PRESERVE NEW JERSEY HISTORIC PRESERVATION FUND

2023 Applicant Workshop

NEW JERSEY HISTORIC TRUST

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.

BOARD OF TRUSTEES

> 12 Citizen Members

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

PROJECTED GRANT REVIEW SCHEDULE

Wednesday, April 19, 2023 **4:00 pm**	Deadline for submission of applications, in Trust's office by 4:00pm
Tuesday, August 1, 2023	All resources must be listed or certified eligible for listing in the NJ or National Register
May – September 2023	Staff reviews applications and makes site visits; Evaluator Panel meets
Wednesday, September 27, 2023	Historic Board of Trustees votes on its recommendations
October-November 2023	GSPT reviews NJHT Board recommendations and submits final recommendations for Legislature and Governor
January – March 2024	Enactment of appropriations bills making grant funds available. *this date is an estimate for planning purposes only

STAFF OF THE HISTORIC TRUST

- Dorothy Guzzo, Executive Director
- Historic Preservation Specialists:
  - Alexis Alemy
  - Jennifer Boggs
  - Shannon Bremer
  - Glenn Ceponis
  - Judith Murphy, AICP, PP
  - Ashley Parker
  - Vito Scocozzo
- Carrie Hogan, Fiscal Officer
- Paula Lassiter, Secretary

NEW JERSEY HISTORIC TRUST

WEBINAR OVERVIEW AND AGENDA

OVERVIEW AND TODAY'S AGENDA

Webinar Overview

> Recording will be posted next week to the NJHT website

> Q+A will be held at the end of each section **and** at the end of the presentation

> All questions should be submitted through the Q+A function located at the bottom of your screen

> Questions that are project specific may be referred to the njht@dca.nj.gov email so you can be directed to a Program Officer

> Please stay until the end to learn about the required application attachments and how to set your 2023 application apart!

Agenda

> 2023 Grant Guidelines

> Archaeological Requirements

> Application overviews and details
> > Historic Site Management (HSM)
> > Municipal, County and Regional Planning Projects (MCRP)
> > Heritage Tourism
> > Capital

> Attachments

> How to set your application apart

> Q+A

2023 GRANT GUIDELINES

NOTABLE FOR 2023

Historic Site Management and Heritage Tourism
- The maximum grant award has been raised from $50,000 to $75,000

Municipal, County, and Regional Planning Grants
- Separate application
- The maximum grant award has been raised from $50,000 to $75,000
- Includes preparation of design guidelines, local preservation ordinances, historic preservation components of a municipal or county master plan, and architectural surveys

Multi-Phase Capital Funding Commitments
- Funding for large scale capital projects
- Must be applying for at least two phases of work
- Minimum request of $500,000 per phase (maximum request is $750,000 per phase)

Special Initiatives for 2023
- 250th Anniversary of the American Revolution
- Underrepresented Histories

Information submitted after the application deadline will not be accepted or reviewed

2023 SPECIAL INITIATIVES

> **Semiquincentennial**
>> 250th Anniversary of the American Revolution in 2026

> **Underrepresented Histories**
>> Expand representation of marginalized groups and empower meaningful involvement of minority constituencies in the identification, preservation and interpretation of historic resources
>>> Project areas:
>>>> Capital Investments
>>>> Identification and Evaluation
>>>> Interpretation
>>>> Exhibit and Programming

NEW JERSEY
HISTORIC TRUST

Preserve New Jersey Historic Preservation Fund
Underrepresented Histories Special Initiative

In response to the nation's recent reckoning with racial injustices, and in keeping with the New Jersey Comprehensive Statewide Historic Preservation Plan (2013), the New Jersey Historic Trust seeks to expand representation of marginalized groups and empower meaningful involvement of minority constituencies in the identification, preservation, and interpretation of historic resources. For the upcoming Preserve New Jersey grant round, the Trust encourages applications that demonstrate efforts and/or initiatives that consider underrepresented histories, such as Black history, civil rights history, disability history, indigenous history, Latinx history, LGBTQ+ history, or the history of any other marginalized group.

The needs of sites with underrepresented history associations are as diverse and numerous as the sites themselves, hence the goal of this initiative is to address those needs holistically using any of the activities eligible for the Preserve New Jersey grant program. To be considered for the special initiative, the scope of the proposed project does not necessarily need to engage underrepresented history directly, so long as the subject property represents marginalized history in its significance, or if the applicant organization has demonstrated expanded interpretation of the site's history in the context of current events. Applicants might consider developing projects that fall into the following categories:

Project Areas:

Capital Investments
- Physical preservation of historic resources with established or newly understood associations with underrepresented histories, such as Black history, civil rights history, disability history, indigenous history, Latinx history, LGBTQ+ history, or the history of any other marginalized group

Identification & Evaluation
- New or revised nominations for the New Jersey and National Registers of Historic Places, to bring more underrepresented history sites into the preservation fold and to encourage already listed sites to identify and interpret lesser known or previously excluded stories
- Architectural surveys, archaeological investigations, or other endeavors to identify new sites associated with underrepresented histories
- Historic preservation ordinances, design guidelines, or elements of municipal master plans to empower preservation in minority communities

Interpretation
- Capital, Historic Site Management, or Heritage Tourism projects which incorporate the interpretation of underrepresented histories, expand a site's interpretation within the context of current events, or expose previously unknown or misunderstood history

Exhibit & Programming
- Heritage tourism projects that elevate underrepresented histories, re-examine history within the context of current events, and/or specifically engage minority audiences

CROSSROADS *of the* AMERICAN REVOLUTION

★ NATIONAL HERITAGE AREA ★

ONLINE APPLICATION

Tips for our Online Application:

› Start early!!

› Make an account for your Formsite application so that you can save and return later

› Review the PDF or Word version FIRST and read it through carefully

› Type your answers in a word document OFFLINE and then copy/paste into online application

› Familiarize yourself with the **Attachments Checklist** for your grant type

› Look at your Board Meeting Schedule *now* and plan accordingly to have the **Governing Body Resolutions** signed by the application deadline

Instructions

Please read the following information carefully before starting the application.

This is the application for **Historic Site Management Grants ONLY**. Visit the <u>Preserve NJ page of our website</u> for links to the Capital and Heritage Tourism applications.

We recommend that you download a Word doc or PDF of the application, prepare your answers offline, then return to the online application and copy and paste your answers.

<u>HSM Application (Word doc)</u>

<u>HSM Application (PDF)</u>

Creating a login is optional but *highly recommended* so that you can save and return to your application.

Make sure to SAVE as you go. If you hit the back button or exit the browser before hitting save, your answers may be lost.

