



Community MT Division

**MONTANA HISTORIC PRESERVATION
GRANT PROGRAM
2024 Application and Guidelines for the 2027 Biennium**

Grant Applications Due

February 29, 2024

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

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2024 Montana Historic Preservation Grant Application and Guidelines for 2027 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 1 through 17. 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. The MHPG Program demonstrates the economic impact of historical resources throughout the state.

MHPG Program applications, application guidelines, project administration manual, other relevant information and resources are available on the Montana Department of Commerce (Commerce), Community MT 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 the MHPG Program through the legislative process. To be considered for the 2027 biennium, the deadline for submitting a grant application for funding is February 29, 2024.

These application guidelines explain how to apply for MHPG funding. They 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 MT 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

In accordance with 22-3-1305, MCA, eligible applicants for MHPG Program include:

A. Person

- a. Individuals must apply through a fiscal agent, which is an association, or in coordination with a local government. The fiscal agent or local government will be the recipient of the grant award and becomes the legal applicant of record, manages the disbursement of grant funds in accordance with Commerce directions, and is responsible for all the

requirements of the specific grant as outlined in a grant agreement between the applicant and Commerce. Commerce is not able to act as a fiscal agent for an individual applying to the MHPG Program.

- i. *Private residences are encouraged to inquire with Commerce staff to ensure eligibility as referenced in 22-3-1306(2), MCA. MHPG projects must ensure that a significant portion of the facility be open to public access and use. Projects that confer only a private benefit are not eligible.

B. Association

- a. For-profit, nonprofit, or not for profit organizations and businesses.

C. Governing Unit

- a. Incorporated city or town, County, Consolidated government, State, and federal agencies.
- b. Representative of a governing unit such as a library or school district, or
- c. Tribal government
 - i. A waiver of sovereign immunity will be required for a tribal government if MHPG funds are awarded.

Additional Considerations for Eligible Applicants

All applicants must have the management capacity to undertake and satisfactorily complete the project and assure proper management of MHPG funds. Grant recipients must be in compliance with applicable auditing and financial reporting requirements and have the capability to specifically ensure proper tracking and recording of funds. Applicants must be a resident or registered business in the State of Montana.

Applicants must submit a letter of approval from the property owner, if the property is not owned by the applicant and address the historical site, historical society, or historical museum that would benefit from the MHPG funded activity. 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, as defined in 22-3-1306, MCA, can apply to complete projects or activities for the preservation of

A. Historic sites

- a. Historic sites will be considered eligible if one of the below criteria is met:
 - i. Structure or site is listed on National, State, or Local Historic Registry,
 - ii. Structure or site contributes to a historic district,
 - iii. A structure more than 50 years old and has documented significance to the history of a Montana community or region.

B. Historical Societies

C. 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 permanent security, infrastructure, 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.

Additional Considerations for Eligible Projects

- A. Projects should demonstrate a reasonable and achievable budget and implementation schedule.
 - a. Budgets must be rounded to the nearest whole dollar amount.
 - b. Applicants will be given preference if they anticipate completion of project activities within 2 years of the signed contract.
 - i. The signed contract with the contractor deadline is no later than the end of September of the year the legislature awarded the project.
- B. Projects which can demonstrate economic impact immediately after completion will be given preference.
- C. Projects that are open to or highly visible to the public.
- D. Project Scope of Work
 - a. Proposed preservation projects submitted to the MHPG Program for funding must be comprised of “stand-alone” activities. Applicants should be aware of the conditions of a building in relation to the request for funds and prioritize activities accordingly.
- E. Project Activities
 - a. 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 (also Table B).** 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.

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

- F. Project Design Considerations
 - a. Projects should adhere to the [Secretary of the Interior’s Standards for the Treatment of Historic Properties](#) (Standard) and the related guidelines for preserving, rehabilitating, restoring, and reconstructing historic buildings, historic sites, structures, objects, and community districts. 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 such as level of significance, physical condition, proposed use, and code and other regulations. Please review the Standards at the link above and how they relate to your specific project.

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. The legislature must approve and award all projects.

