

Gregory Smith, Chair
Lloyd Yavener, Vice Chair
Ann Aldrich
Brianna Candelaria



Vernell Doyle
Michael Lushbaugh
Kourtney Lowery
Wayne K. Keefer, BOCC Rep

HISTORIC DISTRICT COMMISSION OF WASHINGTON COUNTY, MARYLAND AGENDA

February 1, 2023, 7:00 p.m.

Washington County Administration Complex, 100 West Washington Street, Room 1301, Hagerstown, MD 21740

CALL TO ORDER AND ROLL CALL

MINUTES

1. Minutes of the December 7, 2022 meeting *
2. Minutes of the January 4, 2023 meeting *

NEW BUSINESS

1. Non-Capital Grant Opportunities through MHT – (Discussion) - Virtual Roadshow review (<https://mht.maryland.gov/roadshow.shtml>) *

OLD BUSINESS

1. Historic Property Incentives Ordinance (DRAFT) – (Discussion/Consensus) Revisions made and final walkthrough of remaining comments/notes *

OTHER BUSINESS

1. Staff Report
 - a. Staff Reviews *
 - b. Professional Organization Outreach (Realtors/Builders)
 - c. Appalachian Trail National Register Nomination

ADJOURNMENT

UPCOMING MEETING

1. Wednesday, March 1, 2023, 7:00 p.m.

*attachments

The Historic District Commission reserves the right to vary the order in which the cases are called. Individuals requiring special accommodations are requested to contact the Washington County Planning Department at 240-313-2430 to make arrangements no later than ten (10) days prior to the meeting. Notice is given that the agenda may be amended at any time up to and including the meeting.

747 Northern Avenue | Hagerstown, MD 21742 | P: 240.313.2430 | F: 240.313.2431 | TDD: 7-1-1

**MINUTES OF THE
HISTORIC DISTRICT COMMISSION
FOR WASHINGTON COUNTY**

December 7, 2022

The Washington County Historic District Commission held its regular monthly meeting on Wednesday, December 7, 2022 at 7:00 p.m. virtually. There was no in person meeting.

CALL TO ORDER AND ROLL CALL

The Chairman called the meeting to order at 7:00 p.m.

Commission members present were: Greg Smith, Chairman, Lloyd Yavener, Vernell Doyle, Michael Lushbaugh, Kourtney Lowery, and Ann Aldrich. Staff members present were: Washington County Department of Planning & Zoning: Meghan Jenkins, GIS Coordinator and HDC Staff member and Debra Eckard, Administrative Assistant.

NEW BUSINESS

Certified Local Government FFY22 Annual Report (Draft)

Ms. Jenkins reminded members that as part of the Certified Local Government program, we are required to submit an update to the State of activities regarding historic resources in our jurisdiction as well as Commission membership. Ms. Jenkins briefly reviewed the draft form. Updates were made to the professional qualifications and areas of interest of each Commission member. Members discussed major new projects or plans for the coming year and added “outreach and collaboration with homebuilders and craftspersons in the County” as well as “continue to encourage retention of historic structures through outreach to the public to reduce demolition without permits”. Members discussed training and educational needs for the Commission. They expressed interest in learning more about new materials, sustainability, and additional outreach opportunities.

Consensus: It was the consensus of the Commission members to submit the CLG form contingent upon the addition of Brianna’s qualifications and areas of interest.

US 40 over Conococheague Bridge No. 2101200

Ms. Jenkins presented a project for the rehabilitation of Bridge No. 2101200 (US 40 Alt. over the Conococheague Creek. MDOT SHA has determined there will be no adverse effect on the bridge and requested an informal review by MHT’s Easement Committee in order to determine whether or not SHA must file an Easement Change form in order to install a temporary road with geotextile film, fill and travel as well as a temporary bridge to move materials from the staging area on the south side of the bridge to the SHA bridge. After a review of the project, the Easement Committee was satisfied that SHA does not need to submit any additional paperwork to use the easement area at the Wilson Bridge Park. SHA will be in contact with the County as they get closer to completing the temporary easement area.

Consensus: The Commission does not feel it is necessary to participate any further in the review of this portion of the project.

OLD BUSINESS

Historic Property Incentives Ordinance (Draft)

The Commission resumed their review of the draft Ordinance with Section 4 “Property Tax Credits for Improvements to Specified Historic Structures”.

- Section 4.03a Eligibility – Expand to include structures listed on the MIHP in municipalities where the County has the authority to review permit applications, the municipality has a Planning Commission, and the municipality has something equivalent to the HP overlay.
- Sections 403b and 403c – Clarifying what is in the current Ordinance
- Section 403d – New text for the adopted Rural Villages where we currently have review authority
- Section 403e – MHT easement structures would qualify for the County’s tax credit – Ms. Jenkins will investigate further to determine if we want to include MET and Rural Legacy easements.
- Section 406c – New text added
- Section 407a – We are using the MHT list for qualified rehabilitation expenses. Ms. Jenkins will contact MHT to determine if water and sewer connections to historic structures would be eligible.
- Section 407b – Should we add “health” to the text
- Section 408 – This section has been written to be consistent with MHT guidelines and to make the paperwork process less difficult for the public.

OTHER BUSINESS

Staff Report

Ms. Jenkins stated that a written report was included in the agenda packet.

Training was completed by members on Monday. There are funds in the budget that we can use for additional training opportunities.

ELECTION OF OFFICERS

Mr. Yavener made a motion to nominate Mr. Smith for the position of Chairman. The motion was seconded by Ms. Aldrich and unanimously approved with Mr. Smith abstaining from the vote.

Ms. Aldrich made a motion to nominate Mr. Yavener for the position of Vice-Chairman. The motion was seconded by Mr. Lushbaugh and unanimously approved with Mr. Yavener abstaining from the vote.

ADJOURNMENT

Mr. Lushbaugh made a motion to adjourn the meeting at 8:20 p.m. The motion was seconded by Ms. Doyle and so ordered by the Chairman.

UPCOMING MEETINGS.

The next meeting of the Historic District Commission is scheduled for January 4, 2023 at 7:00 p.m.

Respectfully submitted,

Jill Baker, AICP
Director, Washington County Dept. Of
Planning & Zoning

**MINUTES OF THE
HISTORIC DISTRICT COMMISSION
FOR WASHINGTON COUNTY**

January 4, 2023

The Washington County Historic District Commission held its regular monthly meeting on Wednesday, January 4, 2023 at 7:00 p.m. at the Washington County Administrative Complex, 100 W. Washington Street, Room 1301, Hagerstown, MD.

CALL TO ORDER AND ROLL CALL

The Chairman called the meeting to order at 7:00 p.m.

Commission members present were: Greg Smith, Chairman, Lloyd Yavener, Vernell Doyle, Michael Lushbaugh, Brianna Candelaria and Ann Aldrich. Staff members present were: Washington County Department of Planning & Zoning: Meghan Jenkins, GIS Coordinator and HDC Staff member. Also present at the meeting was Jeff Tedrick of the Bowman Corporation and George Warmenhoven of Antietam Creek Vineyards.

MINUTES

Motion and Vote: Ms. Aldrich made a motion to approve the minutes of the November 2, 2022 meeting as presented. The motion was seconded by Mr. Yavener and unanimously approved.

NEW BUSINESS

2022-06007 – Antietam Vineyards – 4835 Branch Avenue

Ms. Jenkins presented a sign permit application for property located at 4835 Branch Avenue, adjacent to the Antietam National Battlefield in the Antietam Overlay zone. Due to the topography in this area, the sign will need to be 15 feet high. The owner is proposing a 4' x 30" vinyl sign with a blue background and white lettering on pressure treated wooden posts. Staff recommends approval of the sign at the size, shape and scale depicted in the permit application including the typeface and color combination; however, the materials used should be the wood support surrounding the vinyl and wood posts.

Discussion and comments: Ms. Doyle suggested the owner consider landscaping around the wooden posts to help hide some of the height.

Motion and Vote: Ms. Aldrich made a motion to approve the sign permit in compliance with Staff's recommendations of materials to be used. The motion was seconded by Mr. Lushbaugh and unanimously approved.

2022-06097 – Demolition Permit – 18209 Showalter Road

Ms. Jenkins presented a demolition permit application for structures located at 18209 Showalter Road, adjacent to the I-81 off-ramp. In 2001, it was determined that the property was not eligible for the National Register of Historic Places. The house is described as a typical early Colonial Revival built in 1926 with 6 over 1 windows and a asphalt roof. There is a brick garage with pyramidal roof to the rear of the property as well as several other outbuildings. All buildings are covered under the demolition permit application. There was a large deck added to the structure and 1 window on the west side was replaced with french doors. During a site visit, Ms. Jenkins noted that most of the original windows are still intact with storm windows attached to several, there is some exterior trim missing and there has been a lack of

maintenance to the structure throughout the years; however, most of the brick is still in good condition. The outbuildings also lack maintenance; however, the roofs are still intact.

Staff believes that very little integrity of the location and setting remain due to the surrounding development and the interstate in close proximity. The integrity of the design and materials from 1926 remain and exploration of salvageable materials should be taken into consideration by the applicant. The applicant provided an update of materials thought to be salvageable that was prepared by their contractor. Ms. Jenkins reviewed several photographs of the structures with the Commission members.

Mr. Tedrick explained that each time a rental property is vacated the owner must perform a lead paint test. In this instance, it would cost the owner more than \$30,000 to make the property safe for new residents. Therefore, the property owner does not feel this is economically feasible and wants to demolish these structures. There is also a liability concern for the owner due to vagrants living in the structures. The developer is proposing a convenience store in this location. Mr. Tedrick also stated that the applicant owns several houses along this portion of Showalter Road, all of which are zoned for commercial uses and there is a master plan in place for this area.

Motion and Vote: Mr. Lushbaugh made a motion to support the approval of the demolition permit application including the amended materials listing the potential items for salvage provided by Allegany Wrecking & Salvage in addition to the front porch columns if they are viable and the fireplace surrounds., if possible. The motion was seconded by Mr. Yavener and unanimously approved.

MD 56 over Green Spring Run Remedial Repair to Small Structure No. 21187XO

Ms. Jenkins presented a determination from the Maryland Department of Transportation stating that the proposed project will have no adverse effect on any historic structures.

Motion and Vote: Ms. Aldrich made a motion to concur with MDOT that the proposed project will not have any adverse effect on any historic structures. The motion was seconded by Mr. Lushbaugh and unanimously approved.

OLD BUSINESS

Historic Property Incentives Ordinance (Draft)

Ms. Jenkins began the review with Section 5 “Historic Property Grant Program” which is a new program being proposed to establish grants to assist in the preservation of historic structures. This grant would cover rehab activity that conforms with the Secretary of Interior’s Standards and the County’s adopted Design Guidelines. Three funding sources have been identified with a yearly allocated amount of \$150,000 or greater. Members discussed adding a minimum grant amount of \$5,000. Grants would not be available for properties that have an open permit or zoning violation. Members suggested that a grant should not be available on properties that are delinquent on taxes.

Section 5.08b should match the MHT guidelines for in-kind matches of labor and materials.

There was a brief discussion regarding the point system which can be adjusted each year. Members decided to remove the County Recognized Program and add the 5 points to the Continued use of resource category.

OTHER BUSINESS

Staff Report

Ms. Jenkins reported that we have received a Tax Credit Application for property located on The Terrace in the City of Hagerstown.

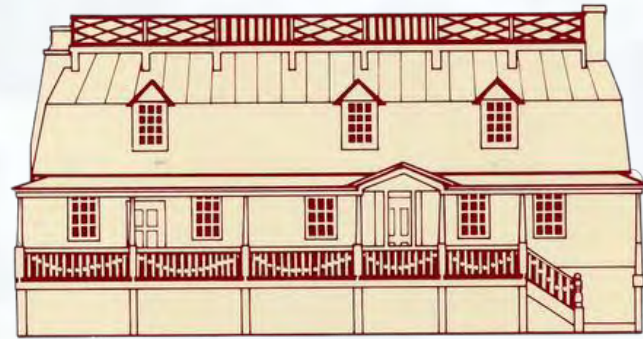
ADJOURNMENT

Mr. Lushbaugh made a motion to adjourn the meeting at 8:45 p.m. The motion was seconded by Ms. Aldrich and so ordered by the Chairman.

Respectfully submitted

Jill Baker, AICP
Director, Washington County Department of
Planning & Zoning

MARYLAND HISTORICAL TRUST



TRUST

MHT VIRTUAL ROADSHOW

2022

Historic Preservation Non-Capital Grant Program

The Maryland Historical Preservation Grant Program provides funding for construction (reverse) and non-capital projects to inform and promote preservation.

Eligible Projects: Resource Surveys, Educational Outreach, Registration

Eligible Products: Resource Surveys, Educational Outreach, Registration

Applicants: Non-Profit, State and Federal

Grant Range: \$5,000 to \$100,000

Match Requirement: 1-to-1 match of non-kind funds

Selection Process: Pre-check

How to Apply: Submit Intent to Apply followed by full application (February/March)

Learn More: [bit.ly/MHTMHAANCGP](#)

Historic Preservation Capital Grant Program

The Maryland Historical Preservation Capital Grant Program provides funding for the acquisition, restoration, and preservation of historic properties in Maryland, typically available in February and March, with decisions made by the end of the fiscal year.

Eligible Projects: Rehabilitation, Acquisition, Pre-development

Eligible Properties: Must be listed in the National Register of Historic Places

Applicants: Non-profit, State and Federal

Allocation and Grant Range: \$5,000 to \$100,000 each year, maximum

Match Requirement: 1-to-1 match for all applicants

Program Requirements: Limited preservation projects

Selection Criteria: Significance, Administrative, Benefit, Impact, Location

How to Apply: Submit Intent to Apply followed by full application (February/March)

Learn More: [bit.ly/MHTMHAACGP](#)

African American Cultural Preservation Program

A partnership of the Maryland Commission on African American Culture, the African American Cultural Preservation Program provides funding for the preservation of buildings, sites, and objects of cultural importance.

Eligible Projects: Construction, Acquisition

Eligible Properties: Construction, Acquisition

Projects must be: Educational, Cultural, or Historical

Applicants: Non-Profit, State and Federal

Applicants: Non-Profit, State and Federal

Selection Criteria: Design, Project Impact, Location

How to Apply: Submit Intent to Apply followed by full application (February/March)

Learn More: [bit.ly/MHTMHAACP](#)

Historic Revitalization Credit Program

If you own a certified historic structure in Maryland, you may have the opportunity to earn a state income tax credit for qualified rehabilitation expenses. If you are planning to rehabilitate a secondary residence or a commercial building, there are state incentives available.

Small Commercial: This program provides a 25% credit for scale commercial rehabilitation projects capped at \$50,000 in a year. Projects do not exceed \$500,000.

Competitive Commercial: This program provides a 25% credit for scale commercial rehabilitation projects. Projects must be competitive for rehabilitation projects.

Homeowners: Homeowners can earn a credit on their historic occupied residence.

How to Apply: Submit Intent to Apply (January), followed by full application (February/March)

Learn More: [bit.ly/MHTMHAA](#)

Maryland Heritage Areas Program

Capital Grants

Eligible Projects: Rehabilitation, Restoration, Acquisition, Development, Pre-development Activities (lifespan of 15 years or more)

Grant Range: \$5,000 to \$100,000

Match Requirement: 1-to-1 match of non-kind funds (any combination of cash and in-kind funds)

Non-Capital Grants

Eligible Projects: Planning, Interpretation, Programming

Types of Products: Research, Feasibility Studies, Exhibits, Interpretive Signage, Educational Programs, Festivals, Seminars, Commemorations, Digital Resources

Grant Range: \$5,000 to \$50,000

Match Requirement: 1-to-1 match of non-kind funds (any combination of cash and in-kind funds)

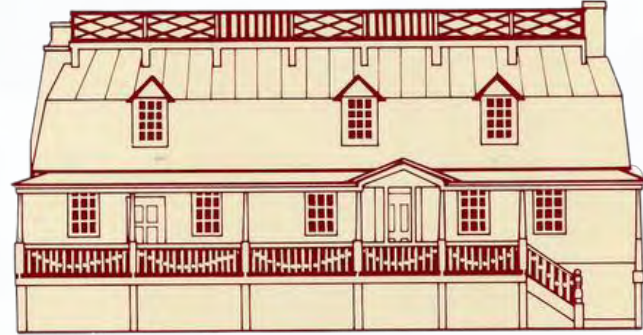
How to Apply: Submit Intent to Apply (January), followed by full application (February/March)

Learn More: [bit.ly/MHTMHAA](#)



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST

MARYLAND
HISTORICAL



TRUST

HISTORIC
PRESERVATION
NON-CAPITAL
GRANT
PROGRAM



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST

PROGRAM OVERVIEW

- Designed for research, survey, planning, and educational activities involving architectural, archaeological, or cultural resources in Maryland.
- Funds distributed to the program by the Maryland Heritage Areas Authority Financing Fund.
- Eligible applicants: Non-profit organizations, including State and Federal agencies, and local jurisdictions.
- Local governments must provide a 1:1 cash and/or in-kind match.
- No match is required for non-profit organizations, but providing some match will make applications more competitive.



WHAT TYPES OF ACTIVITIES CAN BE FUNDED?



- Architectural & Archaeological Survey Work
 - National Register nominations
 - Historic Structures Reports
- Thematic research that supports the development of historic contexts
 - Preservation Plans
- Education & Outreach activities



WHAT TYPES OF PROJECTS CANNOT BE FUNDED?



- Projects that involve “capital” expenditures.
- Documentation and display of museum collections.
- Archival projects that seek to conserve or catalog historic collections.
- Publications of previously completed manuscripts.
- Projects that are already underway or completed prior to execution of the grant agreement.



REQUIREMENTS



- Program Requirements
 - Selection Criteria
 - Funding Priority Areas



THE FY 2023 NON-CAPITAL GRANT CYCLE

- Funded at \$300,000 for FY 2023.
- The cap for individual projects is \$75,000.
- Two-step application process (online).
- For FY23, MHT received 23 grant applications totaling nearly a million dollars.



BALTIMORE ARCHITECTURE FOUNDATION

Women in Maryland Architecture, Phase II



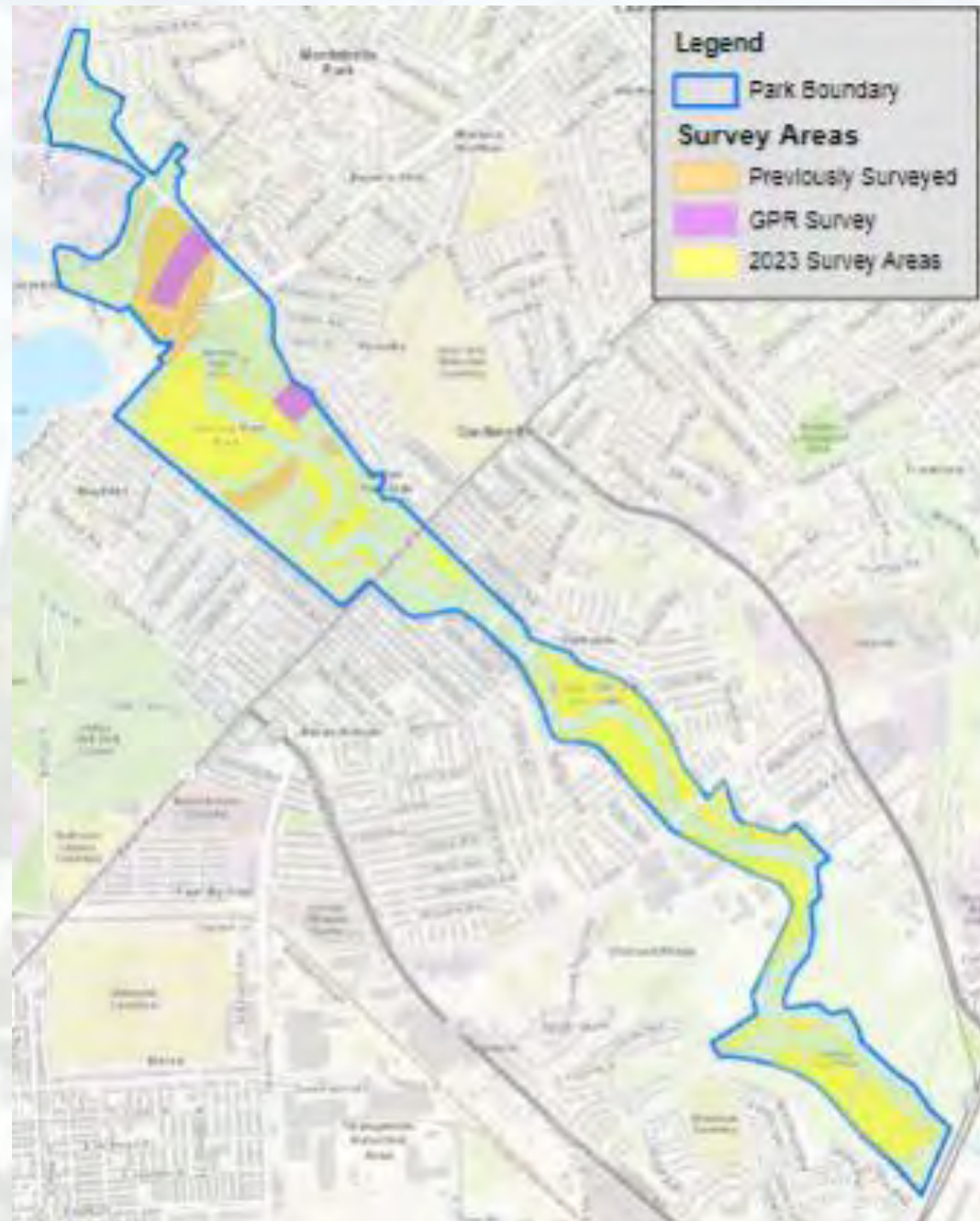
This project will nominate properties designed by early women architects to the National Register of Historic Places.



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST

TOWSON UNIVERSITY

Herring Run Park Comprehensive Archaeological Investigations



The Herring Run Park Comprehensive Archaeological Investigations will involve archaeological survey (using a number of methods) of a 375-acre park in northeast Baltimore by Dr. Kat Sterner and her students at Towson University.



ST. JOHN'S COLLEGE

St. John's College Campus History



This project will involve research and documentation at the College, including an examination of the history of enslaved people in relation to the campus.



QUESTIONS? GET IN TOUCH!

Heather Barrett

Administrator of Architectural Research

heather.barrett@maryland.gov

410-697-9536

Matt McKnight

Chief Archaeologist

matthew.mcknight@maryland.gov

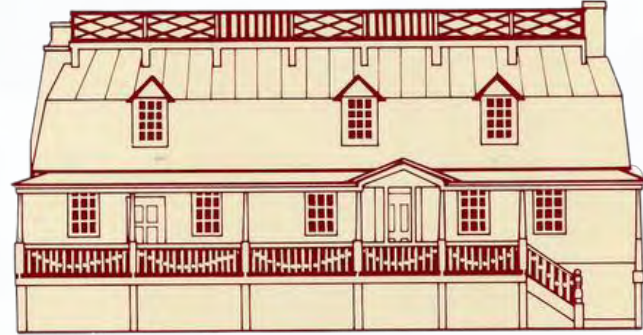
410-697-9572

http://mht.maryland.gov/grants_noncap.shtml



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST

MARYLAND
HISTORICAL



TRUST

CAPITAL
FUNDING
PROGRAMS



Bank Barn – Buckingham House and Industrial School Complex, past awardee, Frederick County



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST

MHT CAPITAL FUNDING PROGRAMS

African American Heritage Preservation Program (AAHPP)

Historic Preservation Capital Grant Program

Historic Preservation Loan Program



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST

AAHPP GRANTS

Program Overview

- Established by the General Assembly in 2010, this program provides capital grants up to \$100,000 per project per year to assist in the preservation of buildings, sites, or communities of historical and cultural importance to the African American experience in Maryland
- Administered as a partnership between the Maryland Historical Trust and the Maryland Commission on African American History and Culture



Christ Rock Church, past awardee, Dorchester County



HISTORIC PRESERVATION CAPITAL GRANTS

Program Overview

- Funded for the first time in 8 years in 2018, more than 500 projects have been awarded roughly \$15 million since FY 1978
- Promotes the acquisition, restoration, and rehabilitation of historic properties in Maryland
- Grant award maximum: \$100,000
- Match requirement for all applicants except non-profits
- FY23 grant round underway!



Iron Hill Cut Jasper Quarry, past awardee, Cecil County



HISTORIC PRESERVATION CAPITAL LOANS

Program Overview

- Created as a permanent program by the General Assembly in 1973, this program has provided over \$8 million in loans to over 85 projects since inception.
- Repayments are returned to the loan fund.
- Annual appropriation is generally around \$300,000.



ELIGIBLE APPLICANTS

- Non-profit organizations*
- Local governments
- Business entities**
- Private individuals**

*State and federal government entities are eligible to apply for grants as nonprofits.

**To be competitive, projects sponsored by private individuals and for-profit business entities must involve a predominantly “public purpose” use, rather than a private benefit.



