

# GRANTEE WORKSHOP

**Preserve New Jersey Historic Preservation Fund**

**Historic Site Management, Heritage Tourism, Capital Level I and Capital Level II**

**2019 Grant Recipients**





## NJ HISTORIC TRUST MISSION

- *The mission of the New Jersey Historic Trust is to advance historic preservation in New Jersey for the benefit of future generations through education, stewardship and financial investment programs that save our heritage and strengthen our communities.*
-

# NJ HISTORIC TRUST BOARD

- 12 Citizen Members
- 3 *Ex-Officio* Members, representing
  - Department of Community Affairs
  - Department of Environmental Protection
  - Treasury





# STAFF OF THE HISTORIC TRUST

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- Dorothy Guzzo, Executive Director
- Historic Preservation Specialists:
  - Glenn Ceponis
  - Erin Frederickson
  - Carrie Hogan (and Fiscal Officer)
  - Haley McAlpine
  - Sam Siegel
- Ashley Parker, Program Assistant
- Paula Lassiter, Secretary



# OVERVIEW



# TODAY'S AGENDA

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- Overview of the Grant Agreement process
- Overview of Grantee Packet and Grant Manual materials
- Executing the Grant Agreement
- Defining the Scope of Work
- Administering an active grant
- Closing out the grant
- Publicity for your project



# GRANT AGREEMENT PROCESS

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- The Trust holds a Grantee Workshop to explain the administrative requirements of the Grant Agreement.
- The Grantee submits the supporting documentation.
- The Trust assembles the materials and sends two originals of the Grant Agreement to the Grantee for signature.
- The Grantee signs and returns the two Grant Agreements to the Trust for signature by the Executive Director and Department of Community Affairs Fiscal Office; ***at this point the Agreement is executed.***
- Once the Agreement is executed, all reporting, signage and easement requirements are in effect.



# GRANT TYPES

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## HSM+HT

- Historic Sites Management (HSM)
  - Planning Documents
- Heritage Tourism (HT)
  - Visitor Readiness

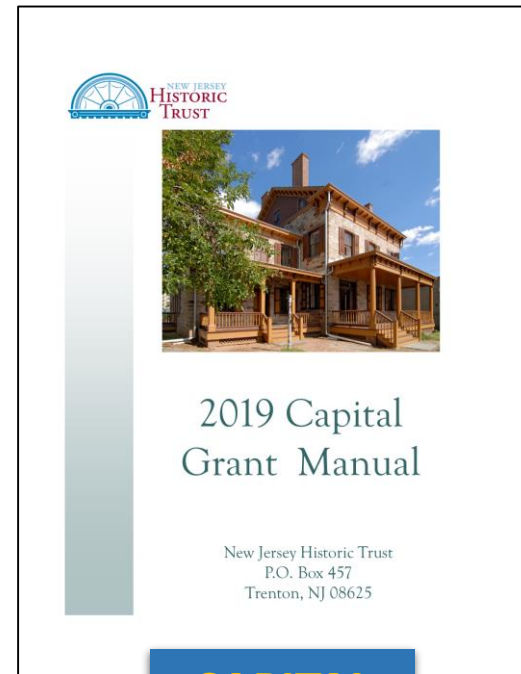
## CAPITAL

- Capital Level I
  - Capital Projects \$5,000 - \$150,000
- Capital Level II
  - Capital Projects \$150,001 - \$750,000
  - Multi-Phase Capital Projects up to \$750k per phase

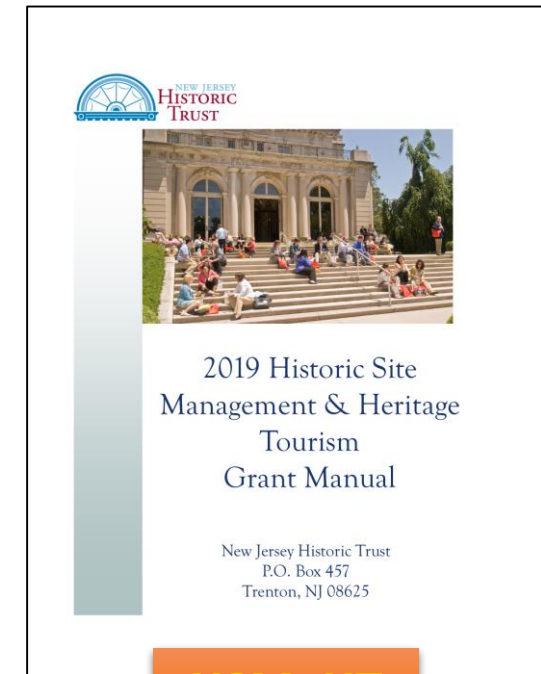


# GRANT MATERIALS AND MANUAL

- **Grantee Packet**
  - Documents for executing your Grant Agreement
- **Grant Manual (Binder)**
  - Everything you need to know to successfully manage your grant project



CAPITAL



HSM+HT

Governor Chris Christie • Lt. Governor Kim Guadagno  
 NJ Home | Services A to Z | Departments/Agencies | FAQs