If you are unable to complete the application online, or if you have problems with the application, contact NJ Historic Trust staff at njht@dca.nj.gov or (609) 984-0473.

Do not wait until the last minute! This is the first year of the online application and there are bound to be glitches. Start early to avoid missing the deadline.

In addition to the online application, you will need to submit a USB drive of supporting documentation to the Trust office by the application deadline. See the Grant Guidelines for delivery instructions. A checklist for supporting documents is included at the end of this online application and can also be <u>downloaded here</u>.

New User	Returning User
Username:	Username:
Password:	Password:
Confirm password:	Submit
	Forgot Password?
Email address:	
Submit	

Powered by ≡ formsite

ELIGIBLE APPLICANTS

› Agencies or entities of county government

› Agencies or entities of municipal government

› Agencies or entities of state government

› Nonprofit 501(c) organizations that are compliant with NJ Charitable Registration Laws

› **Ownership of project property:**
  › HSM and Heritage Tourism Grants
    › Owner Assurance
  › Municipal, County, and Regional Planning Grant
    › No ownership or lease requirements
  › Capital Grant
    › Owned in fee-simple by applicant
    › Lease with minimum of 15 years remaining **OR** signed owner authorization form
    › Owner Assurance – applicant must obtain written consent of the property owner

ELIGIBLE PROPERTIES

›   Individually listed in the National or NJ Register of Historic Places

›   Contributing resource in a historic district that is listed in the NJ or National Register (must provide Documentation from SHPO)

›   Determined eligible for listing by the NJ Historic Preservation Office, must be listed or certified eligible for listing on the New Jersey Register or National Register by **August 1, 2023**

   ›   **For Capital Applicants:** Resources <u>must</u> be listed in the State Register before funds can be dispersed

ELIGIBLE ACTIVITIES

Historic Site Management

> Construction Documents and Designs

> Preservation Plans

> National Register/New Jersey Register Nominations

Heritage Tourism

> Visitor Readiness Assessment

> Design/Fabrication of Interpretive Signs

> Interpretive Planning

Municipal, County, and Regional Planning

> Architectural Surveys

> Preparation of Local Historic Preservation Ordinances

> Preparation of Design Guidelines

Capital

> Preservation, Restoration, Rehabilitation, Reconstruction

> Visitor Amenities

> ADA Accessibility

See **Grant Guidelines** for a Comprehensive List

CRITERIA FOR REVIEW

Significance of the Resource:

> Is the property listed in NJ Register?

> > Must be listed or certified eligible for listing by <u>August 1, 2023</u>

> Is property under threat of collapse, demolition, inappropriate use or development?

Project Concept/Team:

> Is the scope of work clear, thorough, and appropriate for resource?

> Is the project team qualified?

> Is the proposed budget realistic?

> Is the schedule feasible?

CRITERIA FOR REVIEW

Organizational Ability:
- › Has the organization been a good steward to the property?
- › Does the organization have a long-term commitment to the preservation of the resource?
- › Are matching funds available?
- › Does the organization have a good fundraising record?

Public Benefit:
- › Does project represent innovative design, programming, or reach new audiences?
- › Does the project complement other State initiatives?
- › Is there community support?
- › Will funding make a difference in quality of the project?

Other Considerations:
- › Geographic distribution

GRANT TYPES FOR 2023

Historic Site Management (HSM):

› $5,000 - $75,000

› Trust provides 75% match

Heritage Tourism Planning:

› $5,000 - $75,000

› Trust provides 75% match

Municipal, County, and Regional Planning:

NEW!

› $5,000 - $75,000

› Trust provides 75% match

Capital Level I:

› $5,000 - $150,000

› Trust provides 60% match

Capital Level II:

› $150,001 - $750,000

› Trust provides 50% match

Capital Multi-Phase:

› $500,000 - $750,000 per phase (must be at least two phases)

› Trust provides 50% match

ARCHAEOLOGICAL REQUIREMENTS

WHEN IS ARCHAEOLOGY REQUIRED?

If ground disturbance is planned, archaeological consideration is required.

Examples of common ground disturbance necessitating the consideration of archaeology:

> Installation of electrical, water, or gas utility lines
> Grading for construction or expansion of parking lots, sidewalks, and other landscape alterations
> Construction of ADA compliant improvements
> Removal and installation of footings
> Installation of outdoor HVAC systems
> Exterior foundation work

POTENTIAL APPROACHES

Public Engagement Opportunity!
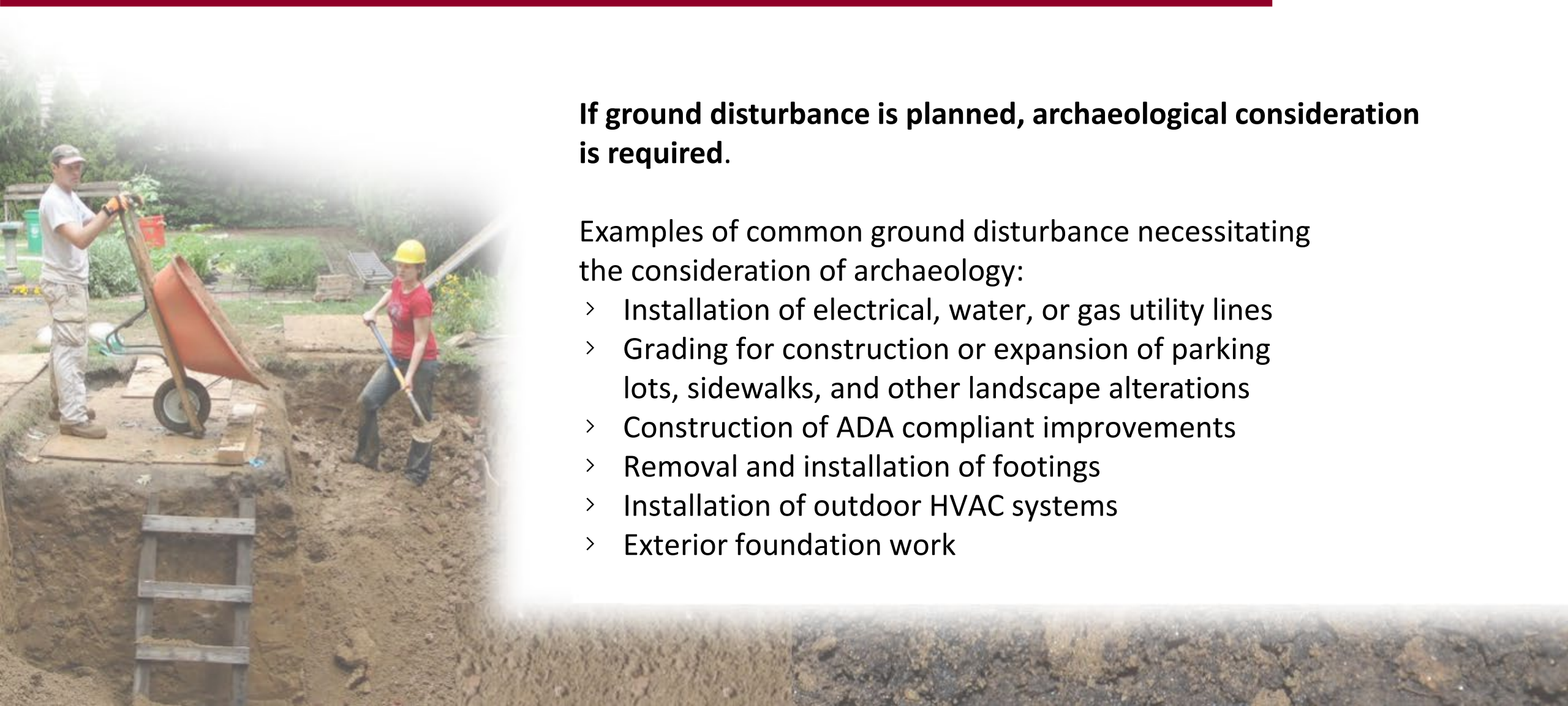
> **Archaeological Management Plan**
>> Avoid last-minute problems
>> Protect interesting and significant resources
>> Learn more about your property and those who inhabited it
> **Phase I Survey –** "Is there archaeology here?"
> **Phase II Survey –** "There is archaeology, but is it significant?"
> **Phase III Survey –** "There is significant archaeology here and we need to fully excavate it in order to understand it."
> **Monitoring** is not considered best practice but may be employed in select circumstances.

