



Community Development Division

**MONTANA HISTORIC PRESERVATION
GRANT PROGRAM**
2020 Application and Guidelines for the 2023 Biennium

Grant Applications Due No Later Than

February 28, 2020

DOCCDD@mt.gov

<https://comdev.mt.gov/Programs-and-Boards/Montana-Historic-Preservation-Grant>

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2020 Montana Historic Preservation Grant Application and Guidelines for the 2023 Biennium Projects

I. Introduction

The Montana Historic Preservation Grant (MHPG) Program is a state-funded program created in 2019 as a result of Senate Bill 338 (SB 338), Sections I through I7. The MHPG Program is designed to support public or private entities with the preservation of historic sites, historical societies, or history museums through grant funding. The MHPG Program provides the opportunity to stimulate economic development, community revitalization, and statewide tourism through increased investment, job creation or retention, business expansion, and local tax base growth. Combined with such return on investment, the program supports the preservation of Montana's historic structures, sites, societies, and museums, contributing to the maintenance and demonstrating the economic impact of historical resources throughout the state. The program coordinates with wider historic preservation technical assistance available and utilizes the diversity of funds to address both the financial and preservation gaps of projects. The program funding invests in the critical point to help projects move forward, catalyzing local revitalization and economic growth.

MHPG program applications, grant application guidelines, project administration manual, other relevant information and resources are available on the Montana Department of Commerce (Commerce), Community Development Division (Division) website at <https://comdev.mt.gov/Programs-and-Boards/Montana-Historic-Preservation-Grant>. Interested persons can also e-mail MHPG program staff at DOCCDD@mt.gov or call staff at (406) 841-2770 regarding any questions they may have about the MHPG Program.

Funding is made available for MHPG through the legislative process, all MHPG grants approved are dependent upon the availability of funding. In order to be considered for the 2023 biennium, the deadline for submitting a grant application for funding is February 28, 2020.

These application guidelines explain how a public or private entity can apply for MHPG funding to be considered for an award of funds through the program, and include the application and reference to the administrative requirements of the program

Alternative accessible formats of this document will be provided upon request. If you need this document in an alternative format, such as large print, Braille, audio tape, or computer diskette, please contact the Montana Department of Commerce Community Development Division at (406) 841-2770, TDD (406) 841-2702, or the Relay Services number, 711.

The Department of Commerce does not discriminate on the basis of disability in admission to, access to, or operations of its program, services, or activities. Individuals who need aids or services for effective communications or other disability-related accommodations in the programs and services offered are invited to make their needs and preferences known. Please provide as much advance notice as possible for requests.

II. Eligible Applicants

All applicants must have the management capacity to undertake and satisfactorily complete the project applied for and assure proper management of the MHPG funds. Grant recipients must be in compliance with all applicable auditing and financial reporting requirements and have the capability to specifically assure proper tracking and recording of funds awarded.

A. Eligible applicants for MHPG assistance include:

a. Person

- i. Individuals may apply through a fiscal agent, which is a 501(c)3 incorporated nonprofit tax-exempt organization and , as applicable, must submit a letter of approval from the property owner of the historical site, historical society, or history museum that would receive the benefit of the MHPG funded activity. The fiscal agent will be the recipient of the grant award and becomes the legal applicant of record, manages the disbursement of grant funds according to the Commerce reimbursement processes, and is responsible for all the requirements of the specific grant. Commerce is not able to act as a fiscal agent for an individual applying to the MHPG Program.
- ii. Individuals may apply in coordination with a local government and must submit a letter of approval from the property owner of the historical site, historical society, or history museums that would receive the benefit of the MHPG funded activity.

b. Association

- i. For-profit or not for profit organizations and businesses may apply directly but must submit a letter of approval from the property owner, if the property is not owned by the applicant, of the historical site, historical society, or historical museum that would receive the benefit of the MHPG funded activity.

c. Governing Unit: Governing Units may apply directly but must submit a letter of approval from the property owner, if the property is not owned by the applicant, of the historical site, historical society, or historical museum that would receive the benefit of the MHPG funded activity. The following governing units are eligible to apply:

- i. Incorporated city or town,
- ii. County
- iii. Consolidated government, or
- iv. Tribal government

- I. A waiver of sovereign immunity will be a provision included in the grant contract. If the project is awarded, at the time the grantee wishes to enter into a contract, the following will be required 1) a waiver containing the provisions of 90-6-709, MCA, approved and signed by the tribal government before the contract is executed of 2) a resolution approving the tribe enter into the contract that contains the provisions of 90-6-709, MCA before the contract is executed. Applicants may submit the waiver of sovereign immunity at time of application, or, if that is not possible, the waiver will be a condition of the award and will need be submitted with other start up conditions, to allow for an applicant to enter into a contract with Commerce.