Union Mills Homestead – Shriver Grist Mill Flume, past awardee, Carroll County



ELIGIBLE PROPERTIES

AAHPP

The property or project is of historical and cultural importance to the African American experience in Maryland

Capital Grants & Loans

The property is listed in or eligible for listing in the National Register of Historic Properties



ELIGIBLE PROPERTIES: RELIGIOUS STRUCTURES



Asbury UM Church, past awardee, Talbot County



Christ Rock Church, past awardee, Dorchester County

Structures used for **religious purposes** are generally eligible for assistance for exterior work only and are reviewed for eligibility on a case-by-case basis. Spaces used primarily for religious purposes or elements bearing religious imagery are not eligible for funding.



ELIGIBLE PROPERTIES

| | AAHPP | Capital Grants | Loans |
|------------------------------|-------|--------------------------------|------------------------------------|
| Acquisition | ✓ | ✓ | ✓ |
| Rehabilitation / Restoration | ✓ | ✓ | ✓ |
| Pre-Development | ✓ | ✓ (non-profits & local gov) | ✓ (under special circumstances) |
| New Construction | ✓ | | |
| Refinancing | | | ✓ |



IS AN EASEMENT REQUIRED?

- ALL Capital Grant and Capital Loan projects require either a Preservation Easement (for real property) or a Preservation Agreement (for other property, such as a bridge, ship, etc.)
- AAHPP projects involving properties that are individually listed on or individually eligible for the National Register will require a Preservation Easement



IS AN EASEMENT REQUIRED?

| | AAHPP | Capital Grants |
|-----------------|------------------|--------------------|
| Workshops | Spring | Late Fall/Winter |
| Intent to Apply | N/A | N/A |
| Application | Due July 1, 2023 | Due March 15, 2023 |
| Grant Awards | December 2023 | June 2023 |

- Loan applications are accepted at any time.
- Non-profits do NOT need to provide match for Historic Preservation Capital grants!
- Visit our website for detailed guidelines: <https://mht.maryland.gov/Financial.shtml>



CONTACT US WITH QUESTIONS!

Ivy Weeks

AAHPP and Loans

ivy.weeks@maryland.gov

410-697-9559

Barbara Fisher

Historic Preservation Capital Grant Program

barbara.fisher@maryland.gov

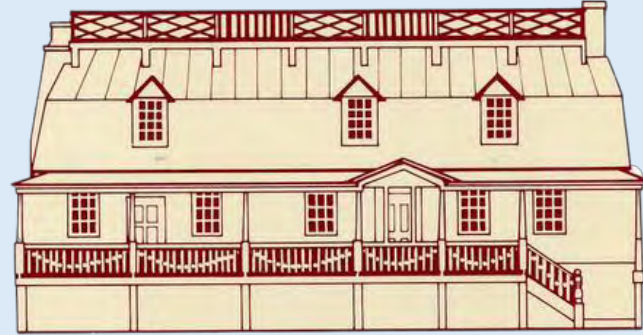
410-697-9574

<https://mht.maryland.gov/Financial.shtml>



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST

MARYLAND
HISTORICAL



TRUST

HISTORIC
REVITALIZATION
TAX
CREDITS



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST

MARYLAND HISTORIC REVITALIZATION TAX CREDIT

What it is:

A 20% refundable state income tax credit on eligible rehabilitation expenses on certified historic structures.

Three tax credit types:



Competitive Commercial



Small Commercial



Homeowner



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST

MARYLAND HISTORIC REVITALIZATION TAX CREDIT

Website Resources:

<https://mht.maryland.gov/taxcredits.shtml>

Main Tax Credit program Webpage

Each individual tax credit type has its own webpage with the following resources:

Resources

- › National Register of Historic Places
- › Comptroller of Maryland
- › Tax Credit Program Statute
- › Tax Credit Program Regulations
- › Proposed Amendments to Historic Revitalization Tax Credit Program Regulations
- › Secretary of the Interior's Standards for the Treatment of Historic Properties (NPS)
- › Preservation Briefs
- › Federal Rehabilitation Tax Credit

Reports and Studies

- › The Abell Report: Heritage Tax Credits: Maryland's Own Stimulus to Renovate Buildings for Productive Use and Create Jobs, an \$8.53 Return on Every State Dollar Invested (March 2009)
- › Final Report of the Governor's Task Force on Maryland's Heritage Structure Rehabilitation Tax Credit Program (2016)

Maryland Historic Revitalization Tax Credit Program

[PRESS RELEASE — Hogan Administration Announces More than \\$19 Million to Revitalize Historic Buildings](#)

NOTICE — Changes to Competitive Commercial and Small Commercial Revitalization Tax Credit

HB0027/SB289 was passed by both the House and Senate Chambers and signed into law by Governor Hogan with an effective date of July 1, 2022. Please note the following changes:

Competitive Commercial Revitalization Tax Credit:

- For each of the fiscal years 2023-2031, the appropriation to the Reserve Fund for competitive commercial projects increases to \$20,000,000 annually.
- The cap on Qualified Rehabilitation Expenditures for commercial projects increases to \$5,000,000 for any project that does not qualify as either a level 1 or level 2 opportunity zone, \$5,250,000 for a project that qualifies as a level 1 opportunity zone project, and \$5,500,000 for a project that qualifies as a level 2 opportunity zone project.

Small Commercial Revitalization Tax Credit:


- The bill establishes a new Trust Account for Small Commercial projects within the Reserve Fund which will receive an appropriation of \$2,000,000 annually for each of the fiscal years 2024-2031. The Small Commercial program will officially reopen **July 1, 2023**.

If you have any questions about these legislative changes, please contact Kate Jaffe at kate.jaffe@maryland.gov

The purpose of state and federal preservation tax incentives is to encourage private sector investment in the rehabilitation and re-use of historic buildings and to promote investment in local economies.

If you own a certified historic property in Maryland, you may have the opportunity to earn a state income tax credit on qualified rehabilitation expenditures. Whether you are planning to rehabilitate your primary or secondary residence or a commercial property, there are state incentives that may help. Select a project type for more information.

Homeowner Tax Credit **Competitive Commercial Tax Credit** **Small Commercial Tax Credit**

- › FAQs
- › Application Instructions
- › Part 1
- › Part 2
- › Part 3
- › Part 3 Expense Spreadsheet 
- › Amend Application

Click here for more information about each tax credit type



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST

COMPETITIVE COMMERCIAL

- Annual program, must apply to MHT by the deadline, typically August 31
- Available for redevelopment of larger income producing properties
- State income tax credit of 20% of eligible rehabilitation expenditures for substantial rehabilitation projects, capped at \$5 million*
- Substantial rehabilitation: Projects with eligible expenses that exceed the greater of the adjusted basis value of the structure or \$25,000
- Statewide program, only 60% of total available funding can go to one county or Baltimore City



* Projects that achieve LEED Gold certification or equivalent, or are a certified low-income housing project may, or are in Opportunity Zones may be eligible for additional credits.



**DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST**

SMALL COMMERCIAL

COMING BACK
NEXT YEAR!

- Not currently available. Starting July 1, 2023, \$2 million will be available annually through FY2031*
- Available for income producing properties, properties that are part of a development project to be sold to a homeowner, or an agricultural or post-WWII building
- Small commercial projects cannot exceed \$500,000 in qualified rehabilitation expenditures
- Projects located in Opportunity Zones may be eligible for additional credits.



*Reserved on a first come first serve basis. Anticipated reopening late spring for new applications, with approvals beginning July 1, 2023 with the new budget year.



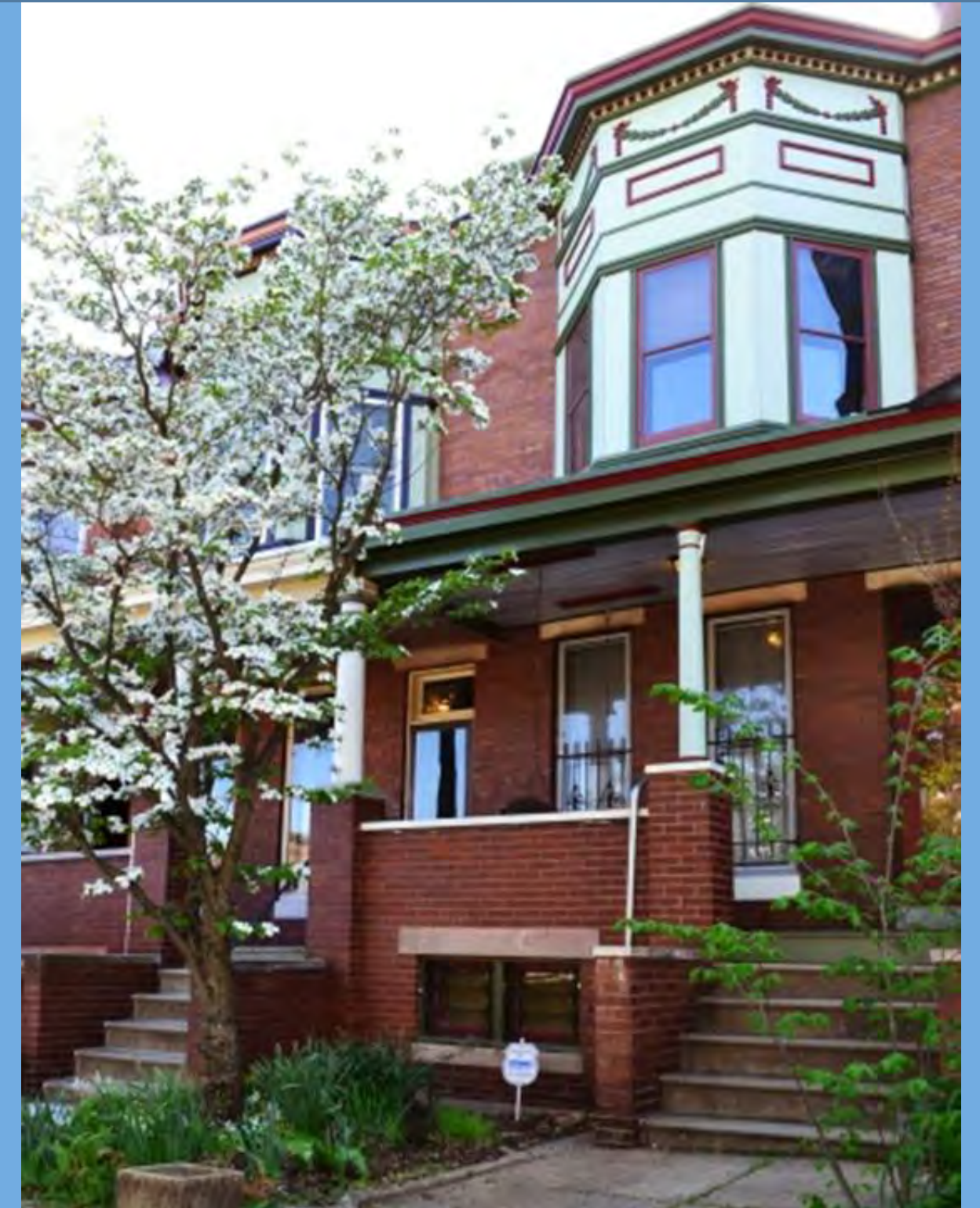
DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST

HOMEOWNER

- For owner-occupied primary and secondary residential properties that undergo rehabilitations that exceed \$5,000 in eligible costs in a 24-month period.

The credit is:

- 20% of total eligible rehabilitation cost
 - Capped at \$50,000 in a 2-year period (\$250,000 in eligible expenses)
- Applications are accepted on a rolling basis, year-round, no annual cap on the amount available.



FEDERAL TAX CREDIT

- Administered by the National Park Service via MHT, all applications are passed through MHT
- Available for redevelopment of income producing properties only, can be combined with the state credits
- Federal income tax credit of 20% of eligible rehabilitation expenditures for projects that meet the substantial rehabilitation test
- Substantial rehabilitation: Projects with eligible expenses that exceed the greater of the adjusted basis value of the structure or \$5,000
- Applications accepted on a rolling basis, there are no application deadlines



KEY PRESERVATION TERMS

National Register of Historic Places

- “Official list of the Nation's historic places worthy of preservation.”
- Managed by the National Park Service through each SHPO

National Register Nomination

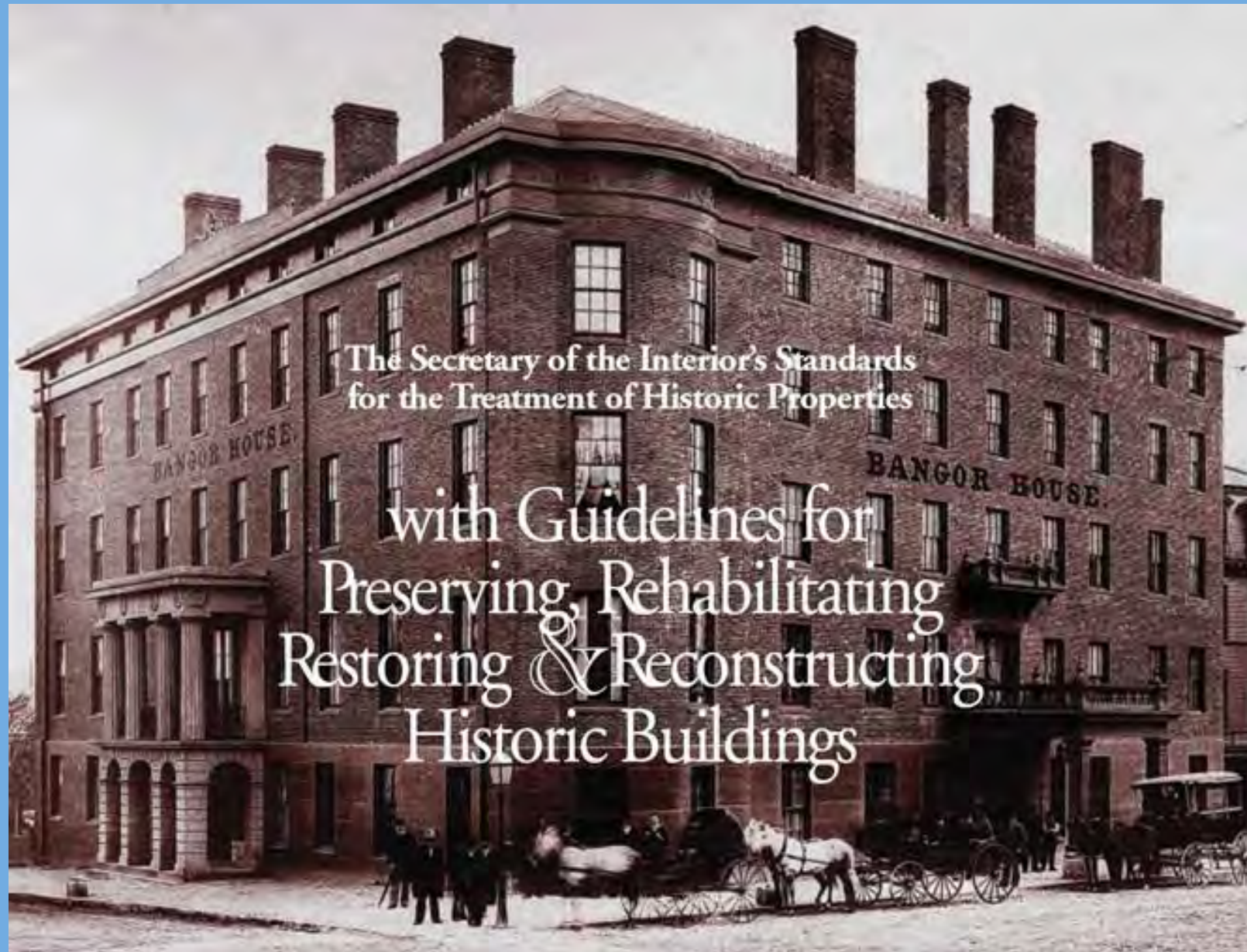
- Period of Significance
 - Defines the time period for which the district/site is significant
- Statement of Significance
 - Describes what makes the district/site significant and why it is listed
- Contributing & Non-contributing resources

Secretary of the Interior's *Standards for Rehabilitation*

- Ten principles established by the National Park Service that we use in our review



SECRETARY OF THE INTERIOR'S *STANDARDS*



Three Main Principles:

- Distinctive features that characterize a property must be preserved.
- When deteriorated beyond repair or missing, features must be replaced to match.
 - New construction and additions must be compatible with but differentiated from the historic architecture.



APPLICATION PROCESS

**MHT reviews applications in the order received and there is an approximate 30–45-day review period.

PART 1



PART 2



PART 3

- Certifies that property is historic and therefore eligible for the tax credit
- Valid for 5 years from date of approval
- No fee

- Certifies that the proposed project meets the Secretary's *Standards*
- \$10 review fee (for homeowner & small commercial)
- \$250 for competitive commercial applications

- Certifies that the project was completed in accordance with the Part 2 approval
- Certifies eligible expenses
- Review fee is 3% of estimated or actual credit, whichever is greater (-\$10)
- \$1,000 credit = \$30 review fee - \$10 = \$20



PART 1 - HISTORIC CERTIFICATION

Properties must be certified as historic by submitting a Part 1 Application

Must have at least one of the following designations:

- Individual listing in the National Register of Historic Places (NRHP)
- Contributing to a Historic District that is listed in the NRHP
- Local individual or historic district designation that MHT determines is eligible for listing in the NRHP

Documentation required:

- Physical description
- Statement of significance
- Historic District map (if applicable)
- Interior and exterior photographs representative of entire property

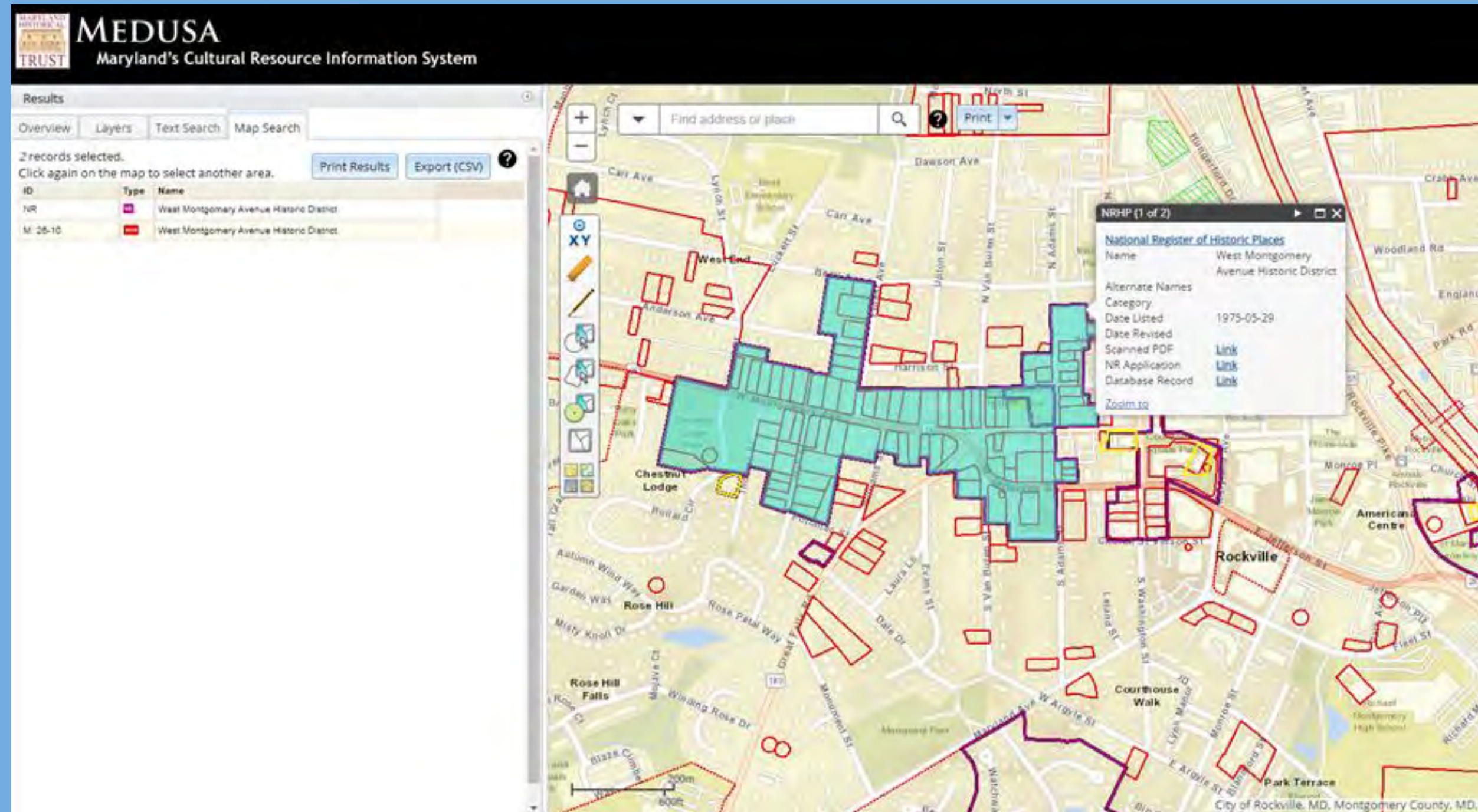
The image shows a scan of a form titled "Maryland Historical Trust Historic Certification Application" with "PART 1 - EVALUATION OF SIGNIFICANCE" prominently displayed. The form includes a header with the Maryland state logo and the text "Maryland Historical Trust Historic Certification Application". Below the header, there are several sections for providing information about the property, including "1. Property Name", "2. Address", and "3. Statement of Significance". The form is filled out with some text, but it is mostly illegible due to the scan quality. The form is a standard application form for historic certification.



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST

MEDUSA

- [MEDUSA](#) is MHT's database of historic properties and sites.
- Database is available through MHT's website.
- Useful for Part 1 application required information.



PART 2 - CERTIFICATION OF PROPOSED WORK

Part 2 Applications must:

- Be submitted and approved prior to starting work
- Have estimated expenses of at least \$5,000
- Describe ALL work that is being contemplated
- Conform to the Secretary's *Standards*

Documentation required:

- Description of work
- Detailed photos showing areas of work (can be combined with Part 1 photos)
- Product specifications, drawings, plans, etc. as applicable
- Contractor's estimate/contract (optional / if available)

The image shows a form from the Maryland Historical Trust, titled "PART 2 - CERTIFICATION OF PROPOSED WORK". The form is for the "Maryland Historical Trust Modern Rehabilitation Tax Credit" and includes a section for "PART 2 - CERTIFICATION OF PROPOSED WORK". It contains several sections for providing details about the property and the proposed work, including fields for property name, address, and project description. There are also checkboxes for various conditions and a field for "Estimated Qualified Rehabilitation Expenses".



AMENDMENTS

- Submit to revise or add new work items
- Must be submitted and approved prior to starting work
- Describe ALL work that is being contemplated
- Conform to the Secretary's *Standards*

Documentation required:

- Description of work
- Detailed photos showing areas of work (if applicable)
- Product specifications, drawings, plans, etc. as applicable
- Contractor's estimate/contract (optional / if available)

The image shows a form titled "Maryland Historical Trust History Rehabilitation Tax Credit Non-Owner Certification Application Amendment Form". The form includes sections for property information, a declaration of work, and a signature line. It also contains checkboxes for compliance with the Secretary's Standards for Rehabilitation. The form is partially filled out with handwritten text.



EXAMPLES OF ELIGIBLE EXPENSES

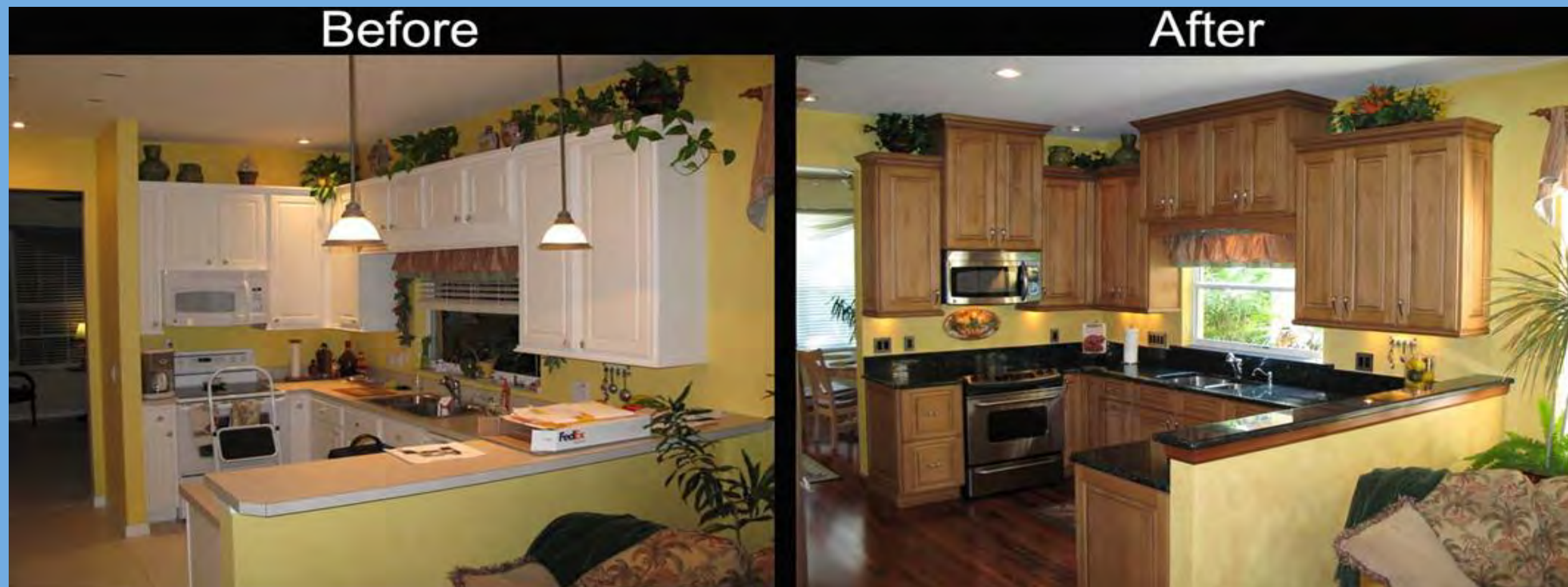


- Roof replacement/repair & chimney repair/lining
- Window/door restoration
- Selective window/door replacement
- New storm doors/windows
- Scraping/painting (interior/exterior)
- Repointing & structural work
- Floor refinishing
- HVAC, plumbing, & electrical work
- Drainage work
- Architectural/engineering fees
- Tool/equipment rental



EXAMPLES OF INELIGIBLE EXPENSES

- Landscaping
- Sidewalks, patios, driveways
- Non-historic outbuildings
- Appliances
- New construction
- Carpeting over historic flooring
- Curtains, blinds, rugs, & other décor
- Remodeling expenses
- Tool/equipment purchases
- Permit fees
- Acquisition costs



REPAIR VS. REPLACEMENT

Standard #6 – Deteriorated elements must be repaired rather than replaced wherever possible.