WHAT IF NO DIGGING IS PLANNED?

The potential for archaeology must be addressed in your application.

Also consider your long-term goals:

› Will there be ground disturbance as part of your future scope of work?

› Do you have a research question about your property or its occupants that you might eventually answer with archaeology?

HISTORIC SITE MANAGEMENT (HSM) GRANTS

ELIGIBLE ACTIVITIES

> Non-construction activities related to planning for preservation or rehabilitation of a historic property
>> Preservation plans and historic structure reports
>> Feasibility studies
>> Structural evaluations
>> Archaeological studies and reports
>> Historic landscape plans
> Preparation of nominations to the NJ Register of Historic Places
> Strategic plans

See the Grant Guidelines for additional activities

MATCHING FUNDS

> Historic Site Management grants provide a 3:1 funding match
>> Trust provides up to 75% of the total project costs
>> Applicant provides 25% (or more) of the total project costs

> The applicant must demonstrate the ability to provide the full match required to complete the project.
>> Match in hand
>> Fundraising plan

HSM REQUIREMENTS

- Owner consent signature is required, if applicant does not own or lease the property
  - If the project is for a historic district nomination, the Owner Assurances form must be signed by **each municipality** that falls within the boundaries of your proposed project area
- Work must be complete within two years after funds are appropriated
- Grantee should acknowledge funding assistance in published materials
- If property is not currently listed, submission of New Jersey Register of Historic Places nomination is strongly encouraged to be one of the project goals

APPLICATION SECTIONS

Eligibility Questions

Project Summary

Applicant Information

Property Ownership

Evaluation Criteria Sections:

1. Property Information & Historic Significance
2. Project Concept and Team
3. Project Budget & Matching Funds
4. Organizational Ability
5. Public Access & Benefit

APPLICATION SECTIONS

Eligibility Questions

> Eligible applicant

> Eligible resource

> Permission granted

Project Summary

> Project title

> Grant request; total project costs

> **BRIEF** project description: refer to specific eligible planning activities.

APPLICATION SECTIONS

Applicant Information

› Contact listed should be very familiar with your project and able to arrange site visit

› All Non-profits need

  › IRS letter to document tax-exempt status
  › Current NJ Charitable Registration Number

› Governing Board Resolution (sample provided)

  › Authorizes and designates a single person to sign applicant assurances

  › Local Governments may use their own resolution format

    › should authorize application and include exact amount of grant request and matching funds

› Applicant Assurances

  › Signed by the authorized representative

  › Assures that matching funds are or will be available

APPLICATION SECTIONS

Property Ownership

› Owner Assurances

    › If applicant and owner are the **same**, sign only the <u>Applicant Assurances</u>

    › Signed by the property owner of each property included in the proposal

        › If the project is for a historic district nomination, the Owner Assurances form must be signed by **each municipality** that falls within the boundaries of your proposed project area. NOT every property owner.

1 Property Information & Historic Significance

Historic property name
> As listed by the NJ Historic Preservation Office
> If application is for more than one property, choose one relevant property or district as the **"reference property."** You will be able to list all the properties in a separate question.
> Physical <u>property address</u> and link to google map

Historic Register Status
> National and/or State Register
> Individual or contributing to district
> Certified eligible (8/1/23 deadline)

Historic Significance
> Date built, architectural style, builder, how is it significant, and why it is important to preserve.

History of Property's Use
> Historic use, current use, and future plans

Ownership/ Applicant History
> When acquired
> Stewardship history

Current Condition/ Preservation Need
> Occupied or unoccupied
> General condition/ structural issues
> Any threat to the resource/ inappropriate use

Project Concept & Team

What are the goals of this project? How will this project address the needs of the resource(s)? (1000 word max)*

What activities are included in this project? (check all that apply*)

Historic Site Management Projects
☐ Historic Structures Report (HSR)
☐ Preservation Plan
☐ Update to an HSR or Preservation Plan
☐ Conditions Assessment
☐ National Register Nomination
☐ Architectural Plans, Designs, Specifications, or other Construction Documents
☐ Cost Estimates
☐ Archaeological Investigation
☐ Adaptive Reuse/Feasibility Study
☐ Master Plan for Rehabilitation
☐ Historic Research Report
☐ Materials Analysis
☐ Building Systems Analysis
☐ Engineering Report
☐ Landscape Report
☐ Disaster Management Plan
☐ Maintenance Plan
☐ ADA Accessibility Planning
☐ Strategic, Fundraising, or Endowment Planning
☐ Other:

+Required if HSR, Preservation Plan, or Update to HSR/Preservation Plan: Will the document follow the guidelines set out in "Historic Structure Reports & Preservation Plans - A Preparation Guide"?
☐ Yes
☐ No

Goals of the Project
> Expand on brief project description above
> Problems and needs of site that will be addressed
> Reference consultants' proposal (if available)

Identify all activities included in project
> Proposed scope of work

Project Status
> RFP/ Proposals Received/ Consultants Selected

List proposed consultants and timetable
> Include resume and credentials

Proposed Fees and Estimates

No Match Expended

> Prior to the application deadline of April 19, 2023

Project Budget

> Detailed list of work products and associated costs

> Grant request

> Total project cost

> Minimum match requirement

> Match required to complete the project

> Match in-hand and/or plan to raise the funds

Documenting Match in-Hand

> Non-profit: Account statements or funding commitment

> County/Municipal: Governing Body Resolution committing specific matching funds

4 ORGANIZATIONAL ABILITY

About your Organization

> Size of Organization and Mission Statement
>> How many staff, board members, and volunteers?
>> How is proposed project related to mission of the organization?

