



MICHIGAN STATE HISTORIC PRESERVATION OFFICE CERTIFIED LOCAL GOVERNMENT FY2024 GRANT PROGRAM

Rehabilitation Planning and Rehabilitation Projects Grant Manual and Application Instructions

APPLICATION DEADLINE | FRIDAY, FEBRUARY 2, 2024



CERTIFIED LOCAL GOVERNMENT FY2024 GRANT PROGRAM

Rehabilitation Planning and Rehabilitation Projects

IMPORTANT DATES

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| October 2, 2023 | Application round opens |
| December 8, 2023 | Deadline for preliminary review (optional) |
| February 2, 2024 | Application deadline – 5:00 p.m. |
| Spring 2024 | Anticipated notice of award |
| June/July 2024 | Anticipated grant agreement execution |
| August 31, 2026 | 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
Grants Manager/Budget Specialist
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

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| Who May Apply? | <p>Any local unit of government that has entered the CLG program prior to the grant application deadline (February 2, 2024) 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. This means that work can be completed on a property owned by a non-profit or public entity. This also 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) 2024, SHPO anticipates that approximately \$250,000 will be available to fund CLG projects.</p> |
| How Much Funding Can Be Applied For? | <p>The minimum grant award is \$5,000. The maximum grant award is \$100,000. However, most awards will fall within the range of \$5,000-\$50,000. An applicant seeking more than \$50,000 must specifically identify 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 FY24 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? Grant funds may be used for rehabilitation planning and rehabilitation projects for properties owned by the CLG (i.e., the local unit of government), a non-profit, or another public entity.

Rehabilitation Planning (Exterior or Interior)

Grant dollars can be used to complete a rehabilitation planning project for properties that are listed in the National Register of Historic Places, either individually or as a contributing resource to a historic district, or properties that have been determined eligible for listing by SHPO **prior to January 1, 2024**.

Planning projects include, for example, Historic Structure Reports (HSR), Cultural Landscape Reports (CLR), Condition Assessment Reports (CAR), feasibility studies, façade studies, plans and specifications, and construction administration services. Planning projects must be completed by a consultant who has experience with historic properties and meets or exceeds the Secretary of the Interior’s Professional Qualification Standards ([36 CFR Part 61](#)) for “Historic Architecture.”

Rehabilitation Projects (Exterior or Interior)

Grant dollars for rehabilitation projects are exclusive for properties that are individually listed in the National Register of Historic Places or a contributing resource to a National Register property such as a historic district. Rehabilitation is defined as the act or process of making possible a compatible use for a property through repair, alterations, and additions while preserving those portions or features that convey its historical, cultural, or architectural values.

Rehabilitation projects include, for example, stabilization, roof repair, masonry repair, window repair, exterior painting, replacement of missing features; and rehabilitation, stabilization, or protection of well-documented historic landscapes. **For rehabilitation projects, plans and specifications must be submitted with the application.**

A Note on Interior Projects

If the project is for the interior of a property, the application must specifically address how the interior contributes to public use of and engagement with the property and why rehabilitation of the interior is critical to meeting long-term goals for the property.

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 2024**, but the start date is dependent upon receipt of SHPO’s allocation from the Historic Preservation Fund; all work must be complete by **August 31, 2026**, 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. For rehabilitation

projects requiring a historic preservation easement, reimbursement will only occur after the easement is recorded at the Register of Deeds and the original recorded easement is submitted to SHPO.

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| Treatment of Historic Properties: | All work must comply with the Secretary of the Interior's Standards for Rehabilitation. Projects that do not meet the Standards will not be funded. The Standards present concepts about maintaining, repairing, and replacing historic materials, as well as designing new additions and making alterations. View the Secretary of the Interior's Standards for Rehabilitation here . |
| Historic Preservation Easement Requirement (<i>rehab projects only</i>): | When rehabilitation work is performed, a historic preservation easement (easement of maintenance and public accessibility) is required to protect the historic resource. The historic preservation easement is prepared by SHPO. Before grant funds are released, the grant recipient must record the easement with the Register of Deeds, and the original documentation must be submitted to SHPO. See <i>Section 6. Historic Preservation Easement</i> for more information. |
| Project Readiness: | The project must be ready to proceed at the time of application and must not be dependent on future funding, actions, or approval from other organizations. For rehabilitation projects, plans and specifications must be submitted with the application so that the scope of work and feasibility of the project can be understood. |
| Concurrent Projects and Project Phasing: | Grant recipients are limited to having one open CLG grant for an individual historic property at a time: one rehabilitation planning or one rehabilitation project. One grant must be closed before another is applied for. Projects can be logically phased over a period of years. For example, a CLG grant may fund plans and specifications for a historic property, and a second grant may be used the following year to carry out the rehabilitation project utilizing the plans from the previous CLG grant. |
| Ineligible Activities: | Activities determined by the U.S. Department of the Interior to be ineligible for funding include but are not limited to: total reconstruction (some specific features may be eligible for funding if historical documentation is provided); new additions, code improvements, and routine maintenance activities; landscaping in relation to site improvements for parking lots, sidewalks, street paving, street lighting, etc.; and mitigation activities as a condition or precondition for obtaining a federal permit, license, or funding. 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 7. Project Completion</i> . |
| Allowability of Federal Costs: | The principles governing allowable direct costs are determined in accordance with 2 CFR 200 , and the National Park Service's Historic Preservation Fund Grant Manual . |