Additional Considerations for Eligible Applicants

Applicants should be familiar with their status of audit compliance and related financial considerations at the time of application, as applicable audit and financial compliance reports are reviewed by Commerce staff as part of the ranking process. Information related to the audit and financial status of a local government applicant is available at any time on the Department of Administration, Local Government Services website at <http://sfsd.mt.gov/LGSB>.

III. Eligible Projects

Eligible applicants can apply to complete projects or activities for the preservation of historic sites, historical societies, or history museums. Preservation activities include:

- A. Internal or external “brick-and-mortar” improvements that will address infrastructure, building renovation, maintenance, or building code issues
- B. Improvements that will enhance security, climate control, or fire protection; and
- C. Projects with a total cost over \$50,000 may use up to 10% of grant funding for planning and/or grant administration costs that are directly related to the preservation activities A. and B.

Historic sites will be considered eligible if one of the below criteria is met:

- Structure or site is listed on National, State, or Local Historic Registry
- Structure or site contributes to a historic district
- A structure more than 50 years old and has documented significance to the history of a Montana community or region

Additional Considerations for Eligible Projects

A. Budget and Implementation

Application budgets must be rounded to the nearest whole dollar amount.

The project scope of work should be completed in a reasonable amount of time.

Projects should demonstrate a reasonable and achievable budget and implementation schedule. Applicants will be given preference if they anticipate completion of project activities within 4 years from June 1, 2020 and can demonstrate in their application that all non-MHPG funding will be secured no later than July 1, 2021. Projects which can demonstrate economic impact within this time frame may be given a priority recommendation in the statutory criteria.

For example, a project that can demonstrate the firm commitment of non-MHPG leveraged project funds that addresses the entirety of the project or phase may be better positioned to demonstrate economic impact. Conversely, a vacant building that requires roof repair, but lacks any other components or leveraged funds, may indeed require assistance to protect a historical resource with value to Montana, but may not be positioned to be competitive in demonstrating local impact in a reasonable timeframe.

B. Project Scope of Work

Proposed preservation projects submitted to MHPG for funding must be comprised of “stand-alone” activities. The intent of the requirement is to preclude preliminary-type work from being funded that

would only result in a substantive improvement once additional funds were obtained, and the project can be completed.

For example, an application request to replace a roof should affirm that the foundation and other structural elements are secure and address these issues as part of the project to ensure a stabilized building. Similarly, a project to replace shingle roofing should also ensure that skip sheathing, rafters, etc. are sound.

Applicants should be aware of the conditions of a building in relation to the request for funds and prioritize activities accordingly. Applicants are not required to completely eliminate a particular type of deficiency, such as the completion of all building code issues for the entire museum facility, within the scope of the proposed project, but rather apply for a single phase of a multi-phase project.

For example, internal rehabilitation should be subsequent to roof repairs if any water damage or wall repair must take place. Similarly, a museum may prioritize upgrades to the fire protection system and address additional building code issues in future phases.

Applicants are encouraged to include any organizational plans or strategy documents that help to provide the context and need of a project. While not every project or organization will have such documents, if such documentation is available, then please provide with application materials. We understand that any such documentation may exist in a wide array of formats depending on the size and purpose of the organization. Organizations are not required to conduct strategic plans, organizational or operating plans, or fully audited financial reports in order to be eligible for grant funding.

C. Project Activities

Projects may include multiple activities within the scope of work, but applicants must demonstrate that each activity within the scope of work is necessary for a complete stand-alone project. Commerce reserves the right to reduce a grant amount and/or scope of work, if there are too many unrelated components within a proposed project. Applicants are to include a prioritization of project activities or components with funding amounts requested for each activity. Commerce may determine to recommend awarding all or part of the requested activities. Application narrative should be supported with approximate cost breakdowns by appropriate activity, photographs and other supporting documentation that provides the context or detail of activities. As an example, an applicant that is requesting funding for upgrades to the HVAC system, roof system and sidewalks; should identify the approximate cost breakdown for each of the activities and provide other supporting documentation.