Search  All of NJ

STATE OF NEW JERSEY  
**NJ HISTORIC TRUST**

NEW JERSEY  
**HISTORIC TRUST**

Home About the Trust Funding Programs Funded Sites Preservation Easements Heritage Tourism Hot Topics **Resources** Applications and Guidelines Events

Home > Resources > Grantee Resources

NJ Historic Trust Annual Reports  
 Related History and Preservation Links  
 Publications  
 Resources to Help with Your Application  
 Sandy Grant Program for Historic Properties

**Grantee Resources**  
[Preserve New Jersey Historic Preservation Fund Cultural Trust](#)  
[1772 Foundation](#)  
[Sandy Disaster Relief Grants for Historic Properties Preservation Easements](#)

**Preserve New Jersey Historic Preservation Fund**

Grantee Manual

Website only documents:

- Tab 1: Sample Capital Grant Agreement
- Tab 2:
  - Preservation Plans & Historic Structure Report Requirements
  - Site Interpretation Guidelines
- Tab 3:
  - Affirmative Action Guidelines
  - Application for Public Works Registration
- Tab 4:
  - Sample Criteria and Qualification Statement
  - Sample Bidders Questionnaire
- Tab 5: Sample Easement
- Tab 6:
  - Schedule D - Annual Easement Report Form
  - Schedule E - Request for Approval Form

Reference Attachments:

- Attachment A - GSPT Regulations
- Attachment B - *Secretary of the Interior's Standards*
- Attachment C: NPS Preservation Brief 43
- Attachment D: Construction Division Codes

## RESOURCES WEB PAGE

The entire grant manual will be available on this site:  
<http://njht.org/resources/granteeresources.html>

**\*Please note that most of these documents will not be available on the website until *after* the workshop.**

**\*\*Also note the NJHT website is undergoing a complete redesign. All of this information will still be available, but the look and feel of the Resources page may change once the redesign goes live.**

A large, stylized elephant sculpture, possibly made of stone or concrete, is the central focus. The elephant's eye is particularly prominent, featuring a white ring with a red and blue center. The sculpture is set against a background of a red building with a window and a clear blue sky. A semi-transparent red horizontal bar is overlaid across the middle of the image, containing the text "EXECUTING THE GRANT AGREEMENT" in a dark red, serif font.

# EXECUTING THE GRANT AGREEMENT

# EXECUTING THE GRANT AGREEMENT

- **Checklist**
  - outlines all the items required to prepare the Grant Agreement for execution
- **Letter of Acceptance**
  - to be signed and returned with an ORIGINAL signature

## *Grant Agreement Check-list*

Project #: 2019.1001

Project Name: Millville Army Air Field Historic District

Please refer to the project grant number and name (listed above) in all correspondence with the Historic Trust.

Be sure the following items are included with the package. Please note any missing items that will be submitted under separate cover (insurance certificates, board resolutions, etc.)

### Must be received

- This Grant Agreement Check List
- Acceptance Letter with original signature
- Information Form
- Insurance Certificate (with all categories completed by your insurance co.)
- Attachment E - Governing Body Resolution (with original signature and raised seal)
- Attachment G - Statement of adequacy of accounting (with original signature)
- D-1 (reviewed and updated) if necessary
- Project Profile (reviewed and updated) if necessary

# EXECUTING THE GRANT AGREEMENT

- **Information Form**

- to be completed and returned to the Trust so that we can prepare the Grant Agreement document
- **NJ Start**
  - Registration in NJSTART creates an account for the Grantee so that checks can be issued for grant reimbursements
  - Help desk – 609-341-3500



**GRANT AGREEMENT INFORMATION FORM**

The following information is required for the Trust to generate your grant agreement

Project Number: 2016. \_\_\_\_\_

Project Name: \_\_\_\_\_

- Chief Financial Officer:** \_\_\_\_\_
- Organization's Federal I.D. Number:** \_\_\_\_\_
- NJSTART Vendor I.D. Number:** \_\_\_\_\_
- If using Federal funds as matching dollars (example: CDBG or Tea 21 grants), give Catalog of Federal Domestic Assistance (CFDA) Account Number: \_\_\_\_\_
- Your Fiscal Year ends: (month) \_\_\_\_\_ (day) \_\_\_\_\_
- Your Accounting Records use the following system:
  - Cash Basis
  - Accrual Basis
  - Modified Accrual
  - Other (explain): \_\_\_\_\_
- Insurance**
  - Comprehensive General Liability:
    - Insurance
    - Self Insurance
  - Automobile Liability:
    - Insurance
    - Self Insurance
    - Organization does NOT own or lease vehicles in its name
  - Workers' Compensation:
    - Insurance
    - Self Insurance
    - Organization has no paid employees
  - Employers' Liability:
    - Insurance
    - Self Insurance
    - Organization has no paid employees

1) Please contact your insurance agent and verify that your coverage meets the minimum required for each Insurance Type listed above. Refer to page 1.6 of your Grant Manual.



# EXECUTING THE GRANT AGREEMENT

## • Governing Body / Board Resolution

- Your governing body needs to pass a resolution
- The individual authorized in Attachment E must be the same individual who will sign the Grant Agreement
- The resolution **must be** imprinted with a raised government, corporate, or notary seal or official stamp.
  - Resolutions that are not properly certified will not be accepted.

