



*Maryland Department of Planning
Maryland Historical Trust*

Manual of Program Requirements

MHT Capital Grants, MHT Capital Loans, & AAHPG Grants

Contact:

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MHT Capital Grants, MHT Capital Loans, & AAHPG Grants Resource Sheet

As the recipient of project funding through the MHT Capital Grant, MHT Capital Loan, or African American Heritage Preservation Grant programs, you and your organization have important responsibilities to fulfill. This list is a resource that you should refer to continually to help you understand and carry out those responsibilities. If you have any questions or require additional information, do not hesitate to contact your project monitor:

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<i>I need to know about...</i>	<i>... where do I find this information?</i>
Historic Preservation	
General preservation principles; how MHT evaluates changes to historic properties	The Secretary of the Interior's Standards http://mht.maryland.gov/standards.html
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/hps/tps/briefs/presbhom.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 Anne Raines (contact info above) for more information.
Easements	http://mht.maryland.gov/easement.html
What is a perpetual preservation easement? Do you have a sample easement?	MHT Easement Conveyance Packet http://mht.maryland.gov/documents/PDF/Easement_Procedures_Conveyance_Grant.pdf
What documents do I need to provide to MHT so MHT can create an easement on my property?	MHT Easement Conveyance Packet http://mht.maryland.gov/documents/PDF/Easement_Procedures_Conveyance_Grant.pdf
How do I get MHT's approval for changes to an easement property?	MHT Application for Change/Alteration to Easement Property

	http://mht.maryland.gov/documents/Word/Easement_Forms_ProjectApplication.doc instructions for completing the form: http://mht.maryland.gov/documents/PDF/Easement_Procedures_ProjectReview.pdf
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.html
Approval of grant- or loan-funded work	
How do I get MHT's approval for work:	
➤ For an easement-protected property or a property that <i>will have</i> an easement	See above under "Easements"
➤ For a property that <i>does not and will not</i> have an easement	Contact Anne Raines (above) about submission requirements
Hiring an architect, engineer, contractor, or consultant	Any work to be paid with MHT funds MUST be selected through competitive bidding and MAY NOT be sole-sourced. Your bidding / procurement process MUST conform to MHT's requirements (below).
➤ For an architect, engineer, or other consultant	http://mht.maryland.gov/documents/PDF/Grants_Capital_Manual.pdf -- see bookmarked section
➤ For a contractor, builder, or craftsman	http://mht.maryland.gov/documents/PDF/Grants_Capital_Manual.pdf -- see bookmarked section
Does MHT have a list of consultants and contractors?	MHT maintains a directory online; however, listing in the directory does not imply an endorsement by MHT. The consultants in the directory have expressed interest in providing professional services in the identification, evaluation, and treatment of Maryland's historic resources. The directory is by no means comprehensive. http://mht.maryland.gov/consultant_directory.html
Disbursement of MHT funds	http://mht.maryland.gov/documents/PDF/Grants_Capital_Manual.pdf -- see bookmarked section
Recordkeeping Requirements & Financial Responsibilities	http://mht.maryland.gov/documents/PDF/Grants_Admin_FinancialResp_072008.pdf
Project Completion	http://mht.maryland.gov/documents/PDF/Grants_Capital_Manual.pdf -- see bookmarked section
Other Funding Sources for Preservation Projects	http://mht.maryland.gov/documents/PDF/Grants_Funding_Sources.pdf
Lead Paint	http://www.epa.gov/lead/ http://www.mde.state.md.us/lead/Pages/lead.aspx

MHT Capital Grants, MHT Capital Loans, & AAHPG Grants

Insurance Requirements

The terms of the grant agreement or loan commitment letter require the grantee / property owner to insure the property and to include the Maryland Historical Trust on the insurance policies.

The grant agreement language reads as follows [loan commitment letter language is similar]:
“Grantee shall cause the Property and the improvements on the Property, including those covered by the Easement or Preservation Agreement, if applicable, to be insured against loss or damage by fire and such other hazards, casualties, and contingencies as may be required from time to time by the Trust, in amounts satisfactory to the Trust but in any event not less than the total of the Grant and the outstanding principal balance under all mortgages on the Property. Comprehensive general liability insurance shall also be maintained on the Property including the improvements on the Property covered by the Easement or Preservation Agreement, if applicable, in amounts satisfactory to the Trust. Grantee shall also cause to be attached to each policy a clause that the insurer shall endeavor not to cancel the policy except upon 30 days prior written notice to the Trust, and shall direct the insurer to name Grantor as additional insured, but without obligation on the part of Grantor to make premium payments.”

How do I fulfill this requirement?

- You will need to contact your insurance company (or companies) or insurance agent to request this change to your policy. You may want to provide them with the grant agreement language (above) and the sample evidence of coverage document.
- You, your insurance company, or your insurance agent will need to provide a copy of the evidence of coverage to your MHT grant/loan monitor.

How much insurance, and what types, do I need to carry?

- You need to carry both general liability and hazard insurances.
- Coverage for the property needs to be in an amount not less than your total MHT grant or loan amount PLUS any liens or mortgages on the property.

What will my evidence of insurance document need to look like?

- See sample evidence of coverage document on next page.

Does my contractor also have to be insured?

- Yes. You must submit your contractor’s proof of insurance to your grant monitor prior to the start of construction.

ACORD EVIDENCE OF PROPERTY INSURANCE

DATE (MM/DD/YY)

THIS IS EVIDENCE THAT INSURANCE AS IDENTIFIED BELOW HAS BEEN ISSUED, IS IN FORCE, AND CONVEYS ALL THE RIGHTS AND PRIVILEGES AFFORDED UNDER THE POLICY.