The MHPG Program can support a multitude of projects of varying sizes across the state. Generally, more substantive preservation activities and projects may require feasibility or planning (including but not limited to, Historic Structure Assessments or Preliminary Architectural Reports) aspects in combination with brick-and-mortar activities. Planning components may be especially helpful when projects need to determine the architectural soundness of a structure.

Applicants may include the necessary planning components of a project in the proposal. This may include architectural assessments, feasibility studies, or basic design plans. Additionally, proposals may include the expenses to conduct a nomination to list a structure on the National Register since historic preservation rehabilitation projects are best positioned for success when using the Federal and State Historic Tax Credits. Please consult with the Montana State Historic Preservation Office for guidance on the nomination process and to determine if a structure is eligible for nomination.

The following hypothetical project application examples illustrate the various potential pathways project proposals may take using the MHPG Program:

- A small local history museum requires roof repairs, ADA facility upgrades, collections shelving, window repair and replacement, and a climate control system for exhibit storage. The museum is taking steps toward implementing a strategy created by the volunteer board of directors that will more prominently position the organization in the region, coordinate interpretation with other history institutions, and expand visitation through local municipal partnerships. The museum has been fundraising and uses local funds as match even though a match is not required. The application notes the requested funds will help the institution to expedite its in-house strategic plan and allow it to address key facility needs.
- A non-profit historical society's building is listed on the National Register of Historic Places and has minor roof repairs to maintain the structure and to prevent any further damage. The society and the community are exploring long-term funding solutions for more substantial rehabilitation. The non-profit historical society applies for a modest amount to address immediate repair needs with the intention to apply for a larger sum in a subsequent grant cycle while it identifies other resources available for the longer-term improvements. The society includes a request for a preliminary architectural report (PAR) in the application so that future rehabilitation will be better informed with structural and financial analysis. Match comes from a combination of society funds and a small grant from a private foundation.
- A private owner of a vacant building listed on the National Register of Historic Places has been investing significant funds over the last few months into the rehabilitation of a large two-story structure using the Federal/State Historic Tax Credit. In order to maintain the historic significance of the structure, the owner intends to find materials that best match the original windows and will incur slightly more expenses than originally anticipated. The owner works with the Town to apply to request an amount that augments these extra expenses and allows for the purchase and crafting of authentic window treatments for the building.
- A private owner recently purchased a hotel building constructed 85 years ago, but not listed on the National Register of Historic Places. The owner has plans for a mixed-use renovation and works with a local non-profit to apply for funds to complete a National Register nomination and listing process, restore the boarded-up windows, and repoint brickwork. The grant has enhanced the buildings appearance and allowed the owner to leverage Historic Tax Credits to complete the rehabilitation project. The total project, once completed, will provide needed retail and housing, supporting economic vitality in the historic downtown.

D. Project Design Considerations

Projects should strive to adhere to the [Secretary of the Interior's Standards for the Treatment of Historic Properties](#) and the related guidelines for preserving, rehabilitating, restoring, and reconstructing historic buildings, historic sites, structures, objects, and community districts.

- **Preservation** is applied in places such as Virginia City and Bannack, so that the passage of time and layers of history remain evident. The intent is to arrest decay, not to make buildings look

new. The Preservation Standards are commonly used when a property's primary function is to interpret history.

- **Restoration** is applied in places such as the Original Governor's Mansion, which is depicted at a certain period of significance in the building's history. Certain features that were added to the mansion outside of that period of significance were removed, and historic or replica features were reintroduced. Restoration Standards are commonly used when a property's primary function is to interpret history.
- **Rehabilitation** is applied to many of the historic properties we encounter daily, such as local businesses and government buildings. Although rehabilitation sometimes involves the preservation of serviceable historic character-defining features and the restoration of missing features, the Rehabilitation Standards are more flexible than those for Preservation and Restoration. The Rehabilitation Standards accommodate a change in use, continuation of a historic use, and meeting current codes in a way that maintains the property's historic fabric and character.