Project Name:  
Project Number:

ATTACHMENT E

**PRESERVE NEW JERSEY HISTORIC PRESERVATION FUND  
ADMINISTERED BY THE NEW JERSEY HISTORIC TRUST**

GOVERNING BODY / BOARD RESOLUTION

The governing body/board of \_\_\_\_\_ desires to further historic preservation through a grant from the New Jersey Historic Trust, State of New Jersey in the amount of \$ \_\_\_\_\_ for the following project \_\_\_\_\_.

Therefore, the governing body authorizes \_\_\_\_\_ (Insert Name and Title of Authorized Signatory) to execute a grant agreement with the State in an amount up to that awarded for the proposed project, and to seal the grant agreement.

Introduced and passed \_\_\_\_\_, 2020

Ayes: \_\_\_\_\_

Noes: \_\_\_\_\_

Absent: \_\_\_\_\_

Approved:

\_\_\_\_\_  
(Signature of Mayor, Freeholder Director, or Board Chairperson)

Title: \_\_\_\_\_

Attested: \_\_\_\_\_  
(Signature of Municipal or County Clerk, Board Secretary, or Notary Public)



**Insert raised government, corporate or notary seal**

# EXECUTING THE GRANT AGREEMENT

- **Statement of Adequacy of Accounting System**
  - Your CFO or organization's treasurer must review the requirements of the Grant Agreement (state-required audits and reporting) and sign this form.
  - Your CFO/Treasurer **cannot be the same person** authorized by resolution to execute the Grant Agreement.
  - Your CFO certifies reimbursement requests and payment vouchers.

Project Name:  
Project Number: 2019.\_\_\_\_

ATTACHMENT G

**A GRANT AGREEMENT BETWEEN STATE OF NEW JERSEY  
NEW JERSEY HISTORIC TRUST AND**

Organization Name (Grantee)

2019.\_\_\_\_(Project Number)

STATEMENT OF ADEQUACY OF ACCOUNTING SYSTEM

I am the \_\_\_\_\_ (Insert Title of Chief Financial Officer or Treasurer) of Organization (Grantee) and, in this capacity, I will be responsible for establishing and maintaining the financial statements for Grant Number 2019.\_\_\_\_\_.

The accounting system that will be established and maintained for the purpose of this proposed contract/ grant will be adequate to:

1. Provide for accurate identification of the receipts and expenditures for items to be reimbursed by the New Jersey Historic Trust;
2. Provide for documentation supporting each book entry, filed in such a way that it can be easily located;
3. Provide accurate and current financial reporting information;
4. Be integrated with a strong system of internal controls and;
5. Will conform to any and all requirements or guidelines that the New Jersey Historic Trust may issue including Section VIII and Section XI of the Grant Agreement.

\_\_\_\_\_  
Signature of Chief Financial Officer / Treasurer

\_\_\_\_\_  
Name (Print or Type)

\_\_\_\_\_  
Date



A large, multi-story building with a mix of stone and brick masonry and blue window frames. The building features a prominent corner with stone masonry and several windows with blue shutters. A smaller structure with a white roof and a blue door is visible on the right side. The text "DEFINING THE SCOPE OF WORK" is overlaid in the center in a red, serif font.

DEFINING THE SCOPE OF WORK

# DEFINING THE SCOPE OF WORK

## Attachment D-1 (Scope of Work)

- The Grantee will need to review and approve the Attachment D-1.
- Unless changes were made by the Trust during the application period, the Scope of Work in the Grant Agreement should correspond with the Scope of Work submitted in the Grantee's application to the Trust.

2.4

- Sample Scope of Work/ Attachment D-1 -

### ATTACHMENT D-1, SCOPE OF WORK

**Name of Grantee:** Historical Society  
**Project Name:** Historic Battlefield  
**Project Number:** 2017.0039  
**Grant Award:** \$20,000

#### I. OVERVIEW OF PRESERVATION OBJECTIVES OF ENTIRE PROJECT

The Battlefield is significant for its association with the Revolutionary War battle fought at the site in 1776 and the location of a Native-American encampment. The park includes the Vanderveer House (a Dutch Colonial, brownstone house from 1713 with brick end gables) and the foundation of a rare grist mill.

The Trust grant will fund the creation of a site management plan that will serve as a blueprint for the development of the site, examining site constraints and even environmental context. The plan will assess properties on both sides of the battlefield, including land held by the State of New Jersey and the Historical Society.

#### II. PROJECT REVIEW AUTHORITY

The New Jersey Historic Trust will review and approve at least one draft (80%) and a final copy of the project deliverables. If appropriate, such documents will be reviewed for compliance with the *Secretary of the Interior's Standards for the Treatment of Historic Properties*. Grantee shall copy the New Jersey Historic Trust on all project correspondence and inform Trust representative in advance of project meetings.

#### III. ACTIVITIES FUNDED BY THIS GRANT

##### III.A. Description of Work to be Funded with this Grant.

The scope of work of this grant includes non-construction tasks directly related to the funded work:

1. Professional architectural and historic preservation services for Site Design Guidelines and Phased Implementation Plan as described in proposal by ABC Associates, dated April 22, 2000, pages 1 to 8 (Exhibit 1).
2. Professional services for Archaeological Report as described in proposal by Smith Archaeologists, dated January 10, 2000, pages 1 to 3 (Exhibit 2).
3. Preparation of a Project Completion Report.