PRODUCER	PHONE (A/C, No, Ext): ()	COMPANY	
CODE:	SUB-CODE:	LOAN NUMBER	POLICY NUMBER
AGENCY CUSTOMER ID #:		EFFECTIVE DATE	EXPIRATION DATE
INSURED			CONTINUED UNTIL TERMINATED IF CHECKED
THIS REPLACES PRIOR EVIDENCE DATED:			

PROPERTY INFORMATION
LOCATION/DESCRIPTION

COVERAGE INFORMATION	COVERAGE/PERILS/FORMS	AMOUNT OF INSURANCE	DEDUCTIBLE
	* COVERAGE SHOULD BE FOR AT LEAST THE VALUE OF THE GRANT FUNDS.		

REMARKS (including Special Conditions)

* MHT is additionally insured, mortgagee and loss payee for up to \$_____ (the value of the grant funds) without responsibility for payment of premiums.

CANCELLATION
THE POLICY IS SUBJECT TO THE PREMIUMS, FORMS, AND RULES IN EFFECT FOR EACH POLICY PERIOD. SHOULD THE POLICY BE TERMINATED, THE COMPANY WILL GIVE THE ADDITIONAL INTEREST IDENTIFIED BELOW 30 DAYS WRITTEN NOTICE, AND WILL SEND NOTIFICATION OF ANY CHANGES TO THE POLICY THAT WOULD AFFECT THAT INTEREST, IN ACCORDANCE WITH THE POLICY PROVISIONS OR AS REQUIRED BY LAW.

ADDITIONAL INTEREST

NAME AND ADDRESS	<input checked="" type="checkbox"/> MORTGAGEE <input checked="" type="checkbox"/> LOSS PAYEE <input type="checkbox"/> ADDITIONAL INSURED
* MARYLAND HISTORICAL TRUST 100 COMMUNITY PLACE CROWNSVILLE MD 21032	LOAN #
	AUTHORIZED REPRESENTATIVE <i>[Signature]</i>

Architect / Engineer / Consultant Procurement Guidelines

These procurement procedures are applicable only if the Grantee or Borrower intends to use an MHT Capital Grant, MHT Capital Loan, or African American Heritage Preservation Grant to pay some or all of the architectural, engineering or consulting fees associated with this project.

Architects and/or engineers who are to be paid, in whole or in part, with these funds MUST be selected on the basis of sealed, competitive bids unless otherwise determined by MHT. The following guidelines are intended to assist project managers with the bidding process for securing architectural and engineering services to carry out the planning phase(s) of your capital project.

- **Procurement requirements vary depending on the anticipated cost of the services.**

For projects where the cost of architectural, engineering or other consulting services will exceed \$25,000, bids must be solicited through public advertising. Bids may also be solicited directly from specific consultants, however, public notice is required to ensure that the largest possible number of contractors are allowed to bid on the project. The lowest qualified bidder must be selected.

For projects where the cost of architectural, engineering, or other consulting services will be less than \$25,000 you may solicit bids through invitation only. A minimum of six bids should be solicited through direct solicitation and/or public notice.

- **This document details the required steps for bidding your project and provides sample procurement documents.**

➤ **PROCUREMENT PROCEDURE**

- 1. Develop the scope of required services.** You may require the services of only one professional, or you may have a complex project that requires the services of an architect, preservation consultant, and various engineers. Consult with your MHT project monitor for guidance if you are unsure. You will need to provide a general description of the types of services anticipated.
- 2. Determine whether you will be required to publicly advertise the project or whether you may directly solicit proposals from individual firms** (see Page 1 of this document).
- 3. Determine whether you will hold a pre-bid inspection** (see description below). Coordinate the date for this inspection with your MHT project monitor, who may wish to attend.
- 4. Determine by what date proposals must be submitted.**
- 5. Develop the “Request for Proposals”** based on the guidance and sample provided below. Submit this to your MHT project monitor for review before distributing it. Mail the “Request for Proposals” directly to consultants.
- 6. Develop an “Advertisement for Bids”, if required,** based on the guidance and sample provided below. Submit this to your MHT project monitor for review before sending it to the newspaper. Have the ad printed in your regional newspaper or construction journal. Be sure to get a copy of the printed ad for your records.
- 7. Prepare the bid packages** (see description below.) Submit all proposal forms to your MHT project monitor for review before distributing them.
- 8. Distribute the proposal packages.** Each consultant who is interested in making a proposal will need to contact you and obtain the complete proposal package directly from you.
- 9. Receive the proposals.** See additional guidance below.
- 10. Determine which bidder is the “lowest qualified bidder”.**
- 11. Request approval of successful proposal from MHT.** See below for a description of materials to submit to your MHT project monitor.
- 12. Once you have MHT approval, enter into a contract with the successful bidder.**

REQUEST FOR PROPOSALS (RFP)

The first step in procuring an architect or an engineer is advertising or distributing a Request for Proposals (RFP). See following pages for sample RFP and advertisement. The RFP/advertisement should contain the following information:

- (1) The name of the grant/loan recipient.
- (2) The name and address of the project property.
- (3) The nature of the project (e.g. restoration of outbuildings, stabilization of exterior walls, interior rehabilitation, etc.); the date by which proposals must be submitted to the Grantee/Borrower; a statement that the project is being assisted by a grant / loan from the Maryland Historical Trust; and a statement that all work must comply with the Secretary of the Interior's *Standards for Rehabilitation*.
- (4) A description of the services that you anticipate will be required.
- (5) A statement that the contract will be awarded to the lowest qualified bidder.
- (6) A statement that the successful bidder must be an Equal Opportunity Employer.
- (7) Instructions to bidders explaining the submission requirements, including the project title and location, where RFP packages may be obtained, the deadline for submission of proposals, and the location to which proposals are to be delivered.
- (8) The name and telephone number of a contact person associated with the project.
- (9) A specific time and date at which all those wishing to bid on Architectural/Engineering services can inspect the project property. The bid closing date must not be less than twenty-one (21) days after the date you first solicit bids, and not less than fifteen (15) days after the site inspection.
- (10) A requirement that all amendments, addenda, and changes, and the receipt thereof, be acknowledged in writing.
- (11) Require bidders to submit the names and locations of comparable projects that they have successfully completed so that you can evaluate each bidder's qualifications.