Each of the Standards ask project planners to meet the historic property on the property's terms. None allow for damaging treatments or adaptations arbitrary to the property's historic integrity. The Standards address both exterior and interior historic building work and suggest consistent approaches to treatments and techniques that help maintain the integrity of historical resources. Choosing the most appropriate treatment for a building requires careful decision making about the historical significance of a building and taking into consideration other factors:

- **Level of Significance**
National Historic Landmarks, designated for their "exceptional significance in American history," and other properties important for their interpretive value may be candidates for Preservation or Restoration. Rehabilitation, however, is the most commonly used treatment for most historic buildings.
- **Physical Condition**
Preservation may be appropriate if distinctive materials, features, and spaces are essentially intact and convey the building's historical significance. If the building requires more extensive repair and replacement, or if alterations or a new addition are necessary for a new use, then Rehabilitation is probably the most appropriate treatment.
- **Proposed Use**
Many historic buildings can be adapted for a new use or updated for a continuing use without seriously impacting their historic character. However, it may be very difficult or impossible to convert some special-use properties for new uses without major alterations, resulting in loss of historic character and even integrity.
- **Code and Other Regulations**
Regardless of the treatment, regulatory requirements must be addressed. But without a sensitive design approach such work may damage a building's historic materials and negatively impact its character. Therefore, because the ultimate use of the building determines what requirements will have to be met, some potential uses of a historic building may not be appropriate if the necessary modifications would not preserve the building's historic character. This includes adaptations to address natural hazards as well as sustainability.

For more detailed guidance, please refer to the National Park Service (NPS) website [NPS Standards & Treatment Guidelines 2017](#)

IV. Eligible Funding

The amount of eligible funding is derived from the tax collections allocated in 15-68-820(3)(b) and (4)(c) and deposited into the Historic Preservation Grant Account and further carried out according to the guidance established in SB 338. The legislature must approve and award all projects.

Matching Funding Sources for MHPG Projects

Eligible applicants may apply for funding up to \$500,000 per eligible project. Match is encouraged and may increase the competitiveness of an application, but is not required unless the applicant is a for-profit entity.

A. Eligible and Ineligible Match

1. A minimum match of 25% of the total project cost is required for all for-profit applicants. Match greater than 25% may increase the competitiveness of an application from a for-profit entity. Additionally, the Division's website has information regarding other resources that may be a better fit or complement the MHPG program.
 - a. In-kind donations are not considered eligible match.
2. In order to be eligible for a MHPG project grant, matching funds must be provided by the for-profit applicant to assist in financing the total project cost. For-profit applicants do not need to secure match before applying; however, documentation of match will be required after MHPG awards are made. Additional information as to eligible match can be found in the MHPG Project Administration Manual available on the Division's website.

B. Eligible and Ineligible Reimbursable Project Expenses

Successful applicants can begin incurring eligible project costs once awarded funds through successful legislation and may request reimbursement after meeting all start-up conditions and executing a contract with Commerce. Other than match requirements, program reimbursement grants will not require funds up front. Project funds are dispersed by submitting draw requests and applicable invoices to the department for processing. Projects will have multiple draw requests, depending on the project size, timeline, and budget. While we do request time to process such draws, the department recognizes the need to expedite such requests and will be in regular communication with each grant applicant and/or administrator throughout the startup process, draw requests, and close out process. MHPG grantees are required to adhere to various laws and requirements of the State and the program. Failure to do so could result in MHPG funds not being eligible for reimbursing project activities such as professional consultant services, building material purchases, construction, etc. Applicants that plan to commence a project before it has been approved for funding should discuss their plans with the MHPG staff to ensure that they have sufficient matching funds as required by the program and do not take any steps that could violate state law or regulations. Additional information as to eligible project expenses can be found in the MHPG Project Administration Manual available on the Division website.

V. Application Submission

General Requirements

To apply for a MHPG, an eligible applicant must complete the required application information listed below by February 28, 2020. One hard copy and one electronic copy of the MHPG application, any relevant information (such as photos and National Register nominations), and associated documents (such as plans or design documents) must be postmarked or delivered to the Department of Commerce, 301 South Park Ave., PO Box 200523, Helena MT, 59620 on or before the application date listed in these guidelines. It is preferable that electronic copy of application information and associated documents be transmitted via the file transfer service at <https://transfer.mt.gov>. Applicants will need to create an account in the transfer service, upload the files and email the transfer to DOCCDD@mt.gov prior to or by close of business on the application date listed in these guidelines. Please identify your upload(s) to include the name of the grantee in the file name.

Only one application per project is permitted each application cycle. Applications from multiple eligible applicants for the same project in any given application cycle are not allowed. This does not preclude an application for a subsequent phase in the next application cycle.