> Cyclical Maintenance Plan
>> Do you have one? Who is responsible for routine maintenance? Is there a maintenance fund?

> Experience managing grants and working with consultants

> Who will be managing this grant and providing project oversight?
>> List all relevant prior grants managed

> Any open grants? Explain status and projected end date

> Climate change (building resiliency)

> Operating budget / Balance sheet (non-profits only)

Continuing Education / Professional Development

> NJHT Best Practices workshops

> NJ History and Historic Preservation Conference

> Continuing Education in Historic Preservation such as classes at Rutgers-Camden/M.A.R.C.H

> Other professional credits

5 PUBLIC ACCESS & BENEFIT

Anticipated Community Benefit
› Who will benefit and how?
   › Increased accessibility and awareness
   › Public interpretation
   › Increased visitation
   › Planning for future capital work

Special Initiatives
› Does your project meet the special initiatives?

Current Public Access and Interpretation
› Regular open hours / entry fees
› ADA Accessible
› Annual visitation numbers

State and Federal Heritage Initiatives
› Certified Local Governments
› Journey Through Jersey site
› Main Street Community
› Women's Heritage Trail

MUNICIPAL, COUNTY, & REGIONAL PLANNING (MCRP) GRANTS

ELIGIBLE ACTIVITIES

> Preparation of Design Guidelines

> Preparation or revision of Local Historic Preservation Ordinances

> Preparation of historic preservation components to a municipal or county Master Plan

> Preparation of an architectural survey to identify historic properties using the NJ State Historic Preservation Office's approved guidelines and format

If a planning document or activity other than those listed above is proposed, please consult with staff to determine if it is an eligible activity.

MCRP REQUIREMENTS

The Municipal, County, and Regional Planning Application is very similar to HSM.
Some of the **major differences** are:

Property Ownership

› MCRP grants <u>do not</u> need to demonstrate ownership

  › The signature of the chief elected official of each municipality in which the project area is located is required.

Property Information and Historic Significance

› At least **<u>one</u>** resource in the project area must be listed or certified eligible for listing in the **New Jersey or National Register of Historic Places** either individually or as a contributing resource in a historic district

› Identify previous and current preservation planning efforts of the community

› Identify any existing preservation planning documents

Project Concept & Team

› Historic Preservation Commission details

Organizational Ability

› Will project promote stewardship and maintenance of historic resources by private owners?

› Are there other stakeholders' groups involved with project: historical societies, main street orgs, etc.?

Public Access & Benefit

› How will project increase public participation in the community's preservation efforts and planning process?

› Will the project increase awareness of the community's history?

› Level of community involvement and support

CRITERIA FOR REVIEW

- Degree to which the project promotes stewardship and maintenance of historic resources by private owners.

- Degree to which the project fosters the goals and objectives of the [New Jersey Comprehensive Statewide Historic Preservation Plan (2023-2028).](#)

- **Project concept and team**

  - Quality and appropriateness of the project, proposed consultants, budget, and schedule

    - Consultants must demonstrate that they meet or exceed accepted professional qualifications in their respected fields

- **Organizational ability**

  - Degree to which the applicant involves the community in the preservation planning process

  - Availability of matching funds

- **Public benefit**

  - Degree the project represents innovative design or programming

  - Demonstrated community support for the proposed project and future preservation

  - Distribution of funds throughout the state and to a variety of projects

 - Ability of this grant to make a difference in the quality of this project

HERITAGE TOURISM GRANTS

ELIGIBLE ACTIVITIES

> Visitor-readiness assessment

> Visitor evaluation and/or development of performance evaluation measures

> Interpretive planning for one or multiple sites and/or development and enhancement of linkages between sites

> Design/fabrication of interpretive signage or literature

> Marketing plans or studies

> Design/fabrication of marketing materials

> Training and workshops that create, foster, or enhance linkages between sites
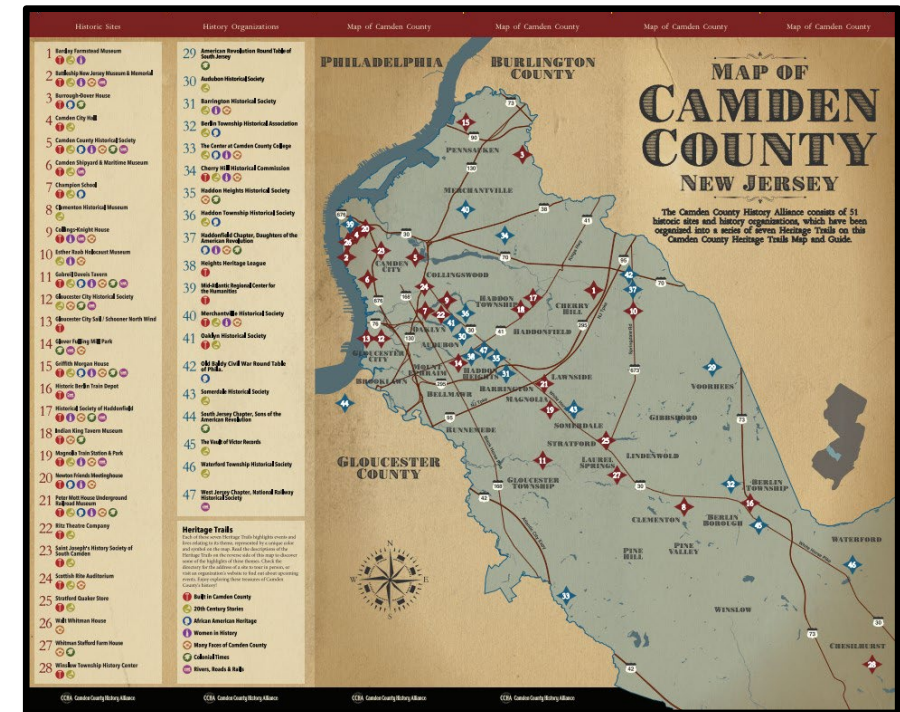
CRITERIA FOR REVIEW

The following criteria is also used:

Project Concept/Team:

> Does the project enhance or benefit the visitor experience at the resource?