Match Requirement for MHPG Projects

Eligible applicants may apply for funding up to \$500,000 per eligible project. A 20% match of the total project cost is required for all applications.

A. Eligible Match

1. Cash,
2. Grants,
3. Loans,
4. In-Kind (ONLY 1/3 of the total match can be in-kind).
 - a. In-kind contributions are considered an eligible match at a rate of \$20 per hour.
5. Previous Components
 - a. Previous expenditures are **only** eligible as matching funds when:
 - i. Directly related to the preparation of architectural/engineering studies, reports, and construction of the proposed project, **and**
 - ii. Completed after February 28, 2023.
6. Applicants do not need to secure match before applying, but documentation of match will be required after MHPG awards are made.

B. Ineligible Match

1. Previous expenditures when **not** directly related to the proposed project;
2. Previous expenditures completed more than 1 year prior to application deadline;
3. Ongoing or monthly operational costs; and
4. Staff salary

V. Application Submission

General Requirements

To apply for MHPG funding, an eligible applicant must complete and submit the required application information listed below by **February 29, 2024**. One electronic copy of the MHPG application, any relevant information (such as photos and National Register of Historic Preservation nominations), and associated documents (such as plans or design documents) must be submitted to Commerce.

To apply electronically, please go to <https://transfer.mt.gov/Home/Login>. Either log in or create an OKTA account if you do not have one. Once logged in, click on "Send a New File" and select your application file(s) and click "Continue." When prompted, click on "State Employee or OKTA Montana Customer." On the "Recipients" page, select the "Find a State Group" tab. In the "Search" box, type "DOC CDD FTS" and hit "Search." Select the Existing Group found "DOC CDD FTS." To find the correct state

distribution group, please use spaces between DOC and CDD and FTS. Please ensure your application file includes the applicant of record's name 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. MHPG grantees that were awarded during the previous application cycle may apply during the current application cycle.

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

- Appendix A:** Application Eligibility Screening Checklist
- Appendix B:** MHPG application including responses to Statutory Review Criteria
- Appendix C:** Completed Environmental Review
- Table A:** Sample Project Budget
- Table B:** Sample Implementation Schedule **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

VI. Award Process and Legislative Session

Commerce has no decision-making authority over any application and only provides advisory recommendations to the legislature. Commerce staff will review applications based on the eight (8) statutory review criteria found in 22-3-1306, MCA, and listed below. To facilitate Commerce's review, applications should be organized according to the appendix format outlined in Section V. Application Submission. The applicant may not submit any additional information after the application deadline, unless requested by Commerce staff to clarify information already presented in the application.

Statutory Review Criteria:

- a) **Immediate Economic Impact:** 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) **Purpose and Need:** 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 permanent security infrastructure, climate control, or fire protection for museums or address infrastructure, maintenance, or building code issues for museums, historical societies, or historic sites.
- c) **Shovel Ready:** 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) **Historic Importance:** The degree to which the project activity contributes historic, or heritage value related to the State of Montana;
- e) **Organization's Capacity:** The degree to which the applicant demonstrates a successful track record or experience of the organization directing the project; and,

- f) **Ongoing Economic Impact:** The degree to which the project's expected ongoing economic benefit to the state as a result of the project completion.
- g) **Local Contributions:** The degree to which the project shows local contribution. Projects that show local match and local buy-in will score higher.
- h) **Public Benefit:** The degree to which the applicant demonstrates anticipated public benefit, including the extent the site or building will be open to the public and the degree of immediate facility use after 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. 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 and present them to the legislature by the 15th day of the regular legislative session in accordance with 22-3-1305, MCA. During the legislative session, MHPG applicants will have the opportunity to testify on behalf of their project. Commerce will communicate the date, time, and details of this process with MHPG applicants as soon as practicable. MHPG applicants are encouraged to testify and share an overview of their project, its importance, its impact, and any applicable updates.

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 MHPG award may be revoked.

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.

APPENDIX A

Application Eligibility Screening Checklist

Please fill out this checklist.