- Most historic buildings are constructed with materials that are of superior quality to modern building materials including exterior siding and wood windows.
- Always try to repair damaged elements rather than replace them.
- If an element is truly beyond repair, it may be replaced in kind.
- Alternative synthetic materials like vinyl, composites, etc. are typically not appropriate.



PART 3 - CERTIFICATION OF COMPLETED WORK

Part 3 Applications must:

- Be submitted by the end of the second year after work has been completed. If not submitted prior to filing your taxes, your taxes must be amended prior to the statute of limitations.
- Only claim expenses incurred in a contiguous 24-month period.

Documentation required:

- Photographs showing completed work and documenting unchanged condition of areas where no work was undertaken.
- Itemized expense spreadsheet
- Copy of invoices and certified proof of payments



PART 3 - CERTIFICATION OF COMPLETED WORK

MARYLAND FORM 502S HERITANCE STRUCTURE REHABILITATION TAX CREDIT 2021

Find using line or back line only.

Name of taxpayer(s) _____

Enter the entity's Federal Employer Identification Number _____

Check here if this credit is derived from an entity other than that shown above.

YOUR MARYLAND RESTORATION AND QUALIFIED COSTS MUST BE CERTIFIED BY THE MARYLAND HISTORICAL TRUST (MHT). Attach a copy of your approved Certification Application (Part 3) and Form 502S to your tax return.

REMINDER: Do not send photographs to the Revenue Administration Division. All photographs are to be sent to the MHT at: 100 Community Place, 3rd Floor, Crownsville, Maryland 21032-2023. For more information or to obtain applications, contact the MHT at 410-697-9535 or mht@maryland.gov.

Check here if a credit is being claimed for more than one property. See Special Instructions for Multiple Properties.

1. Enter MHT Project Number _____
Location of Property _____

2. Certified rehabilitation expenditures _____

3. Credit for certified rehabilitation expenditures (Multiply line 2 by 20% (.20) and enter on line 3.) _____

4. Additional credit for certified rehabilitation of a high performance building, (if applicable; multiply line 2 by 5% (.05) and enter on line 4. Otherwise, enter 0.) _____

5. Total credit amount (Add lines 3 and 4. For commercial rehabilitations, enter the lesser of the total or \$3,000,000. For all other rehabilitations, enter the lesser of the total or \$50,000.) _____

6. Total credit amount less recaptures (Enter line 5 less any recaptures, if applicable. If less than 0, enter negative amount. See Instructions.) _____

If you are filing Form 502 or Form 505, enter the amount from line 6 on line 2, Part ICE of Form 502CR.
If you are filing Form 504, enter the amount from line 6 on line 30 of Form 504.
Corporations and PTEs will claim this credit on line 1, Part DDD of Form 500CR.
If negative, enter the negative amount on the appropriate form.

RELIEF Act Contact Us 1-800 MDTAXES Email Us Governor's Office Translate Select Language

Home COVID File Pay Forms News Security About the Agency Locations

Breaking News Comptroller of Maryland's YouTube Channel anytime!

Home Individual Taxes 2021 Individual Income Tax Forms

2021 Individual Income Tax Forms

For additional information, visit [Income Tax for Individual Taxpayers > Filing Information](#).

Instruction Booklets

Resident Individuals Income Tax Forms

| Number | Title | Description |
|--------------|--|--|
| 502-502B(20) | Maryland Resident Income Tax Return with Form 502B. Read PDF Viewer And/Or Browser Incompatibility if you cannot open this form. | Maryland long form for full- or part-year residents claiming dependents. |
| PV(20) | Income Tax Payment Voucher. Read PDF Viewer And/Or Browser Incompatibility if you cannot open this form. | Payment voucher with instructions and worksheet for individuals sending check or money order for any balance due on a Form 502 or Form 505, estimated tax payments, or extension payments. |
| 502 | Maryland Resident Income Tax Return | Maryland long form for full- or part-year residents. |
| 502B | Maryland Dependents Information | Form to be used when claiming dependents. |
| PV | Personal Tax Payment Voucher for Form 502/505, Estimated Tax and Extensions | Payment voucher with instructions and worksheet for individuals sending check or money order for any balance due on a Form 502 or Form 505, estimated tax payments, or extension payments. |

- Claim the credit in the calendar year that the project was completed
- Submit Certified Part 3 Application and MD Form 502S with income tax return
- Tax credit is refunded in the form of a check from the Comptroller



CREDIT RECAPTURE



If work is performed that would disqualify a certified rehabilitation within the first 5 years (starting with the first year the credit was claimed), a portion of the credit may be recaptured.

| Year | Recapture |
|------|-----------|
| 1 | 100% |
| 2 | 80% |
| 3 | 60% |
| 4 | 40% |
| 5 | 20% |



KEY TAKEAWAYS

Tips & tricks for preparing successful tax credit applications for streamlined review

- Part 1 & Part 2 may be submitted together with one set of photos
- All work must be reviewed and approved prior to beginning work to be eligible for the tax credit
- All work must meet the Secretary's *Standards* whether associated costs are eligible or ineligible for the tax credit
- Undertaking inappropriate or unapproved work may jeopardize your ability to claim the tax credit at the end of your project
- MHT state tax credit review is independent from city and/or county review
- If you have questions about an upcoming project or application, ask us!



ANY QUESTIONS? CONTACT US!

Carey Jones

Preservation Officer, Tax Credits

410-697-9560

carey.jones@maryland.gov

mht.maryland.gov/taxcredits.shtml



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST



MARYLAND HERITAGE AREAS PROGAM



Image by Quatrefoil Associates courtesy of Annapolis Maritime Museum



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST



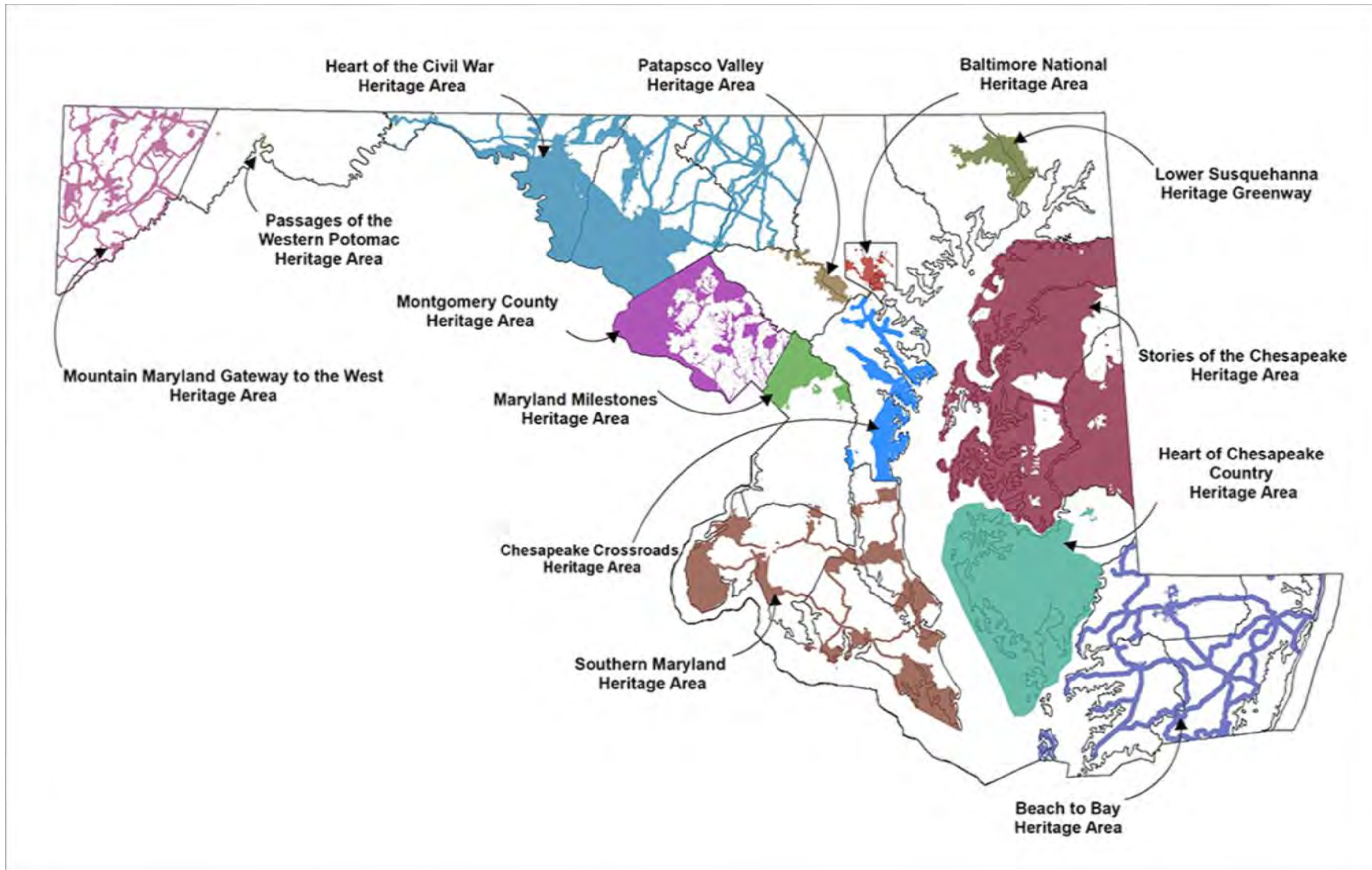
THE MARYLAND HERITAGE AREAS PROGRAM

- Provides targeted financial and technical assistance to 13 regional state-certified areas
- Each heritage area is operated by local entities
- Establish and promote the identity of each region and create unique destinations
- Committed to economic development through heritage-related tourism



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST





THE MARYLAND HERITAGE AREAS PROGRAM

Each of Maryland's 13 certified heritage areas support the economic well-being of Maryland's communities by preserving and celebrating the state's history, cultural traditions, and natural resources through partnerships that promote, support, and create place-based experiences for visitors and residents alike.



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST



GOVERNANCE AND FUNDING

- Governed by the Maryland Heritage Areas Authority, staffed by the Maryland Historical Trust
- The Authority is a 19-member body, including representatives from 9 state agencies and community leaders
- Up to \$6 million allocated annually from DNR's Program Open Space



WHO IS ELIGIBLE FOR MHAA GRANTS?



Photo (via drone) by Elevated Element and courtesy of Baltimore Museum of Industry

Non-profits in good standing with SDAT, local jurisdictions, state and federal agencies

Organizations must be located within a certified heritage area boundary, or

have a project that takes place within the boundaries of a certified heritage area

Verify if you are in a heritage area:
<https://bit.ly/heritageareastatus>



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST



MHAA GOALS

Eligible activities must support the goals set forth in the most current Maryland Heritage Areas Program Strategic Plan:

1. Develop Heritage Tourism Products
2. Build Partnerships
3. Sustain Regional Identity



TYPES OF MHAA PROJECT GRANTS

Non-Capital



Photo courtesy of Maryland Department of Natural Resources

Capital



Photo courtesy of Rackliffe House Trust, Inc.



CAPITAL PROJECT GRANTS: “BRICK & MORTAR”

Eligible Activities (lifespan of 15 years or more)

- Acquisition (fee title of real property)
- Development (repair/alteration of existing building, structure or site, new construction, trails)
- Rehabilitation (returning a property to a state of utility)
- Restoration (accurately depicting a property as it appeared at a particular period of time)
- Pre-Development (plans and specifications, fees for architectural design and engineering)



Image courtesy of Friends of the Greenbelt Museum



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST



CAPITAL PROJECT GRANTS: “BRICK & MORTAR”

- Subject to “Section 106” review
- May require an easement through MHT
- Does NOT have to be a “historic” property

\$5,000 to \$100,000

with a required one-to-one match of non-state support



Image courtesy of the City of Hagerstown



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST



NON-CAPITAL PROJECT GRANTS



Image courtesy of Talbot County Government

- Planning (research, field investigation, data recovery, feasibility studies, design documents)
- Interpretation (exhibits, signage, pedestrian wayfinding signage, interpretive brochures, educational programs and materials)
- Programming (seminars, conferences, performances, reenactments, commemorations, festivals)

\$5,000 to \$50,000

with a required one-to-one match of
non-state support



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST



INELIGIBLE GRANT EXPENSES FOR ALL PROJECT GRANTS

- No overhead expenses for applicant organizations (unless they are part of the allowed 10% indirect costs for non-profit organizations seeking non-capital grants)
- No grant funds can be spent on staff salaries for the applicant organization (but staff salaries are OK as part or all of the matching contribution)
- No grant funds can be spent on marketing expenses (but they are eligible as match)
- No liquor



MATCHING FUNDS

- All MHAA Grants Require 100% Match
- Match can be any combination of cash and in-kind funds
- Staff, volunteers, board, and partner time can count as in-kind match
- Donated or discounted goods and services

Other state funds can NOT be used as match (except state employee staff time that is directly working on the project)



GRANT SCHEDULE

- **January:** Intent to Apply forms due
- **Late February – March:** Grant applications due online to local heritage areas
- **April – June:** Applications reviewed local and state level
- **July:** Grant applicants notified, and awardees may begin projects
- **August – December:** Grant agreements drafted, mailed, and signed
- **Next January:** First disbursements begin to be issued



ANY QUESTIONS? PLEASE CONTACT US!



mht.maryland.gov/heritageareas

MHT.grants@maryland.gov

Ariane M. Hofstedt

Administrator

410-697-9686 | ariane.hofstedt@maryland.gov

Andrew Arvizu

Assistant Administrator

410-697-9514 | andrew.arvizu@maryland.gov

Martha Waldron

Assistant Administrator

410-697-9555 | martha.waldron@maryland.gov



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST



Q & A SESSION

*WHAT FINAL QUESTIONS DO
YOU HAVE FOR OUR PROGRAM
ADMINISTRATORS?*



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST

Q & A SESSION

*WHAT MAKES YOUR PROGRAM
DIFFERENT FROM THE OTHERS
DISCUSSED TODAY?*



Q & A SESSION

*ARE ORGANIZATIONS ELIGIBLE
TO APPLY TO MULTIPLE
GRANT PROGRAMS FOR THE
SAME PROJECT?*



Q & A SESSION

WHAT SPECIFIC ADVICE DO YOU HAVE FOR APPLICANTS TO APPLY FOR THE HP CAPITAL AND MHAA GRANT PROGRAMS SIMULTANEOUSLY?

THESE PROGRAMS ARE OPEN AROUND THE SAME TIME AND HAVE SOME OVERLAP IN ELIGIBLE PROJECT TYPES.



THANK YOU!

*OTHER QUESTIONS?
PLEASE CONTACT US!*

<https://mht.maryland.gov/Financial.shtml>



DEPARTMENT OF PLANNING
MARYLAND HISTORICAL TRUST

MARYLAND HISTORICAL TRUST

**CERTIFIED LOCAL GOVERNMENT
GRANT PROGRAM**

FFY 2022

Application and Reporting Guidelines

DEADLINE: February 28, 2022

CERTIFIED LOCAL GOVERNMENT PROGRAM GRANTS

The Certified Local Government (CLG) Program recognizes counties and municipalities that have made a special commitment to preservation. This commitment includes, but is not limited to, establishing a qualified historic preservation commission to designate and review historic properties.

Maryland's CLG Program is administered by the National Park Service and the Maryland Historical Trust (MHT). CLG programs exist in every state and are supported through the federal Historic Preservation Fund. MHT awards 10% of its annual allocation from the Historic Preservation Fund via subgrants to CLG projects and educational opportunities each year. Funding available for the FFY 2022 CLG grant round is expected to be approximately \$80,000.

CLG funds are awarded in two categories: 1) Education and Training and 2) Projects. The FFY 2022 deadline to apply is **February 28, 2022**. MHT intends to notify recipients by May 2022; however, the federal appropriations status may cause a delay. If awarded a grant, the grantee may start incurring project expenses at the time of notification, prior to the execution of the official grant agreement. All grant funds must be expended by **June 30, 2023**.

Have questions? Planning to apply? For clarification about the following guidelines or requirements, or to discuss a proposed project or a statewide educational program, please contact Nell Ziehl (nell.ziehl@maryland.gov), MHT's Chief of the Office of Planning, Education and Outreach.

ELIGIBLE APPLICANTS

All CLGs within the state of Maryland are eligible to compete for CLG funds. If you are uncertain whether your local government is a CLG, visit http://mht.maryland.gov/grants_clg.shtml for a complete list. **CLGs with outstanding FFY21 annual reports will not be eligible to receive grant funds.**

To request a FFY 2022 application link, or if your CLG report is currently overdue and you wish to be considered for funding, please contact Nell Ziehl at nell.ziehl@maryland.gov.

EDUCATION AND TRAINING GRANTS

Education and Training funds are distributed on a **REIMBURSABLE** basis and will be administered by Maryland Association of Historic District Commissions (MAHDC) on behalf of MHT. All required reporting on the expenditure of grant funds will be conducted by MAHDC. CLGs are responsible for providing the required documentation to MAHDC in a timely manner.

Training

CLGs may request up to **\$1,500** for Commissioner and staff training each year. Annual grants for Commissioner and staff training are non-competitive. However, the actual award may be less than the requested amount depending on availability of funds and the past performance of a CLG in utilizing and administering funding. Applicants are not required to specify how they will spend training funds in the application.

Eligible activities include, but are not limited to:

- programs by MAHDC;
- programs by the National Alliance of Preservation Commissions (NAPC);
- registration for state-sponsored training workshops; and
- conferences hosted by the National Trust for Historic Preservation, the Association for Preservation Technology, and similar organizations.

Other training activities may be eligible, subject to approval in advance by MHT.

Educational Programs

In addition to non-competitive training funds, CLGs may request up to **\$5,000** each year to support educational programs that benefit CLGs statewide (e.g. MAHDC’s Annual Symposium or a NAPC statewide training). Applications for education grants are reviewed competitively, and only one application per educational program will be accepted (that is, an educational program will only be supported once in one year by the CLG Program).

PROJECT GRANTS

CLGs may request up to **\$25,000** for non-capital projects that support the CLG’s efforts to protect and preserve historic, archaeological and cultural resources. Individual awards generally range from \$5,000 to \$15,000.

Eligible activities include, but are not limited to:

- identifying and documenting cultural and historic resources for survey or planning purposes;
- researching and evaluating historic and archaeological sites (e.g. historic structures reports, archaeological site reports and Historic American Building Survey (HABS) documentation);
- documenting cultural heritage (e.g. oral histories) related to existing structures and historic communities, especially under-served and/or minority communities;
- preparing nominations to the National Register of Historic Places;
- developing local preservation plans or preservation elements in local comprehensive plans;
- developing or updating design guidelines for local historic districts;
- producing heritage education materials including publications, exhibits, video and curricula;
- preparing publications that add to the public knowledge of Maryland’s architectural, archaeological and cultural history; and
- conducting studies to determine the fiscal impact or feasibility of preservation activities.

Ineligible activities include:

- property acquisition, rehabilitation or restoration;
- archival research not associated with historic property documentation;
- curation of objects or collections following the conclusion of a federally funded project; and
- operating or overhead support, with the exception of third-party administrative costs (see “Third-Party Administration” below).

Project Selection

A successful application will clearly demonstrate that the project will make a significant contribution to local preservation efforts and will be managed carefully in a professional manner. The CLG grant application is designed to help MHT's review committee evaluate the following criteria: **significance of the project or affected resources, urgency, project design, professional capability, project readiness, protective value, educational value, demonstration value, project impact, matching funds, administrative capability and geographic distribution.** MHT encourages applications that 1) promote and protect resources significant to communities underrepresented in the historical record and/or 2) include planning for climate adaptation or resilience.

Based on feedback from the review committee, MHT may award funding contingent on changes to the project scope and budget, or MHT may request subsequent consultation prior to its approval of the grant. Project conditions may be proposed to grantees by MHT as part of the award selection, process via MHT's online grants system. Grantees will have the opportunity to discuss and approve changes prior to acceptance of the award and issuance of the grant agreement.

General Project Requirements

All CLG-funded projects must meet the Secretary of the Interior's [Standards for Archeology and Historic Preservation](#) as well as the [Standards and Guidelines for Architectural and Historical Investigations in Maryland](#) or the [Standards and Guidelines for Archeological Investigations in Maryland](#).

In addition, principal investigators undertaking CLG-funded projects must meet the applicable minimum requirements of the Secretary of the Interior's [Professional Qualification Standards](#) as set forth in the Code of Federal Regulations, 36CFR61, published in the Federal Register, Vol. 48, No. 190, pages 44738-39. Federal guidelines typically require that consultants be selected through a competitive procurement process (see "Federal Requirements" below), and MHT must approve the consultant selection.

MHT staff and members of the Board of Trustees may not receive remuneration from CLG grants.

If funding is awarded, the grantee will be responsible for submitting brief quarterly progress reports, as well as a final narrative and financial report that accompanies the project deliverables. Requests for the reimbursement of project expenses, with appropriate documentation, may be submitted along with the quarterly reports (see "Budget Requirements" for more detail). All required reports are distributed and received through the MHT online grants system.

Budget and Financial Requirements

CLG project grants do not require a match, but applicants who include matching funds will be more favorably considered, as described in the "Project Selection" section above. Applications that demonstrate strong local investment are typically ranked higher in the selection process, and a cash match of at least 15% is encouraged. Federal funds may not be used as a match for the CLG program.

If awarded, CLG funds are distributed as **REIMBURSEMENT** for eligible project expenses incurred on or after the announcement of award. Although many grantees elect to file for reimbursement at the final report stage, reimbursements may be requested as part of quarterly progress reports during the project period. All requests for reimbursement require documentation of expenses (e.g. invoices, receipts) acceptable to MHT.

Federal Requirements

Because the CLG Program is funded by the federal government, grantees must comply with certain federal requirements. MHT's grant application review and selection process will help evaluate the project scope and budget for consistency with the National Park Service [Historic Preservation Fund Grants Manual](#) and the Office of Management and Budget requirements set out in 2CFR200.

For projects involving the hiring of consultants and the procurement of services, CLG grant recipients must follow (at a minimum) the federal procurement standards outlined below. Grantees may use their own procurement standards, provided that the procurements conform to applicable Federal law and the standards identified in 2CFR Subsections 200.318 through 200.326.

- Micro-purchases (\$10,000 or less) may be awarded without soliciting competitive quotations if the grantee considers the price to be reasonable.
- Small purchases (more than \$10,000) require written price or rate quotations from at least three qualified sources (if available), as well as documentation of how the fair and reasonable price was determined.

The CLG grant agreement requires all CLG grant recipients to follow state and federal guidelines in the expenditure of CLG grants, including certifications regarding debarment, alcohol- and drug-free workplace requirements, and prohibitions against lobbying.

THIRD-PARTY ADMINISTRATION

CLGs may elect to have their grants administered by a designated third-party organization, subject to MHT's approval. The third-party administrator may be another unit of local government, a business, a non-profit, or an educational institution. To request this arrangement, the CLG can choose this option in the grant application and must include a letter of concurrence from the third-party organization. Alternatively, the third-party administrator may submit the grant application on behalf of the CLG and must, in this case, include a letter signed by the CLG's chief elected official or designee that 1) endorses the project and 2) authorizes the applicant organization to act as the third-party administrator on behalf of the CLG.

If a grant is awarded under either of the above scenarios, MHT will execute a grant agreement between MHT and the designated third-party administrator, which will be responsible for submitting all project reporting and project deliverables.

A third-party administrator of a CLG grant may budget 10% of the direct project costs to cover project administration. If the administrator has an approved federal indirect cost rate higher than 10%, it must submit certification of the approved rate prior to the execution of the grant agreement with MHT.

Designation of a third-party administrator is not considered to be a procurement.

POOLING CLG FUNDS

CLGs are permitted to pool Education and Training or Project grants for eligible uses. For example, several CLGs may combine their CLG funds to hire and share professional preservation services for eligible projects or for training activities. This option allows an administrator CLG to apply on behalf of participating CLGs for funding in excess of the individual \$25,000 grant limit and allows CLGs with a stronger administrative capacity to assist other CLGs.