# DEFINING THE PROJECT SCOPE

## Attachment D-1 (Scope of Work)

- Includes project budget with grant award amount.
- Brief history and statement of significance.
- Identifies the Project Review Authority.
- Defines the agreed upon work that will be funded by the grant.

2.4

- Sample Scope of Work/ Attachment D-1 -

### ATTACHMENT D-1, SCOPE OF WORK

Name of Grantee: Historical Society  
 Project Name: Historic Battlefield  
 Project Number: 2017.0039  
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# DEFINING THE PROJECT SCOPE

## Project Consultants

- Must meet Professional Qualification Standards
- Consultants must be approved by the Historic Trust if not included in the original application
- HSM grantees must submit a signed agreement with the consultant with the initial reimbursement request

2.4

- Sample Scope of Work/ Attachment D-1 -

### ATTACHMENT D-1, SCOPE OF WORK

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3. Preparation of a Project Completion Report.

# D-1 SCOPE OF WORK – HSM+HT

## Attachment D-1 (Scope of Work)

- Includes a copy of the accepted proposal for activities funded by the grant
- Includes a project budget for each work product
- Shows initial payment and final payment
- Includes project schedule:
  - Agreement Commencement date is the day the Governor signs your appropriations bill.
  - Work Period Commencement date may be the same or the day you actually started work.
  - Grant agreement must be executed within 18 months of the Agreement Commencement date.
  - All work must be completed within two years of the Agreement Commencement date.
  - Grant agreement expires three years after the Agreement Commencement date.

2.5

### III.B. Schedule of Values for Work to be Funded with this Grant

<u>Amount</u>	<u>Item</u>
Professional fees and project expenses directly related to the funded work:	
1.	Fees and expenses for Guidelines and Plan by ABC Architects \$18,000
2.	Fees and expenses for report by Smith Archaeologists \$8,670
<b>TOTAL</b>	<b>\$26,670</b>
<b>GRANT AWARD (No more than 75% of total)</b>	<b>\$20,000</b>
Initial payment:	\$16,000
Final payment:	\$4,000

The above payments are based on project costs as specified in the Grant Application. If costs are less, these amounts will be reduced and/or the Grantee will remit the balance of grant to the Trust.

### IV. PROJECT SCHEDULE:

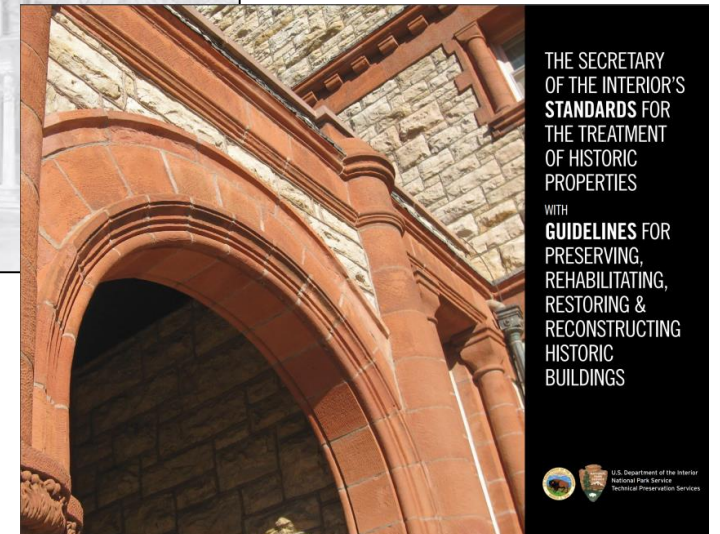
#### 2018 HSM Grant Dates

Agreement Commencement Date: January 16, 2019  
 Work Period Commencement Date: January 16, 2019 (or Actual start of project)  
 Agreement Execution Deadline: July 16, 2020  
 Project Commencement Deadline: July 16, 2020  
 Work Period Expiration Date: January 16, 2021  
 Agreement Expiration Date: January 16, 2022

Created: March 2, 2019 by Trust Staff  
 Revised:

# PROJECT REQUIREMENTS – HSM+HT

- All work must meet the Standards
- Consideration of archaeology or the archaeological potential of your site is required for all preservation planning documents
- Preservation Plans and HSRs
  - Must meet the recommendations of the *Preparation Guide*



# D-1 SCOPE OF WORK – CAPITAL

## Attachment D-1 (Scope of Work)

- Includes list of activities to be funded (listed by construction division)
- Includes your non-construction budget (cannot exceed 20% of the total project budget)
- Archaeology costs are NOT considered non-construction and can be included in your construction budget
- Includes project-specific considerations for archaeology

2.5

### SAMPLE

#### ATTACHMENT D-1, SCOPE OF WORK

Name of Grantee: Friends of Old School House of NJ, Inc.  
 Project Name: Old School House of NJ  
 Project Number: 2019.2000  
 Grant Award: \$294,000

#### I. OVERVIEW OF PRESERVATION OBJECTIVES OF ENTIRE PROJECT

The matching grant will help fund the exterior restoration and interior rehabilitation of this early twentieth century, four-room schoolhouse and annex for continued use as community meeting and educational space. The construction work will include restoration of exterior masonry, roof and chimney repairs, system upgrades, restoration of interior finishes and the construction of a new accessible ramp and entry.