1. Is the applicant an eligible person, association, or governmental unit?	Yes ___ No ___
2. Is the applicant a resident or registered business in the State of Montana?	Yes ___ No ___
3. Is the project for a historical society or history museum?	Yes ___ No ___
4. Is your project a historic site/building as defined by being listed on National, State, or Local Historic Registry, contributes to a historic district, or more than 50 years old and has documented significance to the history of a Montana community or region?	Yes ___ No ___
5. Is your project a private residence only? Projects that confer only a private benefit and not open to the public are ineligible.	Yes ___ No ___
6. Will the site/museum be open immediately after project completion?	Yes ___ No ___
7. Does the project address Internal or external “brick-and-mortar” improvements, infrastructure, building renovation, maintenance, building code issues; climate control, or fire protection?	Yes ___ No ___
8. What is the total project budget?	\$ _____
9. What is the total project match?	\$ _____
10. Completed <i>Environmental Review Process</i> demonstrating compliance with the Montana Environmental Policy Act, Title 75, Chapter 1, MCA.	Yes ___ No ___

If you have questions or need assistance preparing this form, please contact the Department of Commerce via email at DOCCDD@mt.gov or via phone at (406) 841-2770.

APPENDIX B

MHPG Application and Statutory Review Criteria

The following section lists the eight (8) 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.

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. ***Applicants must score above 645 in total points to be considered for funding.***

Level 3: The applicant provides an exemplary/very complete application while considering all questions and addresses all issues deemed important.

Level 2: The applicant provides an adequate application; however, the applicant may not consider some questions or address all issues deemed potentially important.

Level 1: The applicant provides an inadequate application and may not have considered some questions or address all issues deemed important.

Level 0: The applicant provides an incomplete application and did not consider all questions and/or address all issues deemed important.

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 Historical Society History Museum:

<p>6. Grant Funding Request Information</p> <p>Amount Requested: \$ _____</p> <p>Total Amount of Match: \$ _____</p> <p>Total Project Cost: \$ _____</p>	<p>7. Project Address</p> <p>Physical Address:</p> <p>City:</p>
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<p>8. Funding Sources – Total funding sources must match with total project costs. If the funding “pending” you must demonstrate that it will be secured by contract date.</p>				
Source	Type of Funds	Amount	Status of Commitment (Confirmed or Pending) (provide documentation i.e., letters of support, financials...)	Rates and Terms (if applicable)
Montana Historic Preservation Grant (MHPG)	Grant			

9. Brief Description (60 words or less) 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):

10. Certification to Submit:

The undersigned authorized representative hereby certifies that (a) the information set forth in this application is correct to the best of their knowledge; (b) they have 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) they have 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.

Statutory criteria below are associated with a maximum number of points per criterion question. To earn the maximum points, reviewers will consider the “Level” at which each question was answered. You may reference associated documents to answer questions but answers that narrate the associated documents content will score higher than those who just reference documents such as a “see Revitalization plan.”

STATUTORY CRITERIA - A

up to 100 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.

1. Describe how your project will have an IMMEDIATE ECONOMIC IMPACT for project related job creation for Montana Contractors, service workers, and other related jobs after completion.
 - a. How many jobs will this project create?
 - b. What types of jobs?
2. Describe the spillover benefits from project activities.

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 climate control, or fire protection for museums or address infrastructure, maintenance, or building code issues for museums, historical societies, or historic sites.

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 including the duration of time the deficiency has existed.
3. Describe how the proposed project will address the identified deficiency including why MHPG funding will enable proper completion of the resource.
4. Describe the financial need for MHPG grant funds to complete the project.
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 100 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.

1. Describe the organization’s capacity and ability to complete the proposed project within the proposed timeline.

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 300 in Possible Points

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

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 for the public
4. Describe how the proposed project will adhere to the appropriate Secretary of the Interior's Standards for the Treatment of Historic Properties.

STATUTORY CRITERIA - E

up to 75 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.