> Does the project foster the goals and objectives in the New Jersey Heritage Tourism Master Plan?

> Does the project address the development of heritage tourism in an already existing plan or aims to create a broader regional tourism plan or initiative?

Organizational Ability:

> Will the applicant build upon the proposal and continue to foster heritage tourism?

Public Benefit:

> Does the project have the potential to reach new audiences?

> Does the project have the potential to promote other cultural and heritage tourism activities?

> Does the project create links between multiple sites?

HERITAGE TOURISM APPLICATION

Heritage Tourism Application is very similar to HSM. Some of the **major differences** are:

› **Property Information and Historic Significance**
  › At least **one** resource in the project must be listed or certified eligible for listing in the **New Jersey or National Register of Historic Places** either individually or as a contributing resource in a historic district
  › Choose a "**Reference Property**" if your project is for more than one property (you will have a chance to identify all properties in the application, but you must select only one "reference property")
  › There are no ownership or lease requirements, but you **must** submit the **Owner Assurances** demonstrating support for the project

› **Project Concept and Team**
  › Is the project consistent with the New Jersey Heritage Tourism Master Plan?
  › Does it link to broader/regional heritage tourism initiatives?

› **Public Access and Benefit**
  › Is your site visitor ready?
  › If so, provide documentation with Attachment G

CAPITAL PRESERVATION GRANTS

ELIGIBLE ACTIVITIES

Construction Activities

> Preservation, restoration, rehabilitation, reconstruction, barrier free access, interpretive signage, project sign, etc.

> Archaeology

> New construction (e.g., visitor amenities, ADA compliance)

Non-construction activities directly related to the Capital project (up to 20% of project budget)

> Consultant's fees for planning, design, and construction administration

> Construction documents, schematic designs, specifications, etc.

MATCHING FUNDS

Match Provided by Applicant

› Grants $5,000 – $150,000 – 60% / 40% match

› Grants $150,001 to $750,000 – 50% / 50% match

› Special state appropriations or monies derived from the Corporate Business Tax (CBT) are not eligible as match for non-profit organizations or County/Municipal governments

› Federal & County grants are eligible as match

Match Expended Limitation

› Monies spent prior to April 19, 2021 do not qualify

› Expended funds must be integral part of the grant project

› Work must meet the Secretary of Interior Standards

› No more than 25% of project can be complete at time of application

› Documentation of **Match Expended Required** (Attachment E)
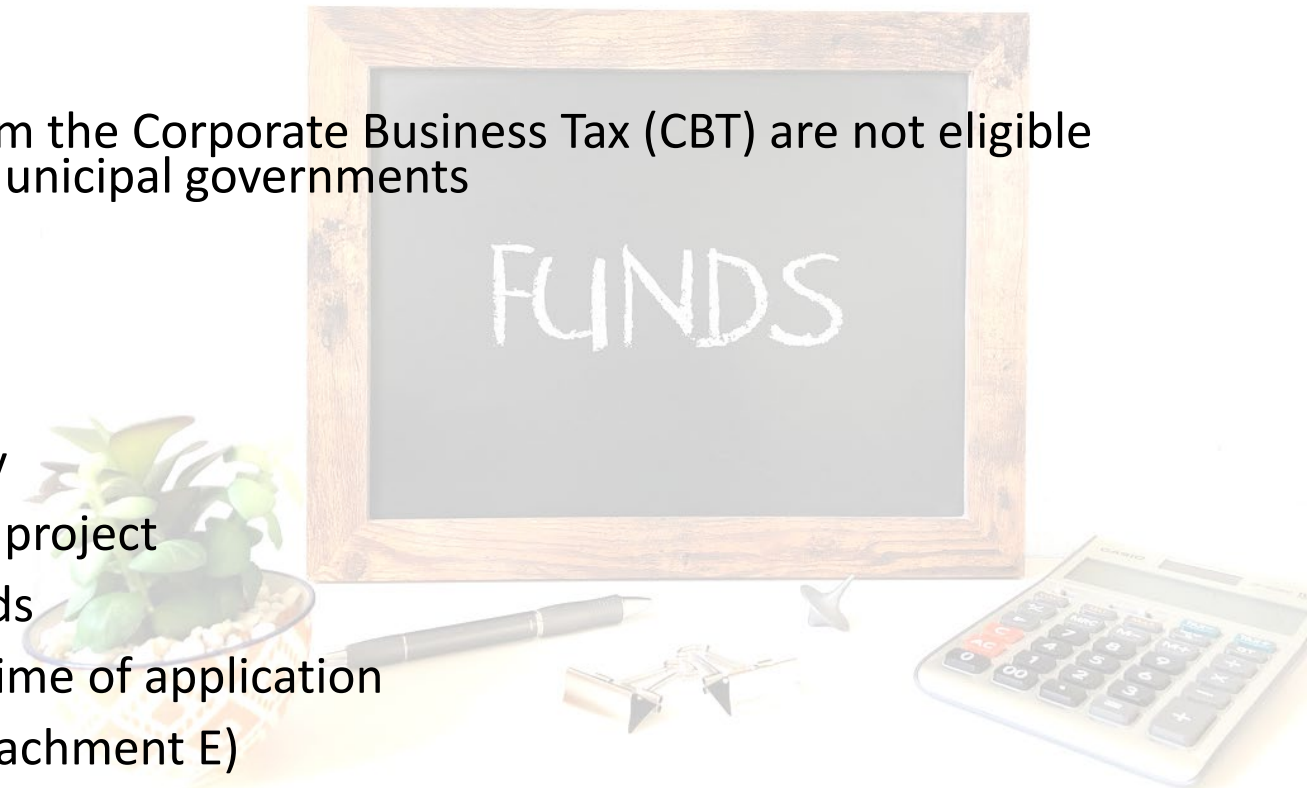
CAPITAL GRANT REQUIREMENTS

Control of Property

› Must be <u>owned in fee simple</u> **OR** <u>leased</u>

› If leased:

  › Minimum **15 years** remaining from the date grant funds are appropriated (signed lease to be included in Attachment B)

  › Lease cannot be revoked "at will"

  › Signed Owner Authorization form in the absence of a long-term lease

Project Timetable

› A grant agreement must be in effect within 18 months from the date of appropriation