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| Program Audit Requirements: | 2 CFR 200 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: | Grant recipients 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 grant recipients 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 grantee is expected to take necessary steps to insure itself and its personnel and to comply with the applicable local, state, or federal safety standards, including standards established pursuant to the National Occupational Safety and Health Act of 1970. |
| National Environmental Policy Act (NEPA) Review: | Rehabilitation projects are subject to NEPA review. Following the award of a CLG grant for a rehabilitation project, SHPO will submit a summary of the environmental impacts on any impacted cultural resources to NPS. This summary must be approved before work can begin. NPS review can take a minimum of three (3) months, which should be accounted for when planning rehabilitation projects. |
| 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 . |
| 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. |
| Barrier Free Access: | <p>State and federal laws, including the Americans with Disabilities Act (ADA), concerning barrier free designs that facilitate access to grant-assisted properties by persons with disabilities are applicable to the CLG. SHPO strongly urges each applicant contemplating rehabilitation of a historic structure to consider the implications of such compliance at the earliest possible stage. Note that not all preservation work involving extant buildings or structures will trigger the need to meet the barrier-free design requirements.</p> <p>Should a determination be made that barrier-free design requirements are applicable, the Michigan Barrier-Free Design Board is empowered to grant a variance to the Michigan requirements when an applicant sufficiently shows that: 1) the proposed repairs, alterations or additions are to be performed on a building or structure listed in or eligible for listing in the National Register of Historic Places or the State Register of Historic Sites; and that 2) adherence to the barrier-free design provisions would destroy or diminish a significant feature of the building's or</p> |

structure's historic character or physical integrity or both. The applicant will demonstrate these exceptions at an administrative hearing conducted in Lansing, Michigan by a hearings officer for the Design Board.

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

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| 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 Friday, February 2, 2024 . 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 8, 2023 . |
| 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—Rehabilitation Planning and Rehabilitation 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., “Public Library Rehabilitation”).
- *Property Name*: Identify the resource that is the focus of your project (e.g., Allegan Public Library).
- *Property Address*: Provide the complete street address for the subject property.

- *Historic Designation:*
 - For rehabilitation projects: Only properties that are listed in the National Register of Historic Places individually or as part of a historic district are eligible for rehabilitation grants. Provide the formal name of the designated resource.
 - For rehabilitation planning projects: Only properties that are eligible for listing in the National Register or listed in the National Register of Historic Places individually or as part of a historic district are eligible for rehabilitation planning grants. Provide the formal name of the eligible or listed resource.
- *Property Owner Name:* Identify the name of the person/entity that owns the subject property.
- *Primary Telephone Number:* Provide the primary telephone number for the property owner.
- *E-mail:* Provide the primary e-mail address for the property owner.
- *Project Summary:* Provide a brief (1-2 sentence) summary statement of your project that describes the general focus and goal(s) of your project. For example, “The [name of CLG] will hire a contractor to complete necessary stabilization measures at the public library. This work will ensure the library is structurally sound and remains viable as a community asset.”

2. Grant Funding Request

- *CLG Grant Request:* Identify the amount of funding being requested from SHPO.
- *CLG Match:* There is **NO** match required for FY24 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., contractor bidding) documents.