To apply for any of the funding approved through the legislative process, applicants must provide the following MHPG application information:

Appendix A: A MHPG application including responses to Statutory Criteria review criteria,

Appendix B: Completed Environmental Review forms that comply with the information in these guidelines. If the applicant is unable to complete this review by March 1, 2020, Commerce will accept the environmental information until May 1, 2020. If the Environmental Review is not completed and documentation of its completion has not been submitted to Commerce by May 1, 2020; the application will be considered incomplete, and;

Associated Documents: As applicable, relevant information and associated documents. Please note this information cannot exceed 25 MB in total, except for a formal Preliminary Architectural Report, Historic Structure Assessments or similar reports.

Environmental Review

Montana Historic Preservation Grants are a state action subject to the Montana Environmental Policy Act (MEPA). MEPA specifies three different levels of environmental review, based on the significance of the potential impacts. The levels are: (1) exempt or excluded from MEPA review; (2) environmental assessment (EA), and (3) environmental impact statement (EIS). The following outlines the environmental review process that must be completed by the applicant for each project proposed for MHPG funding.

For detailed information on MEPA, see *A Guide to the Montana Environmental Policy Act*, or *A Citizen's Guide to Public Participation in Environmental Decision Making*,

at: <https://leg.mt.gov/committees/interim/eqc/montana-environmental-policy-act/>

All necessary environmental review of the proposed project is recommended to be completed prior to submission of the application for grant funding. Commerce will accept applications on February 28, 2020 without a completed environmental review process documentation, as long as the applicant submits

documentation of a completed environmental review process by May 1, 2020. Any application received on February 28, 2020 without documentation that the environmental review process has been completed, must complete the environmental review process and submit documentation to Commerce no later than May 1, 2020 or risk being determined incomplete by Commerce.

To document completion of the environmental review process the applicant must provide documentation of the completed environmental review process and include with all documentation of the public review process, including but not limited to, the public notice for and minutes of a public hearing at which the environmental review was discussed, the public comments received, and the final decision on the environmental determination made during a public meeting. Please see Appendix B for a more complete discussion of the environmental review process.

VI. Award Process

Commerce staff has no decision-making authority over any application. Commerce only provides recommendations to the legislature that are advisory. Commerce staff will review applications based on the extent to which the proposed project relates to each of the six (6) statutory criteria found in SB 338 and listed below. To facilitate Commerce's review, applications should be organized according to the appendix format outlined in the Application Submission section of these guidelines. The applicant may not submit any additional information after the application deadline, unless requested by Commerce staff or is part of the Environmental Review process, in order to clarify information already presented in the application.

SB 338 Statutory Criteria:

- a) The degree to which the project supports economic stimulus or economic activity, including job creation and work creation for Montana contractors and service workers;
- b) The degree to which the project activity can demonstrate the purpose and need of the project. This includes whether it provides features that establish or enhance security, climate control, or fire protection for museums or address infrastructure, maintenance, or building code issues for museums, historical societies, or historic sites;
- c) The degree to which timing of the project can be completed without delay, including access to matching funds and approval of permits, if needed;
- d) The degree to which the project activity contributes historic or heritage value related to the State of Montana;
- e) The degree to which the applicant demonstrates a successful track record or experience of the organization directing the project; and,
- f) The degree to which the project's expected ongoing economic benefit to the state as a result of the project completion.

To prepare the recommendations, Commerce will review all applications in consultation with the Tourism Advisory Council (TAC) and the State Historic Preservation Office (SHPO), before they are submitted to the legislature, as indicated below. Commerce may allow outside technical review of applications by other public or private agencies or professionals when deemed necessary to assure adequate review. Commerce may take additional information into account based upon Commerce's or other agency's knowledge about a proposed project or community in the scoring of an application.

Commerce will prepare its recommendations, present them to the legislature by the 15th day of the regular legislative session. The legislature will make the funding decisions.

Consultation with the TAC and SHPO will include the following steps:

1. An initial list of applications will be provided to both TAC and SHPO, as well as being posted on the Division's website
2. Electronic access to the applications submitted for MHPG funding will be provided to TAC and SHPO
3. Commerce will review all the applications in consultation with TAC and SHPO, after which, Commerce will make recommendations to the legislature on each proposal submitted to the Department.
4. Any consultation information will be included with the Commerce Recommendation Report that will be made available online and/or provided to the Legislative Appropriations Committee, no later than the 15th day of the regular legislative session.

VII. Project Administration

Please see the Project Administration Manual on the Division website for information on how to administer a MHPG project. Projects must be completed in accordance with the applicable rules or the grantee risks losing the grant.

MHPG grantees should be prepared to provide information to the Department about how they intend to procure grant administration, professional services and construction services in accordance with applicable procurement laws applicable, including but not limited to the list of vendors to be or that were solicited, a copy of any advertisements, a copy of the request for proposals, or the information detailing the scope of work if price is the only consideration.