PUBLIC NOTICE: Public notice is required to ensure that the largest possible number of consultants is allowed to bid on the project. Therefore, when required, the RFP must be published in at least one newspaper of general circulation, or in construction or trade journals. Examples of acceptable regional newspapers include the Baltimore Sun, Wilmington (Delaware) Journal, or the Star Democrat of Easton; construction journals

include the Dodge Report or the Blue Report. Grantees also are free to invite specific consultants to bid.

Every effort should be made to allow interested minority firms to participate all phases of your project. State regulations require that, at the very least the grant recipient and the selected architectural, engineering or consulting firm selected be Equal Opportunity Employers.

PROPOSAL PACKAGES: Proposal packages should contain affirmative action or equal employment opportunity materials, description of special requirements, the time of the pre-bid site inspection (if offered), and sample copies of the proposal forms and qualification forms which the consultant will be required to complete and submit. A “No Bid” Reply form should be included so that the contractor can notify you if he is not submitting a bid.

BIDDING TIME: A minimum of twenty-one (21) days must elapse between the time the bid package is first made available and the time by which bids must be received.

PRE-BID SITE INSPECTION: You may want to provide a set time at which potential bidders may inspect the project site. Sufficient time should be provided between the time of the inspection and the bid date to allow potential bidders to prepare their bids. You should solicit the attendance of MHT staff.

PROPOSALS: Each proposal submitted should include a fixed price for each of the services desired. These may include:

- Preparation of preliminary construction documents
- Preparation of final construction documents
- Supervision of public solicitation of contractor's bids and selection of contractor(s)
- Construction supervision

RECEIPT, OPENING, AND RECORDING OF BIDS: When a bid is received, it should be kept sealed and stored in a secure place until the time and place set for its opening. Bids are to be opened at the time, date, and place specified in the Invitation for Bids. The name of each bidder, the bid price, and such other information, as is deemed appropriate, should be recorded at the time of bid opening and becomes a part of the official project record and should be made available to the public. Bids then are to be tabulated or a bid abstract prepared. Opened bids should be available for public inspection at a reasonable time after the bids are opened but before a contract is awarded.

Bid should be reviewed by the grantee for:

- completeness
- responsiveness to the program
- project related qualifications

- previous preservation experience
- timeliness, and
- price

Copies of all proposals must then be forwarded to your MHT project monitor, along with copies of solicitation letters and any correspondence from the bidders. Send all bids, qualification forms, no-bid reply forms, and a copy of the newspaper ad. Include a cover letter describing how the bidding process was carried out and indicate who you would like to select as the lowest qualified bidder. If, after reviewing the bids, we concur with your selection you may enter into a contract with the successful bidder.

CONTRACT AWARD: The contract is to be awarded to the responsible and responsive bidder whose bid meets the requirements and evaluation criteria set forth in the Invitation for Bids, and offers the lowest qualified bid price. A BID MAY NOT BE EVALUATED FOR ANY REQUIREMENT OR CRITERION THAT WAS NOT DISCLOSED IN THE INVITATION FOR BIDS. The successful bidder should be notified of his selection in writing by the Grantee; unsuccessful bidders should also receive written notification from the Grantee.

It is recommended that the contract be drawn up on a standard AIA Document which provides protection for both the Owner/Grantee and the Consultant in the event of a dispute.

Architect / Engineer / Consultant

Sample Request for Proposals

Dear _____,

The (Name of Grantee/Borrower) in (location of Grantee/Borrower) invites you to submit a proposal for professional services to be rendered toward the (rehabilitation, stabilization, etc.) of the (Name of Property).

1. **Scope of Services** [Detail the services you anticipate will be required of the consultant or consultant team] :
[Sample text: "The consultant will provide comprehensive architectural and engineering services for all work identified. Services will include architectural, structural, graphics and all other professional services required to accomplish the work described herein. Work is being assisted by a grant from the Maryland Historical Trust and all work must meet the Secretary of the Interior's Standards for Rehabilitation."]
2. **Information about the project or property** [Include date of construction, significance, current condition, current and proposed uses]
3. **Scope of Work** [Detail particular tasks or areas that need to be addressed in the drawings, specifications, or reports]:
[Sample text: "The successful applicant will provide design and construction administration services to the owner for the full rehabilitation of the Facility through to completion of the project and oversee that portion of the rehabilitation assumed by the contractor. Tasks will include:
 1. *Thorough analysis of the building, especially water penetration issues.*
 2. *Working with the owner to evaluate costs and priorities to provide a cost effective construction proposal.*
 3. *Analysis of and compliance with all code requirements as needed.*
 4. *Design of the improvements and preparation of all necessary bid documents.*
 5. *Assistance to the owner in the qualification and selection of contractor(s) to perform the restoration work.*
 6. *A preliminary estimate of construction costs.*
 7. *Construction administration services during restoration/rehabilitation.*
 8. *Coordination of architectural plans, at specific stages, with specific granting and approval agencies.*
 9. *Co-ordination and close contact with the Maryland Historical Trust on all details of this project."*
4. **Requirements** [list any general or project-specific requirements]:
[Sample text:

