

GRANTEE WORKSHOP

Preserve New Jersey Historic Preservation Fund

Capital Level I and Capital Level II

2020 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

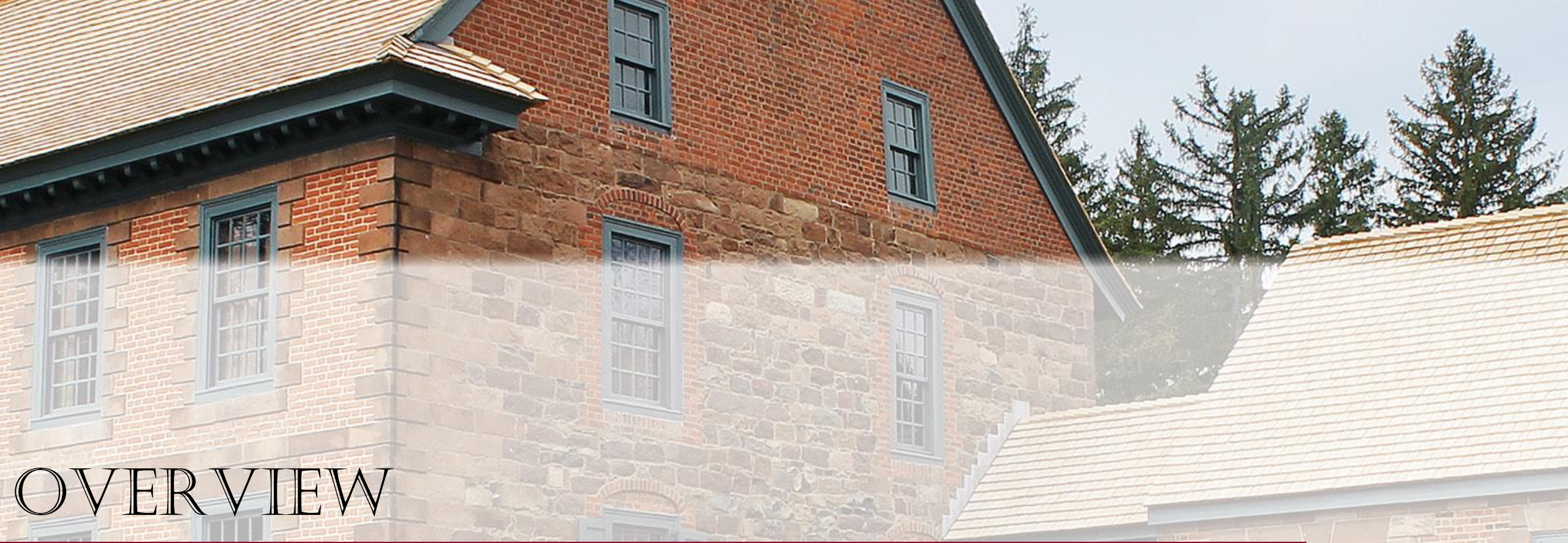
- 12 Citizen Members
- 3 *Ex-Officio* Members, representing
 - Department of Community Affairs
 - Department of Environmental Protection
 - Treasury



STAFF OF THE HISTORIC TRUST

- 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

- Overview of the Grant Agreement process
- Overview of Grantee Info 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
- Q&A



GRANT AGREEMENT PROCESS

- 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 MATERIALS AND MANUAL

- **Grantee Packet:**
 - Documents for executing your Grant Agreement
 - **Please print, fill out, compile certifications and resolutions, then mail to the Trust by Monday, March 15**
- **Grant Manual (PDF):**
 - Everything you need to know to successfully manage your grant project



