**APPENDIX A**

**MHPG Application and Statutory Review Criteria**

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

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

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

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

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

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

LEVEL 3: The applicant provides an adequate narrative addressing the overall criterion, applicable ranking issues, and minimum requirements, with acceptable documentation to support its claims. The Applicant's response to the ranking criterion (or the Applicant’s actions or situation relative to the ranking criterion) is considered average, adequate, or to be generally consistent with the intent of the ranking criterion. The application meets the minimum requirements for responding to the criterion and has documented compliance with the special requirements that are pertinent to the ranking criterion; however, the application may not have adequately considered some ranking issues that may be potentially important.

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

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

**MHPG Application Section 1.**

**1. Applicant:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**2. Property Owner (if different from applicant):** \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**3. Authorized Representative of Applicant:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: City: Zip Code: \_\_\_\_\_\_

Phone: E-mail:

**4. Primary Contact**: Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: City: Zip Code: \_\_\_\_\_\_

Phone: E-mail:

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

Historic Site: Infrastructure Maintenance Building Code Issue

Security Climate Control Fire Protection

Historical Society: Infrastructure Maintenance Building Code Issue

Security Climate Control Fire Protection

History Museum: Infrastructure Maintenance Building Code Issue

Security Climate Control Fire Protection

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

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

1. ***Background and project (please provide narrative response):***
2. ***Description of proposed solution (please provide narrative response):***

**9. Certification to Submit:**

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

**Signature Date Printed Name and Title**

**MHPG Application Section II.**

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

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

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

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

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

**STATUTORY CRITERIA - B up to 200 in Possible Points**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

**Sample Project Budget**

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

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

**Sample Implementation Schedule**

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

|  |  |
| --- | --- |
| **TASK** | **MONTH / YEAR** |
| ADVERTISEMENT FOR PROFESSIONAL SErvices | |
|  |  |
| Publish RFP |  |
| Select firm |  |
| Professional services Draw |  |
| Major ACTIVITIES/milestones(Below are examples. PLEASE change AS NECESSARY for the proposed project.) | |
| Construction bidding |  |
| Select contractor |  |
| Construction |  |
| Substantial completion |  |
| Project Closeout |  |
|  |  |
|  |  |
|  |  |
|  |  |
| Drawdowns | |
| Submit draft report and request first drawdown of funds |  |
| Submit final report and request final drawdown of funds |  |

**Environmental Overview**

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

For detailed information on MEPA, see *A Guide to the Montana Environmental Policy Act*, or *A Citizen’s Guide to Public Participation in Environmental Decision Making,* at: <http://leg.mt.gov/css/Publications/environmental/default.asp> or <http://leg.mt.gov/css/services%20division/lepo/mepa/mepaforpublic.asp>

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

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

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