- “1. The Architect must be licensed by the State of Maryland at the time of execution of this document.
 2. The Architect must demonstrate experience in working with historic buildings. Please use the attached qualification form.
 3. The Architect must demonstrate Architect’s Professional Liability Insurance providing coverage in a principal amount of no less than \$1,000,000 for any willful or negligent act or omission by the Architect arising out of the performance of this Agreement. The Architect will provide the owner with a certificate indicating that such insurance is in effect. Such insurance will add the **[insert name of organization]** as additional insureds.
 4. The project will be partially funded through a [grant/loan] from the Maryland Historical Trust (MHT), and the [Architect / Engineer / Consultant] will be required to carefully document and submit project expenses with each request for payment. It may take thirty days or more to process requests for payment in order to allow for review and processing by MHT.
 5. The Property is protected by a preservation easement that restricts alterations to [note the area, structures, etc covered by the easement]. The project will be executed with the involvement and oversight of the State Historic Preservation Office (the Maryland Historical Trust, “MHT”). All work must be designed and executed in accordance with the Secretary of the Interior’s Standards for Rehabilitation. “
- 5. Submission** [list all items that must be included with the submission]:
1. Qualification Form & Attachments
 2. Fee proposal, including all sub-consultants, with breakdown per work phase and consultant as defined above, in a separate, sealed envelope clearly marked as “Fee Proposal”.
 3. A list of the hourly rates for salaries of professional, technical and clerical employees to be engaged in this project, including all overhead and cost of benefits. Provide this for principal(s), project manager, designer(s), draft person(s), and clerical for all the professional disciplines on the project.
 4. Consultant’s estimate of time frame for completion of (a) work through deliverable bid documents and (b) construction oversight.
 5. Proof of Professional Liability Insurance.

6. Term of Contract:

Sample text: “The term of the contract to be awarded is anticipated to be through the completion of the rehabilitation project. The contract will be administered by the directors or agents of the Owner or their designees.”

FAILURE TO INCLUDE ALL REQUIRED INFORMATION WILL RENDER THE PROPOSAL NON-RESPONSIVE.

The (Name of Project Property), located at (Address of Project Property), will be available for your inspection at a bidders' conference to be held on (Date of Conference) at (Location of Conference). Your completed proposal should be submitted to (Name and Address of Recipient) by (Bid Closing: Time and Date), at which time bids will be opened.

Bids will be opened at [location] at [time] on [date]. Those bids that do not meet the selection criteria will not be considered. Of those bids that are considered, the successful bidder will have the lowest cost.

The Selection Committee will evaluate the submission of each consultant, using the following criteria:

- * Success in restoration of historic buildings.
- * Ability to provide a full range of services necessary for the complete implementation of the project.
- * Ability to meet the schedule for performance and delivery of services.
- * Cost

Please contact (Name of Person to Contact) at (Telephone Number, E-mail Address) if you have any questions.

Sincerely,
[Owner Representative]

Architect / Engineer / Consultant

Sample Newspaper Ad – Request for Proposals

Proposals are requested for _____ [Architectural, Engineering, Consulting, etc.] services for the restoration of the [property name, address, city, state]. Work includes [insert brief description of work].

Project is partly funded by the MD Historical Trust. All work must comply with Secretary's Standards and all State regs. incl. EEO.

Proposals must be rec'd before [date, time] at [address, city, state, zip]. Call [tel. no.] for RPF Documents.

Contact awarded to lowest qualified bidder.

Pre-bid site inspection [date, time].

Architect / Engineer / Consultant Sample Qualification Form

The undersigned certifies under oath the truth and correctness of all statements and of all answers to questions made hereinafter.

Project Identification: [The John Doe House Restoration and Rehabilitation]

Name

Title

Company Name

Phone

Address

City/State/Zip

1. How many years has your organization been in business? _____

2. How many years under your present name? _____

3. What time periods under a previous business name? (List below)

a: Company Name

Period

b: Company Name

Period

c: Company Name

Period

4. Is your organization licensed to do business in the State of Maryland? Yes No, and
_____ County (if applicable)

5. Do you have a professional license in the State of Maryland? Yes No

6. Have you ever failed to complete any work awarded to you? Yes No
If no, note when, where and why:

7. Have you in the previous five years, been denied a contract award on which you submitted the low bid in competitive bidding, or been refused pre-qualification? Yes No If yes, please list and describe:

8. List four or more projects executed by your firm within the past three years that were similar in nature and scope to this project, and were in compliance with the *Secretary of the Interior's Standards*. Additional projects may be listed on a separate sheet.

a: Project Name	Location	Year
Project Cost	Owner Name and Phone Number	

b: Project Name	Location	Year
Project Cost	Owner Name and Phone Number	

c: Project Name	Location	Year
Project Cost	Owner Name and Phone Number	

d: Project Name	Location	Year
Project Cost	Owner Name and Phone Number	

9. Provide names of key personnel to be employed on this project. Indicate the projects listed in Item 6 with which they were involved. On attached sheets, give brief resumes of each person, describing specific experience and qualification that will indicate ability to perform work required on this project.

A.	_____	_____	_____	_____	_____
	Name	Years of Experience	Years with this Firm	Projects listed in #6 on which they worked	Project Role
B.	_____	_____	_____	_____	_____
	Name	Years of Experience	Years with this Firm	Projects listed in #6 on which they worked	Project Role
C.	_____	_____	_____	_____	_____
	Name	Years of Experience	Years with this Firm	Projects listed in #6 on which they worked	Project Role
D.	_____	_____	_____	_____	_____
	Name	Years of Experience	Years with this Firm	Projects listed in #6 on which they worked	Project Role
E.	_____	_____	_____	_____	_____
	Name	Years of Experience	Years with this Firm	Projects listed in #6 on which they worked	Project Role

10. Will you subcontract any part of the work? If yes, which part(s)?

10 a. Name and address of subcontractors.

11. Attach photographic documentation (flysheets, marketing materials, etc.) of projects listed in Item 6 that illustrate work that you have completed that are most comparable in style, technique, and workmanship to this project.