› Capital work must begin within 2 years from date of appropriation

Audit Requirements

› Audits are required for those entities receiving more than $100,000 from state or federal grants in a fiscal year

› Audit costs are NOT reimbursable

CAPITAL GRANT REQUIREMENTS

All proposed work **must** meet the Secretary of the Interior's *Standards for the Treatment of Historic Properties.*

Reimbursement Conditions

› Documentation of expenses

› Project sign

Preservation Easement

› Must be recorded when a property owned by a non-profit organization receives a grant greater than $50,000

  › $50,001 - $100,000 – 15 years

  › $100,001 - $450,000 – 20 years

  › Over $450,000 – 30 years

Permanent Sign or Plaque

› Required if project receives $50,000 or more

APPLICATION SECTIONS

Eligibility Questions

Project Summary

Applicant Information

Property Ownership

Evaluation Criteria Sections:

1. Property Information & Historic Significance
2. Project Concept & Team
3. Project Budget
4. Organizational Ability
5. Public Access & Benefit

APPLICATION SECTIONS

Eligibility Questions
> Eligible applicant
> Eligible resource

Project Summary
> Project title
> Grant request, total project cost

Provide a **BRIEF** project narrative

APPLICATION SECTIONS

PRESERVE NEW JERSEY
HISTORIC PRESERVATION FUND

GRANT APPLICATION
CAPITAL LEVEL I & II

Applicant information:
› Provide organization and project contact
› One person familiar with the project and accessible

All non-profits need:
› **IRS letter** to document tax-exempt status (Attachment A)
› Current **charitable registration number** from Division of Consumer Affairs Charities Registration

Governments need resolution authorizing application and exact amount of matching funds

APPLICATION SECTIONS

Property Ownership

› Owner Assurances

  › If applicant and owner are the **same**, sign only the Applicant Assurances

  › If applicant **does not** own the property, but has a long-term lease, then owner signs Owner Assurances and applicant signs Applicant Assurances

› Owner Authorization

  › If the applicant does not have a long-term lease and the owner is an eligible applicant, the owner can sign the Owner Authorization **and** be a co-signer of the grant agreement.

1 PROPERTY INFO & HISTORIC SIGNIFICANCE

Historic property name

> Physical property address and map link

Historic Register status

> National and/or State Register

> Individual or contributing to a historic district

> Certified eligible (COE)

Historic significance

> Date built, architectural style, builder, importance, etc.

Use history

> Historic use and current use

Current condition

> Occupied or unoccupied

> General condition

> Any threat to the resource

2 PROJECT CONCEPT & TEAM

Project Overview

› Describe the project and goals of the project

› Complete the Scope of Work form and Budget Worksheet

› Stand-alone project vs. part of a larger project

› Multi-phase project

Project Specifics

› Interior/exterior

› Treatment approach

› Non-construction activities included

Project Substantiation

› Planning documents that substantiate proposed capital project

› **Scope Statement**

  › Capital Scope of Work Form

› **Current project status**

  › Proposals received and/or selected

  › Proposed cost estimates

  › Consultant resumes and credentials

  › Project timetable

› **Archaeological considerations**

3 PROJECT BUDGET & MATCHING FUNDS

Total Project Budget

› Grant request

› Minimum match requirement

› Match required to complete the project

Documenting Match-in-Hand

› Non-profit: Account statements or funding commitment

› County/Municipal: **Governing Body Resolution** committing specific matching funds

Documenting Match-Expended

› No more than 25% of total project cost

› Work completed between **April 19, 2021 and April 19, 2023** is eligible for reimbursement

› Signed contracts, invoices, proof of payment, before and after photos

PROJECT BUDGET

- **Capital Budget Worksheet**
  - Break out proposed costs by construction divisions
  - Link to CSI divisions included in application
  - Include **Budget Worksheet** (Attachment E)
  - Multi-phase applicants must complete worksheet for individual phases and overall project
  - The **Capital Budget Worksheet** directly corresponds with your **Capital Scope of Work Form**
  - **Please note, NJHT is using the expanded CSI Divisions in the 2023 grant application**

ORGANIZATIONAL ABILITY

About your Organization

> Staff, board, volunteers, mission

> Operating budget **(non-profits only)**

> Experience managing grants

> Experience working with consultants

> Cyclical Maintenance Plan

> Climate change (building resiliency)

Continuing Education/Professional Development

> NJHT Best Practices workshops

> NJ History and Historic Preservation Conference

> HPO Historic Preservation Commission training

> Continuing Education in Historic Preservation classes at Rutgers-Camden/M.A.R.C.H

> Other professional credits

Public Access (hours and visitation data)

> Regular open hours

> Annual visitation

> Entry fees

Anticipated Community Benefit

> Accessibility

> Public interpretation

> Increased visitation

> Planning for future capital work

Heritage Initiative Areas

> Certified Local Governments

> Scenic by-ways

> Federal or state heritage trails

Special Initiatives

> 250th Anniversary of the American Revolution

> Underrepresented Histories

ATTACHMENTS

USB ATTACHMENTS

Project Title Grant Application Attachments

Name

📁 Attachment A
📁 Attachment B
📁 Attachment C
📁 Attachment D
📁 Attachment E
📁 Attachment F
📁 Attachment G
📁 Attachment H
📄 Table of Contents
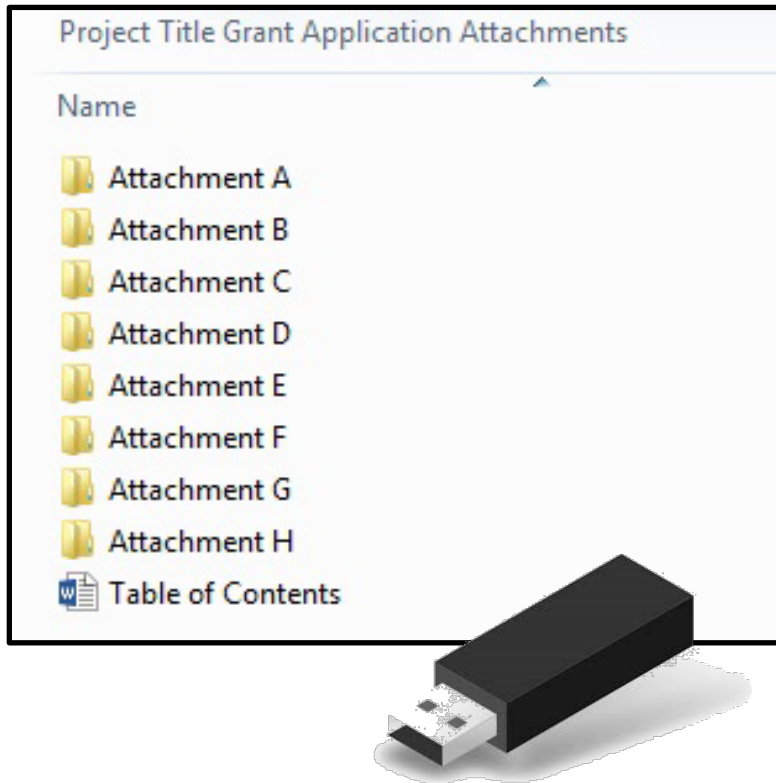
> One USB drive with **all** required attachments must be submitted with **each** application