To help provide financial support for compliance with state procurement laws, when applicable, and manage a project, applicants whose projects are over \$50,000, are eligible to include 10% of the MHPG funds requested toward the administration of the project. This means a smaller museum or organization could obtain funds that address facility needs and also obtain the administrative support to manage the grant funds.

Changes to an Awarded Project

Commerce cannot approve amendments to the scope of work or budget affecting priority activities or improvements that would materially alter the intent and circumstances under which the application was originally recommended by Commerce and approved through the legislative process. Significant changes to the scope of work or budget could jeopardize the continued funding of the project using MHPG funds if Commerce determines that the proposed amendments could "materially alter the intent and circumstances" under which the project was originally approved. Grantees that request a modification that significantly affects the scope of work or budget for an awarded MHPG eligible project, that is already under contract, must have their proposed modification presented to the Legislature for its approval at the next regular legislative session.

APPENDIX A

MHPG Application and Statutory Review Criteria

The following section lists the six (6) statutory criteria used to score and recommend proposed projects, along with the criteria that will be considered by Commerce in evaluating each applicant's response. MHPG applicants are required to submit Section 1 of the application and include a signature of the authorized representative of the applicant. MHPG applicants are required to submit Section 2 of the application and include narrative responses that describe the relationship of their proposed MHPG project to each of the statutory criteria, except where noted otherwise. Each application will be scored based upon the extent to which the proposed project is consistent with each statutory criterion, using the point levels identified within each criterion where a score of one (1) is the lowest score possible.

Narrative responses should adequately explain the proposed project as concisely as possible; however, the applicant may use as many pages as necessary. Only information pertaining directly to the proposal and the MHPG Statutory Criteria should be included. Relevant information and associated documents that are submitted with a MHPG Program application cannot exceed 25 MB in total, except for a formal Preliminary Architectural Report, Historic Structure Assessments or similar reports.

In order to avoid unnecessary duplication, the applicant can reference other pertinent portions of the application or appendices in the narrative responses to the priorities. However, the applicant should not reference another portion of the application, such as the PAR, without including a narrative statement that provides at least a summary of what is being referenced. For example, an applicant should not simply state, "See page 4 of the Preliminary Architectural Report" as a response to a statutory criterion.

The following general definitions are applied to all non-technical ranking criteria relative to the overall quality of the applicant's response or situation and relative to the ranking criteria and applicable special requirements.

LEVEL 5: The applicant provides a very complete narration that thoroughly addresses the overall criterion, applicable ranking issues, and minimum requirements, including very complete substantive supporting documentation to support its claims. The Applicant's response to the ranking criterion (or the Applicant's actions or situation relative to the ranking criterion) is considered exemplary, particularly innovative, or to be extremely consistent with the intent of the ranking criterion. There are no ranking issues of any significance that were not completely addressed.

LEVEL 4: The applicant provides a solid narration addressing the overall criterion, applicable ranking issues, and minimum requirements, with strong documentation to support its claims. The Applicant's response to the ranking criterion (or the Applicant's actions or situation relative to the ranking criterion) is considered above average, very thorough, or to be very consistent with the intent of the ranking criterion. A "LEVEL 4" score would not reflect the level of excellence or be as consistent with the intent of the ranking criterion as a "LEVEL 5" would be. The application may not have completely addressed some ranking issues, but these were considered to be minor concerns.

LEVEL 3: The applicant provides an adequate narrative addressing the overall criterion, applicable ranking issues, and minimum requirements, with acceptable documentation to support its claims. The Applicant's response to the ranking criterion (or the Applicant's actions or situation relative to the ranking criterion) is considered average, adequate, or to be generally consistent with the intent of the ranking criterion. The application meets the minimum requirements for responding to the criterion and

has documented compliance with the special requirements that are pertinent to the ranking criterion; however, the application may not have adequately considered some ranking issues that may be potentially important.

LEVEL 2: The applicant provides some narration addressing the overall criterion, ranking issues, and minimum requirements, but may have provided weak or inadequate responses and/or documentation to clearly or completely support its claims or compliance with a requirement. The Applicant's response to the ranking criterion (or the Applicant's actions or situation relative to the ranking criterion) is considered below average, inadequate, or not entirely consistent with the intent of the ranking criterion. The application has not met all the minimum requirements for responding to the ranking criterion or has not complied with all the special requirements that are pertinent to the ranking criterion. The application may not have been complete or did not consider or adequately address some ranking issues that are considered to be important.