Architect / Engineer / Consultant
Sample No Bid Reply Form

BIDDER NAME: _____

It is important that the _____ [organization requesting bids] receive a reply from all invited bidders. There is no obligation to submit a quotation or proposal; however, should you choose not to bid, completion of this form will assist us in the future.

If for any reason, you are not submitting a bid on this Request, we ask that you check one or more reasons below, or explain briefly in the space provided at the bottom of the page. Please return the completed form by fax to _____ [fax number] or by mail to:

_____ [organization requesting bids]
_____ [street address]
_____ [city, state, zip]

We hereby submit a "No Bid" because:

- 1. We are not interested in being selected through a bid process.
- 2. We have insufficient time to respond.
- 3. Our schedule will not permit us to perform.
- 4. We do not feel we can be competitive.
- 5. Scope of work is too large or too small. [Please circle one.]
- 6. We do not wish to bid under the terms and conditions of the request for bid document.

Reasons: _____
_____.

- 7. We are unable to meet the requirements because: _____
_____.

- 8. Other: _____
_____.

COMPANY NAME

SIGNED

DATE

PRINTED NAME

Contractor / Builder Procurement Guidelines

These procurement procedures are applicable only to components of the project for which the Grantee or Borrower intends to use an MHT Capital Grant, MHT Capital Loan, or African American Heritage Preservation Grant to pay the contracting fees associated with that component of the project.

Contractors or builders who are to be paid, in whole or in part, with these funds MUST be selected on the basis of sealed, competitive proposals unless otherwise determined by MHT. The following guidelines are intended to assist project managers with the procurement process for securing contracting services to carry out the construction phase(s) of your capital project.

➤ **Procurement requirements vary depending on the anticipated cost of the project or component.**

For projects where the contracting costs are expected to exceed \$40,000, proposals must be solicited through public advertising. Proposals may also be solicited directly from specific contractors; however, public notice is required to ensure that the largest possible number of contractors is allowed to submit proposals on the project. The lowest qualified proposal must be selected.

For projects where the contracting costs will not exceed \$40,000 you may solicit proposals through invitation only. A minimum of six proposals should be solicited through direct solicitation and/or public notice. The lowest qualified proposal must be selected.

➤ **This document details the required steps for procuring services for your project and provides sample procurement documents.**

➤ **PROCUREMENT PROCEDURE**

- 1. Develop the scope of work for your project.** For a complex project, this may be in the form of architectural and engineering drawings and specifications. For a less complex project, this may be in the form of a written description of work that you create on your own or in consultation with a professional. Consult with your MHT project monitor for guidance along the way – don't wait until you are done!
- 2. Submit the scope of work to MHT for approval.** If you have had drawings and specifications prepared by an architect and / or engineer, submit those. If you only have a written description of the work, submit that. In either case, submit photographs of the existing conditions at the property. The proposed work will be reviewed in one of two ways:
 - If the property is under easement, the proposed work will be reviewed by MHT's in-house Easement Committee, which meets every three weeks, and will be approved in a letter from MHT's Director.
 - If the property is NOT under easement, the proposed work will be reviewed by your MHT project monitor.
- 3. After you have MHT's approval for the work, you can start the procurement process for a contractor or builder.**
- 4. Determine whether you will be required to publicly advertise the project or whether you may directly solicit proposals from individual firms** (see Page 1 of this document).
- 5. Determine whether you will hold a pre-proposal inspection** (see description below). Coordinate the date for this inspection with your MHT project monitor, who may wish to attend.
- 6. Determine by what date proposals must be submitted.**
- 7. Develop the "Request for Proposals"** based on the guidance and sample provided below. Submit this to your MHT project monitor for review before distributing it. Mail the "Request for Proposals" directly to contractors.
- 8. Develop an "Advertisement for Proposals", if required,** based on the guidance and sample provided below. Submit this to your MHT project monitor for review before sending it to the newspaper. Have the ad printed in your regional newspaper or construction journal. Be sure to get a copy of the printed ad for your records.
- 9. Prepare the proposal packages** (see description below.) Submit all proposal forms to your MHT project monitor for review before distributing them.
- 10. Distribute the proposal packages.** Each contractor who is interested in making a proposal will need to contact you and obtain the complete proposal package directly from you.
- 11. Receive the proposals.** See additional guidance below.
- 12. Determine which firm has the "lowest qualified proposal".**
- 13. Request approval of successful firm from MHT.** See below for a description of materials to submit to your MHT project monitor.
- 14. Once you have MHT approval, enter into a contract with the successful firm.**

➤ **REQUEST FOR PROPOSALS / ADVERTISEMENT FOR PROPOSALS**

A sample request for proposals (RFP) and a sample advertisement can be found on the following pages. The RFP should contain the following information:

- (1) Instructions to firms explaining the RFP submission requirements, including the project title and location, where proposal packages may be obtained, the deadline for submission of proposals, and the location to which proposals are to be delivered.
- (2) The name of the grant/loan recipient.
- (3) The name and address of the project property.
- (4) The nature of the project (e.g. restoration of outbuildings, stabilization of exterior walls, interior rehabilitation, etc.); the date by which proposals must be submitted to the Grantee/Borrower; **a statement that the project is being assisted by a grant/loan from the Maryland Historical Trust; and a statement that all work must comply with the Secretary of the Interior's *Standards for Rehabilitation*.**
- (5) A copy of the construction documents (plans and specifications) prepared by your architect, engineer and/or consultant.
- (6) A specific time and date at which all those wishing to make a proposal for contracting services can inspect the project property. The RFP closing date must not be less than twenty-one (21) days after the date you first solicit proposals, and not less than fifteen (15) days after the site inspection.
- (7) A statement that the contract will be awarded to the lowest qualified proposal (i.e. based on cost and qualifications).
- (8) A requirement that all amendments, addenda, and changes, and the receipt thereof, be acknowledged in writing.
- (9) A statement that bid, performance and payment bonds are required.
- (10) A statement that the contractor and any subcontractors must be an Equal Opportunity Employers.
- (11) The name and telephone number of a contact person associated with the project.