Such an arrangement is available if the participants satisfy the following conditions:

- all participants involved in the pooling are CLGs;
- one CLG is designated as the grant applicant and administrator;
- the CLG grant application contains:
 - a. the names of all CLGs participating in the combined project;
 - b. letters of endorsement with signatures of each participating CLG's chief elected local official or designee;
 - c. the total amount of CLG funds requested for the pooled funds project; and
 - d. the source and amount of each CLG's matching share commitment, if applicable.

CLG GRANTS PROGRAM SCHEDULE

The application and selection process will follow the schedule below:

| | |
|-----------------------------|--|
| Feb. 1, 2022 | Notice to CLGs of Grant Application Availability MHT staff assistance is available for application consultation and project planning. |
| Feb. 28, 2022 | Full Application Due Fully completed applications must be submitted through MHT's online grants system on or before February 28, 2022 . The application must include the application form and all required attachments. |
| May 2022 (estimated) | Evaluation of Applications Completed MHT staff presents the recommendations of the review committee to the State Historic Preservation Officer, who will approve, approve with modifications, or deny the applications. |
| May 2022 (estimated) | Award Announcements |
| June 30, 2023 | Project Completed All work on the project must be completed, and all project costs incurred <i>no later than June 30, 2023</i> . |
| July 31, 2023 | Project Close-Out The final narrative and financial reports, the final request for disbursement, and all project deliverables must be submitted <i>no later than July 31, 2023</i> . |

APPLICATION ASSISTANCE

It is highly beneficial for applicants to contact MHT staff to discuss project proposals prior to submission of an application. For assistance in developing a scope of work and budget for your proposal, or with questions about CLG guidelines or requirements, please contact Nell Ziehl at nell.ziehl@maryland.gov.

This program receives Federal funds from the National Park Service. Regulations of the U.S. Department of the Interior strictly prohibit unlawful discrimination in departmental Federally Assisted Programs on the basis of race, color, national origin, age, or disability. Any person who believes he or she has been discriminated against in any program, activity, or facility operation by a recipient of Federal assistance should write to Director, Equal Opportunity Program, U.S. Department of the Interior, National Park Service, P.O. Box 37127, Washington, DC 20013-7127.



Maryland Heritage Areas Authority Grants Program

FY 2023 GRANTS MANUAL

Revised August 25, 2022

Maryland Heritage Areas Authority
Maryland Historical Trust
100 Community Place
Crownsville, MD 21032
mht.maryland.gov

Ariane M. Hofstedt
Administrator
410-697-9586
ariane.hofstedt@maryland.gov

Andrew Arvizu
Assistant Administrator
410-697-9514
andrew.arvizu@maryland.gov

Martha Waldron
Assistant Administrator
410-697-9555
martha.waldron@maryland.gov

Table of Contents

| | |
|--|----|
| Getting Started | 4 |
| Orientation Session | 4 |
| Project Summary Sheet | 4 |
| Grant Agreement and Legal Documents | 5 |
| Scope of Work..... | 5 |
| Project Budget *NEW* | 6 |
| Project Timetable..... | 6 |
| Other Legal Documents | 7 |
| MHT Project Review..... | 7 |
| Easement Conveyance and Review | 8 |
| Policies | 9 |
| Indirect Costs | 9 |
| Procurement | 9 |
| Recognition of Support | 10 |
| Review of Draft Materials | 11 |
| Amendments and Extensions..... | 11 |
| Amendment Request Email..... | 12 |
| Insurance | 12 |
| Progress Reports and Requests for Disbursement | 13 |
| Mid-Project and Final Completion Reports | 13 |

| | |
|--|-----|
| Requests for Disbursement | 13 |
| Certification of Expenses *(NEW form as of FY 2023)* | 15 |
| Financial Documentation | 16 |
| Documentation of Expenses | 16 |
| Submitting Proof of Project Expenses | 17 |
| Conclusion | 17 |
| Resources | 18 |
| Appendix A – Sample Project Summary Sheet | 21 |
| Appendix B - Easement Requirements | 23 |
| Appendix C – Insurance Requirements..... | 255 |
| Appendix D – Certification of Expenses..... | 27 |

GETTING STARTED

Congratulations! You have been awarded a grant from the Maryland Heritage Areas Program which is governed by the Maryland Heritage Areas Authority (MHAA) and administered by the Maryland Historical Trust (MHT). MHAA provides targeted financial and technical assistance within thirteen locally designated Heritage Areas, each of which has a distinct focus or theme that represents a unique aspect of Maryland's character. Together, MHAA, the Heritage Areas, and local partners such as yourself, support the economic well-being of Maryland's communities by promoting, sustaining, and creating place-based experiences for visitors and residents alike.

Orientation Session

The first thing you need to do is attend a mandatory orientation session. These are typically offered in late August/September and will either be done in-person or virtually. MHAA will notify you when the sessions are taking place and how to register. **All grant recipients MUST attend an orientation session.**

Project Summary Sheet

Once you have attended the orientation session the next thing you need to do is **fill out the Project Summary Sheet**. You can do this by logging in to your MHT grant account online (go to <https://mht.maryland.gov> and click the "My Grant Account" button at the top of the left sidebar), and look under the "Requirements" tab. Note who your Project Monitor is, as that is the person you will communicate with while working on your project.

You MUST submit the Project Summary Sheet, even if there are no changes, as without this form, we cannot begin to draft your Grant Agreement. The faster you complete this step, the sooner you'll receive your Grant Agreement in the mail for signature.

IMPORTANT: Be sure to **check the box at the top of the page indicating that you have attended the mandatory orientation session**. This is a required field, and you cannot submit your Project Summary Sheet without completing it.

Take a few minutes to review the information on the sheet to make sure it is still up to date and accurate. If you need to make changes to the Scope of Work, Deliverables, or any other information on the sheet, you can do so in the fields provided (or at the bottom of the form). There is also an opportunity to upload documents as part of this form, however, it is not required if no changes have occurred.

You will see the Project Commencement Date (aka project start date) and Project Completion Date (aka project end date) listed. The start date is the day you are allowed to begin incurring grant and match expenses and will be the same for every project that is funded in a given grant round. The end date will vary project to project and is when you expect to finish your project. Any expenses incurred

outside of those two dates are not eligible for inclusion. Any potential changes to your Project Timetable can be listed in the “Notes” section of the Project Summary Sheet.

Please pay special attention to the Compliance and Easement fields, as well as the section titled “Special Conditions.” If they are blank, there are no conditions particular to your project; however, if there are conditions listed, you need to make sure you address those conditions. Some may have a deadline associated with them, others must be completed before you begin work on the project. For more information, see the “MHT Project Review” section below.

See **Appendix A: Sample Project Summary Sheet**.

Grant Agreement and Legal Documents

Once you have completed your Project Summary Sheet online and any other outstanding compliance requirements, MHAA/MHT staff will begin generating your **Grant Agreement**. As a result of the volume of grants that MHAA awards, please be aware that you may not receive your Grant Agreement for signature until **late fall or early in the new year**.

The Grant Agreement is the legal contract between your organization and the State of Maryland. Be sure to review the entire document with your team, paying special attention to **Exhibit A “Project Requirements,” which will cover the Scope of Work, Project Budget, Project Timetable, and Special Conditions** of your grant.

The Grant Agreement must be signed by someone who is legally authorized to enter into contracts for your organization. If you are not sure who is legally authorized, check your organizational bylaws or Corporate Resolution. For more information, see “Other Legal Documents” section below.

You must be in good standing with SDAT - State Department of Assessment and Taxation (or qualified to do business in Maryland if your organization is located outside the state) to have your Grant Agreement executed. If you are not in good standing, it is usually an easy fix (and can sometimes be done online), but you will need to resolve the issue before we can issue your Grant Agreement. You can check your status at <http://www.dat.maryland.gov/> by going to “Online Services” and clicking “Search the Business Database” in the left sidebar.

Scope of Work

Your Scope of Work as listed in Exhibit A of the Grant Agreement conveys the property location and **exactly what work can take place as part of your grant**. The Scope of Work is based on the project budget you provided in your original application and takes the form of a narrative list of items in the following format:

The Grant and Grantee’s Contribution may support the costs of... (items that can be grant-funded or match funded). The Grantee’s Contribution may also support the costs of... (items that may only be match funded).

Over the course of your grant, you may only spend grant funds and matching funds on items listed in your Scope of Work. If you need to add or remove items from your Scope of Work, you must reach out to your Project Monitor in advance. If you don't get prior approval, you risk not having those expenditures covered in the grant project. You are, however, **welcome to spend any amount of money on each of the items listed in your approved Scope of Work**, provided you fulfill your one-to-one match requirement, don't spend grant funds on match-only items, do not exceed your approved grant amount, spend funds on all of the items in your Scope of Work, do not spend grant or match on funds outside the approved Scope of Work, and successfully complete your project and deliverables.

Project Budget *NEW INFORMATION*

Starting in FY 2023, the Project Budget in Exhibit A will only show the value of your **"MHAA Grant" award and your match or "Grantee's Contribution,"** and **"Total MHAA Project Budget"** (combined total of MHAA grant and match - this does NOT include other project costs). Other project costs are any additional costs incurred beyond your grant and one-to-one match requirement. **Your approved budget line items will now be listed in the Scope of Work.**

Please keep in mind that **every MHAA grant can only be spent on the items listed in the Scope of Work and requires a one-to-one match**, which can be made of any combination of cash and in-kind contributions. **In-kind contributions** are defined as any professional materials or services that are donated or discounted to the project, as well as volunteer time for work associated with the project.

Please **review the list of items in your Scope of Work carefully** as any expenses in your original application that were deemed ineligible during the review process will not be included and this may require you to revise your project.

MHAA staff encourages grantees to devise their own consistent method for tracking the list of items in the approved Scope of Work, including any other project costs which will need to be reported when requesting a disbursement of funds. For more information, see "Progress Reports and Requests for Disbursement" section below.

Project Timetable

The Project Timetable listed in Exhibit A of your Grant Agreement includes a Project Commencement Date (aka project start date), which is the same for all grantees; the Mid-Project Report Due Date, which vary; the Project Completion Date (aka project end date); and the Project Completion Report Due Date (aka final report due date).

The **Project Commencement Date** is the date the grant was awarded and is the first day you can incur grant and matching contribution expenses. Even if your project will not start right away, your Project Commencement Date stays the same.

The **Project Completion Date** is the last day you can incur grant and matching contribution expenses.

Any expenses incurred after this date are ineligible. If at any point you think you will not be able to finish your project by the Project Completion Date, email your Project Monitor and request an extension.

For more information on the Mid-Project and Project Completion Reports, see “Progress Reports and Requests for Disbursement” section below.

Other Legal Documents

If your organization is a nonprofit, and you have not received a grant from MHAA or MHT in the last three years, you will be asked to complete a document called a **Corporate Resolution**. This document must include the names of at least two authorized signatories for your organization, **including the person who signs your Grant Agreement. The Secretary of your organization, or another appropriate officer, must sign as a “witness.”** Neither of the two authorized signatories are permitted to serve as the witness. The Corporate Resolution certifies that your organization approves receipt of the grant award and certifies who those authorized signatories are.

If your organization received a capital grant of \$90,000 or more, you will be required to complete a **Minority Business Enterprise Plan (MBE)** when you sign your Grant Agreement. In the MBE, you set a percentage goal for your organization to make a best effort to hire a MBE firm to complete some, or all, of your project. There is no predetermined goal. You should simply consider your project and decide on a percentage of the work for which you would like to recruit and/or hire an MBE firm or multiple MBE firms. While you are not required to meet your goal – you must make your best effort to achieve the goal. If for some reason utilizing an MBE firm is not feasible for your project, you should contact your Project Monitor to discuss the circumstances. You may be eligible to request a waiver from the requirement.

MHT Project Review

Prior to the award of your grant, **your project was reviewed by MHT Compliance staff to assess its effect on National Register and National Register-eligible historic properties.** This is required of all projects that receive Maryland state funding, including MHAA grantees, under *Sections 5A-325 and 5A-326 of the State Finance and Procurement Article* (see <https://mht.maryland.gov/projectreview.shtml>). If MHT requires additional information to complete the review of your project, that information is listed under “Special Conditions” on your Project Summary Sheet. If you need to provide MHT with additional information, you must do so prior to beginning work. **If MHT staff have placed special conditions on your project as a result of the project review, you must adhere to those special conditions or risk forfeiting your grant award.** If you make substantial changes to the scope of your project, you may need to have MHT Compliance staff review your project again.

Projects that take place on properties that have existing preservation easements, or for which a preservation easement is required, will be reviewed by MHT Easement staff through a separate process. For more information, see “Easement Conveyance and Review” section below.

Easement Conveyance and Review

If your project takes place on a **property on which MHT holds an existing preservation easement, you must ensure that you have approval from the Director of MHT** before starting the project and receiving your first grant disbursement. If you have not already done so, be sure to submit a “Change/Alteration Request Application” form with as much detail as possible. The form is available on the MHT website at https://mht.maryland.gov/easement_existing.shtml.

If your project property does not currently have an easement on it, but a **preservation easement is a condition of your grant award, you must convey the easement to MHT before receiving your final grant payment**. In addition, you must seek approval from the MHT Director for all proposed work, prior to beginning that work, as if the easement were already in place. If an easement is required for your project, you will receive a complete Easement Conveyance Packet from MHT Easement staff.

See **Appendix B: Easement Requirements** for additional information.

POLICIES

Indirect Costs

Indirect costs are those operating costs that are for the joint benefit of both the grant project and your other organizational activities. Indirect costs are frequently referred to as **overhead, operating, or administrative costs, and can include rent, utilities, salaries, personnel costs, and professional service fees.**

Maryland law and MHAA's policy regarding indirect costs allow nonprofit organizations¹ who are completing MHAA Non-Capital projects to include indirect costs in their grant budgets. **Indirect costs are limited to 10% or less of the total grant award amount, and the grantee must still be able to complete the entire project using the remaining funds.** If you choose to include indirect costs in your budget, your grant amount will not change. Indirect costs must come out of grant funds, not your matching contribution. If your approved Scope of Work does not currently include indirect costs and you would like to add them, please contact your Project Monitor to discuss a budget amendment. Please note, that you are **required to retain financial documentation for up to three years on indirect costs.**

Procurement

You are expected to ensure that costs for goods and services obtained to carry out the project are reasonable and customary for the type of work performed and materials purchased. You must follow the procurement guidelines for your type of organization, as detailed below.

Government agencies: Government organizations should follow your normal procurement procedures and must be able to document that applicable procurement procedures were followed, if requested by MHAA staff.

Nonprofits: Nonprofit organizations should use a procurement process that allows you to obtain project goods and services at reasonable and customary prices and must be able to document that expenditures are reasonable and customary, if requested by MHAA staff.

Procurements greater than \$500 and less than \$10,000: You are strongly encouraged to obtain written bids from two or more vendors for any goods and services for which costs are expected to be greater than \$500 but not more than \$10,000.

¹ This does not include grants to heritage area management entities, or grants to nonprofit organizations that were awarded before October 2018. Alternatively, if a nonprofit organization completing an MHAA Non-Capital has a negotiated federal rate, the organization can use that rate.

Procurements greater than \$10,000: If costs for goods or services from any one vendor are expected to exceed \$10,000 written bids from at least three vendors must be obtained. You must be able to provide documentation that at least three written bids were obtained, if requested by MHAA staff.

When bids are obtained, grant recipients are not required to select the lowest bid but must be able to provide documentation on why a vendor other than the low bidder was selected and what criteria other than the most favorable bid price were considered.

Sole-source procurement of goods and services should not be utilized unless there is a demonstrable and justifiable need, and it can be demonstrated that competitive procurement is impractical because only one product or service vendor can meet specific project requirements. As with all procurements, expenditures must be reasonable and customary for the type of goods and services being obtained. If requested by the Grantor, grant recipients must be able to document project requirements that justified the sole- source procurement and that expenditures are reasonable and customary for the goods and services obtained.

Recognition of Support

It is important to **acknowledge the support of MHAA when talking about your grant-funded project, and when producing materials** that were supported by your grant. At a minimum, you should include either the MHAA logo, or the following statement:

This project has been financed in part with State Funds from the Maryland Heritage Areas Authority, an instrumentality of the State of Maryland. However, project contents and opinions do not necessarily reflect the views or policies of the Maryland Heritage Areas Authority.

MHAA's logo can be downloaded here:

https://mht.maryland.gov/images/MHAA/MHAA_logo_New.jpg

Email your Project Monitor if you require a higher quality version.

It is important to remember that acknowledgement of support does not just mean on printed materials. In addition to including the logo and/or the MHAA statement on brochures, websites, and signage, you must also **include acknowledgement of MHAA support for construction projects, exhibits, trails, and other projects**. This can take the form of an acknowledgements panel that is installed at the location of the MHAA-funded work, a sign with the MHAA logo, or some other way to show that the completed project was funded in part by MHAA. You will be asked to include evidence of this acknowledgement in your final report.

Please also remember to **acknowledge MHAA support when you are speaking to the press**, issuing press releases, or discussing the project with the public. If you aren't sure how to incorporate acknowledgement into your project, contact your Project Monitor to discuss your options. Don't forget to also **acknowledge the technical support of your local heritage area** management entity by including their logo as well.

Review of Draft Materials

Prior to producing materials funded as part of your grant project, you **must obtain approval from your Project Monitor**, who will be reviewing them to ensure the content is up to MHAA's standards, that you have properly acknowledged MHAA support, and that the materials are acceptable based on your approved Scope of Work. This includes, but is not limited to, drafts of brochures, wayside panels, web pages, video scripts, advertisements, press releases, and signage.

Be sure to give your Project Monitor plenty of time, preferably 1 – 2 weeks, to review the materials. Do not send them for review an hour before you need to finalize them.

Amendments and Extensions

You may find that your project does not play out in the way you had planned when you originally submitted your grant application. This is not unusual. If you find that you are getting off track with your Scope of Work, Timetable, or Deliverables, reach out to your Project Monitor as soon as possible to discuss your options. If your Project Monitor determines that an amendment or extension is warranted, they will work with you to finalize the details of the changes that are needed and will work with you on an extension or an amendment to your grant.

If you need more time to complete your project or to add/remove items from your Scope of Work, you will need to request an amendment from your Project Monitor via an email explaining the reasons for the need. See the list of information you should include in your email in the “Amendment Request Email” section below.

Once approved, your Project Monitor will send you an email granting your extension and/or amendment. **You will have 10 days in which to reject the extension and/or amendment. After that, it is considered accepted.** Note that if your Project Monitor has not heard from you and your Project Completion Date is approaching, they may proactively implement an extension.

If the changes needed are major (adding major new elements to the Scope of Work), approval of those changes will need to be approved by the Maryland Heritage Areas Authority directly. Your Project Monitor can help you with that process.

Amendment Request Email

Requests to extend your Mid-Project or Final Project Report due dates, your Project Completion Date, or to amend your Scope of Work are considered on a case-by-case basis. **All requests must be submitted in writing via email to your Project Monitor before your Project Completion Date** (at least 2 or more weeks prior to the deadline). Please provide the following information:

1. **Fiscal Year** the grant was awarded and the name of the grant project;
2. **Name and address** of the grant recipient;
3. The **reasons for requesting** an extension/amendment;
4. The **current project completion date** as specified in the Grant Agreement “Exhibit A,” or if an extension was previously approved, the current end date;
5. A **revised Scope of Work** (if applicable)
6. The **revised Project Timetable** (if applicable)
7. The **new Project Completion Date** that you are requesting (generally extensions of more than 1 year will not be approved but can be considered).

The **timely completion of grant projects is critical** not only for the development of heritage tourism products across Maryland, but to the continued support of the Maryland Heritage Areas Program by our elected officials. Failure to complete grant projects by the date specified in the Grant Agreement, or by the date specified in an approved grant extension, may result in cancellation of the grant and the rescinding or recovery of funds for uncompleted portions of the project. Your assistance in closing or extending any soon to be overdue grants with your organization is appreciated.

Insurance

You are **required to maintain certain levels of insurance** coverage in relation to your grant-funded project. See **Appendix C: Insurance Requirements** for details on those requirements. You must provide proof of insurance if requested by MHAA/MHT staff.

PROGRESS REPORTS AND REQUESTS FOR DISBURSEMENT

Mid-Project and Final Completion Reports

For most projects, you will be required to submit two reports through the online grants management system: **the Mid-Project Report and the Project Completion Report**. You can access both of these via the online MHT Grants Portal at <https://mht.maryland.gov> by clicking the “My Grant Account” button at the top of the left sidebar and logging in to your account. You will then click on the “Requirements” tab which should show you the available reports for your project. If you are having problems finding your report forms, please contact your Project Monitor, as the forms may be in another member of your organization’s online account.

A Mid-Project Report must be submitted at roughly the mid-point of your project. Once the project is complete, and all work finished, you will also need to submit a final Project Completion Report. **The deadlines for both reports are listed in Exhibit A under Project Timetable in your Grant Agreement.** If you are not able to complete a report on time, be sure to let your Project Monitor know, and request an extension if you are behind schedule.

In addition to answering the questions on the report forms, you will want to **upload supporting materials for your reports**, including photographs of the work, drafts and final versions of all work products, and other documentation that the project is underway at the mid-point, and completed at the end point.

Requests for Disbursement

For most grants, **you will receive three payments, or disbursements**. After you have fulfilled all outstanding Special Conditions² and the Grant Agreement and Corporate Resolution (if applicable) have been signed by all parties and executed, you should expect to receive your first disbursement within about 60 days. The amount of the disbursement will be determined by your Project Monitor. **Typically, you will receive 50% of your total award in your first payment. Then your second and third payments would each be 25%.** Under certain circumstances, your Project Monitor may alter the number or percentage of disbursements. If you feel that your disbursement schedule may require alteration, please reach out to your Project Monitor.

You must be in good standing with the Maryland State Department of Assessment and Taxation in order to receive a disbursement. If you are not in good standing, and owe the State of Maryland money or filings, you risk having your grant payment recaptured, so it is a good idea to check your

² Your first payment will not be disbursed until after you have successfully completed any MHT Preservation Easement review requirements, if applicable.

status every time you submit a request for disbursement. For more information, see “Grant Agreement and Legal Documents” section above. You can check your status at <http://www.dat.maryland.gov/> by going to “Online Services” and clicking “Search the Business Database” in the left sidebar.

To receive the **second payment, you should be able to certify that you have spent 50% of your total project costs** (which is the grant and matching amounts combined). You are then eligible to receive an additional 25% on top of the 50% that you received at the start of the project. Your Project Monitor will determine if you have expended a sufficient amount of your grant and/or matching funds to receive your second payment, based on your project details.

The **third disbursement is considered reimbursable**, meaning you must certify that you have incurred all remaining project expenses to request the third and final disbursement. Your final disbursement will be the balance of funds available (typically 25%), based on your final expenditures, and will not be issued until all project expenses have been incurred, all work products are finished and approved by MHAA/MHT staff, and your final Project Completion Report has been submitted.

MHAA reserves the right to withhold disbursement of grant funds if you have not incurred sufficient project expenditures by the date of the Request for Disbursement.

To receive your second and third payments, you must: 1) **complete your Mid-Project Report** (for the second payment) or **final Project Completion Report** (for the third payment); and 2) submit the **Certification of Expenses form**. All can be accessed via your online MHT Grants Portal at <https://mht.maryland.gov> (see above section for access instructions). **As of FY 2023, there is a new Certification of Expenses form** that is located on the second page of your online Mid-Project Report and Project Completion Report. For more information, see “Certification of Expenses” section below.

Please note, if you have not incurred sufficient expenditures or chose not to request a disbursement at the same time you are submitting your Mid-Project Report, you can just submit your report, and request payment at a later date. To do so, simply contact your Project Monitor who will open the Certification of Expenses form up for resubmission.

When reviewing your request for disbursement, MHAA will consider the following:

- **Is the cost eligible?** – Has it been incurred in the grant period? Is it related to the approved Scope of Work as outlined in Exhibit A of your Grant Agreement?
- **Is the cost necessary?** – If there were no grant funds involved, would the cost have had to be incurred, or incurred at the amount stated?
- **Is the cost reasonable?** – Is it in line and reasonable with costs for the same item or service in your area?

Once approved by MHAA/MHT, **payment requests to grantees are generally processed within approximately 60 days.**

Certification of Expenses *(NEW form as of FY 2023)*

Starting FY 2023, MHAA will be using a **new Certification of Expenses form**, which can be found on the second page of the online Mid-Project and Project Completion Reports (accessed via the MHT Grants Portal at https://www.grantrequest.com/SID_1777?SA=AM). Grantees are required to complete the Certification of Expenses form online when requesting a disbursement of funds. In the new form grantees are **NOT required to report against individual budget line items**, instead you will be asked to provide the following totals and information:

- **Total Grant Funds Expended to Date:** this is the amount of MHAA grant funds you have spent against approved line items in the Scope of Work.
- **Total Match Funds Expended to Date:** this is the amount of match funds you have spent against the approved line items in the Scope of Work.
- **Total Other Project Costs Expended to Date:** any additional project costs incurred beyond your grant and one-to-one match requirement.
- **Amount Requesting:** this is the amount of funds you are requesting be disbursed (typically 25% of your grant award).
- **Name, Title, and Date:** of authorized signatory submitting the request.