- *Project Goals:* Succinctly identify the major goals of your project.
- *Scope of Work:* Describe the current conditions of the subject property and how the project relates to those conditions. Describe the major tasks necessary to successfully complete the project. This may include, for example, project management, contractor selection, and project work to be undertaken (e.g., the physical work to be completed for rehab projects). While all applications must generally detail the tasks to be completed, specific guidance for each project type is provided in **Appendix A**.
- *Project Need:* Explain why the project is needed. Describe the problems, 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). If you are requesting more than \$50,000, your application should specifically identify why the extra funding is necessary (particularly complex, impactful, etc.).
- *Project Urgency:* Identify the urgency of the project. For example, address if it is related to an immediate structural threat to the property or more broadly related to ongoing rehabilitation efforts or long-term facility planning and management.
- *Project Impact:* Identify the project's anticipated benefit on the resource and community. For example, describe how the project will meet the needs of the property and contribute to its long-term, continued use. Describe if the project will enhance or facilitate public use of the property.
- *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.
 - If applicable, describe the relationship of the project to other community planning and development, economic development, revitalization initiatives, and/or cultural tourism efforts?
 - Are there other entities or partnerships that will benefit from the project? For example, will the project benefit a non-profit organization or enhance partnerships with other municipal entities.
 - 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. 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 contractor to complete roof repairs | \$10,000 | \$0 | \$0 | \$10,000 |
| Hire a contractor to complete rehabilitation of 8 windows | \$15,000 | \$2,000 | \$0 | \$17,000 |
| Total Costs | \$25,000 | \$2,000 | \$0 | \$27,000 |

IMPORTANT! While not required, applicants are **strongly encouraged** to include estimates or quotes (not formal bids) from consultants/vendors, or other such data, 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. Please note that there are different requirements for rehabilitation planning and rehabilitation projects as indicated in the application.

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, 2024**. All project work must be completed and invoiced by **August 31, 2026**. 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.

Schedules must allow appropriate time for SHPO review of project components. 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 you have included the necessary exhibits and attachments.

10. Certified Local Government Authorized Signatory

The completed grant application must be signed and dated by the authorized contract 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

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 \$30.15/hour, which is the value assigned to volunteer time in Michigan by the [Independent Sector](#) as of 2022.

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

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. For rehabilitation projects, the resolution must also include the name/title of the individual property owner authorized to sign and record the easement. 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. TAX INCENTIVE CERTIFICATION

Submit a letter from the **owner of the property** stating that no federal historic preservation tax incentives have been or will be taken for the work proposed under this application.

EXHIBIT D. DEED AND OWNERSHIP INFORMATION

- Submit a copy of the deed showing the Register of Deeds recordation markings and sufficient documentation that discloses all present and future interests in the land, together with a statement of each lien, change, and liability, if any.
- If a copy of the deed is not available, sufficient documentation may include:
 - Title commitment or an abstract of title OR legal opinion from the local unit's attorney
- If a previous historic preservation easement exists on the property, submit a copy with the application.

EXHIBIT E. FLOOD PLAIN CERTIFICATION

Submit documentation indicating whether the project is within a federally designated flood area.

- Not Located in a Federally Designated Flood Area

- Provide proof that the historic resource is not located in a federal designated flood area with a letter from the municipal planner with a copy of the FEMA map ([link](#))
- Located in a Federally Designated Flood Area
 - Attach a copy of flood insurance policy or other proof of insurance

EXHIBIT F. SUPPORT LETTERS

1. Submit a letter from the Historic District Commission supporting the grant application (required).
2. Submit a letter from the property owner supporting the CLG grant application (required).
3. 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.

EXHIBIT G. PHOTOGRAPHS, MAPS, AND SUPPORTING DOCUMENTATION

1. Photographs

- All applications must include 5-15 digital photographs illustrating the existing character and conditions of the historic property that is the focus of the project. Photographs should be accompanied by a caption sheet and, if not easily discernible, by an annotated aerial image, site map, or floor plan.
- 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
 - All photographs must clearly explain and demonstrate the project in its entirety. Photographs taken within the last six months or after seasonal work has been completed are acceptable.
- 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 property boundaries must be included. Parcel maps created from online municipal databases and aerials freely available via online sources are acceptable.

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.
- For rehabilitation projects:
 - Applications for rehabilitation projects **must include** a copy of the plans and specifications for the proposed work. The specific nature of plans and specifications will depend on the project type. For example, an in-kind shingle replacement project will not need construction drawings; however, construction drawings would be necessary for structural framing repair. Please contact SHPO if you are not sure what to provide with your application.
- For rehabilitation planning projects:
 - If the grant application is to update an existing document (e.g., master plan or condition assessment), submit an electronic copy of the current document with your application.