1. Describe the organizational capacity and experience with similar projects of all project partners.
2. Please identify the entity that will administer the grant.
3. Describe your organization's most recent project, specifically identifying:
 - any significant barriers or impediments and how your organization overcame them;
 - any project delays; and
 - any changes to the budget.
4. If available, please provide a copy of your organization's most recent audit or financial documents. Please discuss if there were any unresolved audit or financial issues.

STATUTORY CRITERIA - F**up to 225 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 (for example, on the local economy or tourism) of the proposed project to the local, regional, and Montana as a result of project completion.
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.).
3. 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?

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

The degree to which the project shows local contribution (for example, monies and letters of support).

Describe your community's commitment to the project by showing various levels of local contribution.

- a. What degree of local cash has been committed?
- b. If this is a phased project, please describe funds expended through previous phases.
- c. What local organizations support the project? (provide letters of support as applicable)

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

The degree to which the applicant demonstrates anticipated public benefit, including the extent the site or building will be open to the public and the degree of immediate facility use after project completion.

Describe the projects anticipated public benefit.

- a. Detail exactly when the facility will be open to the public after project completion.
- b. What is the public benefit of the project?
- c. What proportion of the building will be open to the public?
- d. What efforts will be made to make the building accessible to the public?

APPENDIX C

MHPG Environmental Review

The Montana Historic Preservation Grant (MHPG) Program is a state action subject to the Montana Environmental Policy Act (MEPA). All applicants must follow the environmental review process to determine a finding level, discuss the project and finding level at a public meeting, and make a final determination.

Applicants must submit a complete environmental review record with the MHPG application. A complete environmental review record must include:

- Environmental Review Form (See Appendix C-1),
- Resolution to Accept Determination,
- Documentation of public process including meeting minutes,
- Supporting environmental documentation and;
- Environmental Review Checklist (See Appendix C-2 on the Division's website) *
 - *If an environmental assessment is required.

More information on MEPA and the applicable environmental review process can be found on the Division's website and sample MEPA forms can be found on the Division's website as well.

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/past-interim-committees/2017-2018/eqc/montana-environmental-policy-act/>

**Appendix C-1
Environmental Review Form**

On a separate piece of paper, please answer the following as they apply to your proposed project:

1. **Alternatives:** Describe reasonable alternatives to the project.
2. **Mitigation:** Identify any enforceable measures necessary to reduce any impacts to an insignificant level.
3. **Is an EA or Environmental Impact Statement (EIS) required?** Describe whether an EA or EIS is required and explain in detail why or why not.
4. **Public Involvement:** Describe the process followed to involve the public in the proposed project and its potential environmental impacts. Identify the public meetings -- where and when -- the project was considered and discussed, and when the applicant approved the final environmental assessment.
5. **Person(s) Responsible for Preparing:** Identify the person(s) responsible for preparation of this checklist.
6. **Other Agencies:** List any state, local, or federal agencies that have over-lapping or additional jurisdiction or environmental review responsibility for the proposed action and the permits, licenses, and other authorizations required; and list any agencies or groups that were contacted or contributed information to this Environmental Assessment (EA).

(I) Authorized Representative, Title

Date

Table A.

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. It is highly recommended that service and or project costs are acquired through bids or cost estimates and those documents be attached to the application.

BUDGET for: _____		Date: _____		
(Project Title)				
	SOURCE: MHPG	SOURCE: (Identify)	SOURCE: (Identify)	TOTAL
Professional Planning or Administration Activities				
Architectural or Engineering Activities				
Construction Costs				
Other (Describe)				
TOTAL PROJECT BUDGET	\$	\$	\$	\$

Table B.

Sample Implementation Schedule

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

TASK	MONTH / YEAR
ADMINISTRATION MILESTONES (BELOW ARE EXAMPLES. PLEASE CHANGE AS NECESSARY FOR THE PROPOSED PROJECT)	
Procurement process for professional services	
Select firm	
Other (<i>describe</i>)	
ACTIVITY MILESTONES (BELOW ARE EXAMPLES. PLEASE CHANGE AS NECESSARY FOR THE PROPOSED PROJECT)	
Procurement process for construction	
Select contractor	
Construction	
Other (<i>describe</i>)	
Project closeout	