archaeology and Historic Preservation* and in coordination with SHPO.

- Describe the type of project, program, and/or publication (e.g., heritage tourism program, K-12 lesson plan, workshops, etc.) to be produced or coordinated.
- Describe the targeted audience(s), and how the project is appropriate for the audience(s).
- Describe the methodology for developing the project, program, or publication.
- Describe the anticipated content and format, including physical and/or digital products that will be produced. Identify if intended for one-time or continued use.
- Describe any examples of similar projects previously completed by the community and/or models from other communities that might be used, if applicable.
- Describe the anticipated outcome and benefits of the project.

Required Deliverables:

- First and revised draft products in electronic (Word or PDF) format, as applicable
- One (1) bound hardcopy and two (2) electronic copies (Word and PDF) of the final materials, as applicable
- *For conferences, training, and workshops only:* All notices, advertisements, publications, etc. must be provided to SHPO.
- Educational projects must include a substantial public outreach/participation component. The applicant should define these components in consideration of the project being pursued.

APPENDIX B. ALLOWABLE WORK ITEMS

All grant funds are paid on an **EXPENSE REIMBURSEMENT** basis only. The grantee must have funds available for expenditure amounting to 100% of the project cost at the time of a grant application submittal. The grantee will be reimbursed for eligible expenses incurred (up to the grant amount) at the end of the grant process.

The SHPO will review and may make changes to budget line items as submitted in the application to ensure all project costs are eligible. The final budget approved by the SHPO will become an attachment to the grant agreement. Common allowable and unallowable costs are listed below:

Allowable Work Items

- Paid Staff Time and In-Kind Services: Compensation for project personnel during the project period including wages, salaries, and supplementary compensation and benefits are allowable costs, but additional materials must be submitted with the CLG grant application. Project personnel must demonstrate that they meet or exceed the professional requirements as stated in 36 CFR Part 61.
 - Fringe benefits for paid or in-kind employees in the form of employer's contributions to social security, life and health insurance plans, unemployment insurance coverage, worker's compensation plans, and pension plans are allowable, provided costs are distributed equitably to grant costs and other activities.
- Volunteers: Volunteer time may be accounted for as project match only. All volunteer services must be substantiated at the conclusion of the project by time sheets that show the actual hours worked, the rate of pay, and the specific duties performed. If volunteer time is being included as part of the grant application, the application must include a written justification of the volunteer rates used:
 - If a volunteer is a professional (e.g., an architectural historian meeting 36 CFR 61 qualifications) and is performing duties corresponding to their profession, their normal rate of pay is acceptable as long as it does not exceed the allowable federal maximum.
 - For all other volunteers, time is valued at \$28.35/hour, which is the value assigned to volunteer time in Michigan by the [Independent Sector](#) as of 2021.
- Transportation, lodging, subsistence and related items for project personnel who are in travel status for project-related work is allowable. Costs are charged on an actual basis and must be consistent with the Standard State of Michigan rate. Documentation and invoices must be provided for each cost. First-class airfare is not allowable.
- The cost of supplies necessary to carry out the grant work is allowable. Purchases under \$5,000 made specifically for the grant work shall be charged at their actual prices after deducting all cash discounts, trade discounts, rebates and allowances received by the grant recipient; they do not need to be bid out, but backup documentation (e.g., invoice, receipt, etc.) must be retained for reimbursement. Supplies exceeding \$5,000 must be competitively bid per the above policies. Required documentation of the competitive bid process should be determined in consultation with SHPO.
- The grant recipient may contract all or part of the project work. Free and open competition must be maintained. The SHPO must receive documentation of the procurement at each stage and must approve the contractor and contract.

Unallowable Work Items

- Personal/staff time for preparing a grant proposal
- Property acquisition
- Routine maintenance and utilities
- New construction or additions
- Demolition unless necessary for repair or rehabilitation of the property (e.g., removing roofing to inspect and repair underlayment)
- Non-historic site features including, but not limited to, parking lots, sidewalks, and paving
- Furnishings
- Major landscaping not directly related to a property's active use

- Landscaping that is not historically documented
- Certain environmental cleanup activities required under federal law
- Reconstruction of demolished buildings (Reconstruction of certain missing elements may be allowable if based upon historical documentation, such as photographs.)
- Mitigation activities as a condition or precondition for obtaining a federal permit, license, or funding
- Expenses and costs of organized fundraising, including financial campaigns, endowment drives, solicitation of gifts and bequests, and similar expenses incurred solely to raise capital or obtain contributions
- Fines, penalties, debts or losses arising from non-collectable accounts and other claims, and related collection costs
- Interest and other financial costs; interest on borrowing
- Cost-plus subcontracts, unlimited time and materials sub-contracts, and contingency fees
- Entertainment, costs of amusements, social activities, and related incidental cost such as meals, beverages, lodgings, rentals, transportation, and gratuities
- Costs of meals for employees when they are not in travel status
- Historical markers or commemorative plaques
- Archaeological Salvage
- Museum exhibits and curation of collections
- Lobbying, costs associated with activities to influence legislation
- Political activities or any other, no grant funds may be made for the use of equipment or premises for political purposes, political activities sponsoring or conducting candidates' meeting(s), engaging in voter registration activity or voter transportation activity, or other partisan political activities
- Costs incurred before the project starting date or after project completion date
- Costs over the approved grant amount
- Costs for work not included in the scope of work or not approved by SHPO
- Work not in compliance with applicable SHPO and NPS standards and guidelines

APPENDIX C. FEDERAL CREDIT

FEDERAL FUNDING CREDIT AND DISCLAIMER REQUIRED ON ALL MATERIALS

Acknowledgment of federal assistance and nondiscrimination must be included in each written, audio, visual, or other material, including public announcements and news releases, produced through the funded project. The following **must be included verbatim** in each such material:

The activity that is the subject of this project has been financed in part with Federal funds from the National Park Service, U.S. Department of the Interior, through the Michigan Strategic Fund, State Historic Preservation Office. However, the contents and opinions herein do not necessarily reflect the views or policies of the Department of the Interior or the Michigan Strategic Fund, State Historic Preservation Office nor does the mention of trade names or commercial products herein constitute endorsement or recommendation by the Department of the Interior or the Michigan Strategic Fund, State Historic Preservation Office.

This program receives Federal financial assistance for identification and protection of historic properties. Under Title VI of the Civil Rights Acts of 1964, Section 504 of the Rehabilitation Act of 1973, and the Age Discrimination Act of 1975, as amended, the U.S. Department of the Interior prohibits discrimination on the basis of race, color, national origin, disability, or age in its federally assisted programs. Michigan law prohibits discrimination on the basis of religion, race, color, national origin, age, sex, marital status, or disability. If you believe you have been discriminated against in any program, activity, or facility as described above, or if you desire further information, please write to:

Chief, Office of Equal Opportunity Programs
United States Department of the Interior
National Park Service
1849 C Street, NW, MS-2740
Washington, DC 20240