IMPORTANT: Be sure to **check the box** formally certifying that the information you provided is correct and within your approved Scope of Work (the box is located directly below where you will be indicating the amount you are requesting).

In addition to the above information, MHAA will fill in the following items on the form:

- Tax ID and Legal Name of Organization
- MHAA Project Monitor Name and Email
- Approved Total Grant Amount
- Approved Total Match Amount
- Approved Other Project Costs

There is also a “State Use Only” section at the bottom of the page that will be completed by MHAA/MHT staff at a later date.

As stated earlier, **grantees are allowed to spend any amount of money on each of the items listed in your Scope of Work**, provided you fulfill your one-to-one match requirement, don't spend grant funds on match-only items, do not exceed your approved grant amount, spend funds on all of the items in your Scope of Work, do not spend grant or match on funds outside the approved Scope of Work, and successfully complete your project and deliverables. **To report accurate and up-to-date totals, MHAA staff encourages grantees to devise their own consistent method for tracking the list of items in the approved Scope of Work.** See Appendix D for a sample of the new Certification of Expenses form.

FINANCIAL DOCUMENTATION

The following guidelines will help you understand the types of records MHAA/MHT expects you to retain and provide upon request to document your grant expenses, as well as some suggestions to help make the documentation process easier as the project progresses.

Documentation of Expenses

You must retain records that show proof of all project expenses, both grant-funded and grantee contributed, for up to three years and provide them upon request.

For **cash expenses**, retain copies of your invoices, receipts, timesheets (if your grant allows staff time as cash match) and/or contracts supporting the cost breakdown in your approved Scope of Work. Documentation should show what was purchased or funded, when it was purchased, or when the work was completed, and how much it cost. QuickBooks and other accounting system printouts are accepted as proof of expenditure for payroll expenses.

For **donated or discounted services or materials** (such as paint, photography, architectural fees, etc.), vouchers or other official documentation, signed by the appropriate person must be retained to verify what the goods or services being claimed were and what they were valued according to reasonable market rate costs. If included in your approved Scope of Work, **staff and/or volunteer time contributions must also be documented** by a timesheet or spreadsheet that includes the rate used to calculate the value.

The value of unpaid volunteer time can be calculated by using the current Maryland hourly rate as determined by Independent Sector (http://independentsector.org/volunteer_time). You should always check Independent Sector's website for the most up-to-date hourly rate before submitting a request for disbursement as it changes. Please note, in order to see the Maryland rate, you must provide your name, email address and organization. If you are not comfortable doing that, email your Project Monitor and they can provide you with the current information.

For **property acquisition**, grantees have two options: 1.) get reimbursed for the property purchase after the purchase is complete, or 2.) make arrangements with your Project Monitor to have a joint check issued directly to you and the title company and delivered to the title company at settlement. If you choose to have a check issued to the title company, you will be required to provide proof of title work, insurance, and a purchase agreement before the check will be issued.

Submitting Proof of Project Expenses

A percentage of MHAA's grantees each fiscal year will be randomly selected and required to provide financial documentation of their expenses. If selected, you will need to submit those materials as part of your final report. If your project is selected, you will be notified prior to submission of your final Project Completion Report that you must include, in addition to a Certification of Expenses form, all proof of project expenses, both grant-funded and grantee contributed.

Regardless of whether or not you are required to submit proof of grant expenses to MHAA, you still must retain these records, as your files are subject to state audit and must be retained for three years from the Project Completion Date.

Failure to submit documentation upon request could result in recapture of your grant funds and cancellation of your grant. It is critical that you retain these records and provide them upon request.

Even if you are asked to provide financial documentation, **you do NOT need to submit proof of payment** (i.e., copies of bank statements, cancelled checks, and/or credit card statements) for project expenses. As a standard accounting practice, however, we **encourage you to retain that documentation for your records.**

Conclusion

Congratulations again on receiving a grant from MHAA! The staff is looking forward to working with you to ensure that you are good stewards of State funds, and your project is completed successfully. If you have additional questions, please do not hesitate to contact your Project Monitor or any member of the MHAA staff using the contact information provided on the cover page.

RESOURCES

The following listing of helpful resources is meant to serve as a starting place for a variety of questions that may arise, related to your grant project. Always feel free to contact your Project Monitor and your local heritage area for technical assistance.

| I need to know about Historic Preservation | ... where do I find this information? |
|--|--|
| General preservation principles; how MHT evaluates changes to historic properties | The Secretary of the Interior’s Standards http://www.nps.gov/tps/standards.htm |
| Specifics of preservation “best practice”, for example, guidance on how to repoint masonry or restore plaster, or how to adapt for accessibility, among other subjects | National Park Service Preservation Briefs http://www.nps.gov/tps/how-to-preserve/briefs.htm |
| I need technical preservation advice above and beyond the written materials referenced above. Can MHT help? | Yes, MHT offers technical preservation assistance through the Office of Preservation Services. Contact your Project Monitor for more information. |
| Lead Paint | http://www.epa.gov/lead/ http://mde.maryland.gov/programs/Land/LeadPoisoningPrevention/Pages/index.aspx |
| Easements | http://mht.maryland.gov/easement.shtml |
| What is a preservation easement? Do you have a sample easement? | MHT Easement Conveyance Packet http://mht.maryland.gov/documents/PDF/easement/easement_procedures_conveyance_grants.pdf |

| | |
|--|--|
| What documents do I need to provide to MHT so MHT can create an easement on my property? | MHT Easement Conveyance Packet https://mht.maryland.gov/easement_howto.shtml |
| How do I get MHT's approval for changes to an easement property? | MHT Application for Change/Alteration to Easement Property https://mht.maryland.gov/easement_existing.shtml |
| When will MHT's Easement Committee meet to review my application? When are applications due? | Easement committee meets approximately every three weeks. The dates are posted annually with a link on this page: http://mht.maryland.gov/easement.shtml |
| Hiring an architect, engineer, contractor, or consultant | Be sure to follow the procurement requirements listed on Page 8. |
| Does MHT have a list of consultants and contractors? | The Maryland Association of Historic District Commissions (MAHDC) maintains a directory online: http://mahdc.org/contractor-directory/ Preservation Maryland maintains a directory online: http://preservelist.org/ |

| Grant Financial & Reporting Requirements | |
|--|--|
| Where do I submit MHAA reports and/or request a disbursement of funds? | You can access MHAA reports (which include the Certification of Expenses form which is used for requesting funds) in the Maryland Historical Trust Online Grants Portal here: https://www.grantrequest.com/SID_1777?SA=AM |
| How do I check if I'm in good standing with the State Department of Assessment and Taxation? | Visit https://dat.maryland.gov/Pages/default.aspx and click on "Search the Business Database." |

| | |
|--------------------------------------|---|
| How do I sign up for Direct Deposit? | To sign up for direct deposit with the state, go to the following website: https://www.marylandtaxes.gov/divisions/gad/ef-t-program.php If you have issues with the website, call the Comptroller at 1-888-784-0144 and select option 7 from the menu. |
|--------------------------------------|---|

| | |
|---|---|
| Other Funding Sources for Preservation Projects | http://mht.maryland.gov/documents/PDF/grants/Grants_Funding_Sources.pdf |
| Where do I find information about best practices for oral history projects? | https://www.oralhistory.org/about/principles-and-practices-revised-2009/ |
| Where do I find information about best practices for museums? | http://ww2.aam-us.org/resources/ethics-standards-and-best-practices/standards |
| Where do I find information about best practices for designing wayside exhibits (also called interpretive signs)? | https://www.nps.gov/subjects/hfc/upload/Wayside-Guide-First-Edition.pdf |
| Where do I find resources about the Indigenous Peoples of Maryland? | Whose land am I on (Indigenous-led interactive mapping resource)? https://native-land.ca/ Resources related to Indigenous peoples of Maryland: https://goci.maryland.gov/maryland-commission-on-indian-affairs/ |

APPENDIX A – SAMPLE PROJECT SUMMARY SHEET

Project Summary

Attachments

Review My Requirement

Project Summary

Printer Friendly Version | E-mail Draft

* Required before final submission

Before completing this Project Summary Sheet, please view MHAA's online orientation at the link below:

[LINK]

* **Have you completed your online orientation? If so, please complete the following quiz: <https://forms.gle/KHD8Q7zR7YDcCpaA>**
By checking the box below you are certifying that an authorized representative from your organization has completed the mandatory orientation session provided by MHAA that is required for all grant recipients.

Please review the following information. If any of the information is incorrect, please make the changes necessary in the corresponding text box, or in the Notes field at the bottom of the page. The information provided in this document will form the basis of your grant agreement. Please be sure to submit the form, even if there are no changes. If you are receiving a reduced award, please be sure to upload a new version of your project budget reflecting that reduction.

Grantee Organization:

The Awesomest House Museum in the World

test

test AL 12345

Project Contact:

Miss Andrew Arvizu

Your Project Monitor:

Andrew Arvizu andrew.arvizu@maryland.gov

Project Title:

Multiple Property Documentation Form

Scope of Work:

The Grant and Grantee's Contribution may support item A, item B, and item C. The Grantee's Contribution may also support item D and Item E

Proposed Changes to Scope of Work:

Word count 0 of 250

Grant Award:

0.0000

Required Total Match:

102.00

Deliverables:

- Item A
- Item B
- Item C
- Item D
- Item E

Revised Deliverables:

Word count 0 of 250

Project Start Date: **Project End Date:**

Compliance Review Required?

No

Easement or Easement Modification Required?

No

Easement Review Required?

No

Special Conditions

Please list the name and email of your organization's Secretary of the Board

If you do not have a Secretary of the Board, please list any other relevant executive capable of entering into contract on behalf of your organization.

If you are a government agency, you may skip this step.

Secretary of the Board

Email for Secretary of the Board

Notes:

Use this field to provide any additional information, or to update fields that are not editable above. If there are no changes needed, indicate that here.

Word count 0 of 500

Save & Finish Later

Next

APPENDIX B – EASEMENT REQUIREMENTS

If your Grant Agreement indicates that you must convey an easement or preservation agreement as a condition of your grant award (check your Grant Agreement, **Exhibit A – Special Conditions**), the following information will apply to your project.

As a condition of disbursement of your grant, you may be required to execute, or have the owner of the property where the project is taking place to execute, one of the following agreements:

- A Deed of Preservation Easement Agreement (an “Easement”), or a modification to an existing Easement (a “Modification”) encumbering the historic real property assisted by the grant; or
- A preservation and maintenance agreement (a “Preservation Agreement”), or a modification of an existing Preservation Agreement (also a “Modification”), for historic property other than real property.

“Historic property” means a site, building, structure, monument, or object which is individually listed in, or is individually eligible for listing in the Maryland Register of Historic Properties.

The Easement or Preservation Agreement requires that you or the owner of the project property:

- maintain the project and the project property in good order, condition and repair;
- permit MHT to enter upon and inspect the project during construction;
- prevent any waste of the project property; and
- prevent any demolition or modification of the improvements on the project property without MHT’s prior written consent.

If you or the owner of the project property are required to execute an Easement or Modification, you or the property owner must also provide the following documentation:

- an owner’s policy of title insurance for the project property, along with a bring to date title search updating the policy to the date of the Easement, satisfactory in form and content to MHT and its legal counsel;
- evidence of property/hazard insurance, commercial general liability or other insurances coverages in accordance with the insurance requirements set out in Exhibit B of this Manual;
- evidence that the Easement or Modification has been recorded among the applicable land records of the county in which the project property is located; and

- any other instrument or document required by MHT, including the subordination of any encumbrances with respect to the project property which are prior to the lien of the Easement, and the foreclosure of which could extinguish the Easement.

The Easement requirements include the following:

- The Easement will have a term of duration equal to the longer of (i) fifteen years or (ii) one year for every \$5,000 increment of the Grant, or portion thereof, as further described in Exhibit A-Special Conditions of your Grant Agreement, if applicable;
- If there are no prior existing liens on the project property, the Easement must be a first lien encumbrance with respect to the project property, prior to all other liens; and
- You must reimburse MHAA all Grant funds that have been disbursed if the Easement is determined, by court finding or otherwise, to be not legally enforceable by MHT for any reason, and you will not be entitled to disbursement of any further Grant funds.

If you or the property owner executes a Preservation Agreement, Grantee must provide, or cause the owner of the Property to provide the following documentation:

- evidence of property/hazard insurance, commercial general liability or other insurances coverages in accordance with the insurance requirements set out in Exhibit B of this Manual; and
- Any other instrument or document requested by MHT.

An existing Easement or Preservation Agreement that is satisfactory to MHT may satisfy these requirements.

APPENDIX C – INSURANCE REQUIREMENTS

As a condition of disbursement of a capital grant, you must carry, and may be required to provide evidence of the following insurance coverages satisfactory to MHT with respect to the property where the project will take place.

Insurance coverages must be provided by a company that is registered with the Maryland Insurance Agency and authorized to do business in the State.

If you are a government entity, the insurance requirements may be satisfied through evidence of a self-insurance program satisfactory to MHT.

Hazard Insurance

You must carry, and may be required to provide evidence satisfactory to MHT that the project property is insured against loss or damage by fire and such other hazards, casualties, and contingencies as may be required from time to time by MHT, in amounts satisfactory to MHT, but not less than the total amount of the Grant plus the outstanding principal balances of any mortgages on the property.

You must have the hazard insurance policy endorsed to add MHT as an additional insured (but without obligation on the part of MHT to make premium payments), with rights to prior notice of policy cancellation.

You must maintain property insurance on the project property from the Project Commencement Date throughout the term of the Easement, Preservation Agreement or Modification, as applicable. If requested by MHT, you must submit evidence of such insurance coverage to MHT.

Commercial General Liability Insurance

You must carry insurance and may be required to provide evidence satisfactory to MHT that the project property is insured, under a comprehensive general liability insurance in amounts satisfactory to MHT.

You must have the comprehensive general liability insurance policy endorsed to add MHT as an additional insured (but without obligation on the part of MHT to make premium payments), with rights to prior notice of policy cancellation.

You must maintain comprehensive general liability insurance on the project property from the Project Commencement Date throughout the term of the Easement, Preservation Agreement or Modification, as applicable. If requested by MHT, you must submit evidence of such insurance coverage to MHT.

Flood Insurance

If your project property is located in a 100-year flood plain, you must carry, and may be required to provide evidence satisfactory to MHT that the Property has flood insurance.

You may be required to provide evidence showing whether the project property is located in a 100-year flood plain, as designated by the United States Department of Housing and Urban Development.

If the project property is located in a 100-year flood plain, you must obtain flood insurance coverage in amounts satisfactory to MHT.

You must have the policy endorsed to add MHT as an additional insured (but without obligation on the part of MHT to make premium payments), with rights to prior notice of policy cancellation.

You must maintain flood insurance on the project property from the Project Commencement Date throughout the term of the Easement, Preservation Agreement or Modification, as applicable. If requested by MHT, you must submit evidence of such insurance coverage to MHT.

General Contractor's Insurance

You must carry and may be required to provide evidence satisfactory to MHT of general contractor's insurance coverage for comprehensive public liability, property damage liability/builder's risk, and workers' compensation in the form and amounts required by MHT.

You must require general contractor's insurance from the Project Commencement Date until the project is completed. If requested by MHT, you must submit evidence of such insurance coverage to MHT.

APPENDIX D – SAMPLE CERTIFICATION OF EXPENSES

| | | | |
|------------------------------------|---|-----------------------------|---------------------------------------|
| Mid-Project Report | Certification of Expenses | Attachments | Review My Requirement |
|------------------------------------|---|-----------------------------|---------------------------------------|

Save & Finish Later
Next

Certification of Expenses

Printer Friendly Version | E-mail Draft

* Required before final submission

Certification of Expenses and Disbursement Request

If you decide not to request payment at this time, you do not need to complete this second page. You may request funds in the future by reaching out to your Project Monitor, shown below.

| | |
|-----------------------------|---|
| Tax ID | Legal Name |
| 12-345678 | The Awesomest House Museum in the World |
| MHAA Project Monitor | Email Address |
| Andrew Arvizu | andrew.arvizu@maryland.gov |

Upon completing the Mid-Project Report, grantees who have expended roughly 50% of their award and match are eligible to request their second disbursement of 25% of their total grant award using this form. By requesting payment, you certify that all grant fund-related expenditures align with your most up to date Scope of Work, as listed on the first page of your Mid-Project Report. Further, you certify that you will retain documentation for all expenditures for at least three years after your project end date. Finally, you certify that this Certification of Expenses is made in accordance with the terms and conditions of the Grant Agreement made between the Grantee and the Maryland Department of Planning and that the amounts listed are correct.

| | |
|-------------------------------------|---|
| Approved Total Grant Amount | Total Grant Funds Expended to Date |
| 0.0000 | <input style="width: 95%;" type="text"/> |
| Approved Total Match Amount | Total Match Funds Expended to Date |
| 102.00 | <input style="width: 95%;" type="text"/> |
| Approved Other Project Costs | Total Other Project Costs Expended to Date |
| 201.00 | <input style="width: 95%;" type="text"/> |

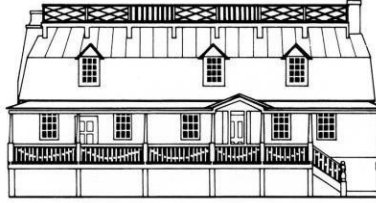
Payment Request

| | | | |
|--|--|--|--|
| Amount Requesting: | Name | Title | Request Date: |
| <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> |

By checking the box below, you are certifying that the information that you have provided is correct and that you have only expended grant and matching funds on line items within your approved Scope of Work.

STATE USE ONLY

| | | | |
|--|--|--|--|
| Date Received | Payment Requested | Amount Requested | Amount Approved |
| <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> |
| Payment Reviewed By | Payment Approved By | PCA Code | Date Grant Agreement Executed |
| <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> |



Maryland Historical Trust

MARYLAND HISTORICAL TRUST

FISCAL YEAR 2023

HISTORIC PRESERVATION NON-CAPITAL GRANT PROGRAM

GRANT GUIDELINES AND MANUAL

DEADLINE

June 27, 2022 – Intent to Apply Due

August 1, 2022 – Completed Application Due

FOR GRANTS UP TO \$75,000

Maryland Department of Planning

Robert S. McCord, Secretary
Sandy Schrader, Deputy Secretary

Maryland Historical Trust

Office of Research, Survey and Registration
100 Community Place
Crownsville, MD 21032



**FISCAL YEAR 2023 MARYLAND HISTORICAL TRUST GRANT
FUND HISTORIC PRESERVATION GRANT
APPLICATION AND INSTRUCTIONS**

INTENT TO APPLY DEADLINE: June 27, 2022
FULL APPLICATION DEADLINE: August 1, 2022

The Maryland Historical Trust is dedicated to preserving and interpreting the legacy of Maryland’s past. Through research, conservation, and education, the Maryland Historical Trust assists the people of Maryland in understanding their historical and cultural heritage.

The Maryland Historical Trust is an agency of the Maryland Department of Planning (MDP). The Maryland Department of Planning promotes growth that fosters vibrant, livable communities, preserves and protects the environment, and makes efficient use of State resources.

Table of Contents

| | |
|--|-----------|
| INTRODUCTION | 2 |
| ELIGIBLE APPLICANTS | 3 |
| ELIGIBLE PROJECTS AND ACTIVITIES | 3 |
| FY 2023 FUNDING PRIORITIES | 4 |
| PROGRAM REQUIREMENTS | 5 |
| ELIGIBLE COSTS | 5 |
| INELIGIBLE EXPENSES AND ACTIVITIES | 6 |
| PROJECT SELECTION CRITERIA | 6 |
| GRANT AMOUNTS AND MATCHING REQUIREMENTS | 6 |
| GRANT PROGRAM SCHEDULE | 7 |
| IMPORTANT APPLICATION INFORMATION | 8 |
| APPLICATION ASSISTANCE | 8 |
| GRANT TERMS AND CONDITIONS | 8 |
| POLICIES | 9 |
| AMENDMENTS AND EXTENSIONS | |
| FINANCIAL DOCUMENTATION | |
| APPENDIX A – PROJECT SELECTION CRITERIA | 11 |
| APPENDIX B – GRANT TERMS AND CONDITIONS, ADDITIONAL INFORMATION | 13 |
| APPENDIX C – PROJECT BUDGET | 15 |
| APPENDIX D – PROJECT FOCUS | 18 |
| APPENDIX E – PROOF OF NONPROFIT STATUS | 19 |

INTRODUCTION

The Maryland Historical Trust (MHT) Historic Preservation Grant Fund is a source of funding to assist and encourage efforts to study, acquire, and preserve historic properties and to support the upgrade, care, research, interpretation, documentation, and display of Maryland's historical and cultural museums and collections. For FY 2023, funding totaling \$300,000 has been distributed from the Maryland Heritage Areas Authority Financing Fund to the Maryland Historical Trust to be awarded as Historic Preservation Non-Capital Grants.

Non-Capital Grants are available to nonprofit organizations and local governments for research, survey, planning, and educational activities involving architectural, archaeological, or cultural resources. Eligible activities may include the development of preservation plans; architectural, archaeological, or cultural resource surveys; educational outreach programs; and National Register nominations. Eligible projects should seek to preserve the tangible remains of Maryland's past in a manner that is consistent with MHT's standards and guidelines. For architecture projects, please contact Heather Barrett at 410-697-9536 or heather.barrett@maryland.gov for more information. For archaeology projects, please contact Matt McKnight at 410-697-9572 or matthew.mcknight@maryland.gov.

The MHT Historic Preservation Capital Grant Program, for projects including acquisition, rehabilitation, or restoration of historic properties will award grants for its FY 2023 grant round in May 2023.

Application materials for MHT grants may be downloaded from the MHT website at: https://mht.maryland.gov/grants_noncap.shtml. The following is general information about the Historic Preservation Non-Capital Grant Program and instructions for completing the project grant application online.

ELIGIBLE APPLICANTS

Nonprofit organizations and local jurisdictions are eligible to apply for MHT Non-Capital Grant funding. Nonprofit organizations must be in good standing with the State of Maryland Department of Assessments and Taxation, be qualified to do business in Maryland, and have the legal capacity and authority to incur obligations under the grant program. Organization status information can be obtained by contacting the State Department of Assessments and Taxation (SDAT) at 301 W. Preston Street, Baltimore, MD 21201, 410-767-1184, or through its website at dat.state.md.us.

ELIGIBLE PROJECTS AND ACTIVITIES

Non-Capital Grants are available for research, survey, documentation, conservation, planning, and educational activities involving historic, architectural, archaeological, or cultural resources (i.e., the tangible remains of Maryland's past). ***It is strongly recommended that you contact MHT staff to discuss your project prior to submission of an application.*** Activities most commonly supported by Non-Capital Grant funds include:

- ◆ Identifying, documenting, and evaluating standing structures through broad-based comprehensive surveys completed by qualified professionals to MHT's *Standards and Guidelines for Architectural and Historical Investigations in Maryland (2019)*;
- ◆ Conducting broad-based, comprehensive archaeological investigations to identify, evaluate, and/or document the full range of prehistoric and/or historic archaeological resources in a defined region of the State;
- ◆ Researching, documenting, and evaluating individual historic and archaeological sites that are listed or eligible for listing on the National Register of Historic Places (e.g., historic structure reports and Historic American Buildings Survey (HABS) documentation);
- ◆ Documenting oral traditions and cultural heritage in historic communities and traditional occupations as they may relate to historic places, especially in underserved communities (the curation of objects or collections is not an eligible activity);
- ◆ Preparing nominations to the National Register of Historic Places for historic districts or thematic groups of historic and cultural resources, or for highly significant individual properties;
- ◆ Conducting thematic research that supports historic context development for more effective evaluation and protection of architectural, archaeological, or cultural resources;
- ◆ Enhancing existing, systematically assembled (through excavation or survey) archaeological collections from Maryland;
- ◆ Undertaking regional, thematic, or interdisciplinary projects to locate, identify, evaluate, and prioritize heritage resources to aid in planning for the protection of these resources during Federal or State emergency response actions;
- ◆ Developing preservation elements for local comprehensive growth management plans;
- ◆ Developing design guidelines for historic districts and preservation commissions in communities that have historic area zoning ordinances consistent with the Annotated Code of Maryland, Article 66B, Section 8;
- ◆ Producing heritage education materials directly related to architectural, archaeological, or cultural resources, ranging from publications to multimedia presentations;
- ◆ Conducting programs specifically designed to engage the public in Maryland archaeology, historic preservation, and cultural conservation;

- ◆ Preparing publications for a scholarly or general audience summarizing the current state of knowledge of Maryland’s architectural, archaeological, and cultural history at the statewide and regional level based on research and documentation developed in conjunction with MHT; and
- ◆ Conducting resource specific studies that determine the fiscal impact and potential of heritage preservation activities (i.e., preservation plans, feasibility studies and assessments) for properties that are listed in or eligible for listing on the National Register of Historic Places.

Archival projects that seek to conserve or catalog historic collections are not eligible for Non-Capital Grant funding. However, funds can be used for the conservation and enhancement of archaeological collections, both from field projects funded by the grant program and collections generated by prior research.

Publication of previously completed manuscripts is not an eligible activity, unless the research was conducted under the auspices of MHT.