In addition, you may also wish to require firms to submit the names and locations of comparable projects that they have successfully completed so that you can evaluate each firm's qualifications. See following pages for a sample contractor qualification form.

PUBLIC NOTICE: Public notice is required to ensure that the largest possible number of contractors is allowed to make a proposal for the project. Therefore, when required, the RFP must be published in at least one newspaper of general circulation, or in construction or trade journals. Acceptable regional newspapers include the Baltimore Sun, Wilmington (Delaware) Journal, or the Star Democrat of Easton; construction journals include the Dodge Report or the Blue Report. Grantees/borrowers also are free to invite a particular contractor to submit a proposal.

Every effort should be made to allow interested minority firms to participate all phases of your project. State regulations require that, at the very least the grant recipient and the selected contractor and sub-contractors be Equal Opportunity Employers.

RFP PACKAGES: RFP packages should contain copies of project plans and specifications, affirmative action or equal employment opportunity materials, special materials or requirements based on consultant's reports or testing, the time of the pre-proposal site inspection, and sample copies of the proposal forms and qualification forms which the contractor will be required to complete and submit. A "No Bid" Reply form should be included so that the contractor can notify you if he is not submitting a proposal.

If your proposal package is large and expensive to reproduce you may wish to require a deposit from firms when they pick up a proposal package; this deposit is refunded when the firm returns the plans and specifications to you. If you choose to do this, notice that a deposit will be required should also be included in the RFP.

RESPONSE TIME: A minimum of twenty-one (21) days must elapse between the time the proposal package is first made available and the time by which proposals must be received.

PRE-PROPOSAL SITE INSPECTION: You may want to provide a set time at which firms may inspect the project site. Sufficient time should be provided between the time of the inspection and the proposal due date to allow firms to prepare their proposals. You should solicit the attendance of MHT staff.

PROPOSALS: Each proposal submitted should include a fixed price for each of the services desired. These services will be described in detail in the proposal package that has been prepared by your architectural, engineering or preservation consultant(s).

RECEIPT, OPENING, AND RECORDING OF PROPOSALS: When a proposal is received, it should be kept sealed and stored in a secure place until the time and place set for its opening. Proposals are to be opened at the time, date, and place specified in the RFP. The name of each firm, the proposal price, and such other information, as is deemed

appropriate, should be recorded at the time of opening and becomes a part of the official project record and should be made available to the public. Proposals then are to be tabulated or a proposal abstract prepared. Opened proposals should be available for public inspection at a reasonable time after the proposals are opened but before a contract is awarded.

Proposals should be reviewed by the grantee for:

- completeness
- responsiveness to the program
- project related qualifications
- previous preservation experience
- timeliness, and
- price

Copies of all proposals must then be forwarded to your MHT project monitor, along with copies of solicitation letters and any correspondence from the firms. Send all proposals, qualification forms, no-bid reply forms, and a copy of the newspaper ad. Include a cover letter describing how the procurement process was carried out and indicate which proposal you would like to select as the lowest qualified proposal. If, after reviewing the proposals, we concur with your selection you may enter into a contract with the successful firm.

CONTRACT AWARD: The contract is to be awarded to the responsible and responsive firm whose proposal meets the requirements and evaluation criteria set forth in the RFP, and offers the lowest qualified proposal price. A PROPOSAL MAY NOT BE EVALUATED FOR ANY REQUIREMENT OR CRITERION THAT WAS NOT DISCLOSED IN THE RFP. The successful firm should be notified of his selection in writing by the Grantee; unsuccessful firms should also receive written notification from the Grantee.

It is recommended that the contract be drawn up on AIA Document A 107 "Abbreviated Form of Agreement between Owner and Contractor". This approach provides protection for both the Owner/Grantee and the Contractor in the event of dispute.

PRE-CONSTRUCTION MEETING: A pre-construction meeting (where the contractor presents a project "Draw Schedule" or schedule of payments) will need to occur at the beginning of each project. Similarly, progress meetings should occur regularly throughout the course of construction. Attendees for these site meetings typically include the owner/grantee, architect, general contractor, MHT project monitor, related contractors, and other interested parties.

Contractor / Builder

Sample Request for Proposals

Proposals: _____ [Month, Day, Year and Time proposals are due]

_____ [Name of Project]

_____ [Location of Project]

_____ [Date First Advertised]

_____ [Name, Address and Phone of Contact Person]

The Owners of the _____ [Property Name] in _____
[City/County] Maryland will receive sealed proposals on a General Contract, for the
_____ [restoration, rehabilitation, etc.] of a _____
[Describe Building construction type and use]

The Work includes, but is not limited to, [Describe complete scope of work]

The Property [is, will be] protected by a preservation easement that restricts alterations to [note the area, structures, etc covered by the easement]. The project will be executed with the involvement and oversight of the State Historic Preservation Office (the Maryland Historical Trust, "MHT").

The project will be partially funded through a [grant/loan] from MHT, and the Contractor will be required to carefully document and submit project expenses with each request for payment. It may take thirty days or more to process requests for payment in order to allow for review and processing by MHT.

All work must be executed in accordance with the *Secretary of the Interior's Standards for Rehabilitation*. The contractor must be familiar with these standards, and must be willing to work with the Architect and MHT to resolve all unanticipated conditions in a manner that will be acceptable to the Reviewing Agency (MHT).

Proposals will be for a guaranteed maximum price, with unit prices for additional work. Proposals must also include the qualifications of the contractor and any subcontractors. The contract will be awarded to the lowest qualified proposal.

Receipt of all amendments, addenda, and changes must be acknowledged in writing.

Bid, performance and payment bonds will be required.