#### II. PROJECT REVIEW AUTHORITY

The New Jersey Historic Trust will review the planning and construction documents for this project. The Trust will also review the contract documents, plans, specifications, etc. according to the *Secretary of the Interior's Standards for the Treatment of Historic Properties* (1995) as well as oversee construction.

#### III. ACTIVITIES FUNDED BY THIS GRANT

##### III.A Description of Work to be Funded with this Grant.

The scope of work of this grant includes:

##### 1. Non-construction costs directly related to the funded work:

a. Architectural and engineering services by ABC Preservation Architects relevant to the construction work listed below (including schematic design, design development, contract documents, and construction administration).

b. The contract documents must set minimum qualifications for all general contractors and subcontractors using language similar to below:

The bidder shall demonstrate successful experience in the restoration of historic buildings using the Secretary of the Interior's Standards for the Treatment of Historic Properties on at least two projects of similar size

# D-1 SCOPE OF WORK – CAPITAL

## Attachment D-1 (Scope of Work)

- Includes project schedule deadlines:
  - Agreement Commencement date is the day the Governor signs your appropriations bill.
  - Work Period Commencement date may be the same or the day you actually started work.
  - Grant agreement must be executed within 18 months of the Agreement Commencement date.
  - Work must begin within 24 months of the Agreement Commencement Date
  - All work must be completed within four years of the commencement date
  - The grant agreement expires 5 years from the commencement date

2.5

### SAMPLE

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# D-1 SCOPE OF WORK – CAPITAL

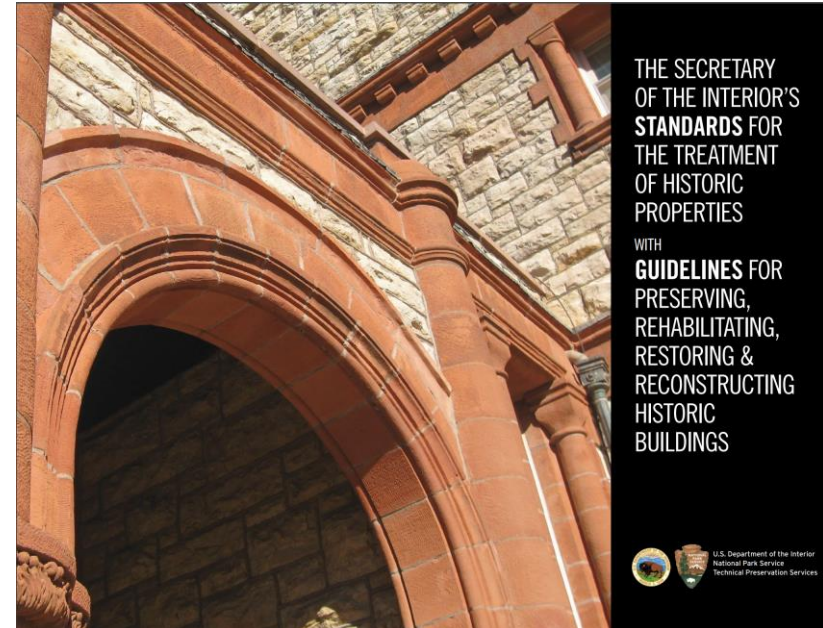
## Attachment D-1 (Scope of Work)

- Includes D-1 expenditure spreadsheet (that corresponds with the funded activities by construction division)
- Shows both proposed costs and any match-expended
- Includes non-construction budget and activities