FY 2023 FUNDING PRIORITIES

In FY 2023, special priority will be given to:

Broad-based and comprehensive archaeological or architectural surveys (as opposed to surveys of limited or “development-defined” areas):

- The overarching goal of such projects should be to identify and document previously unknown archaeological sites and architectural resources in a systematic manner.
- Projects in areas where less survey work has been carried out, or where surveys are significantly out-of-date, are particularly encouraged to apply, as well as projects that will lead to new or significantly updated historic districts in the National Register of Historic Places.

Projects designed to assess, document, or address the impacts of natural disasters, ongoing natural processes, and/or climate change on threatened resources:

- The overarching goal of such projects should be to assist State Agencies, local governments, nonprofits, and others in efforts to monitor the impacts of changing environmental conditions on known archaeological sites, architectural resources, or unsurveyed areas likely to be abundant in historical and cultural resources, to assess those threats, and respond appropriately.
- Priority will be given to work in areas that are poorly surveyed, that are known to have under-documented resource types, or that characterize underrepresented communities.

Projects that undertake in-depth architectural or archaeological study of a specific topic, site, time period, or theme:

- The overarching goal of such projects should be to develop a viable approach for focusing on a particular archaeological or architectural subject in-depth.
- Projects that explore topics that are poorly documented in MHT site files, or that develop historic contexts, will be strong contenders for grant funding.

Applications for projects that address these priorities will receive special consideration in the application ranking process. **Applicants are strongly encouraged to contact MHT staff prior to application submission to discuss project eligibility and the proposed scope of work.**

PROGRAM REQUIREMENTS

Non-Capital Grant projects must be consistent with preservation best practices and meet high preservation standards. All projects must be completed according to the following standards and guidelines:

- Architectural and archaeological research, survey, and documentation projects must be consistent with the *Standards and Guidelines for Architectural and Historical Investigations in Maryland (2019)* or the *Standards and Guidelines for Archeological Investigations in Maryland*. These documents are available on the MHT website at http://mht.maryland.gov/documents/PDF/research/Survey_standards_architecture_web.pdf and http://mht.maryland.gov/documents/PDF/ archeology/Archeology_standards_investigations.pdf. Reconnaissance (or “windshield”) level surveys will rarely be funded.
- For archaeological investigations that result in the recovery of artifacts, the application must state where and how the artifacts will be conserved and stored. Artifacts must be conserved in a qualified facility, such as the Maryland Archaeological Conservation Laboratory, according to the *Standards and Guidelines, Technical Update No. 1: Collections and Conservation Standards* (Revised, July 1, 2005). This document is available on the MHT website at http://mht.maryland.gov/documents/PDF/ archeology/Archeology_standards_curation.pdf.
- Personnel performing architectural and archaeological research, survey, and documentation projects must meet the minimum requirements of the *Secretary of the Interior’s Professional Qualification Standards* under 36 CFR 61 (available on the National Park Service website at <https://www.nps.gov/articles/sec-standards-prof-quals.htm>).
- For projects involving only one resource (i.e., historic structure reports, preservation/restoration plans, feasibility studies, etc.), that resource must be listed on the National Register of Historic Places or determined by the Director of MHT to be eligible for such listing. To find out if a property is listed on the National Register of Historic Places visit the MHT website at <http://mht.maryland.gov/nr/index.html> or contact Jessica French at 410-697-9623 or jessica.french@maryland.gov.
- For projects with GIS or spatial data development, the grantee must provide copies of all databases, image files, and GIS files developed under the grant. Format requirements are:
 1. Databases must be provided in Microsoft Access format, accompanied by a data dictionary.
 2. Image files must be in .tif or .geotiff format, accompanied by metadata.
 3. GIS files must be in Shapefile (.shp) or File Geodatabase (.gdb) format, preferably in Maryland State Plane NAD83 meters, accompanied by federally compliant metadata.

ELIGIBLE COSTS

MHT grant funds must be used for costs *directly* related to research, survey, planning, and educational activities involving architectural, archaeological, or cultural resources. Any costs included in the project budget must be justified in the project narrative. Eligible costs include:

- **Salary and Wages:** Salaries must be reasonable and customary for the work undertaken, but may include fringe benefits such as health insurance costs. The budget must show the total

salary/wage for each individual at an hourly or daily rate (e.g., \$50/hour for 100 hours for a total cost of \$5,000).

- **Consultant fees:** Consultant fees are eligible as lump sum contracts, however the application and budget must detail and justify all work items included under the contract.
- **Contractual Services:** Contractual services may include items such as photography, printing, and production costs. The budget and project narrative must detail and justify these costs.
- **Materials and Supplies:** The project narrative and budget must justify and detail these costs.
- **Travel:** Mileage costs must be billed at the State-approved rate (\$0.585/mile). Other travel costs must be reasonable and appropriate for the geographic region.
- **Purchase of Equipment:** Purchase of equipment necessary for the completion of the project is an eligible cost; however, equipment that has a useful life that will extend beyond the period of the grant (i.e., computers, printers, cameras, etc.) is strongly discouraged, and may be subject to recapture by MHT. The cost of equipment purchase is eligible as cash match.
- **10% Indirect Costs for Nonprofit Organizations:** Indirect costs are those operating costs that are not readily identifiable within the details of the grant project, but which will be incurred for the benefit of the grant project and other organizational activities. Indirect costs include overhead, operating, or administrative costs, and can include rent, utilities, personnel costs, and professional service fees.

INELIGIBLE EXPENSES AND ACTIVITIES

MHT grant funds may not be used to pay for the following items:

- Legal and appraisal fees;
- Insurance premiums;
- Food or beverage costs;
- State staff time or funds;
- Payment to any MHT staff and Board of Trustees members;
- *Costs incurred or work accomplished prior to the approval of the MHT grant. The expected approval date for FY 2023 Non-Capital Grants is November 1, 2022.*

PROJECT SELECTION CRITERIA

See Appendix A for the list of criteria that are considered when applications are reviewed.

GRANT AMOUNTS AND MATCHING REQUIREMENTS

Individual Non-Capital Grant awards generally range from \$5,000 to \$75,000. The maximum Non-Capital Grant award is **\$75,000**.

For grants to **local jurisdictions**, a one-to-one match is required of the grant recipient. This match may consist of cash, an equivalent dollar value of in-kind contributions, or a combination of both. In most cases, projects that provide an equivalent cash match will be given preference in selection funding. For Fiscal Year 2023, nonprofit organizations are exempt from matching requirements. However, a grantee contribution is strongly recommended, and the existence of contributing funds will enhance the competitiveness of the application. If awarded funding, applicants will be required to document all matching or contributing funds shown in the project budget. State of Maryland funds and State staff time are not eligible as match.

GRANT PROGRAM SCHEDULE

The application and selection process will follow this established schedule:

May 2022

Official Announcement of Grant Availability

MHT staff assistance is available for application consultation, project planning, and identifying sources of alternate and matching funding. It is strongly recommended that applicants contact MHT staff prior to submitting an application.

June 27, 2022

Intent to Apply Form Due

Intent to Apply forms must be **completed online on or before 11:59 PM on June 27, 2022**. It is understood that data included on the June Intent to Apply submittal may change by the time that a full application is submitted.

August 1, 2022

Full Application Due

Fully completed applications must be **completed online on or before 11:59 PM on August 1, 2022**. The Application must include the application form and all required attachments, including submission of all support letters. The full application will be released to the online account used to submit the Intent to Apply form.

October 2022

Evaluation of Applications Completed

MHT staff reviews and ranks the applications and then presents the results of their evaluation to the MHT Board of Trustees. The Board reviews the proposed awards and makes recommendations to the Secretary of Planning for final approval of each grant.

November 2022

Award Announcements/Earliest Project Start

IMPORTANT APPLICATION INFORMATION

All applications must be submitted online. All online grant materials are available here: http://mht.maryland.gov/grants_noncap.shtml. See the **Quick Start Guide on the MHT's grants page for full details on the online submission process.**

Please note that the applicant must provide the organization's Articles of Incorporation and Bylaws to MHT prior to drafting of the Grant Agreement, unless these documents have previously been submitted online to MHT. This information can be uploaded as part of the online application process.

Applicants will be required to submit the following supporting documents with their applications:

- A detailed budget (see Appendix C for sample budget)
- Resumes of key project personnel (staff and consultants, if known)
- Proof of matching or contributing funds (if not available, must be provided no later than October 1, 2022)
- Proof of Nonprofit Status (if applicable) (see Appendix E)
- Organizational Documents (if applicable) – Bylaws, Articles of Incorporation, Constitution, Charter (if not previously submitted)
- Letters of Support – Letters of support for the grant application are strongly encouraged, but are not a required submission. Letters from elected officials, partner organizations, and community members help to demonstrate the importance of, need for, and urgency of your project.

Please closely read the application instructions included as help boxes in the online application, particularly the sections regarding the project budget and methodology. Failure to correctly complete the application form could jeopardize your competitiveness for funding.

APPLICATION ASSISTANCE

These Guidelines, the Intent to Apply form, and the Non-Capital Grant Application form are available **ONLINE** at mht.maryland.gov/grants_noncap.shtml. Instructions for completing the form are included within help boxes throughout the application.

It is highly beneficial for applicants to contact MHT staff to discuss project proposals prior to submission of an application. For assistance in developing a scope of work, budget, and application for your proposal, please contact the MHT staff member responsible for your project discipline:

Archaeology—Matt McKnight, 410-697-9572 or matthew.mcknight@maryland.gov

Architecture—Heather Barrett, 410-697-9536 or heather.barrett@maryland.gov

GRANT TERMS AND CONDITIONS

All applicants awarded grants through the program will be required to enter into a grant agreement with the Department of Planning (MDP or Department) and agree to standard terms and conditions. See **Appendix B** for full terms and conditions.

POLICIES

AMENDMENTS AND EXTENSIONS

You may find that your project does not evolve in the way you had planned when you originally submitted your grant application. This is not uncommon. If you find that you are getting off track with your timeline, budget, or deliverables, reach out to your Project Monitor as soon as possible to discuss your options. If your Project Monitor determines that an amendment or extension is warranted, they will work with you to finalize the details of the changes that are needed and will work with you on an extension or an amendment to your grant.

If you simply need more time to complete your project, you can email your project monitor explaining the reasons for the need. Once approved, your Project Monitor will send you a letter granting your extension. Note that if your Project Monitor has not heard from you and your Project Completion date is approaching, they may proactively implement an extension.

FINANCIAL DOCUMENTATION

The following guidelines will help you understand the types of records MHT expects you to retain and provide upon request to document your grant expenses, as well as some suggestions to help make the documentation process easier as the project progresses.

Documentation of Expenses

You must retain the following records, and provide them upon request:

Proof of all project expenses, both grant-funded and grantee contributed.

For cash expenses, retain copies of your invoices, receipts, timesheets (if your grant allows staff time as cash match), and/or contracts supporting the cost breakdown in your approved grant budget.

Documentation should show what was purchased or funded, when it was purchased, or when the work was completed, and how much it cost. Quickbooks and other accounting system printouts are not sufficient documentation, unless your organization is a government agency using a government agency system printout.

For donated services or materials (such as photography, architectural fees, etc.), vouchers or other official documentation, signed by the appropriate person must be retained to verify what the goods or services being claimed were and what they were valued at according to reasonable market rate costs. If included in your approved project budget, staff and/or volunteer time contributions must also be documented by a timesheet or spreadsheet that includes the rate used to calculate the value. The value of unpaid volunteer time can be valued at the current rate of volunteer time for Maryland set by the organization Independent Sector (<https://independentsector.org/value-of-volunteer-time-2022/>). You should always check Independent Sector's website for the most up-to-date hourly rate before submitting a request for disbursement. (Note, in order to see the Maryland rate, you must provide your name, email address, and organization. If you are not comfortable doing that, email your Project Monitor and they can provide you with the current information).

Submitting Proof of Project Expenses

A percentage of grantees each fiscal year will be randomly selected and required to provide financial documentation of their expenses. If selected, you will need to submit those materials as part of your final report. If your project is selected, you will be notified prior to submission of your final report that you must include, in addition to a Certification of Expenses form, all proof of project expenses, both grant-funded and grantee contributed. The Certification of Expenses form may be found on the MHT website.

Regardless of whether or not you are required to submit proof of grant expenses, you still must retain these records, as your files are subject to state audit and must be retained for three years from the project completion date. Failure to submit documentation upon request could result in recapture of your grant funds and cancellation of your grant.

APPENDIX A – PROJECT SELECTION CRITERIA

In accordance with the Open Project Selection Process Evaluation Criteria, as provided for in COMAR 34.04.01, Non-Capital Grant proposals will be reviewed using the thirteen criteria outlined below. MHT may assign differing weights to the criteria. A multidisciplinary committee of MHT staff evaluates each proposal on the merits of its method, goals, and products, with careful attention to the budget and demonstrated experience of the applicant in managing grant funds. Typically, a successful application clearly demonstrates that the project will make a significant contribution to meeting the stated goals of both MHT and the local preservation community, and that the grant will be managed carefully in a professional manner. The application should address how the project meets each of the following criteria:

- **SIGNIFICANCE:** What architectural, archaeological, or cultural significance to the nation, State, or local community does the affected resource possess? Explain how the project will provide new information and lead to a better understanding of the State's architectural, archaeological, or cultural heritage.
- **URGENCY:** Explain how the architectural, archaeological, or cultural resource is imminently endangered (i.e., by development pressures, erosion, neglect, age, illness) or if there is a unique window of opportunity for the completion of the project.
- **PROJECT DESIGN:** Are project goals realistic within the proposed time frame and budget? Will the project provide a complete product (if one phase of a multi-year project, this refers to the completeness of this year's phase alone)? How does the project address the most pressing needs and assure continued viability of the architectural, archaeological, or cultural resource(s)? Does the proposal articulate a cohesive, stand-alone project, which addresses specific goals or research questions? Can the results of this project be built upon in successive phases? Is the project consistent with the mission and goals of the Maryland Historical Trust? Is the budget realistic for the proposed project? Do all itemized budget items directly relate to needs described in the proposed scope of work? Are the costs reasonable and customary? Are the costs eligible?
- **PROTECTIVE VALUE:** Explain how the proposed project contributes to the long-term preservation, conservation, or documentation of the architectural, archaeological, or cultural resource(s) or Maryland's heritage overall. How does the project provide concrete action to protect, conserve, or document the resource(s)? How can the results of the project be used as part of local, State, or federal planning efforts?
- **EDUCATIONAL OUTREACH VALUE:** How permanent and far reaching is the educational component of the project? Will the project raise awareness of historical, architectural, archaeological, or cultural resources and promote the preservation of such resources?
- **INNOVATION VALUE:** Does the project utilize methods or techniques that are transferable for statewide, regional, or local application? Does the project have potential to be a "model"? Can the methodology or products be used to help others? Will it produce a product unique for quality and innovation?
- **PROJECT IMPACT:** Is the project intended to stimulate or prompt other architectural, archaeological, or cultural resource preservation, conservation, documentation, or educational projects or programs throughout the community and/or professional preservation support? Is there local government support for the project?

- **PROFESSIONAL CAPABILITY:** Does the personnel for the project have the necessary training, education, and experience to carry out specific project goals? (i.e., recognized in field, does high quality work, accomplishes work on time, experience applicable to the subject.)
- **ADMINISTRATIVE CAPABILITY:** Do the project sponsor and administrative personnel have a record of successfully administering grant monies, meeting project deadlines, and following established procedures?
- **PROJECT READINESS:** Can the project begin on schedule and will your grantee contribution or match be in hand when needed?
- **MATCHING/CONTRIBUTING FUNDS:** Does the sponsoring organization provide any contributing funds for the project? How much cash and/or in-kind support is being offered by the sponsor?
- **EQUITABLE GEOGRAPHIC DISTRIBUTION:** (determined by MHT staff) Will the project contribute an equitable geographic distribution of funds based upon the distribution of previous awards, U.S. Census data, and National Register listings?
- **FY 2023 SPECIAL PRIORITIES:** Will the project focus on poorly documented regions of the state, or under-documented themes, communities, or resource types? Does the project address the study and documentation of resources that are especially susceptible to increased flooding and coastal erosion?

APPENDIX B – GRANT TERMS AND CONDITIONS

- **Grant Term:** The period of the grant should not exceed the end date shown in the timetable of the grant agreement unless MHT staff agrees in writing to an extension of the grant period. Projects generally should be completed within twenty-four (24) months of the execution date of the grant agreement.
- **Grant Disbursement:** Grant disbursement will be made as the project progresses, according to a disbursement schedule established in a grant agreement between MDP and the grantee. Disbursement will occur based upon requests for payment submitted by the grant recipient in a form satisfactory to the Department and upon fulfillment of the other requirements of the grant agreement.
- **Quarterly Reports for Archaeological Projects:** Most grant agreements for archaeological projects will require quarterly submission of progress reports to ensure that fieldwork, labwork, and other project tasks are proceeding on schedule to meet deliverable deadlines. Grant disbursement requests can be submitted along with these quarterly reports.
- **Compliance:** All grant recipients are required to comply with the Maryland Historical Trust Historic Preservation Grant Program regulations (COMAR 34.04.01). These regulations require the applicant to comply with all applicable statutes, ordinances, executive orders, regulations, and other laws regarding drug, alcohol, and smoke-free workplaces, disabled access, equal opportunity in employment, housing, and credit practices, and prohibiting discrimination on the basis of race, color, creed, religion, national origin, gender, marital status, familial status, sexual orientation, or physical and/or mental disabilities in any aspect of the grant. These may include: (1) Titles VI and VII of the Civil Rights Act of 1964, as amended; (2) Title VIII of the Civil Rights Act of 1968, as amended; (3) The Governor’s Code of Fair Practices, as amended; and (4) The Department’s Minority Business Enterprise Program, as amended. Those applicants who wish to secure additional information about these compliance requirements may contact Non-Capital Grant program staff.
- **Program Administration:** If it is determined by the Department that the grantee is not complying with any of the requirements of the program or the grant agreement, the Secretary of the Department may terminate the grant, refuse to make additional grant disbursements, or suspend or debar a grantee from further program participation. Each grantee shall agree to abide by the project scope of services, timetable, and budget approved by the program. A grantee shall request in writing permission from Non-Capital Grant program staff for any deviation from the approved project scope of services, timetable, and/or budget.
- **Acknowledgement of Support:** The grantee agrees to include in any material based on or developed under the grant the following credit line: “This publication has been financed in part with State Funds from the Maryland Historical Trust, an agency of the Maryland Department of Planning. However, the contents and opinions do not necessarily reflect the views or policies of the Maryland Historical Trust or the Maryland Department of Planning.”
- **Grantee Administration:** Grantees, contractors, and subcontractors must maintain their books, accounts, and records, using normally accepted accounting procedures, and must file with the Department those financial and other reports, as the Department may require from time to time. All of these books, accounts, and records must be open to inspection by representatives of the Department or other agencies of the State during reasonable working hours before, during, or after the period of time during which grant proceeds are expended. Grantees must make their administrative offices and personnel – whether full-time, part-time, consultants, or volunteers – available to the Department upon request. Books, accounts, and records of contractors and subcontractors must be maintained and made available for

inspection for **up to three (3) years** after either the date of grantee's final expenditure of grant proceeds or the termination of the contractual relationship between the Department and the grantee, whichever is later.

- **Final Report:** Grantees must submit a final report, as well as any interim reports required by the Department, documenting project progress and evaluating project effectiveness. Grantees will be expected to include as part of the final report documentation to the satisfaction of the Department of all expenses related to the Grant – both MHT grant funds and grantee match or contribution.

Non-Capital Grant program staff is available to assist applicants with any questions they may have about the above terms and conditions.

APPENDIX C - PROJECT BUDGET

The project budget is the most critical part of your application. Prepare a realistic budget for the proposed project. The budget should specify such expense categories as personnel, travel, equipment, supplies, rental costs, etc. Only costs *directly* related to the project should be included in the project. A justification for all costs should be included in the project methodology. Typical budget items include:

- **Project Personnel:** Salaries for project personnel must be reasonable and customary for the work undertaken, but may include fringe benefits such as health insurance costs. The budget must list the names and titles of project workers in the “Work Item” column. If no personnel have been selected for the project, put “to be hired” in the “Work Item” column. The budget must show the total salary/wage for each individual working on the project broken down into the number of hours times their hourly rate (i.e., \$50/hour for 100 hours for a total cost of \$5,000). If one person will be performing multiple tasks on the project, break down the hours spent on each task (e.g., researching, reporting writing, etc.). It is acceptable to provide a daily rate, however, the rate for all staff shown in the budget must be presented in a consistent manner (i.e., all staff at their hourly rate, or all staff at their daily rate). This figure should be placed on a separate line in the “Work Item” column. The salaries of person(s) currently on staff and identified as project personnel will be considered as cash contribution only if their involvement with the project is outside of the scope of their normally assigned duties. Otherwise, that salary cost should be considered as in-kind contribution. In-kind volunteer and intern labor must also be quantified in the budget. The budget should show the number of volunteers, with names if available, times hours contributed. Volunteer time can be valued at the rate determined by Independent Sector (<https://independentsector.org/value-of-volunteer-time-2022/>). You should always check Independent Sector’s website for the most up-to-date hourly rate before submitting a request for disbursement. (Note, in order to see the Maryland rate, you must provide your name, email address, and organization. If you are not comfortable doing that, email the administrators of this program, and they can provide you with the current information).
- **Consultant fees:** Lump sum consultant contracts are permissible; however, the application and budget must detail all work items included under the contract. Use the “Work Item” column to provide information regarding the contract. Generally, consultant contracts can be sourced in three ways. 1) Contracts can be sole source when an existing team is outlined in the grant application. 2) Contract sourcing criteria can follow the procurement policies of the nonprofit or grant recipient organization when those policies have been provided to the grant monitor for prior approval. 3) Otherwise, consultant contract should generally be awarded through an RFP or other competitive selection process.
- **Contractual Services:** Contractual services may include items such as photography, printing, production costs, and equipment rental. When possible, those costs should be broken down into per unit costs (i.e., rental cost/day, cost/print, etc.). Contractual services should be chosen through a competitive selection process. Put this information in the “Work Item” column.
- **Indirect Costs:** Indirect costs are those operating costs that are for the joint benefit of both the grant project and your other organizational activities. Indirect costs are frequently referred to as overhead, operating, or administrative costs, and can include rent, utilities, salaries, personnel costs, and professional service fees. Maryland law and the Historic Preservation Non-Capital Grant Program’s new policy allow nonprofit organizations, which are completing non-capital projects, to include indirect costs in their grant budgets. Indirect costs are limited to 10% or less of the total grant award amount, and the grantee must still be able to complete the entire project using the remaining funds. If you choose to include indirect costs in your budget, your grant

amount will not change. Note that you are not required to provide documentation of the specific indirect costs when providing financial documentation – you only need to certify that you have indirect expenses equal to 10% of your grant.

- **Materials and Supplies:** The project narrative and budget must justify these costs. Provide as much information as possible in the “Work Item” column.
- **Travel:** Mileage must be billed at the State-approved rate (\$0.585/mile). Daily meal reimbursement must be billed at no more than the State-approved rate of \$13/breakfast; \$15/lunch; and \$28/dinner. Lodging and other travel costs must be reasonable for the location.
- **Purchase of Equipment:** Purchase of equipment necessary for the completion of the project is an eligible cost; however, equipment that has a useful life that will extend beyond the period of the grant (i.e., computers, printers, cameras, etc.) is strongly discouraged, and may be subject to recapture by MHT. The cost of equipment purchase is eligible as cash match.

MHT grant funds may not be used to pay for the following items: legal fees; insurance premiums; appraisal fees; operating costs and expenses not covered under the 10% reserve of ‘indirect costs’ as outlined above; and food or beverage costs (with the exception of travel meals). These items may, however, be considered toward an applicant’s contribution. State of Maryland funds and State staff time are not eligible as cash or in-kind match. Payment to MHT staff and Board of Trustees members is not eligible. Under no circumstances should the budget include any costs incurred prior to the approval of the MHT grant. The expected approval date for FY 2023 Non- Capital Grants is November 1, 2022. MHT grant funds will not be available to grantees until a grant agreement has been fully executed between both parties. This can be a protracted process and may not be completed until spring of 2023.

Details of how you arrived at budget figures, e.g., 50 hours of staff time at \$50/hour, 200 miles traveled at \$0.50/mile, lump sum consultant contract, etc. should be included under each category within the “Work Item” column.

If your application involves multiple, unrelated projects, the budget must include a separate breakdown for each project.

The following sample budget is provided to illustrate the format MHT grant project budgets **MUST** follow. Typically, proposed budgets include more line items and fewer round numbers, but the format remains essentially the same. Keep the budget to one page. ***See the sample budget below for additional information.*** If you have any questions regarding your project budget, please contact MHT staff.