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 FY24 funding priorities may receive extra points.** For FY24, 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
- 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
 FY24 CLG GRANT PROGRAM
 REHABILITATION PLANNING AND REHABILITATION PROJECTS
 SCORING CRITERIA**

| | Criteria | Available Points | Points Awarded |
|---------------------------------|--|-------------------------|-----------------------|
| Project Scope (30 pts) | Application materials, including supporting documentation, are complete and satisfactorily provide a complete understanding of the project | 10 | |
| | Project goals, scope, and methodology are clearly defined and sufficient to successfully achieve the project goals and result in a meaningful project | 10 | |
| | Project work meets the Secretary of the Interior’s Standards for Rehabilitation | 10 | |
| 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 addresses an identifiable threat (e.g., disinvestment, neglect, substantial deterioration, etc.) | 5 | |
| Project Impact (30 pts) | Project meets one or more of goals identified in Michigan’s Statewide Historic Preservation Plan, 2020-2025 | 5 | |
| | Project will have a (High/Medium/Low) impact on the resource: <ul style="list-style-type: none"> • <u>High</u>: Stabilization or correction of deficiencies to prevent future damage • <u>Medium</u>: Non-critical rehabilitation work or rehabilitation planning to allow continued use (planning will be used as basis for rehabilitation work) • <u>Low</u>: Work that is primarily cosmetic in nature | 15 | |
| | Project will have a significant and long-lasting impact on the historic resource (e.g. providing for continued use of the property for future generations) | 10 | |
| Project Feasibility (20 pts) | Project budget is clearly defined; costs are eligible, reasonable, and sufficient to successfully complete the project | 10 | |
| | Project work schedule is appropriately detailed and provides sufficient time to complete the project | 5 | |
| | Applicant has administrative ability and capacity to successfully complete the project | 5 | |
| | Subtotal | 100 | |
| | Project meets one or more of SHPO’s funding priorities for FY24 | 10 | |
| | Total Points | 110 | |

4. PROJECT IMPLEMENTATION

GRANT TIMELINE

In general, the following timeline is anticipated for FY24 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 2, 2024: | Applications due to SHPO |
| March 2024: | Applications scored by SHPO review panel SHPO requests clarifications/resolution of deficiencies from applicants |
| April/May 2024: | Applicants submit clarifications, as necessary Funding recommendations made to State Historic Preservation Officer SHPO provides letter of intent for projects selected for award |
| June 2024: | SHPO drafts grant agreements |
| July 2024: | SHPO executes grant agreements with subgrantees and Project Work begins |
| August 31, 2026: | 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 must be completed prior to the execution of the grant agreement. These forms include:

- *Assurances—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.

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, the CLG must use the more stringent process.

FOR REHABILITATION PLANNING PROJECTS TOTALING LESS THAN \$100,000

A subgrantee that has a rehabilitation planning project with a total 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. A copy of the executed contract must be returned to SHPO.

FOR REHABILITATION PLANNING PROJECTS TOTALING \$100,000 OR MORE AND ALL REHABILITATION PROJECTS REGARDLESS OF COST

Activities associated with a rehabilitation planning project having a total cost of \$100,000 or more and all rehabilitation projects regardless of cost must use full 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. 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.

REHABILITATION PROJECTS

The following information must be included in the bid documents for rehabilitation projects:

- If the project cost is over \$100,000, a bid guarantee is required from each bidder equal to five-percent (5%) of the bid price.
- If the project cost is over \$100,000, a performance and payment bond for the total fixed-price bid is required from each bidder.

SUBCONTRACT REQUIREMENTS

The subcontract must include all work as outlined in the grant agreement with SHPO. 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.

- **Subcontract Requirements:**

All construction subcontracts (rehabilitation projects) must include or state:

- All work as outlined in the grant agreement with SHPO
- That work is accomplished in accordance with contract specifications
- A provision for compliance with the Copeland “Anti-Kick Back” Act (18 USC 874)
- 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
- A requirement that contractors maintain all required records for three years after grant end date or until any audit questions are resolved
- A signed “Certification of Non-Segregated Facilities” in contracts and require subcontractors to include a signed “Certification of Non-Segregated Facilities.”
 - The Certification of Non-Segregated Facilities can be found [here](#).

In addition, all subcontracts over \$10,000 (aggregate) must include:

- A provision for termination and basis for settlement.