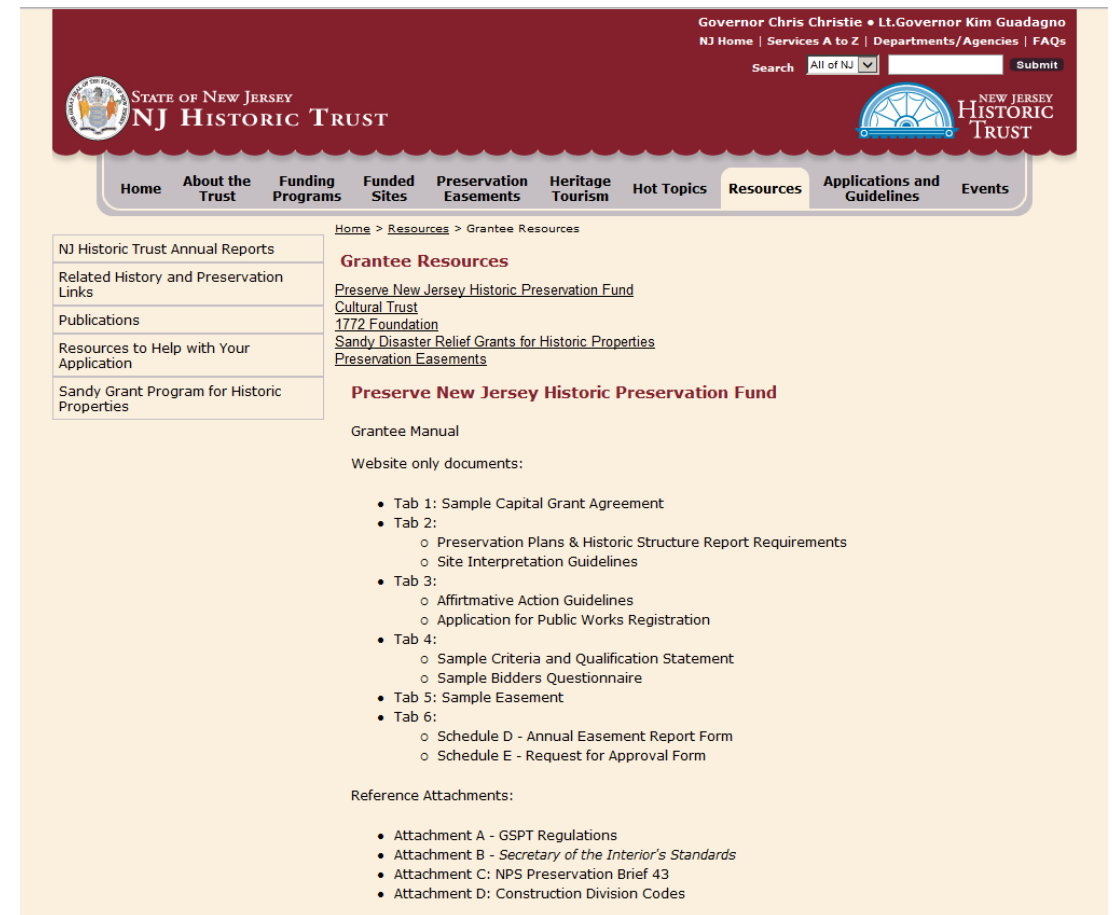
2020 Capital Grant Manual

New Jersey Historic Trust
P.O. Box 457
Trenton, NJ 08625

RESOURCES WEB PAGE

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

***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.**



The screenshot shows the NJ Historic Trust website. At the top, there is a navigation bar with the text "Governor Chris Christie • Lt. Governor Kim Guadagno" and "NJ Home | Services A to Z | Departments/Agencies | FAQs". Below this is a search bar with a dropdown menu set to "All of NJ" and a "Submit" button. The main header features the State of New Jersey seal and the text "STATE OF NEW JERSEY NJ HISTORIC TRUST" on the left, and the NJ Historic Trust logo on the right. A secondary navigation bar includes links for "Home", "About the Trust", "Funding Programs", "Funded Sites", "Preservation Easements", "Heritage Tourism", "Hot Topics", "Resources" (which is highlighted), "Applications and Guidelines", and "Events".

The "Resources" page content includes a breadcrumb trail: "Home > Resources > Grantee Resources". On the left side, there is a sidebar menu with the following items: "NJ Historic Trust Annual Reports", "Related History and Preservation Links", "Publications", "Resources to Help with Your Application", and "Sandy Grant Program for Historic Properties".