LEVEL 1: The application presents serious weaknesses in the narrative responses to the ranking criterion, ranking issues, and lack critical supporting documentation, or fails to adequately document compliance with one or more of the criterion. The Applicant's response to the ranking criterion (or the Applicant's actions or situation relative to the ranking criterion) is considered very weak, seriously inadequate or inconsistent with the intent of the ranking criterion. The application either did not address or did not provide sufficient information regarding several critical ranking issues.

MHPG Application Section I.

1. **Applicant:** _____
2. **Property Owner (if different from applicant):** _____
3. **Authorized Representative of Applicant:** _____ Title: _____
 Address: _____ City: _____ Zip Code: _____
 Phone: _____ E-mail: _____
4. **Primary Contact:** _____ Title: _____
 Address: _____ City: _____ Zip Code: _____
 Phone: _____ E-mail: _____

5. Project Type: Please select one type under the appropriate eligible project type

Historic Site: Infrastructure Maintenance Building Code Issue
 Security Climate Control Fire Protection

Historical Society: Infrastructure Maintenance Building Code Issue
 Security Climate Control Fire Protection

History Museum: Infrastructure Maintenance Building Code Issue
 Security Climate Control Fire Protection

5. Grant Funding Request Information			6. Project Address:	
Amount Requested: \$ _____			Physical Address:	
Total Amount of Leverage: \$ _____			City:	
Total Project Cost: \$ _____				
7. Funding Sources				
Source	Type of Funds	Amount	Status of Commitment (provide documentation as applicable)	Rates and Terms (if applicable)
MT Historic Preservation Grant	Grant			

8. Brief Description of current project and proposed solution or activity to be completed

a. Background and project (please provide narrative response):

b. Description of proposed solution (please provide narrative response):

9. Certification to Submit:

The undersigned authorized representative hereby certifies that (a) the information set forth in this application is correct to the best of his/her knowledge; (b) s/he has received, read, and understood these guidelines and agrees to comply with all requirements; (c) the elected officials of the local government have formally authorized the submittal of this application, as applicable; (d) s/he has the authority to act on behalf of the applicant in submitting this application, and (e) agrees to comply with all applicable state or federal laws and statutes associated with carrying out the project.

Signature	Date	Printed Name and Title
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MHPG Application Section II.

Applicants are required to provide narrative responses to each of the statutory criteria, unless otherwise specifically permitted.

STATUTORY CRITERIA - A

up to 150 in Possible Points

The degree to which a project supports economic stimulus or economic activity, including job creation and work creation for Montana contractors and service workers.

As applicable to the proposed project, address the following in your response:

1. Describe how your project will have an economic impact in the following areas:
 - job creation for Montana contractors, service workers, and other related jobs;
 - local economy and;
 - increased tourism.
2. Describe how your project relates to community goals and previous or concurrent planning efforts (downtown revitalization plan, growth policy, historic preservation plan, economic development strategy, etc.).

STATUTORY CRITERIA - B

up to 200 in Possible Points

The degree to which the project activity can demonstrate the purpose and need. This includes the relevancy of whether the project activity provides features that establish or enhance security, climate control, or fire protection for museums or address infrastructure, maintenance, or building code issues for museums, historical societies, or historic sites.

As applicable to the proposed project, address the following in your response:

1. Describe the current use and condition of the historic resource.
2. Describe the deficiency the proposed project will address and how this has impacted the historic resource. Please also explain the duration of time the deficiency has existed.
3. Describe how the proposed project will address the identified deficiency.
4. Describe how receiving MHPG funding will enable proper completion of the proposed project and enable the long-term financial stability of the resource.
5. Describe how the proposed project was selected and prioritized in relation to plans to preserve and maintain the historic resource.

STATUTORY CRITERIA - C**up to 150 in Possible Points**

The degree to which timing of the project can be completed without delay, including access to matching funds and approval of permits, if needed.

As applicable to the proposed project, address the following in your response:

1. Describe the organization's capacity and ability to complete the proposed project in a timely manner.
2. Describe the status and availability of all matching funds needed to complete the proposed project.
3. Describe how receipt of MHPG funding will enable the ability to leverage additional funding such as grants, loans, and Historic Tax Credits.
4. Describe any potential timeline considerations that are related to permits, environmental considerations or related activities to complete the proposed project.