Identify each source(s) of non-State funding for the project, both cash and in-kind. If more than one organization is providing support, identify each organization and the kind and amount of match or contribution. Should an application prove successful, grantees will be required to provide documentation of all costs shown in the project budget, both MHT grant funds and grantee matching funds. ***See the sample budget for more details.***

PROJECT BUDGET

| Line Item No. | Work Item (Description) | Grant Funds | Grantee Contribution | Other Project Funding | Total Project Cost | Source of Funds |
|---------------------|--|--------------------|-------------------------|-----------------------------|-----------------------|--------------------|
| | CONSULTING FEES: | | | | | |
| 1 | Consultant 1, Approx. 8 structures @ \$3,000 /building | \$24,000.00 | | | \$24,000.00 | NCG |
| 2 | Consultant 2, 64 hrs @ 75.00/hr | \$4,800.00 | | | \$4,800.00 | NCG |
| 3 | Consultant 3, 50 hours @ 50.00/hr | \$2,500.00 | | | \$2,500.00 | NCG |
| 4 | Project Manager 50 hours @ 50.00/hr | \$2,500.00 | | | \$2,500.00 | NCG |
| | REPORT PRODUCTION: | | | | | |
| 6 | Copying, Binding 40 hard copies @ 15.00/copy | \$600.00 | | | \$600.00 | NCG |
| | TOTALS | \$34,400.00 | \$0.00 | \$0.00 | \$34,400.00 | |

NOTE: The Grantee Contribution column is where the combined match from local jurisdictions or any contributing funds from non-profits should be inserted.

APPENDIX D – PROJECT FOCUS

Project Focus

All applicants must select ONE primary focus for their project, choosing among *Research and Documentation*, *Education*, or *Preservation Planning*. The three categories are as follows:

A. Research and Documentation Projects: Research and Documentation Projects are those projects that seek to research and document Maryland’s historic architectural, archaeological, or cultural resources in a manner that is generally consistent with MHT-approved standards and guidelines (e.g., *Standards and Guidelines for Archeological Investigations in Maryland* and *Standards and Guidelines for Architectural and Historical Investigations in Maryland*). Typical research and documentation projects include, but are not limited to: identifying, documenting, and evaluating standing structures through broad-based comprehensive surveys; conducting broad-based, comprehensive archaeological investigations to identify, evaluate, and document the full range of prehistoric and/or historic archaeological resources in a defined region of the State; research, documentation, and evaluation of individual historic and archaeological sites (e.g., historic structure reports and HABS documentation); documenting oral traditions and cultural heritage in historic communities and traditional occupations as they may relate to standing structures and historic communities; the preparation of nominations to the National Register of Historic Places; and thematic research supporting historic context development.

B. Educational Projects: Education Projects are those projects that seek to raise public understanding of Maryland’s architectural, archaeological, or cultural resources. Projects should result in products that are publicly accessible and target as broad an audience as possible. Typical education projects include, but are not limited to: producing heritage education materials that highlight Maryland’s architectural, archaeological, and cultural history; conducting programs specifically designed to engage the public in Maryland archaeology and historic preservation; and preparing publications for a scholarly or general audience summarizing the current state of knowledge of Maryland’s architectural, archaeological, and cultural history at the statewide and regional level.

C. Preservation Planning Projects: Preservation Planning Projects are those projects undertaken by local governments and nonprofit organizations to assist local preservation planning efforts or to provide preservation planning-related products of benefit to the local government or community. Project products should be utilized by local governments and/or nonprofit organizations to more effectively preserve historic and cultural resources according to preservation best practices. Typical preservation planning projects include, but are not limited to: development of preservation plans, or preservation components of local comprehensive plans; creation of design guidelines for a local historic preservation commission; development or expansion of local historic preservation programs; and completion of studies determining the fiscal impact and potential of heritage preservation activities and resources.

APPENDIX E – PROOF OF NONPROFIT STATUS

Proof of nonprofit status (if applicable):

If the Applicant is a nonprofit organization, proof of nonprofit status must be submitted. This should include:

- Articles of Incorporation*
- By-laws*
- Internal Revenue Service 501(c)3 approval letter (if applicable)

*Some organizations may have a constitution or charter instead.

Note: If the applicant has previously uploaded these documents using the online grant system, unless there are changes, the documents do not need to be uploaded again.

If a grant is awarded, nonprofit organizations will be required to submit a Corporate Resolution form that includes the signatures of all authorized signatories for the organization. This form must be completed before the grant funds can be disbursed.



HISTORIC PROPERTIES INCENTIVE ORDINANCE

Adopted XX,XX,XXXX

AN ORDINANCE TO REPEAL AN ORDINANCE ENTITLED "AN ORDINANCE TO PROVIDE PROPERTY TAX CREDITS FOR IMPROVEMENTS TO SPECIFIED HISTORIC STRUCTURES IN WASHINGTON COUNTY, MARYLAND" AND TO REENACT, WITH AMENDMENTS, THE WASHINGTON COUNTY HISTORIC PROPERTIES INCENTIVES ORDINANCE.

RECITALS

In recognition that historic preservation is an effective tool for managing growth and sustainable development, revitalizing neighborhoods, fostering local pride and maintaining community character while enhancing livability, the County has an obligation to create incentives to benefit owners of such properties and thus encourage them to enter that land into historic preservation programs.

Historic landscapes and individual properties designated through this ordinance or through other Federal and State programs and inventories, have a level of integrity which convey historic associations or attributes that owners, residents, neighbors, and users of the designated properties should be prepared to maintain.

The Board of County Commissioners of Washington County, Maryland ("the County") adopted an ordinance entitled "An Ordinance to Provide Property Tax Credits for Improvements to Specified Historic Structures in Washington County, Maryland" on May 5, 1990 (the "1990 Ordinance").

The purpose of the 1990 Ordinance was to encourage preservation and protection of historic structures by granting a County Property Tax Credit on the improvements made to structures in the "HP" Historic Preservation zones and the "AO" Antietam Overlay Zones as defined in the Washington County Zoning Ordinance pursuant to Section 9-204, Tax-Property Article, Annotated Code of Maryland.

A public hearing was held on XXXX,XX,XXXX following due notice and advertisement of a fair summary of the amendments proposed to the 1990 Ordinance.

Public comment concerning the amendments proposed was received, reviewed and considered.

NOW, THEREFORE, BE IT ORDAINED AND ENACTED that the Ordinance entitled "An Ordinance to Provide Property Tax Credits for Improvements to Specified Historic Structures in Washington County, Maryland", adopted May 5, 1990, is hereby repealed; and the following Historic Properties Incentive Ordinance is hereby adopted.

Table of Contents

| | |
|---|----|
| 1. Purpose of the Ordinance | 4 |
| 1.01 The purpose of this Ordinance is to provide for the establishment of Historic Preservation Areas and associated property Tax Credits for Residential Historic Structures, Property Tax Credits for Improvements to Specified Historic Structures and the Historic Property Grant Program in Washington County, Maryland and to provide for the standards and guidelines under which real property in Washington County is eligible for inclusion or participation in these programs..... | 4 |
| 2. Definitions of the Ordinance | 4 |
| 2.01 For the purpose of this Ordinance, the following words shall have the following meanings: | 4 |
| 3. HISTORIC PRESERVATION AREAS | 5 |
| 3.01 Establishment of a Historic Preservation Area..... | 5 |
| 3.02 Procedures for Historic Preservation Areas | 5 |
| 3.03 Qualifying Criteria for Historic Preservation Areas..... | 7 |
| 3.04 Project Review for Historic Preservation Areas..... | 8 |
| 3.05 Ordinary Maintenance Inspections in a Historic Preservation Area..... | 10 |
| 3.06 Addition to an Existing Historic Preservation Area | 10 |
| 3.07 Continuation of a Historic Preservation Area..... | 10 |
| 3.08 Termination and Alteration of a Historic Preservation Area..... | 11 |
| 3.09 Real Property Tax Credit - Historic Preservation Areas | 12 |
| 3.10 Amount of Tax Credit - Historic Preservation Areas | 12 |
| 3.11 Severability - Historic Preservation Areas | 13 |
| 4. PROPERTY TAX CREDITS FOR IMPROVEMENTS TO SPECIFIED HISTORIC STRUCTURES | 14 |
| 4.01 Establishment of Real Property Tax Credits for Improvements on Historic Properties | 14 |
| 4.02 Duration of Real Property Tax Credits for Improvements on Historic Properties..... | 14 |
| 4.03 Eligibility for Real Property Tax Credits for Improvements on Historic Properties..... | 14 |
| 4.04 Qualified municipalities for Real Property Tax Credits for Improvements on Historic Properties | 15 |
| 4.05 Time for filing of application for Real Property Tax Credits for Improvements on Historic Properties | 15 |
| 4.06 Calculation for Real Property Tax Credits for Improvements on Historic Properties..... | 16 |
| 4.07 Qualifying Expenses for Real Property Tax Credits for Improvements on Historic Properties..... | 16 |
| 4.08 Application Review for Real Property Tax Credits for Improvements on Historic Properties | 17 |
| 4.09 Termination of Real Property Tax Credits for Improvements on Historic Properties..... | 17 |
| 5. HISTORIC PROPERTY GRANT PROGRAM..... | 18 |

5.01 Establishment of the Historic Property Grant Program 18

5.02 Grant Funding Source for the Historic Property Grant Program 18

5.03 Grant Amounts for a Historic Property Grant..... 18

5.04 Eligibility for a Historic Property Grant 18

5.05 Procedures for Historic Property Grant 19

5.06 Historic Property Grant Subcommittee 20

5.07 Eligible Activities and Expenses for Historic Property Grants..... 20

5.08 Competitive Selection Criteria for Historic Property Grants 21

5.09 Inspections of a Historic Property Grant Program..... 23

5.10 Grant Agreement for a Historic Property Grant..... 23

5.11 Disbursement of the Historic Property Grant Funds..... 23

DRAFT

1. Purpose of the Ordinance

1.01 The purpose of this Ordinance is to provide for the establishment of Historic Preservation Areas and associated property Tax Credits for Residential Historic Structures, Property Tax Credits for Improvements to Specified Historic Structures and the Historic Property Grant Program in Washington County, Maryland and to provide for the standards and guidelines under which real property in Washington County is eligible for inclusion or participation in these programs.

2. Definitions of the Ordinance

2.01 For the purpose of this Ordinance, the following words shall have the following meanings:

2.01a "County" shall mean the Board of County Commissioners of Washington County, Maryland, its departments, divisions and assigns.

2.01b "Historic District Commission" shall mean the Washington County Historic District Commission.

2.01c "Planning Commission" shall mean the Washington County Planning Commission.

2.01d "Planning Department" shall mean the Washington County Department of Planning and Zoning.

2.01e "Ordinary Maintenance" shall mean work for which a building permit may not be required by ordinance, where the purpose and effect of such work is to correct any deterioration or decay of, or damage to, a structure or any part thereof to restore the same, as nearly as practical, to its condition before the occurrence of such deterioration, decay or damage and does not involve change of design, materials, or appearance.

3. HISTORIC PRESERVATION AREAS

3.01 Establishment of a Historic Preservation Area.

3.01a There is a historic preservation area established that qualifies property owners for County Real Property Tax Credits on historically valuable structures, as authorized by § 9-204 and §9-301 of the Tax-Property Article of State Code.

3.01b One or more owners of real property in Washington County that is listed on the Maryland Inventory of Historic Properties, individually or as a contributing structure to a district, may voluntarily file a petition with the Historic District Commission, in the form prescribed by the Commission, requesting the establishment of a Historic Preservation Area composed of the real property owned by the petitioners. All real property to be located within a Historic Preservation Area shall be titled the same.

3.01c If the petition is approved, the petitioners shall execute a Historic Preservation Area Agreement in the form prescribed by the Commission, agreeing, among other things, that the following covenants, conditions and restrictions shall run with the real property for so long as the Agreement remains in effect:

- i) The landowner agrees to the review, approval, or disapproval of any exterior changes proposed for the property as defined in Section 3.04.
- ii) The landowner agrees to the regular inspection and documentation of the property, including photography.
- iii) The landowner agrees to the Ordinary Maintenance and retention of the structures and landscape.

3.01d The landowner may apply for permanent easement programs for the land or structures within the Area.

3.02 Procedures for Historic Preservation Areas

3.02a After receipt of a petition to establish a Historic Preservation Area:

- i) The Historic District Commission shall inform the County Commissioners whether the proposed area meets the qualifications established in this Ordinance and associated regulations and whether the Historic District Commission recommends establishment of the area.

3.02b If the Historic District Commission recommends approval, the County shall hold a public hearing on the petition. Adequate notice of hearing shall be provided to landowners in the proposed area and to landowners adjacent to the proposed area.

3.02c If the Historic District Commission does not recommend approval, the petition may be taken to the Planning Commission for them to inform the County whether establishment of the area is compatible with existing and approved State and County plans, programs, and overall County policy, and whether the planning and zoning body recommends establishment of the area. If the Planning Commission recommends approval, the County shall hold a public hearing on the petition.

3.02d If neither the Historic District Commission nor the Planning Commission recommends approval, the petition shall be deemed denied and the County shall notify the landowner or landowners stating the reasons for denial.

3.02e The County may approve a petition for the establishment of a Historic Preservation Area only if:

- i) The area meets the qualifying criteria established under this Ordinance and any Regulations associated herewith;
- ii) Approval of the petition has been recommended by either the Historic District Commission or the Planning Commission; and
- iii) The County has held a public hearing.

3.02f Establishment of an area shall not occur until:

- i) The County approves the petition;
- ii) All parties have executed a Historic Preservation Area Agreement; and
- iii) The Historic Preservation Area Agreement is recorded, by the County, in the Land Records for Washington County.

3.03 Qualifying Criteria for Historic Preservation Areas

3.03a The criteria for qualification for Historic Preservation Areas are as follows:

- i) The property is listed in either the Maryland Historical Trust's Inventory of Historic Properties or the National Register of Historic Places individually or as a contributing structure; or
- ii) The property possesses any or all of the historical or cultural significance defined below; or
 - (1) *The historic resource should have significant character, interest, or value as part of the development, heritage, or cultural characteristics of the county, state, or nation;*
 - (2) *The historic resource could be the site of a significant historic event*
 - (3) *The historic resource should be identified with a person or a group of persons who influenced society;*
 - (4) *The historic resource exemplifies the cultural, economic, social, political, or historic heritage of the County and its communities.*
- iii) The property possesses any or all of the architectural or design significance defined below:
 - (1) *The historic resource embodies the distinctive characteristics of a type, period, or method of construction or architecture;*
 - (2) *The historic resource represents the work of a master artisan, architect or builder;*
 - (3) *The historic resource possesses high artistic value;*
 - (4) *The historic resource represents a significant and distinguishable entity whose components may lack individual distinction;*
 - (5) *The historic resource represents an established and familiar visual feature of the neighborhood, community, or County, due to its singular physical characteristics, landscape or historical event.*
 - (6) *The historic resource is the only example ever existing or remaining of a particular period, style, and material or construction technique.*

3.03b Amendments to qualifying criteria occurring after establishment of an area shall not cause the disqualification of the area so long as the Historic Preservation Area remains in effect.

3.04 Project Review for Historic Preservation Areas

3.04a The Historic District Commission shall have review, approval or disapproval of projects that affect the exterior of qualified structures or the site within Historic Preservation Areas.

3.04b Exterior changes to the property shall include, but not be limited to, any activity that requires the issuance of a building permit according to the currently adopted Washington County Building Code and subsequent amendments as adopted for use in Washington County and the procedures of the Division of Permits and Inspections.

- i) Exterior changes requiring a building permit shall provide for the review of appropriateness of the proposed activity, not to change the building permit application procedure.
- ii) Nothing in this Section shall be construed to exempt any activity from the requirement of a building permit.
- iii) All permits as required above shall be transmitted to the Commission by the Division of Permits and Inspections.
- iv) Activities requiring a permit can include but are not limited to construction, reconstruction, relocation, restoration, rehabilitation, modification, enlargement, conversion or demolition of all or any portion of the exterior features of the subject site or structure.

3.04c Any proposed exterior changes to the property shall be reviewed by the Historic District Commission before the start of work to ensure that the criteria under which the property qualified for the incentive are not compromised.

3.04d Exterior changes requiring issuance of a building permit shall be submitted to the Division of Permits and Inspections through the Divisions application procedures. Additional information may be requested from the applicant to obtain sufficient review materials for the Historic District Commission's review of the permit.

3.04e Applications for Certificate of Appropriateness for exterior changes that do not require a building permit shall be submitted to the Department of Planning and Zoning in the form prescribed by the Historic District Commission.

3.04f The Historic District Commission shall render a decision on a completed application within forty-five (45) days of receipt of the completed application. Failure to act within the specified time period shall be considered an approval of the application by the Historic District Commission. The forty-five (45) day review period may be extended upon agreement by the Historic District Commission and the applicant.

3.04g A Certificate of Appropriateness application shall be approved by the Historic District Commission if it is consistent with the following criteria:

- i) The proposal does not substantially alter the exterior features of the structure including but not limited to:
 - (1) *Exterior Design Features or Finishes*
 - (2) *Scale*
 - (3) *Proportion*
 - (4) *Texture*
 - (5) *Distinctive Materials*
- ii) The proposal is compatible in character and nature with the historical, cultural, architectural, or archeological features of the site, structure, or district and would not compromise the integrity or qualifying criteria for the site.
- iii) The proposal would enhance or aid in the protection, preservation and public or private utilization of the site or structure, in a manner compatible with its historical, archeological, architectural, or cultural value.
- iv) The proposal is necessary so that unsafe conditions or health hazards are remedied.
- v) The proposal is consistent with the Secretary of Interior Standards for Rehabilitation and Guidelines for Rehabilitating Historic Buildings and subsequent revisions and; the Washington County Design Guidelines for Historic Structures and subsequent revisions.

3.04h In reviewing the plans for any such construction or change, the Commission shall give consideration to and not disapprove an application except with respect to the factors specified below.

- i) The historic or architectural value and significance of the site or structure and its relationship to the historic or architectural value and significance of the surrounding area.
- ii) The relationship of the exterior architectural features of the structure to the remainder of the structure and to the surrounding area.
- iii) The general compatibility of exterior design, scale, proportion, arrangement, texture, and materials proposed to be used.
- iv) Any other factors including aesthetic factors, that the Commission deems to be pertinent.

3.04i The Commission shall be strict in its judgment of plans affecting contributing structures to the Historic Preservation Area. The Commission shall be lenient in its judgment of plans involving new construction unless such plans would seriously impair the historic or architectural value of surrounding structures or the surrounding area.

3.04j The Commission shall deny an application if it finds, based on evidence and information presented to or before the Commission, that the exterior alteration for which the Certificate of Appropriateness is sought would be inappropriate or inconsistent with, (f), (g) or (h) above, or detrimental to the preservation, enhancement, or ultimate protection of the historic structure site or district or the purpose of this Ordinance.

- i) If the Commission determines that the application should be denied, it shall provide a written statement of the basis for denial with specific references to the goals of this Ordinance. The Commission may also, at its discretion, provide the applicant with suggestions or recommendations for revisions to the proposal.
- ii) A building permit shall not be issued if the Commission has disapproved the application.
- iii) Nothing shall prevent the applicant from modifying the application to address suggestions made by the Historic District Commission to meet the purpose of this Ordinance.

3.05 Ordinary Maintenance Inspections in a Historic Preservation Area

3.05a The Historic District Commission or its designee shall inspect the Historic Preservation Area before the signing of the Agreement to determine the status and integrity of the property and its architectural features. The inspection shall include, at minimum, the status of the following for each building, including outbuildings, in the Historic Preservation Area on a form prescribed by the Historic District Commission, including photos:

- i) Roof, Chimneys and Gutter systems
- ii) Walls and foundations
- iii) Windows and Doors
- iv) Porches and Awnings
- v) Landscaping, circulation systems

3.05b Subsequent inspections on the property will be compared to the initial to determine if Ordinary Maintenance is being undertaken. The failure to complete Ordinary Maintenance or provide a plan for maintenance to the Historic District Commission may result in termination of the Historic Preservation Area.

3.06 Addition to an Existing Historic Preservation Area

3.06a The procedures for adding property to existing areas shall be the same as for the initial establishment of areas.

3.07 Continuation of a Historic Preservation Area

3.07a Historic Preservation Areas shall continue in effect indefinitely unless terminated as approved in this Ordinance or Regulations associated herewith.

3.07b Nothing in this Ordinance shall preclude a landowner from selling land within a Historic Preservation Area. A landowner that sells land within a Historic Preservation Area shall notify the County within thirty (30) days after the sale.

3.08 Termination and Alteration of a Historic Preservation Area

3.08a After ten (10) years from the establishment of the district, a landowner may terminate the property's inclusion in a Historic Preservation Area by giving written notice to the County. Notice of intention to terminate may be submitted to the County at the end of the tenth year of the area's establishment or anytime thereafter.

3.08b If severe economic hardship occurs, the County may release the landowner's property from a Historic Preservation Area at any time upon petition by the landowner. The petition shall be in a form prescribed by the County and the County may require such information necessary to determine whether severe economic hardship exists. If the County approves the petition to release the landowner's property from an area, the County shall prepare the release.

3.08c If an area is terminated before the completion of the initial ten (10) year period, the current landowner shall be liable to reimburse the County for all of the property taxes that would have been due if the property tax credit had not been granted as well as applicable interest on those taxes.

3.08d Demolition of structures contributing to the Historic Preservation Area at any point during the agreement period, without the issuance of an approved Certificate of Appropriateness, shall require the current landowner to be liable to reimburse the County for all of the property taxes that would have been due if the property tax credit had not been granted as well as applicable interest on those taxes.

3.08e Failure to provide for Ordinary Maintenance at any point during the Agreement period will result in notification of the owner that termination and subsequent penalties may be applicable unless the maintenance is performed.

- 3.08f The County may approve alteration or abolishment of the area, if the following occur:
- i) The integrity, as defined by the evaluation of historical integrity for the National Register and discussed in the Design Guidelines for Historic Properties for Washington County, of the property, within the area has deteriorated causing the area to no longer meet the qualifications under this Ordinance or the Regulations associated herewith;
 - ii) The County has assessed the potential impacts of alteration on the remaining lands in the area;
 - iii) The alteration or abolition of the area has been recommended by the Historic District Commission and the County Planning Commission, and the County has held a public hearing; and
 - iv) The alteration or abolition is approved by the County.

3.09 Real Property Tax Credit - Historic Preservation Areas

3.09a There is a defined credit from County Real Property Taxes levied on residential historic structures, if:

- i) The structures are included in a Historic Preservation Area as provided in this Ordinance and;
- ii) The landowner has executed a Contract with the County agreeing to remain in the Historic Preservation Area for ten (10) years; the Contract may be renewed in five (5) year increments after completion of the initial ten (10) years. And;
- iii) The landowner agrees to the Ordinary Maintenance of the structures within the area for a minimum period of ten (10) years from the date the Area Agreement is recorded in the land records of the County.

3.09b There is defined credit from County Real Property Taxes levied on residential historic structures, if:

- i) The structures are included in a Historic Preservation Area as provided in this Ordinance and;
- ii) The landowner has executed a Contract with the County agreeing to remain in the Historic Preservation Area for ten (10) years; the Contract may be renewed in five (5) year increments after completion of the initial ten (10) years. And;
- iii) The landowner agrees to the Ordinary Maintenance of the structures within the area for a minimum period of ten (10) years from the date the Area Agreement is recorded in the land records of the County. And;
- iv) The landowner agrees to the retention of the structures within the area for a minimum period of 10 years from the date the Area Agreement is recorded in the land records of the County or;
- v) The landowner has placed the property in a permanent easement program through the Maryland Historical Trust, that provides additional review and restrictions to the exterior appearance and maintenance of the historic structures as well as demolition protections.

3.10 Amount of Tax Credit - Historic Preservation Areas

3.10a The Amount of the credit granted under Subsection 3.09a of this Ordinance is 50% of the County Real Property Tax levied on the structures within the Historic Preservation Area, provided that the total credit may not exceed \$3,000 per year, for a period not to exceed the term of the landowner's Contract with the County.

3.10b The amount of the credit granted under Subsection 3.09b of this Ordinance is 100% of the County Real Property Tax levied on the structures within the Historic Preservation Area, provided that the total credit may not exceed \$3000 per year, for a period not to exceed the term of the landowner's Contract with the County.

3.10c The tax credits granted by this Ordinance are not cumulative, and in no event shall the total tax credit of the landowner exceed 100% of the County Real Property Tax for the property for each year.

3.11 Severability - Historic Preservation Areas

3.11a If any part of this Ordinance shall be held invalid, any such part shall be deemed severable and its invalidity shall not affect the remaining parts of the Ordinance.

4. PROPERTY TAX CREDITS FOR IMPROVEMENTS TO SPECIFIED HISTORIC STRUCTURES

4.01 Establishment of Real Property Tax Credits for Improvements on Historic Properties

4.01a A historic preservation tax credit from County Real Property taxes on historically valuable structures is authorized by § 9-204 of the Tax-Property Article of State Code.

4.01b The restoration, preservation, and new construction activities referred to in this Ordinance shall be in conformance with the Secretary of Interior's Standards and Guidelines for Rehabilitation and subsequent revisions and with the Washington County Design Guidelines for Historic Structures and subsequent revisions.

4.02 Duration of Real Property Tax Credits for Improvements on Historic Properties

4.02a The owner of a historically valuable structure is eligible for the historic preservation tax credit and may apply for the credit for each year for a period of up to five years, provided the credit is not combined with other optional tax credits as permitted under Title 9 of the Tax-Property Article of the State Code or this Ordinance.

4.02b The tax credits granted by this Ordinance are not cumulative, and in no event shall the total tax credit of the landowner exceed 100% of the County Real Property Tax Bill for the property. If the tax credit for any one year exceeds the amount of the County Real Property Tax Bill for that year, the balance may be carried forward until depleted for up to five (5) years.