> USBs must contain a **Table of Contents** document listing all the included documents

> USBs must be organized with folders labeled for each attachment type

> Only use Attachment A, B, C, etc. as folder title

> Please keep titles of documents relevant and short

> USBs should be mailed to the Trust

> > Limited in-person deliveries

> Must be received by 4:00 pm on April 19, 2023

USB TABLE OF CONTENTS

> Must be included on every USB

> Should list every document included with your application
>> Please keep titles relevant and short
>> Should reflect what is on your USB

> Should be organized by **Attachment Type**

> Formatting for Table of Contents and folder titles should follow the **Supporting Documents Checklist**

Preserve New Jersey – Capital Grant Application for Sample House
Table of Contents

Attachment A
1. IRS 501 (c) Determination Letter
2. Applicant Assurances
3. Governing Board Resolution

Attachment B
1. Owner Assurances
2. Signed Lease Agreement

Attachment C
1. National Register Nomination, Sample House

Attachment D
1. Request for Proposals
2. Proposal from Consultant A
   a. Cost Estimates and Resumes included
3. Proposal from Consultant B
   b. Cost Estimates and Resumes included
4. Schematic Designs for Sample House

Attachment E
1. Documentation of Match in-Hand
   a. Governing Body Resolution committing matching funds
2. Capital Project Budget Worksheet

Attachment F
1. Cyclical Maintenance Plan for Sample House
2. Project Manager Jane Smith Resume

Attachment G
1. Letter of Support 1
2. Letter of Support 2
3. Letter of Support 3
4. Community Support Documents
   a. Press Clipping 1/20/19
   b. Program Flyer for Program A
   c. Program Flyer for Program B

Attachment H
1. Photographs

ATTACHMENT A

Authorization by Applicant's Governing Body/Board
(required)

The governing body/board authorizes _____ (Name and title of person) to sign the assurances and acknowledges the certification above.

Introduces and passed_____

Ayes: _____

Nays: _____

Absent: _____

Approved on this date: _____

_____
(Signature of Board Chair, Mayor, or Freeholder Director)

Typed Name and Title: _____

Attested: _____
(Signature of Municipal or County Clerk or Board Secretary)

Name & Title _____

> **IRS 501(c) Determination Letter**
>   > Required for non-profit organizations
>   > Not required for municipal entities
> **Applicant Assurances**
>   > Required for **all** applicants
> **Governing Body/Board Resolution**
>   > Required for **all** applicants
>   > Should be printed and signed, then scanned and uploaded to the USB

ATTACHMENT B

Owner Assurances

› Must be included on the USB for any properties _not_ owned by the applicant or co-applicant

› If the application is for a **Municipal, County, and Regional Planning Project** or a register nomination for a **historic district**, consent is required from the Mayor of the municipalities within the district, not every property owner

Lease Agreement

› For capital projects, applicants who do not own the resource must provide a copy of their long-term (15 years or more) lease agreement

› In the absence of a long-term lease, the applicant must submit a signed **Owner Authorization form** certifying that the owner of the property will be a joint signatory to the grant

---

Owner Assurances

NOTE: Proposals for multiple resources must include a signed Owner Assurances page for each participating resource. If the application is for a historic district nomination, consent from the Mayor of the municipalities within the district is required, not every property in the district.

The property owner certifies that:

1) He/she understands the purpose of this application, and agrees to its submission to the New Jersey Historic Trust AND

2) He/she agrees that the listing of the property in the New Jersey or National Registers of Historic Places may be a condition of a grant

Signature of Property Owner _____Date _____
Typed Name & Title _____

Signature of Co-Owner (if applicable) _____Date _____
Typed Name & Title _____

ATTACHMENT C

Historic Designation Documentation

> If you are **listed** in the **National or State Register**, provide a copy of the most recent nomination form

> If you have been **certified eligible** for listing, provide a copy of your letter of eligibility from the **State Historic Preservation Office**

> All properties must either be listed or be certified eligible for listing in the National Register by _August 1, 2023_

> **For capital projects,** the resource _must_ be listed in the State register before any funds can be disbursed

ATTACHMENT D – HSM, HT, & MCRP

› **Scope Statement**

› Preliminary Scope of Work, RFP, Proposals Received and/or selected
  › Scope of Work should identify the problem, the proposed activities, timetable and costs/fees associated with the project

› **Project team resumes**

› If you have received proposals and/or selected a project team include the **resumes/credentials** of the consultant team. Resumes should:
  › Demonstrate proficiency in historic preservation and compliance with *Secretary of Interior's Standards*
  › Provide relevant examples of past historic preservation work

› Applications <u>without</u> named consultants ***should*** outline required experience

› **Proposed fees and cost estimates**

› **HSR & Preservation Plan Checklist**

› **For Heritage Tourism:**
  › Heritage Tourism regional plan or initiative your proposed project may be a part of

› **For Municipal, County, & Regional Planning Projects:**
  › Attach a list of HPC members including name, title, and term. Include vacancies!

› **For Survey Projects:**
  › Attach a map showing the proposed project area

Project team resumes

> If you have received proposals and/or selected a project team include the **resumes/credentials** of the consultant team. Resumes should:
>> Demonstrate proficiency in historic preservation and compliance with *Secretary of Interior's Standards*
>> Provide relevant examples of past historic preservation work

> Applications <u>without</u> named consultants ***should*** outline required experience

Proposed fees and cost estimates for this grant

> Multi-phase applicants must include cost estimates for the first phase AND all subsequent phases

Planning documents that substantiate the proposed work

> HSR, Preservation Plan, Conditions Assessment, Construction Documents, etc.

Example:
Division 8: Doors & Windows
   a. Restore wood windows
   b. Repair exterior doors

Project Name:

Division 1: General Requirements
   a.

Division 2: Site-work
   a.