The main content area is titled "Grantee Resources" and lists several links: "Preserve New Jersey Historic Preservation Fund", "Cultural Trust", "1772 Foundation", "Sandy Disaster Relief Grants for Historic Properties", and "Preservation Easements".

Below these links, there is a section titled "Preserve New Jersey Historic Preservation Fund" which includes a link to the "Grantee Manual". Underneath, a section titled "Website only documents:" lists six tabs with their respective sub-items:

- 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

At the bottom, a section titled "Reference Attachments:" lists four items:

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

A large, stylized elephant sculpture, possibly made of concrete or stone, is the central focus. The elephant's head is shown in profile, facing left. It has a large, prominent eye with a white sclera, a red iris, and a dark pupil. The elephant's trunk is thick and tapers slightly. The sculpture is set against a background of a building with a red facade and a clear blue sky. A semi-transparent red banner with white text is overlaid across the middle of the image.

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 #: 2020.2098
Project Name: Salaam Temple (Symphony Hall)

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.). If you have any questions about the required materials, please contact your Program Officer directly.

Must be received

- This Grant Agreement Checklist with completed items checked off
- Acceptance Letter with original signature
- Completed Grant Agreement Information Form and Contact Information sheet
- Insurance Certificate (with all categories completed by your insurance company and NJHT listed as Additional Insured)
- Attachment E - Governing Body Resolution (with original signature **and** raised seal)
- Attachment G - Statement of adequacy of accounting (with original signature)

EXECUTING THE GRANT AGREEMENT

- **Information Form:**

- To be completed and returned to the Trust so that we can prepare the Grant Agreement document
- NJSTART:
 - Registration in NJSTART creates an account for the Grantee so that checks can be issued for approved grant reimbursements
 - Help Desk 609-341-3500
 - www.njstart.gov
 - njstart@treas.nj.gov



GRANT AGREEMENT INFORMATION FORM

The following information is required for the Trust to generate your grant agreement. All fields are required.

Project Number: 2020.2098

Project Name: Salaam Temple (Symphony Hall)

1. **Chief Financial Officer:** _____
2. **Organization's Federal I.D. Number:** _____
3. **NJ START Vendor I.D. Number:** _____
4. If using Federal funds as matching dollars (example: Tea 21 grants), give Catalog of Federal Domestic Assistance (CFDA) Account Number: _____
5. Your **Fiscal Year** ends: (month) _____ (day) _____
6. Your **Accounting Records** use the following system (check appropriate system):
 - Cash Basis
 - Accrual Basis
 - Modified Accrual
 - Other (explain): _____
7. **Insurance:**
 - a) Request that the NJ Historic Trust be named as additional insured (and reference your project number) on the policy for each Insurance Type listed below. Refer to "Insurance Requirements" in your Grant Manual for the Trust's expectations for insurance. If you checked any boxes labeled "**Self-Insurance**," submit a letter indicating the specific types and levels of self-insurance coverage. In the case of any exemptions, submit a certificate from the New Jersey Commissioner of Banking & Insurance identifying the specific exemption.
 - b) Ask your Insurance Company to submit a copy of your Certificate of Insurance to the Historic Trust. Please check appropriate insurance coverage below:
 - 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

EXECUTING THE GRANT AGREEMENT

- Insurance:**

- Grantee must maintain insurance for the term of the Grant Agreement and the full term of the easement
- NJ Historic Trust *must* be named as an additional insured
- Request that the Insurance Company add your Project Number on the Certificate of Insurance
- Grantee must submit Certificates of Insurance and/or documentation of Self-insurance to the Trust.