The Contractor and any Subcontractors must be Equal Opportunity Employers.

Insert if Applicable [A pre-proposal site inspection will be held on _____
[Date and Time]

The Owners will receive proposals until _____ [Time] Eastern Standard Time on
_____ [Date] at _____ [Address]. Proposals received
after this time will not be accepted. Proposals will not be opened publicly.

Proposal Documents may be examined at the _____ [Architect's, Owner's, etc.]
office by appointment.

Copies of the Proposal Documents may be obtained through the _____
[Architect's, Owner's, etc.] office by telephoning _____ [Phone Number]
during normal business hours or by e-mailing [E-mail address].

Insert if Applicable [Firms are required to be prequalified for this project and may obtain
appropriate qualification forms from the _____ [Architect's, Owner's, etc.]
office.]

The Owners reserve the right to waive irregularities and to reject proposals.

Please contact (Name of Person to Contact) at (Telephone Number, E-mail Address) if you
have any questions.

Sincerely,

Contractor / Builder
Sample Newspaper Ad

Proposals are requested for the [restoration, rehabilitation, construction, etc. as applicable] of the [property name, address, city, state]. Work includes [insert brief description of work].

Project is partly funded by the MD Historical Trust. All work must comply with Secretary's Standards and all State regs., incl. EEO. 5% Bid Bond & 100% Performance & Payment Bonds required.

Proposals must be rec'd before [date, time] at [address, city, state, zip]. Call [tel. no.] for Proposal Documents.

Contact awarded to lowest qualified proposal.

Pre-proposal site inspection [date, time].

Contractor / Builder

Sample Construction Proposal Form

[Organization Name]

[Address]

[City, State, Zip]

Due Date: **[Insert date]**

Time: **[Insert time]**

Local Time

[PROJECT NAME]

Firm Submitting Proposal _____

Telephone No. ____ (____) _____

Contact Person: _____

We hereby submit our proposal to the **[Organization Name]** for the "**[PROJECT NAME]**".

1. I/We have received, read, and fully understand:

The drawings/specifications for the project, dated **[insert date]**, as prepared by **[insert architect / engineer]**, **[insert if applicable]** including AIA Document A701 (1997 Edition), Instructions to Bidders contained therein.

Addenda to above numbered and dated:

(Insert all addendum numbers and respective dates)

(Insert all addendum numbers and respective dates)

(Insert all addendum numbers and respective dates)

2. I/We have examined the site, existing structures, access roads, existing utilities, and all existing conditions which affect the construction proposal.

3. I/We are able to provide all the materials, products, labor, equipment, supervision, managerial and professional services necessary for the project, and are able to construct the project as intended by the above mentioned specifications.

4. I/We are able to complete this project within the stipulated calendar days and/or critical completion dates specified by the Owner.

5. I/We clearly understand that this Construction Proposal Form must be completed and submitted in its entirety to be considered a responsive proposal. Failure to completely fill in all blanks may be cause for rejection of this proposal.

INDIVIDUAL PRINCIPAL

In Presence of:

FIRM NAME: _____

Witness: _____

SIGNED: _____

ADDRESS: _____

TELEPHONE NUMBER: (_____) _____

CO-PARTNERSHIP PRINCIPAL

In Presence of:

FIRM NAME: _____

Witness: _____

SIGNED: _____

ADDRESS: _____

TELEPHONE NUMBER: (_____) _____

as to By _____
(Partner)

as to By _____
(Partner)

as to By _____
(Partner)

CORPORATE PRINCIPAL

Attest:

(Corporate Secretary)

(Name of Corporation)

ADDRESS: _____

TELEPHONE NUMBER: (_____) _____

(Affix Corporate Seal)

By: _____
Print name and title.

The firm represents, and it is a condition precedent to acceptance of this proposal, that the firm has not been a party to any agreement to propose a fixed or uniform price.

WITNESS:

_____ (SEAL)
(Signature of Officer and Title)

SUBSCRIBED AND SWORN TO before me, a Notary Public of the State of

_____, County or City of _____

on this _____ day of _____, *[year]* .

(Notary Public)

Please submit this form with original signatures.

Contractor / Builder Sample Qualification Form

The undersigned certifies under oath the truth and correctness of all statements and of all answers to questions made hereinafter.

Project Identification: [The John Doe House Restoration and Rehabilitation]

Name Title

Company Name Phone

Address City/State/Zip

1. How many years has your organization been in business? _____

2. How many years under your present name? _____

3. What time periods under a previous business name? (List below)

a: Company Name Period

b: Company Name Period

c: Company Name Period

4. Is your organization licensed to do business in the State of Maryland? Yes No, and
_____ County

5. Have you ever failed to complete any work awarded to you? Yes No
If no, note when, where and why:

6. Have you in the previous five years, been denied a contract award on which you submitted the low bid/proposal in competitive bidding, or been refused pre-qualification? Yes No If yes, please list and describe:

7. List four or more projects executed by your firm within the past three years that were similar in nature and scope to this project, and were in compliance with the *Secretary of the Interior's Standards*. Additional projects may be listed on a separate sheet.

a: Project Name	Location	Year
Project Cost	Owner Name and Phone Number	

b: Project Name	Location	Year
Project Cost	Owner Name and Phone Number	

c: Project Name	Location	Year
Project Cost	Owner Name and Phone Number	

d: Project Name	Location	Year
Project Cost	Owner Name and Phone Number	

8. Which of the above projects required trade skills and construction practices similar to this project?

9. Provide names of key personnel to be employed on this project. Indicate the projects listed in Item 8 with which they were involved. On attached sheets, give brief resumes of each person, describing specific experience and qualification that will indicate ability to perform work required on this project.