4.03 Eligibility for Real Property Tax Credits for Improvements on Historic Properties

4.03a There is a credit from County Real Property Taxes levied on a historically valuable structure for qualified expenses for preservation, restoration, and rehabilitation, if:

- i) The structure is listed on the Maryland Inventory of Historic Properties, or;
- ii) The structure is listed individually on the National Register of Historic Places or contributes to a National Register Historic or Landmark district, and;
- iii) The structure is located in a qualified municipality as defined in §4.04 of this Ordinance.

4.03b There is a credit from County Real Property Taxes levied on historic structures for qualified expenses for preservation, restoration, and rehabilitation, if:

- i) The structure is in the Antietam Overlay 1 - Battlefield Buffer or the Antietam Overlay 2 - Approach as defined by the Washington County Zoning Ordinance; and
- ii) The structure is listed with the Maryland Historical Trust on the Maryland Inventory of Historic Properties.

4.03c There is a credit from County Real Property Taxes levied on historic structures for qualified expenses for preservation, restoration, and rehabilitation, if:

- i) The structure is located in a Historic Preservation District as defined by the Washington County Zoning Ordinance.

4.03d There is a credit from County Real Property Taxes levied on historic structures for qualified expenses for preservation, restoration, and rehabilitation, if:

- i) The structure is in a County adopted Historic Rural Village; and
- ii) The structure is a contributing resource to the Historic Rural Village.

4.03e There is a credit from County Real Property Taxes levied on historic structures for qualified expenses for preservation, restoration, and rehabilitation, if:

- i) The structure has a permanent or term easement through the Maryland Historical Trust that provides additional review and restrictions to the exterior appearance and maintenance of the historic structures for the duration of the potential County credit.

4.04 Qualified municipalities for Real Property Tax Credits for Improvements on Historic Properties

4.04a For the purpose of this Ordinance, qualified municipalities shall be determined by:

- i) The municipality has exterior design review requirements, equivalent to those in place for the Historic Preservation District as defined by the Washington County Zoning Ordinance or the Historic Preservation Areas in this Ordinance §3.04, by Town Ordinance or by delegation to the County Historic District Commission of permit review through a recorded Memorandum of Agreement.

4.05 Time for filing of application for Real Property Tax Credits for Improvements on Historic Properties

4.05a An application for the tax credit created by this section shall be filed on or before April 1 immediately before the taxable year for which the credit is sought. If the application is filed after April 1, the credit shall be disallowed that year but shall be treated as an application for a tax credit for the next succeeding taxable year.

4.05b Applications for the tax credit created by this section must be submitted before the start of the work subject to credits.

4.06 Calculation for Real Property Tax Credits for Improvements on Historic Properties

4.06a The amount of the credit granted under Subsection 4.03a through 4.03e of this Ordinance shall be 25% of the property owner's qualified expenses for preservation, restoration, and rehabilitation of historic properties that are residential or income-producing.

4.06b The amount of the credit granted under Subsection 4.03a through 4.03e of this Ordinance shall be 5% of the property owner's qualified expenses for the construction of architecturally-compatible new construction attached to a qualifying structure.

4.06c The taxation of significant improvements to, and restoration or rehabilitation of, historic or heritage properties qualifying under subsection 4.03a through 4.03e shall be maintained, for a period of up to 10 years, at taxation levels not greater than those in place before the eligible improvements were made.

4.07 Qualifying Expenses for Real Property Tax Credits for Improvements on Historic Properties

4.07a Qualifying expenses that are eligible for consideration of tax credits for the purposes of this section of the Ordinance shall be:

- i) Construction activities that materially add to the value of the structure, considerably prolongs its useful life, or adapts it to a new use; and
- ii) Qualified Rehabilitation Expenditures (QREs) as defined by 26 USC 47(c)(2)(A).
Examples include but are not limited to:

- (1) *Roof Repair and Replacement*
- (2) *Chimney Repair and Replacement*
- (3) *Window Restoration*
- (4) *New Storm Doors/Windows*
- (5) *Masonry Repointing*
- (6) *Floor Refinishing*
- (7) *Structural Repairs*
- (8) *Plumbing, electrical and mechanical systems*
- (9) *Architectural/Engineering/Consulting Fees*
- (10) *Tool/Equipment Rental*
- (11) *Repair of historic outbuildings*

4.07b Qualifying expenses may also include expenses for life safety (e.g. required sprinkler systems, lead paint remediation) and ADA-Required Improvements.

4.08 Application Review for Real Property Tax Credits for Improvements on Historic Properties

4.08a Application for the Real Property Tax Credits for Improvements on Historic Properties shall be made to the Historic District Commission and at minimum include:

- i) Sufficient application information for initial determination by the Planning Department to determine if the property is eligible for tax credits. The Planning Department may consult with experts, as necessary, to ensure the property meets applicable criteria and standards for historic significance and integrity before qualifying the structure for the credit.
- ii) A completed rehabilitation plan that must be approved by the Historic District Commission before commencement of rehabilitation work to ensure conformance with the Secretary of Interior's Standards and Guidelines for Rehabilitation and subsequent revisions and with the Washington County Design Guidelines for Historic Structures and subsequent revisions
- iii) An application for request for certification of completed work must be reviewed by the Historic District Commission at project completion.
 - (1) *The request for certification of completed work will require inspection by designated staff. The inspection may include photography.*
- iv) The Historic District Commission will forward the qualified expenses, determined by the review of the request for certification of completed work, to the County Treasurer within forty-five (45) days of receipt of the completed application. The Treasurer will process the forwarded application for tax credit.
- v) The Historic District Commission will not determine the dollar amount of the tax credit to be granted nor will it be judging whether the cost of the improvement paid by the property owner was appropriate.
- vi) The Planning Department and Historic District Commission may accept as equivalent documentation, for review, completed applications for tax credits at the local, state or federal level if those applications have sufficient information to meet the application criteria listed in this section.
- vii) The tax credit application shall not be finally approved until the appropriate documentation, on forms prescribed and provided by the Commission or equivalent as listed in this subsection, are supplied. The application must be accompanied by the oath or affirmation of the owner-taxpayer, that the records are those for the actual expenditures in connection with the rehabilitation of the structure or the qualifying new construction.

4.09 Termination of Real Property Tax Credits for Improvements on Historic Properties

4.09a The Tax Credit shall terminate if the property is altered by the owner and no longer complies with the standards by which it became eligible for the credit as a historic property.

4.09b If a tax credit is terminated under this section, the property owner shall be required to refund the entire amount of the tax credit, including applicable interest, from the date the credit was first granted, to the County.

5. HISTORIC PROPERTY GRANT PROGRAM

5.01 Establishment of the Historic Property Grant Program

5.01a There is a Historic Property Grant Program established to assist in the protection, preservation, and enhancement of Washington County's rural historic properties as authorized by § 9-204 of the Tax-Property Article of State Code.

5.01b The rehabilitation activities referred to in this Ordinance shall be in conformance with the Secretary of Interior's Standards and Guidelines for Rehabilitation and subsequent revisions and with the Washington County Design Guidelines for Historic Structures and subsequent revisions.

5.02 Grant Funding Source for the Historic Property Grant Program

5.02a The funding source and yearly allocated amount for this grant program shall be:

i) Any listed below or combination thereof:

(1) *Recordation Tax*

(2) *Ag Transfer Tax*

(3) *General Fund*

ii) The yearly allocated amount for this grant program shall be a minimum of \$150,000 or greater as determined by the County.

5.03 Grant Amounts for a Historic Property Grant

5.03a An individual grant shall be a minimum of \$5,000.

5.03b An individual grant cannot exceed \$50,000.

5.04 Eligibility for a Historic Property Grant

5.04a Eligible applicants include individual property owners and non-profit organizations.

i) Applicants must not have outstanding County permit or zoning violations.

ii) Non-profit organizations must be in good standing with the State of Maryland Department of Assessments and Taxation (SDAT), be qualified to do business in Maryland, and have the legal capacity and authority to incur obligations involved under the grant program.

5.04b Criteria of Eligible properties include:

- i) Located in unincorporated areas of Washington County; and
- ii) The property is in a Historic Preservation Area; or
- iii) The landowner has placed the property in a Maryland Historical Trust permanent easement, that provides additional review and restrictions to the exterior appearance and maintenance of the historic structures; or
- iv) The landowner has placed the property in a Historic Preservation District as defined by the Washington County Zoning Ordinance; or
- v) The property is located in the Antietam Overlay 1 - Battlefield Buffer or the Antietam Overlay 2 - Approach as defined by the Washington County Zoning Ordinance and listed with the Maryland Historical Trust on the Maryland Inventory of Historic Properties; or
- vi) The property is listed in the National Register of Historic Places, individually or as a contributing property in a National Register District; or
- vii) The property is determined to be eligible by the Maryland Historical Trust for National Register designation; or
- viii) The property is in a County adopted Historic Rural Village; and the structure is a contributing resource to the Historic Rural Village.

5.05 Procedures for Historic Property Grant

5.05a Applications will be accepted once a year from December through February and;

- i) Applications will be reviewed by Department of Planning and Zoning Staff for completeness and have the opportunity to resubmit a revised application.
- ii) Applicants may revise final applications through March 31 of each year.

5.05b After receipt of a final application for a Historic Property Grant:

- i) The Historic Property Grant Subcommittee shall review and rank the applications based on competitive selection criteria established in this Ordinance.
- ii) Award recommendations will be presented to the Historic District Commission for approval or revision and subsequent recommendation to the County Commissioners.
- iii) Final award recommendations will be presented to the County Commissioners for approval or revision.

5.05c If neither the Historic Property Grant Subcommittee nor the Historic District Commission recommends the award of grant funding, the grant application shall be deemed denied and the County shall notify the landowner or landowners stating the reasons for denial.

- 5.05d The County may approve a Historic Property Grant only if:
- i) The property meets the eligibility criteria established under this Ordinance and any Regulations associated herewith;
 - ii) The grant application has been reviewed by the Historic Property Grant Subcommittee;
 - iii) Approval of the grant has been recommended by the Historic District Commission;

- 5.05e Award of grant funding shall not occur until:
- i) The County approves the grant application;
 - ii) All parties have executed a Historic Property Grant Agreement

5.06 Historic Property Grant Subcommittee

5.06a The Historic Property Grant Subcommittee may be appointed by the Historic District Commission (HDC) Chairperson and shall consist of five (5) members. The chairperson may invite representatives to serve on the committee or may use the HDC members as the committee. Members may be from, but are not limited to, the following:

- i) A staff member of the Department of Planning and Zoning
- ii) A staff member of the Division of Permits and Inspections
- iii) A member of the Historic District Commission
- iv) A member of the Historic Advisory Committee
- v) A staff member of the Office of Grant Management

5.07 Eligible Activities and Expenses for Historic Property Grants

5.07a Costs for work funded by grant funds are NOT eligible for the Washington County Property Tax Credits for Improvements to Historic Specified Historic Structures.

5.07b Eligible Activities include the stabilization, rehabilitation, restoration and/or preservation to the EXTERIOR of a historic property. Examples of Qualified Rehabilitation Expenses include, but are not limited to:

- i) Roof Repair and Replacement
- ii) Chimney Repair and Replacement
- iii) Window Restoration
- iv) Masonry Repointing
- v) Structural Repairs
- vi) Repair of historic outbuildings

5.07c Ineligible activities include, but are not limited to:

- i) previously completed rehabilitation work; or
- ii) rehabilitation work that is underway; or
- iii) new construction; or
- iv) Landscaping, with the exception of historic; or man-made objects or features (such as stone walls or fences); or
- v) projects that do not conform to the Secretary of Interior's Standards and Guidelines for Rehabilitation and subsequent revisions and with the Washington County Design Guidelines for Historic Structures and subsequent revisions.

5.07d Eligible expenses for the grant will be those directly associated with the stabilization, rehabilitation, restoration, and/or preservation of the property.

5.07e Ineligible expenses are those expenses associated with predevelopment costs necessary to prepare the application, such as fees for architectural plans and/or structural and/or condition assessments, or other expenses not directly associated with the rehabilitation of the property.

5.07f Work must be completed by licensed contractors who have demonstrated preservation skills and/or experience, as applicable.

5.08 Competitive Selection Criteria for Historic Property Grants

5.08a The Historic District Commission, in coordination with the Historic Property Grant Subcommittee, may adjust the points to be awarded and the subcategories criteria before the call for applications each year through regular meeting vote; however, the Historic Property - Forty (40) points, Project - Forty (40) points, and Project Management - Twenty (20) points, shall remain overall categories and points for ranking.

5.08b A grant match is encouraged, but not required. Inclusion of a match will be considered during the evaluation and selection process. In-kind matches of labor and materials are permitted.

| HISTORIC PROPERTY 0-40 points | | |
|---|---|--|
| <p>Historic and cultural significance of the resource(s) What is the historical and cultural significance of the property? Does it have local, state, or national significance? Does it contribute to a district? For example, a property with low to medium significance at a local level would score lower than a property with high significance at the local and state and/or national level.</p> | <p>Urgency of need for financial assistance Is the property at risk because of development or deferred maintenance? Is there a special window of opportunity for the applicant to rehabilitate this property? Is it critical to the operation of the property? A property at risk of collapse, for example, could be scored at 10 points.</p> | |
| 0-10 points | 0-10 points | |
| <p>Diversity of resource types Extent to which the property would expand the diversity of resource types within the current funding cycle. <i>For example, if applicant pool is mostly houses but one consists of a barn, the barn application would score 5 points.</i></p> | <p>Equitable countywide distribution of funds Extent to which the project would contribute to the equitable geographic distribution of the grants funds across the County within the current funding year. <i>For example, if most grant awards or applications have been received from the southern part of the County but one or two applications are from the northern and eastern parts of the County, then those two applications could score 5 points.</i></p> | <p>Continued use of resource Historic resource has an identified use and will not be left vacant</p> |
| 0-5 points | 0-5 points | 0-10 points |
| PROJECT 0-40 points | | |
| <p>Retention of historically significant material or details If the property has extensive and/or original materials, features, and finishes, is extra effort being expended in their retention? <i>For example, if the project involves retaining all the original materials in the resource, then the maximum number of points should be awarded versus a project that calls for the majority of materials to be replaced.</i></p> | <p>Provision for long-term resource preservation Will this project provide long-term protection of the resource? <i>For example, if the project will stabilize or weatherize a resource and protect it from further deterioration, then it should receive the maximum number of points.</i></p> | <p>Leverages funding from other sources Does the applicant provide a match from personal sources or, for non-profits, from donations or other grant sources? Is the match in-kind and does it adequately reflect costs?</p> |
| 0-15 points | 0-15 points | 0-5 points |
| <p>Realistic and feasible budget Does the budget provide enough detail and rationale to complete the project?</p> | | |
| 0-5 points | | |
| PROJECT MANAGEMENT 0-20 points | | |
| <p>Readiness to initiate and complete the project Can the project begin and finish on schedule?</p> | <p>Administrative capability Does the applicant demonstrate a thoughtful and orderly approach to organizing information? Is the proposed project well-presented, and does it meet the goals of the program?</p> | |
| 0-10 points | 0-10 points | |

5.09 Inspections of a Historic Property Grant Program

5.09a All phases of the grant process are subject to photography and inspection of the exterior of the historic structure and its site by Washington County staff.

5.10 Grant Agreement for a Historic Property Grant

5.10a Successful grant applicants will be required to sign a grant agreement detailing the total award amount, scope of work that defines the final project products, expenses eligible for grant funding, and any additional obligations on behalf of the awardee.

5.10b Projects associated with awarded grant funding must be completed within two (2) years of the date of the grant agreement.

5.10c All work shall be in conformance with the Secretary of Interior's Standards and Guidelines for Rehabilitation and subsequent revisions and with the Washington County Design Guidelines for Historic Structures and subsequent revisions.

5.11 Disbursement of the Historic Property Grant Funds

5.11a An initial disbursement of 25% to 50% of the grant funds, to be determined by the Historic District Commission, will be awarded at the signing of the grant agreement.

5.11b At 50% completion of the project, an additional 25% of the grant funds can be disbursed upon receipt of paid invoices.

5.11c The remainder of the award will be released upon completion and delivery of financial receipts and photo documentation.

5.11d If project costs are less than the award, the balance will be absorbed back into the Historic Property Grant Program.

Historic Review Activity 12/22/2022 thru 01/19/2023

| Record # | Type | MIHP# | Record Status | Open Date | Date Assigned | Location | Description | Workflow Info | | | |
|-----------------|---|------------|---------------|-----------|---------------|--|--|-----------------|-------------|-------------------|---|
| HK2022-0009 | Town of Hancock Residential Building Permit | HAN250 | Review | 11-Nov-22 | 27-Dec-22 | 161 WEST HIGH STREET | 40 SQ. FT. ATTACHED COVERED DECK WITH STEPS TO GRADE, ATOP EXISTING FRONT PORCH, TO SERVE EXISTING SECOND FLOOR ENTRANCE | Folder Status | Status Date | Task Name | Comments |
| | | | | | | | | Passed - Info | 18-Jan-23 | Historical Review | HDC does not review in the Town limits of Hancock. |
| | | | | | | | | Days in Review: | 22 | | |
| 2022-05857 | Non-Residential New Construction Permit | I517; I518 | Review | 15-Nov-22 | 10-Jan-23 | SP-22-025 10510 VIDA DRIVE, LOT 2 | 5,200 SQ. FT. ONE STORY BUILDING, WITH (1) 2,145 SQ. FT. CANOPY AND (1) 1,952 SQ. FT. CANOPY FOR MULTI-LANE DRIVE-THRU, 380 SQ. FT. TRASH ENCLOSURE WITH STORAGE, AND 357 SQ. FT. OUTDOOR DINING PATIO. TO BE | Folder Status | Status Date | Task Name | Comments |
| | | | | | | | | Passed - Info | 10-Jan-23 | Historical Review | Permit does not involve demolition. MIHP points referenced were previously demo'd and no HDC review is required for new construction in this area. |
| | | | | | | | | Days in Review: | 0 | | |
| 2022-06097 | Residential Demolition Permit | I865 | Approved | 17-Dec-22 | 17-Dec-22 | LOR 18209 SHOWALTER ROAD | DEMOLITION OF 1,798 SQ. FT. TWO STORY SINGLE FAMILY DWELLING INCLUDING FOUNDATION AND TWO STORAGE SHEDS | Folder Status | Status Date | Task Name | Comments |
| | | | | | | | | Approved | 06-Jan-23 | Historical Review | see documents for details |
| | | | | | | | | Days in Review: | 20 | | |
| 2023-00031 | Residential Addition-Alteration Permit | I144 | Review | 04-Jan-23 | 04-Jan-23 | SI-98-017 22032 ROCKY FORGE ROAD | 696 SQ. FT. INTERIOR RENOVATIONS TO REMODEL EXISTING MUD ROOM, KITCHEN, PANTRY, AND HALF BATH ON FIRST FLOOR TO INCLUDE REMOVING FIREPLACE AND ENCLOSING WINDOW TO ADD SHELVING IN | Folder Status | Status Date | Task Name | Comments |
| | | | | | | | | Passed - Info | 04-Jan-23 | Historical Review | Property is not in a review area for the HDC. Sent no review contact letter. |
| | | | | | | | | Days in Review: | 0 | | |
| 2023-00095 | Non-Residential New Construction Permit | | Review | 05-Jan-23 | 05-Jan-23 | SP-03-002 20952 TWIN SPRINGS DRIVE | 1,800 SQ. FT. DETACHED PAVILION ON CONCRETE SLAB, POLE CONSTRUCTION, PRE-ENGINEERED ROOF TRUSSES, METAL ROOF, FOR BETHEL UNITED METHODIST CHURCH BETHEL UNITED METHODIST | Folder Status | Status Date | Task Name | Comments |
| | | | | | | | | Passed - Info | 06-Jan-23 | Historical Review | New construction is not reviewable in this RV. The proposed structure is also not affecting historic structures as it's on a vacant lot. No HDC review required. |
| | | | | | | | | Days in Review: | 1 | | |
| 2023-00115 | Non-Residential Addition-Alteration Permit | | Review | 06-Jan-23 | 09-Jan-23 | SP-19-007.R01 21427 LEITER STREET | DEMOLISH 851 SQ. FT. EXISTING KITCHEN, 150 SQ. FT. FREEZER, AND EXISTING METAL ROOFING TO ADD NEW 888 SQ. FT. ADDITION TO INCLUDE A KITCHEN, UTILITY ROOM, AND ADA RESTROOM ON CONCRETE SLAB, PRE-ENGINEERED ROOF TRUSSES FOR LEITERSBURG RURITAN CLUB PAVILION LEITERSBURG RURITAN PARK | Folder Status | Status Date | Task Name | Comments |
| | | | | | | | | Passed - Info | 18-Jan-23 | Historical Review | This property does contain historic resources (School house), however, the project site around the existing pavilion does not contain resources and is listed as non-contributing to the Leitersburg District. The HDC did review the site plan for the property and because there is no significant change to appearance/use proposed by this project it does not need to go before the HDC. Sent no review contact letter |
| | | | | | | | | Days in Review: | 9 | | |
| 2023-00145 | Residential Demolition Permit | I874 | Review | 09-Jan-23 | 13-Jan-23 | S-88-80 21016 TWIN SPRINGS DRIVE | DEMOLITION OF 1,326 SQ. FT. TWO STORY SINGLE FAMILY DWELLING, ALL SIDEWALKS AND STEPS BESIDE HOME WILL BE BROKEN AND REMOVED MCCARNEY, DONNA & RAYMOND | Folder Status | Status Date | Task Name | Comments |
| | | | | | | | | Note | 18-Jan-23 | Historical Review | Property is individually listed on MIHP so I have scheduled it for the February meeting for review and sent letter requesting additional information to applicant and owner. |
| | | | | | | | | Note | 19-Jan-23 | Historical Review | Was informed via staff member that this demo was already underway prior to permit issuance. Reported to the Division of Permits and Inspections for them to visit the site. |
| | | | | | | | | Days in Review: | 6 | | |
| 2023-00198 | Residential Addition-Alteration Permit | I11068 | Review | 11-Jan-23 | 18-Jan-23 | LOR 3329 KAETZEL ROAD, LOT 1 | INSTALLATION OF SOLAR ARRAY CONSISTING OF (54) 21.87KW ROOF MOUNTED SOLAR PANELS ON DETACHED BARN AND GARAGE LOT 1 | Folder Status | Status Date | Task Name | Comments |
| | | | | | | | | Passed - Info | 18-Jan-23 | Historical Review | The proposed solar arrays are not located in an area where the HDC has review on individual properties. There appears to be an MIHP for a stone house which is no longer on the property. The outbuildings with the proposed solar are not mentioned in the MIHP. A family cemetery was seen on the plat for the property that was not in the cemetery GIS data and was added for the future. No HDC review required. |
| | | | | | | | | Days in Review: | 0 | | |
| 2023-00228 | Non-Residential New Construction Permit | I363 | Review | 12-Jan-23 | 13-Jan-23 | SP-05-005 16618 HUNTERS GREEN PARKWAY, LOT 7 | 2,400 SQ. FT. ONE STORY DETACHED POLE BUILDING ON CONCRETE SLAB, PRE-ENGINEERED ROOF TRUSSES, METAL ROOF AND SIDING, TO BE USED TO STORE MILLWORK FOR WHOLESALE MILLWORK WHOLESALE MILLWORK | Folder Status | Status Date | Task Name | Comments |
| | | | | | | | | Passed - Info | 18-Jan-23 | Historical Review | This property does have an MIHP point for the stone house and barn but the pole building construction is not near either and this is not in a reviewable area for new construction so HDC review is not required. |
| | | | | | | | | Days in Review: | 5 | | |
| 2023-00219 | Residential New Construction Permit | | Review | 12-Jan-23 | 12-Jan-23 | S-04-074 CLEVELANDTOWN ROAD, LOT 1 | 2,413 SQ. FT. FINISHED SPACE TWO STORY SINGLE FAMILY DWELLING ON FULL UNFINISHED WALKOUT BASEMENT WITH ROUGH IN FOR FUTURE BATH, FIREPLACE IN GREAT ROOM, INTEGRAL THREE CAR GARAGE WITH 520 SQ. FT. UNFINISHED ROOM ABOVE GARAGE TO BE USED AS STORAGE. COVERED | Folder Status | Status Date | Task Name | Comments |
| | | | | | | | | Passed - Info | 18-Jan-23 | Historical Review | A very small portion of the southern edge of this property is included in the Park Hall survey district from MHT on the MIHP. That district isn't adopted so there is no HDC review of new construction and this proposed construction is outside of that area anyway. No HDC review required. |
| | | | | | | | | Days in Review: | 6 | | |
| Activity Count: | 10 | | | | | | | | | | |

Review Activities Summary

| Application Type | Application Number | Approved | Note | Passed - Info | Total |
|---|--------------------|----------|----------|---------------|-----------|
| Non-Residential Addition-Alteration Permit | Total | 0 | 0 | 1 | 1 |
| Non-Residential New Construction Permit | Total | 0 | 0 | 3 | 3 |
| Residential Addition-Alteration Permit | Total | 0 | 0 | 2 | 2 |
| Residential Demolition Permit | Total | 1 | 1 | 0 | 2 |
| Residential New Construction Permit | Total | 0 | 0 | 1 | 1 |
| Town of Hancock Residential Building Permit | Total | 0 | 0 | 1 | 1 |
| Total | | 1 | 1 | 8 | 10 |