Scope Statement

> Preliminary Scope of Work, RFP (or draft RFP), Proposals Received and/or selected

> Completed Scope of Work Form

Documentation of Match In-Hand

› Non-profit organizations must provide account statements or letters of funding commitment showing the amount of available funds

  › Redact any sensitive information, as NJHT files are publicly accessible

› County or municipal government applicants must provide a governing body resolution committing specific matching funds

ATTACHMENT E – CAPITAL

Documentation of Match In-hand

> Non-profit organizations must provide account statements or letters of funding commitment showing the amount of available funds

> County or municipal government applicants must provide a governing body resolution committing specific matching funds

Documentation of Match Expended and Work Completed

> Signed contracts, invoices, proof of payment, before and after photos, SHPO authorization for the work

Capital Budget Worksheet

> Shows project costs broken out by construction division

> Multi-phase applicants must submit the Capital Multi-phase Budget Worksheet providing the budget for the entire project, as well as the budget for each proposed phase

Resource:

Structure:

Preserve New Jersey Historic Preservation Fund
CAPITAL PROJECT BUDGET WORKSHEET

Non-Construction Items	Match Expended	Proposed	Subtotal	Non-eligible costs	Total
			0.00		0.00
			0.00		0.00
			0.00		0.00
			0.00		0.00
			0.00		0.00
			0.00		0.00
			0.00		0.00
Non-Construction Tot	$ –	$ –	$ –	$ –	$ –

Construction Items	Match Expended	Proposed	Subtotal	Non-eligible costs	Total
Div. 1 - General			0.00		0.00
Div. 2 - Sitework			0.00		0.00
Div. 3 - Concrete			0.00		0.00
Div. 4 - Masonry			0.00		0.00
Div. 5 - Metals			0.00		0.00
Div. 6 - Wood/Plastic			0.00		0.00
			0.00		0.00
Div. 9 - Finishes			0.00		0.00
Div. 10 - Specialties			0.00		0.00
Div. 11 - Equipment			0.00		0.00
Div. - Conveying Systems			0.00		0.00
Div. 15 - Mechanical			0.00		0.00
Construction Tota	$ –	$ –	$ –	$ –	$ –

	Match	Proposed	Subtotal	Non-eligible	Total

ATTACHMENT F

› Cyclical Maintenance Plan

› Resumes/credentials of the **Project Manager** and/or **Project Team**

› Organization's current year-to-date <u>balance sheet</u> showing income and expenses to date and past year's summary balance sheet showing income and expenses (required for non-profit applicants only)

ATTACHMENT G

Letters of Support

> Should demonstrate support for the organization, resource, and/or proposed project

> Should come from individuals/groups who support your resource AND from legislators
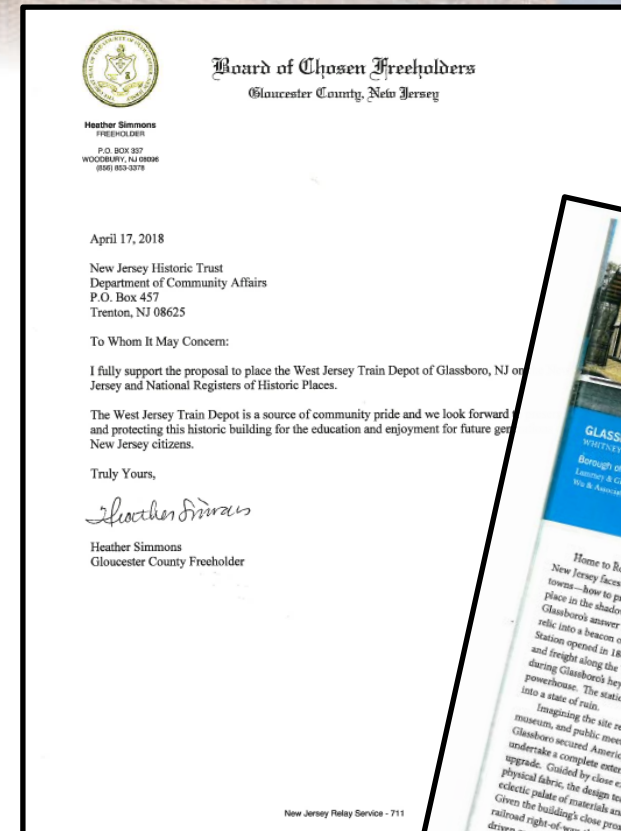
Documentation of Community Support

> Press releases, news articles, event flyers, programming, etc.

> Demonstrate participation in 2023 special initiatives

For Municipal, County, and Regional Planning Projects:

> Public meeting agendas, sign-in sheets, any resolutions passed or adopted, etc.

For Heritage Tourism:

> Provide documentation of visitor-readiness

ATTACHMENT H

Photographs and Photo Identification Sheet

› All photos should be labeled and identified on a photo identification sheet

› Photos should be formatted as jpg, png or pdf

Miscellaneous Documents

› Make sure you label these in the USB Table of Contents to ensure they will be reviewed

For HSM and Capital Applications:
› Include photos showing each elevation of the resource
› Include photos that show resource as a whole
  › Overall shots that show the primary façade and the resource in its context or setting
› Include photos that demonstrate need
  › Detailed shots showing areas of proposed work

For Heritage Tourism and Municipal, County, and Regional Planning Projects:
› Include photos of the reference property and photos showing significant resources within your project boundary
› Include photos that demonstrate need (if applicable)

HOW TO SET YOUR APPLICATION APART

Strong applications have:

› Well written, **_concise_** answers to application prompts

› A clear, well-defined scope of work based on planning documents

› Strong letters of community support, not only from legislators but also from people who love, visit, or cherish your resource

› Compelling photos that give our evaluators a strong understanding of your resource and its needs

Don't forget to:

› Check your numbers! Make sure your project budget is accurate in your application responses, any proposals selected/received, and in the budget worksheet

› Review the attachments checklist before submitting to ensure all required materials have been included

For the 2023 grant round, information submitted after the grant deadline will <u>not</u> be accepted.

QUESTIONS?

Program Officers:

> Alexis Alemy – alexis.alemy@dca.nj.gov

> Jennifer Boggs – jennifer.boggs@dca.nj.gov

> Shannon Bremer – shannon.bremer@dca.nj.gov

> Glenn Ceponis – glenn.ceponis@dca.nj.gov

> Judith Murphy, AICP, PP– judith.murphy@dca.nj.gov

> Ashley Parker – ashley.parker@dca.nj.gov

> Vito Scocozzo – vito.scocozzo@dca.nj.gov

Fiscal Officer:

> Carrie Hogan – carrie.hogan@dca.nj.gov

Visit our website: www.njht.org
Email: njht@dca.nj.gov

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