Project Name:	Old School		<b>SAMPLE</b>
Project Number:	2010.2000	ATTACHMENT D-1	
<b>Preserve New Jersey Historic Preservation Fund PROJECT EXPENDITURE WORKSHEET</b>			
<b>III B. Schedule of Values</b>			<b>TOTAL PROJECT</b>
<b>Non-Construction (N/C)</b>	<b>Match Expended</b>	<b>Proposed</b>	<b>Subtotal</b>
Pre-Construction	31,000.00	18,000.00	49000.00
Construction Admin.	0.00	32,000.00	32000.00
Mortar and Paint Analysis	0.00	15,500.00	15500.00
Post-Construction	0.00	0.00	0.00
Additional N/C	0.00	0.00	0.00
<b>N/C Total</b>	<b>\$ 31,000.00</b>	<b>\$ 65,500.00</b>	<b>\$ 96,500.00</b>
<b>Construction (C)</b>	<b>Match Expended</b>	<b>Proposed</b>	<b>Subtotal</b>
Div. 1 - General	0.00	35,000.00	35,000.00
Div. 2 - Sitework	0.00	26,000.00	26,000.00
Div. 3 - Concrete	0.00	0.00	0.00
Div. 4 - Masonry	0.00	65,000.00	65,000.00
Div. 5 - Metals	0.00	25,000.00	25,000.00
Div. 6 - Wood/Plastic	0.00	89,000.00	89,000.00
Div. 7 - Thermal/Miosture	125,000.00	0.00	125,000.00
Div. 8 - Doors/Windows	0.00	0.00	0.00
Div. 9 - Finishes	0.00	32,000.00	32,000.00
Div. 10 - Specialties	0.00	2,000.00	2,000.00
Div. 11 - Equipment	0.00	0.00	0.00
Div. 12 - Furnishings	0.00	0.00	0.00
Div. 13 - Special Const.	0.00	0.00	0.00
Div. 14 - Conveying Syst.	0.00	0.00	0.00
Div. 15 - Mechanical	0.00	65,000.00	65,000.00
Div. 16 - Electrical	0.00	27,500.00	27,500.00
<b>Const. Totals</b>	<b>\$ 125,000.00</b>	<b>\$ 366,500.00</b>	<b>\$ 491,500.00</b>
	<b>Match Expended</b>	<b>Proposed</b>	<b>TOTAL PROJECT</b>
<b>TOTALS (N/C + C)</b>	<b>\$ 156,000.00</b>	<b>\$ 432,000.00</b>	<b>\$ 588,000.00</b>
		<b>Grant Award</b>	<b>\$ 294,000.00</b>
		<b>Required Match</b>	<b>\$ 294,000.00</b>
		<b>Actual Match</b>	<b>\$ 294,000.00</b>
		<b>Ratio</b>	<b>1:1</b>
Date Created:	11-Jul-11		
Prepared by:	Trust Staff		
Revisions:	11-Jul-11		
	<b>D-1.</b>		

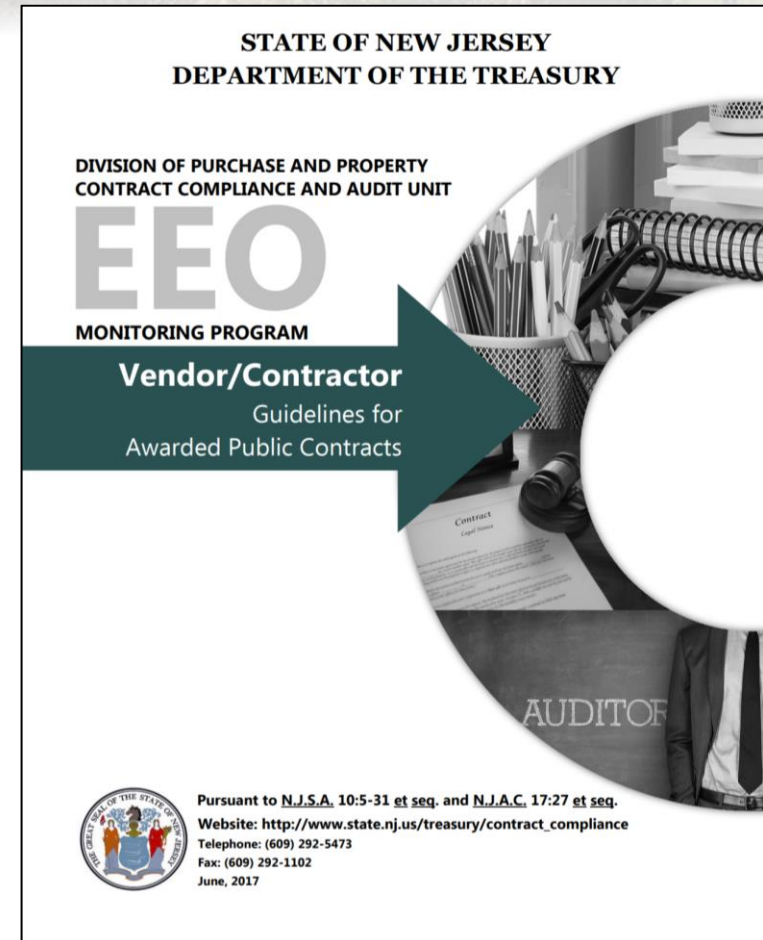
# PROJECT REQUIREMENTS - CAPITAL

- All work must meet the Standards
- Archaeology required for capital projects where there will be ground disturbance
  - All D-1's are being reviewed by an archaeologist before a Grant Agreement can be executed.
- Publicly owned resources may require Project Authorization from the Historic Preservation Office



# NJ STATE REQUIREMENTS

- **Financial Management**
  - Audits
- **Affirmative Action**
  - Nondiscrimination language and policy
  - Consultant to provide evidence of compliance
- **Prevailing Wage**
  - County and Municipal Grantees





# ADMINISTERING AN ACTIVE GRANT

# COMMUNICATION WITH THE TRUST

---

- Know your program staff contact
  - Questions?
  - Problems ☹️
  - Good news 😊
- When in doubt, call or email... or both!



HI... JUST RINGING TO SEE IF YOU GOT MY E-MAIL ?