ACORD		CERTIFICATE OF LIABILITY INSURANCE		DATE ISSUED																			
NUMBER 603-224,250 FAX 603-224,8812 The Rowley Agency, Inc. 139 Loudon Road P.O. Box 511 Concord, NH 03302-0511		THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.		06/28/2012																			
NUMBER 800-Express, Inc. P.O. Box 3988 Peasack, NH 03100-8908		INSURERS AFFORDING COVERAGE: <table border="1"> <tr> <td>INSURER 1</td> <td>Firmen's Ins. Co of Mass. Inc.</td> <td>NAIC #</td> <td>00171</td> </tr> <tr> <td>INSURER 2</td> <td>Acadia Ins. Co.</td> <td>NAIC #</td> <td>00171</td> </tr> <tr> <td>INSURER 3</td> <td></td> <td></td> <td></td> </tr> <tr> <td>INSURER 4</td> <td></td> <td></td> <td></td> </tr> </table>		INSURER 1	Firmen's Ins. Co of Mass. Inc.	NAIC #	00171	INSURER 2	Acadia Ins. Co.	NAIC #	00171	INSURER 3				INSURER 4							
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INSURER 3																							
INSURER 4																							
COVERAGES THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. ACCIDENTAL LIMITS SECTION MAY HAVE BEEN REDUCED BY PAID CLAIMS.																							
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A	GENERAL LIABILITY <input checked="" type="checkbox"/> Commercial General Liability <input type="checkbox"/> Contractual per contract COBOL 1870 FORM APPROXIMATE LIMIT AND DEDUCTIBLE <input type="checkbox"/> Policy <input type="checkbox"/> Limit	CP41500177-24	07/01/2012	07/01/2013	<table border="1"> <tr> <td>COM-OC (LIMITS)</td> <td>1</td> <td>1,000,000</td> </tr> <tr> <td>COM-OC (LIMITS)</td> <td>2</td> <td>2,500,000</td> </tr> <tr> <td>COM-OC (LIMITS)</td> <td>3</td> <td>1,000,000</td> </tr> <tr> <td>COM-OC (LIMITS)</td> <td>4</td> <td>1,000,000</td> </tr> <tr> <td>COM-OC (LIMITS)</td> <td>5</td> <td>2,000,000</td> </tr> <tr> <td>COM-OC (LIMITS)</td> <td>6</td> <td>2,000,000</td> </tr> </table>	COM-OC (LIMITS)	1	1,000,000	COM-OC (LIMITS)	2	2,500,000	COM-OC (LIMITS)	3	1,000,000	COM-OC (LIMITS)	4	1,000,000	COM-OC (LIMITS)	5	2,000,000	COM-OC (LIMITS)	6	2,000,000
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PROPERTY DAMAGE (Per accident)	1																						
AUTO THEFT (Per accident)	1																						
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Limit	\$20,000																						
	No Reefer Coverage																						
DESCRIPTION OF OPERATIONS (LIMITS/COVERAGES) (EXCLUSIONS) (BY ENDORSEMENT) (SPECIAL PROVISIONS) Covering operations of the Named Insured during the policy period. FOR INFORMATIONAL PURPOSES ONLY.																							
EXCEPT 10 days for nonpayment of premium.																							
CERTIFICATE HOLDER SAMPLE CERT XXXXXXXXXX XXXXXXXX, XX		CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, THE ISSUING INSURER SHALL Endeavor TO MAIL "30" DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE LEFT, BUT FAILING TO DO SO SHALL IMPROVE NOT BE HELD LIABLE FOR ANY LOSS FROM THE INSURER, ITS AGENTS OR REPRESENTATIVES. AUTHORIZED REPRESENTATIVE Sara Hartshorn/SMH																					
ACORD 25 (2009)		© 1985-2009 ACORD CORPORATION. All rights reserved.																					

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 frames. 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.

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
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3. Preparation of a Project Completion Report.

D-1 SCOPE OF WORK

- **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

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

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

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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.