- A description of conditions under which the contract may be terminated due to default.
- A description of conditions for termination of the contract because of circumstances beyond the control of the contractor.
- A provision requiring compliance with Executive Order 12246, "Equal Employment Opportunity" (EEO), the "Equal Opportunity Clause," and the "Standard Federal Equal Employment Opportunity Construction Contract Specification."
- Provisions for the "Equal Opportunity Clause" are followed for construction contracts involving force account labor.
- Pursuant to Executive Order 12246, carry out sanctions and penalties imposed by the Secretary of Labor upon the federally assisted construction contractor or subcontractor, and refrain from entering into any contract, extension of a contract, or other modification of such a contract with a contractor debarred from government contracts under this order.

In addition, all subcontracts over \$100,000 must include:

- A provision that requires compliance with section 306 of the Clean Air Act (42 USC 1847 (h)), section 508 of the Clean Water Act (33 USC 1368), Executive Order 12738, and Environmental Protection Agency regulations (40 CFR Part 15), which prohibit the use under non-exempt federal contracts, grants or loans of facilities included on the EPA list of violating facilities. The provision shall require reporting of violations to the Department of the Interior and to the US EPA assistant administrator for enforcement.

All professional service subcontracts (rehabilitation planning projects) 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

5. PROJECT SIGN

FOR REHABILITATION PROJECTS ONLY

When rehabilitation work is performed, a sign at the project site acknowledging support from the CLG program must be placed before work begins and be maintained for the duration of the project.

The sign shall be produced and installed by the grant recipient. **The cost of the sign is an allowable project expense.** The sign must be a minimum of 4' x 3', be constructed of durable weather-resistant materials, be in a publicly accessible location, and identify the project and its sponsors.

Two color photographs of the installed site must be submitted to the SHPO upon within three (3) days of its installation. One photo should show a “zoomed out” view of the sign clearly showing its relationship to the overall property, and one photo should be a closer view of the sign and its installation.

An example of a typical funding sign is provided below. Upon execution of the grant agreement, SHPO will provide a digital file of the exact sign to be installed to the grant recipient.



6. HISTORIC PRESERVATION EASEMENT

FOR REHABILITATION PROJECTS ONLY

When rehabilitation or stabilization work is performed, a historic preservation easement must be executed to protect the grant-funded investment in the historic character of the property. The length of the easement is determined by the amount of the grant funding (not the total project cost).

| Grant Funding Amount | Length of Easement |
|----------------------|--------------------|
| \$1 - \$50,000 | 5-year minimum |
| \$50,001 - \$100,000 | 10-year minimum |

The easement will be prepared by SHPO and must be recorded with the Register of Deeds for the county in which the property is located by the grant recipient before final grant funds can be reimbursed.

- The property owner must advise the SHPO about any entity that may have an interest in the property, and all must consent to the historic preservation easement.
- Present owner(s) and successor(s) must be bound by the historic preservation easement.

The historic preservation easement will include the following provisions:

- The property must be maintained in such a way as to ensure its historical and architectural integrity;
- No major visual or structural changes may be made without the written approval of the SHPO;
- The grounds must be maintained in keeping with the historical integrity of the property;
- Equal opportunity standards regarding race, color, religion, national origin, age or sex in relation to any program or activity directly or indirectly related to the structure must be adhered to; and
- Public access for twelve days a year to the exterior is required where funds are used for exterior work, and to the interior where funds are used for interior work.

View a **Sample Historic Preservation Easement** by [CLICKING HERE](#).

The procedures for executing the historic preservation easement are as follows:

- Acknowledgement of the requirement for a historic preservation easement must be provided in the letter of certification or resolution included with the application.
- The easement is prepared by SHPO and approved by the Office of the Attorney General.
- The authorized individuals who have signed must appear before a Notary Public for the purpose of acknowledging the signing.
- The Notary Public before whom the individuals appear must execute a Certificate of Acknowledgment.
- The property owner must record the historic preservation easement at the Register of Deeds for the county in which the property is located. There will be a fee for recording at the register's office; the property owner is responsible for the recordation fee. The original historic preservation easement will be numbered and stamped by the Register of Deeds. The historic preservation easement will be copied and placed with the deed and other documents of record concerning the property.
- The original easement, after recording, must be returned to SHPO for filing with the Department of State, Office of the Great Seal. Copies for your use should be made prior to returning the original.

7. 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 August 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.