# COMMUNICATION WITH THE TRUST – HSM+HT

---

- **Send to the Trust:**
  - Drafts of planning documents funded by grant
  - Contracts with consultants preparing grant-funded products
  - Quarterly reports and reimbursement requests
- **Close-out**
  - Final approved grant-funded documents
    - Two hard copies and one digital copy
  - Final report and reimbursement request

# COMMUNICATION WITH THE TRUST - CAPITAL

---

- **Send to the Trust:**
  - Planning documents funded by grant
    - Two hard copies and one digital copy
  - Construction drawings and specifications
  - Contractor prequalification forms in draft form
  - Contractor prequalification forms as completed by contractors
  - Accepted bids
- **During construction:**
  - Trust should receive all meeting notices
  - Trust should receive all meeting minutes
  - Grantee is responsible for communication

# SUBMITTING QUARTERLY REPORTS

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- **Submit the Report (C-1)**

- Via email for a report with no reimbursement request
- Via postal delivery for a reimbursement request
  - Payment voucher must have **original signature**
- Send a report - even if there's no activity!

- **Reports are Due**

- April 15
- July 15
- October 15
- January 15



# QUARTERLY REPORTS

- **Attachment C-1**
  - Follow checklist of items
  - Include:
    - Narrative
    - Team List
    - Project Schedule
    - Submissions
    - Certification
- **Submit via**
  - Email or regular mail (if no reimbursement is requested)
  - Regular mail ONLY (if reimbursement is requested)

Project Name: \_\_\_\_\_  
 Project Number: \_\_\_\_\_ ATTACHMENT C-1

**Preserve New Jersey Historic Preservation Fund  
 HISTORIC SITE MANAGEMENT GRANT  
 QUARTERLY REPORT**

Project Number: \_\_\_\_\_ Project Name: \_\_\_\_\_  
 Organization: \_\_\_\_\_  
 Project Contact: \_\_\_\_\_  
 Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

**Quarterly Report Check List**

Quarterly Reports may be e-mailed to Trust or sent hard copy in the mail. The following items are required:

- Attachment C-1 (this form)
- Current Status
- Narrative Description
- Project Team List
- Current Project Schedule

**Reporting Schedule:** Quarterly Reports are due every three months:

<i>Reporting Periods</i>	<i>Quarterly Due Date</i>
Jan. 1 – March 31	April 15
April 1 – June 30	July 15
July 1 – Sept. 30	Oct. 15
Oct. 1 – Dec. 31	Jan 15

**CURRENT STATUS** (check off all applicable):

- Consultant is under contract with Grantee
- Project Status: \_\_\_\_\_
- Work products submitted to Grantee:
  - Outline
  - First Draft
  - Final Product
  - other: \_\_\_\_\_

(C-1.1)

# REIMBURSEMENT REQUESTS – HSM+HT

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- Two reimbursements
- Initial reimbursement is 80% of grant award
- Must include signed consultant contract if not previously submitted
- Initial retainer or invoice is paid (attach invoice and proof of payment)
- Payment takes approximately two to three weeks after receipt
  - Registering for direct deposit payments through the State's ACH system will expedite the payment process.

# REIMBURSEMENT REQUESTS – CAPITAL

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- Project sign installed, photo documentation submitted to the Trust
- Easement recorded (when required)
- Each request for reimbursement must include all necessary documentation of invoice and proof of payment
- During construction, requests should include additional documentation not already submitted, such as meeting minutes, progress photographs, change orders

# REIMBURSEMENT REQUESTS

- State payment voucher
- Will not be paid without it!
- Requires original signatures of designated CFO in blue or red ink ONLY

4.43



NEW JERSEY  
HISTORIC  
TRUST

*NJ Department of Community  
Affairs Transmittal and  
Payment Voucher*

Date: \_\_\_\_\_

To: DCA Fiscal Officer, Budget & Fiscal  
DCA Fiscal, PO Box 800, Trenton, NJ 08625  
From: Carrie Hogan, Fiscal Officer  
New Jersey Historic Trust, PO Box 457, Trenton, NJ 08625

*Payee Reference:*Project #: **2019.2098**Project Name: **Old School House of NJ**

Reimbursement # \_\_\_\_\_

Grantee: **Friends of Old School House of New Jersey, Inc.**Grant Agreement Begins: **2020** Ends: **6/1/2023**

Payment Reporting Period \_\_\_\_\_ to \_\_\_\_\_

Reimbursement Amount \$ \_\_\_\_\_

**Grantee Certification:**

I certify that the within Fiscal Monitoring Report Payment Voucher is correct in all its particulars, and the described goods or services have been furnished or rendered and that no bonus has been given or received on account of said document.

John Smith

Typed Name of CFO/Treasurer

*John Smith*

Original Signature

Date

use BLUE or Red ink only

**NJHT Certification:**

I certify that the articles have been received or services rendered as stated herein.

Carrie Hogan, Fiscal Officer

NJHT Representative

Signature

Date

**Division Fiscal Certification:**

GO # 022-8049800-

Vendor ID #

LN 1 \$ \_\_\_\_\_

(C-1.6)

# WORK PRODUCT REVIEW – HSM+HT

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- Submit work products to the Trust in draft form for review and comment
  - Planning documents
  - Construction drawings and specifications
- Allow at least four weeks for review
- Final work product may be produced after incorporating Trust's comments

# WORK PRODUCT REVIEW – CAPITAL

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- Design Review
  - Prior to construction
  - During construction
- Plans and Specifications
  - Draft submission
  - Final documents (incorporating Trust's comments if needed)
- Bid Packages must be approved before distribution

# REQUIRED SIGNAGE - CAPITAL

- Trust requires a temporary project sign during the construction period
- Trust requires installation of a permanent marker or plaque for completed construction projects
  - Some grantees opt to incorporate information for a marker into larger interpretive signage.