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D-1 SCOPE OF WORK

- **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

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

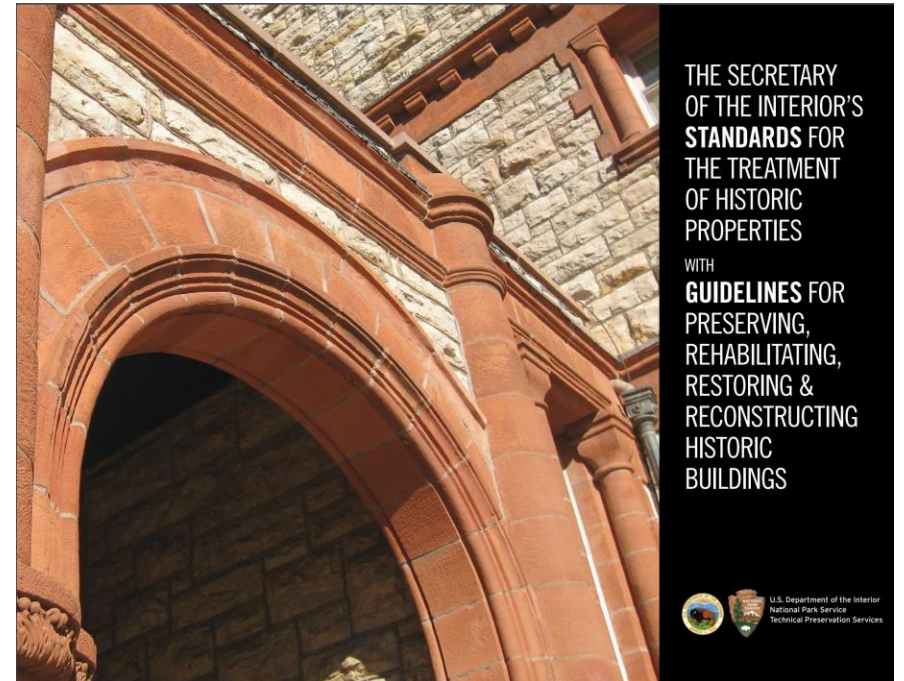
- **Attachment D-1 (Scope of Work):**

- 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		SAMPLE
Project Number:	2010.2000	ATTACHMENT D-1	
Preserve New Jersey Historic Preservation Fund PROJECT EXPENDITURE WORKSHEET			
III B. Schedule of Values			TOTAL PROJECT
Non-Construction (N/C)	Match Expended	Proposed	Subtotal
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
N/C Total	\$ 31,000.00	\$ 65,500.00	\$ 96,500.00
Construction (C)	Match Expended	Proposed	Subtotal
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
Const. Totals	\$ 125,000.00	\$ 366,500.00	\$ 491,500.00
	Match Expended	Proposed	TOTAL PROJECT
TOTALS (N/C + C)	\$ 156,000.00	\$ 432,000.00	\$ 588,000.00
		Grant Award	\$ 294,000.00
		Required Match	\$ 294,000.00
		Actual Match	\$ 294,000.00
		Ratio	1:1
Date Created:	11-Jul-11		
Prepared by:	Trust Staff		
Revisions:	11-Jul-11		
	D-1.		

PROJECT REQUIREMENTS

- All work must meet the Standards
- Archaeology required for capital projects where there will be ground disturbance
 - All projects are reviewed for archaeology considerations before the D-1 is finalized and the Grant Agreement can be executed.
- Publicly owned resources may require Project Authorization from the Historic Preservation Office



NEW JERSEY STATE REQUIREMENTS

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

STATE OF NEW JERSEY
DEPARTMENT OF THE TREASURY


DIVISION OF PURCHASE AND PROPERTY
CONTRACT COMPLIANCE AND AUDIT UNIT

EEO
MONITORING PROGRAM

Vendor/Contractor
Guidelines for
Awarded Public Contracts

CONTRACT
Legal Services

AUDITOR

 Pursuant to **N.J.S.A. 10:5-31 et seq.** and **N.J.A.C. 17:27 et seq.**
Website: http://www.state.nj.us/treasury/contract_compliance
Telephone: (609) 292-5473
Fax: (609) 292-1102
June, 2017



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

- **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

- **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

SUBMITTING 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:

Reporting Periods	Quarterly Due Date
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


- Project sign installed and 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
- Payments take approximately two to three weeks after receipt.
 - Registering for direct deposit payments through the State's ACH system will expedite payments.