STATUTORY CRITERIA - D**up to 250 in Possible Points**

The degree to which the project activity contributes historic or heritage value related to the state of Montana.

As applicable to the proposed project, address the following in your response:

1. Describe the historical context and significance of the historic resource associated with the proposed project including:
 - Heritage value related to the state of Montana;
 - the value of the resource to the local community; and
 - any relevant designations or listings.
2. Describe how the proposed project will sustain the character defining features and integrity of the historic resource.
3. Describe how the proposed project will help promote and interpret the heritage value of the historic resource.

STATUTORY CRITERIA - E**up to 100 in Possible Points**

The degree to which the applicant demonstrates successful track record or experience of the organization directing the project or similarly related projects.

As applicable to the proposed project, address the following in your response:

1. Describe the organizational capacity and experience with similar projects of all project partners. Please identify the entity that will administer the grant.

2. Describe your organization's most recent project, specifically identifying
 - any significant barriers or impediments and how your organization overcame them;
 - any project delays;
 - any changes to the budget.
3. If available, please provide a copy of your organization's most recent audit. Please discuss if there were any unresolved audit issues.

STATUTORY CRITERIA - F

up to 250 in Possible Points

The degree to which the project has ongoing economic benefit to the state as a result of project completion.

1. Describe the ongoing economic impact of the proposed project to the local or regional area as a result of project completion.
2. Describe the ongoing economic impact of the proposed project to Montana as a result of project completion.
3. Describe if this project will enable future phases and detail how such subsequent work will provide an economic benefit as a result of project completion.
4. Please describe your long-term vision for the historic resource and explain how this project fits into organizational plans (strategic, interpretive, business, outreach, etc.).
 - a. Will this project decrease your operating costs, and, if applicable, how will those savings be reinvested?

Sample Project Budget

Please adjust the budget rows and columns to accurately reflect the use of MHPG and matching MHPG funding that will contribute to the completion of project activities.

BUDGET for: _____		Date: _____		
(Project Title)				
	SOURCE: MHPG	SOURCE: Match (Identify)	SOURCE:	TOTAL
Professional Consultant Activities				
Permitting				
Construction Costs				
Building Materials				
Other (Describe)				
TOTAL PROJECT BUDGET	\$	\$	\$	\$

Sample Implementation Schedule

Please adjust the Implementation schedule of tasks to accurately reflect the completion of project activities.

TASK	MONTH / YEAR
ADVERTISEMENT FOR PROFESSIONAL SERVICES	
Publish RFP	
Select firm	
Professional services Draw	
MAJOR ACTIVITIES/MILESTONES (BELOW ARE EXAMPLES. PLEASE CHANGE AS NECESSARY FOR THE PROPOSED PROJECT.)	
Construction bidding	
Select contractor	
Construction	
Substantial completion	
Project Closeout	
Drawdowns	
Submit draft report and request first drawdown of funds	
Submit final report and request final drawdown of funds	

Environmental Overview

Montana Historic Preservation Grants are a state action subject to the Montana Environmental Policy Act (MEPA). MEPA specifies three different levels of environmental review, based on the significance of the potential impacts. The levels are: (1) exempt or excluded from MEPA review; (2) environmental assessment (EA), and (3) environmental impact statement (EIS). The following outlines the environmental review process that must be completed by the applicant for each project proposed for MHPG funding.

For detailed information on MEPA, see *A Guide to the Montana Environmental Policy Act*, or *A Citizen's Guide to Public Participation in Environmental Decision Making*, at:

<https://leg.mt.gov/committees/interim/eqc/montana-environmental-policy-act/>

All necessary environmental review of the proposed project is recommended to be completed prior to submission of the application for grant funding. Any application received without documentation that the environmental review process has been completed, must complete the environmental review process and submit documentation to Commerce no later than May 1, 2020 or risk being determined incomplete by Commerce.

To document completion of the environmental review process the applicant must follow Appendix B on our website. Applicant must provide documentation of the completed environmental review process and include with all documentation of the public review process, including but not limited to, the public notice for and minutes of a public hearing at which the environmental review was discussed, the public comments received, and the final decision on the environmental determination made during a public meeting. In order to complete the environmental review process the applicant may need to complete Appendix B-1 and B-2.

Please refer to our website for Appendix B, B-1, and B-2 to document the environment review process, including the Environmental Review Form and the Environmental Review Checklist. <https://comdev.mt.gov/Programs-and-Boards/Montana-Historic-Preservation-Grant>