# EASEMENTS – CAPITAL

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- Non-Profits with grant awards over \$50,000
- Length of Easement
  - \$50,001-\$100,000      15 Years
  - \$100,001-\$450,000      20 Years
  - More than \$450,000      30 Years



# CONTRACTORS AND BIDDING - CAPITAL

- Pre-qualification of Contractors
  - All projects
    - Prequalification Regulations
    - Bidder’s Questionnaire
- Units of Government
  - Must coordinate the pre-qualification and bidding process with DCA’s Division of Local Government Services

4.16

STANDARD CERTIFICATION TO ACCOMPANY PREQUALIFICATION REGULATIONS SUBMITTED TO DIRECTOR, DIVISION OF LOCAL GOVERNMENT SERVICES, DEPARTMENT OF COMMUNITY AFFAIRS

A. Applicability of Prequalification Regulations

1. Type of projects, goods or services regulations would apply to \_\_\_\_\_

B. Status of Proposed Regulations: (check one)

New regulations \_\_\_\_\_

Reestablishment of old regulations \_\_\_\_\_

If reestablished, date last approved by Director (provide prior approval letter) \_\_\_\_\_

Amendment of existing regulations \_\_\_\_\_

Date existing regulations approved by Director (provide prior approval letter) \_\_\_\_\_

C. Summary of Proposed Regulations

Please provide all criteria which prospective bidders will be required to meet, and explain how said criteria is pertinent and reasonably related to the goods or services to be provided or performed. Add additional sheets as necessary.

D. Public Hearing on Prequalification Regulations

Date of public hearing \_\_\_\_\_

# AMENDING THE GRANT AGREEMENT

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- Reasons to amend the Grant Agreement
  - Change to project schedule
  - Revised scope of work
  - Change in consultant or contractor
- Request for Major Change (Attachment D-2)
  - Complete request **before** the end of the work period or Grant Agreement deadline
  - All requests are reviewed by the Grants and Loans Committee
- General terms and conditions of the Grant Agreement are non-negotiable



# CLOSING OUT THE GRANT



# CLOSING OUT THE GRANT – HSM+HT

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- **Final Report & Reimbursement Request**
  - Attachment C-2 – Follow Checklist
  - Submit final and approved scope of work items
  - Copies of invoices attached to corresponding canceled checks/proof of payment
  - Transmittal/Payment Voucher (with original signature of CFO or Treasurer)
- You will receive the remaining 20% of the grant award

# CLOSING OUT THE GRANT – CAPITAL

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- **Final Reimbursement Request**
  - Attachment C-2 – Follow Checklist
  - Submit final drawings/work products
  - Copies of invoices attached to corresponding canceled checks/proof of payment
  - Transmittal/Payment Voucher (with original signature of CFO or Treasurer)
- You will receive the remaining balance of the grant award

# CLOSING OUT THE GRANT – CAPITAL

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- **Final Report Includes:**

- Narrative of project
- Before and after photographs
- Photograph of permanent plaque installed
- Employment figures from consultant and contractor
- Revised Scope of Work (if necessary)
- Final total project cost
- As-built drawings
- Close-out letter from consultant certifying project is complete

A large, stylized elephant sculpture, possibly made of concrete or stone, is the central focus. The elephant is depicted in profile, facing left. Its eye is a prominent feature, rendered with a white, circular frame and a red and blue center. The elephant's trunk is thick and tapers slightly. The sculpture is set against a background of a red building with a window and a blue sky. A semi-transparent red horizontal bar is overlaid across the middle of the image, with the text "PUBLICITY FOR YOUR PROJECT" centered on it.

PUBLICITY FOR YOUR PROJECT

# GOALS OF YOUR PUBLICITY PROGRAM



- Maintain visibility of project and organization during preservation campaign
- Increase attendance and/or membership for programs and activities
- Attract new funding support and additional resources



# OUR MUTUAL PUBLICITY GOALS

- Promote and raise awareness of history and historic preservation in New Jersey
- Ensure ongoing funding for historic preservation



# JOURNEY THROUGH JERSEY

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- Visit [www.journeythroughjersey.com](http://www.journeythroughjersey.com) to nominate your site for inclusion in this valuable heritage tourism marketing tool
- Tag Journey Through Jersey on your Facebook, Instagram, and Twitter posts:
  - @journeythroughjersey
  - #journeythroughjersey
- Add the Journey Through Jersey link and logo to your website!
- To write a blog post or be otherwise featured on Journey Through Jersey, email: [info@journeythroughjersey.com](mailto:info@journeythroughjersey.com)



# STAY IN TOUCH WITH US

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- Facebook, Instagram, Twitter, LinkedIn

- @njhistorictrust



- Tag us in posts, send us news coverage, progress photos, events, or any other content you'd like us to share (no guarantees but we post as much as we can.)
- Two-way street: please re-share our posts and link to our site.  
Thank you!



Thank you for joining us  
today – we look forward to  
working with you!