Rehabilitation Project Photograph Requirements for Completion Reports

- Color photographs documenting the site, the environment, and the exterior and interior conditions of the prospective project areas prior to the start of work.
- Color photographs of the project work in progress.
- Clear photographs of completed work. The photographs must document the site and the environment and the exterior and interior conditions of the areas of completed rehabilitation. To the extent practical, these photographs should be taken from the same vantage points as the photographs taken prior to rehabilitation work.
- A color photograph of the project sign.

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 FY24 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.

REHABILITATION PLANNING PROJECTS

Rehabilitation planning projects can include, for example, plans and specifications, Historic Structure Reports (HSRs), Cultural Landscape Reports (CLRs), rehabilitation master plans, condition assessment reports, engineering studies, feasibility studies, façade improvement plans, and marketing studies.

Scope of Work Instructions:

All work and recommendations made must comply with the Secretary of the Interior's Standards for Rehabilitation. View the **Secretary of the Interior's Standards for Rehabilitation** [here](#).

- Describe the plan, study, or other item to be produced by the grant project.
- Describe current conditions of the subject property.
- Describe anticipated work activities (e.g., photodocumentation, research, etc.). If any destructive testing is to be included, it must be specifically identified.
- Provide a discussion of past preservation activities at the property, if any, and why the proposed planning project is the next logical step in providing for the protection and ongoing use of the property(ies).
- Identify the type of consultant to be retained (e.g., historical architect, architectural historian, or engineer) to complete the study. Acknowledge that any consultants hired as part of the grant project will, as applicable, meet National Park Service 36 CFR 61 professional qualifications. Architectural consultants to be hired must meet the federal standards for "Historical Architect" listed below:
 - All consultants must demonstrate that they meet or exceed the professional qualifications for "Historical Architecture" as stated in 36 CFR Part 61.
 - The minimum professional qualifications for a Historical Architect are a professional degree in architecture or a state license to practice architecture, plus one of the following: (1) at least one year of graduate study in architectural preservation; or (2) at least one year of full-time professional experience on preservation projects. Such graduate study or experience shall include detailed investigations of historic structures, preparation of historic structures research reports, and preparation of plans and specifications for preservation projects.
- If possible, include a vendor quotation for services to be completed. Providing estimates with your application helps the reviewers understand the reasonableness of costs associated with the project.

Required Deliverables:

- First and revised draft product in electronic format
- One (1) bound hardcopy (not needed for plans and specs) and two (2) electronic copies of the final product
- One CD/DVD or flash drive with digital images

REHABILITATION PROJECTS

Rehabilitation projects can include, for example, stabilization, roof repair/replacement, window repair, entry rehabilitation, masonry repair and tuckpointing, rehabilitation of specialty materials such as stained glass, and rehabilitation of interior character-defining features. If you have any questions about the eligibility of your project, please contact SHPO's CLG Coordinator prior to submitting an application.

Scope of Work Instructions:

All work must comply with the Secretary of the Interior's Standards for Rehabilitation. View the **Secretary of the Interior's Standards for Rehabilitation** [here](#).

- Describe current conditions of the subject property and the issues to be addressed.
- Describe the work to be completed as part of the grant project, including a succinct list of specific activities to be undertaken. The description should clearly describe all materials, methods and techniques to be used for the rehabilitation project and correlate to the budget. Any historic materials to be removed and disposed of should be clearly identified. This work description should complement the included photographs to give a complete account of the proposed rehabilitation work.
- Describe previous rehabilitation work, if any, at the property and its relationship to this project and/or documents available to guide the rehabilitation work.
- Identify if the proposed project is part of a phased rehabilitation project, including a brief summary of previously completed preservation work and/or relationship to anticipated future work. Plans and specifications must be submitted with the application for rehabilitation work and approved by SHPO.
- If possible, include a vendor quotation for services to be completed. Providing estimates with your application helps the reviewers understand the reasonableness of costs associated with the project.
- Plans and specifications must be submitted with the application and approved by SHPO prior to work. All plans and specifications and project work must meet the Secretary of the Interior's Standards for Rehabilitation. If you do not have plans and specifications or you desire a complete building assessment with priorities and estimates of cost, you should apply for a rehabilitation planning grant to prepare them.

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. Allowable and unallowable expenses are determined in consideration of the Historic Preservation Fund Grant Manual and 2 CFR 200. 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, which is \$72.57 as of FY21 (effective October 1, 2020).
 - For all other volunteers, time is valued at \$30.15/hour, which is the value assigned to volunteer time in Michigan by the [Independent Sector](#) as of 2022.
- 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 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