4.43



**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 _____ John Smith _____
Typed Name of CFO/Treasurer 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

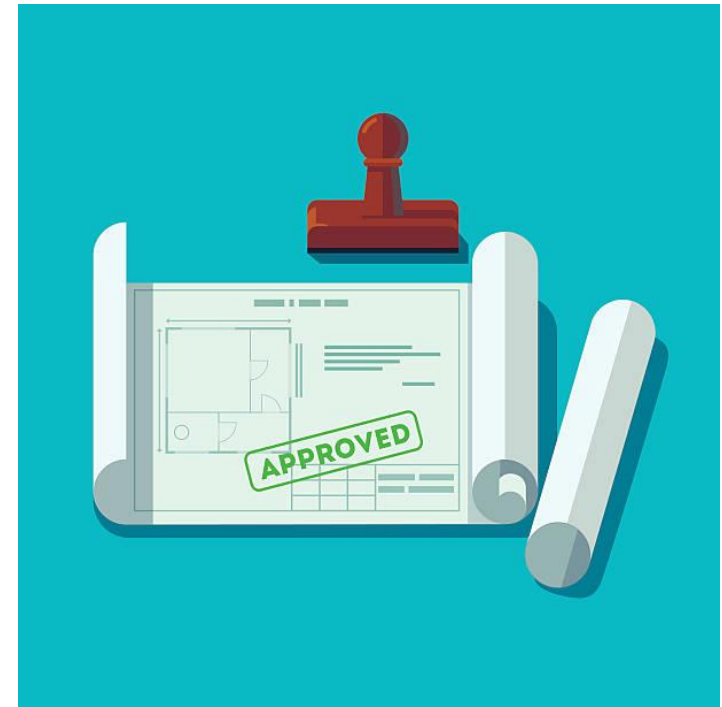
Division Fiscal Certification:

 GO # 022-8049800- _____ LN 1 \$ _____
Vendor ID #

(C-1.6)

WORK PRODUCT REVIEW

- **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

- 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

- 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

- **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

- **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

- **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

Final Report and Request for Retainage (1-2 months)				
Final report should be received within 30 days of completion of construction and final payments to the contractor. Report includes the following:				
<input type="checkbox"/> Final Report/Attachment C-2				
<input type="checkbox"/> Documentation of permanent marker installation				
<input type="checkbox"/> Audit (if applicable)				

Project Name: Project Number:				ATTACHMENT C-2
New Jersey Historic Preservation Fund CAPITAL PRESERVATION GRANT FINAL REPORT & RETAINAGE FORM				
Project Number: _____	Project Name: _____			
Organization: _____				
Final Project Budget				
Total approved budget for each category should correspond with the categories on Attachment B of the Grant Agreement.				
Categories of Work	Total Approved Budget	Costs this Period	Cumulative Amount of Previous Costs	Balance Of Project Remaining
A. Non-Construction				
B. Construction				
E. Total	\$	\$	\$	\$

Please explain any substantial changes or deviations to Budget here:



CLOSING OUT THE GRANT

- **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



MULTI-PHASE PROJECTS

- **Subsequent Capital Phases are Contingent upon:**
 - Completion of current capital phase
 - Passage and signing of an appropriation bill
 - Execution of a new grant agreement for the next proposed phase of work

A large, grey, textured elephant sculpture, possibly made of stone or concrete, is the central focus. The elephant's head is shown in profile, facing left. It has a large, prominent eye with a white sclera, a red iris, and a blue pupil. The trunk is thick and tapers towards the bottom. The sculpture is set against a background of a red building with a yellow and white striped awning. The sky is a clear, pale blue.

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

- Visit 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



Department of Military and Veterans Affairs homepage



STAY IN TOUCH WITH US

- Facebook, Instagram, Twitter, and 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!



QUESTIONS

- Live Q&A
- Questions pertaining specifically to your project should be directed to your PO





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