A.	_____	_____	_____	_____	_____
	Name	Years of Experience	Years with this Firm	Projects listed in #6 on which they worked	Project Role
B.	_____	_____	_____	_____	_____
	Name	Years of Experience	Years with this Firm	Projects listed in #6 on which they worked	Project Role
C.	_____	_____	_____	_____	_____
	Name	Years of Experience	Years with this Firm	Projects listed in #6 on which they worked	Project Role
D.	_____	_____	_____	_____	_____
	Name	Years of Experience	Years with this Firm	Projects listed in #6 on which they worked	Project Role
E.	_____	_____	_____	_____	_____
	Name	Years of Experience	Years with this Firm	Projects listed in #6 on which they worked	Project Role

10. Will you subcontract any part of the work? If yes, which part(s)?

10 a. Name and address of subcontractors. On attached sheets, give brief resumes of each person, describing specific experience and qualification that will indicate ability to perform work required on this project.

11. Attach photographic documentation of projects listed in Item 6 that illustrate work that you have completed that are most comparable in style, technique, and workmanship to this project.

Contractor / Builder
Sample No Bid Reply Form

FIRM NAME: _____

It is important that the _____ [organization requesting proposals] receive a reply from all invited firms. There is no obligation to submit a quotation or proposal; however, should you choose not to make a proposal, completion of this form will assist us in the future. If for any reason, you are not submitting a proposal on this Request, we ask that you check one or more reasons below, or explain briefly in the space provided at the bottom of the page.

Please return the completed form by fax to _____ [fax number] or by mail to:

_____ [organization requesting proposals]
_____ [street address]
_____ [city, state, zip]

We hereby submit a "No Bid" because:

- 1. We are not interested in being selected through an RFP process.
- 2. We have insufficient time to respond.
- 3. Our schedule will not permit us to perform.
- 4. We do not feel we can be competitive.
- 5. Scope of work is too large or too small. [Please circle one.]
- 6. We do not wish to respond under the terms and conditions of the RFP.

Reasons: _____
_____.

- 7. We are unable to meet the requirements because: _____
_____.

- 8. Other: _____
_____.

COMPANY NAME

SIGNED

DATE

PRINTED NAME

MHT Capital Grants, MHT Capital Loans, & AAHPG Grants Fund Disbursement Policies & Procedures

The Maryland Historical Trust has an obligation to monitor projects in order to insure that the goods and services acquired with State funds are verified and approved, and, in the case of the project involving a historic property, that the work meets the Secretary of the Interior's Standards for Rehabilitation.

Your MHT Project Monitor will make periodic site inspections. An effort will be made to visit the site each time a payment request is submitted so that progress on the project, and compliance with the Grant Agreement, can be verified.

Before any grant or loan funds can be disbursed, certain conditions must be met.

- The grant agreement must be fully executed (signed by both parties) and returned to MHT – or – in the case of a loan, settlement must have occurred and all required settlement documents returned to MHT
- The perpetual preservation easement must be fully executed, the grantee / borrower must have it recorded in the Land Records of the County in which the property is located, and the original easement must be returned to MHT
- The grantee / borrower must provide MHT with a Certificate of Title indicating encumbrances and liens on the project property
- MHT must approve the scope of work
- MHT must approve the selection of the consultant (architect, engineer, etc) or contractor and ensure the procurement process was appropriately followed
- MHT and the grantee / borrower must verify that the work that is being paid for has been satisfactorily completed

Please note that MHT grant funds are not disbursed *up-front* but are disbursed based on invoices for *completed* work (except in the case of loans for acquisition, in which case payment is made at settlement).

How do I make a request for payment?

- When a contractor or consultant submits a bill to you for payment, your project architect (if you have one), your MHT Project Monitor, and you will inspect the work for which payment is being requested. You will need to contact your MHT Project Monitor to schedule a site inspection.
- Both you and the project architect or engineer (if you have one) must certify, in writing, that the application for payment is appropriate and that the work has been completed to your satisfaction. This certification is usually in the form of a cover letter attached to a copy of the contractor's or consultant's invoice.

- You must submit to MHT a copy of the invoice(s) for the completed work. In the case of a contractor's invoice, we recommend that if at all possible, submissions should be made on AIA Document G 702 "Application and Certificate for Payment".
- Upon receipt of your certification / cover letter and application for payment, MHT will send a written request to the Office of the Comptroller of the State of Maryland to prepare a check payable to the Grantee in a pro-rated amount of the requested payment (see "Will my invoice be paid in full?" below).
- Payments are only made to the grantee or borrower, NOT to a contractor or consultant. This may delay your payment to your contractor or consultant beyond the customary 30 days. Please be sure your contractor or consultant is aware of this and make any necessary arrangements.
- We expect that checks will be sent from the Office of the Comptroller of the State of Maryland approximately 21 to 30 calendar days after your application for payment is received at MHT.
- Upon receipt of the disbursement, you must deposit and maintain the funds in a non-interest bearing account that is separate from your other accounts (i.e. an auditable escrow account), or establish separate ledger accounts for the funds. You may then pay the contractor or consultant from that account. (See also separate document "Grantee Responsibilities for Financial Reporting".)
- In a documented case of extreme hardship, MHT will work with you to try to find a means of streamlining the payment process as much as possible.

Will my invoice be paid in full?

- At least 10% of the value of the work performed by the contractor or consultant at the time of each request will be withheld until all the work to be carried out *under that particular contract* has been completed and approved by your MHT Project Monitor.
- **In all cases, the final 10% of the grant or loan will not be disbursed until requirements for completion are satisfied.** (See below.)
- For each **grant** payment request MHT will disburse funds in the same proportion as our contribution to the overall project as defined in the Grant Agreement.

Scenario #1: *If you receive an invoice from your contractor for \$10,000, and you have committed to a dollar-for-dollar **cash** match, the Trust may pay 50% of the invoice (minus the 10% retainage as applicable). You will combine the MHT disbursement with your matching funds and present the contractor with full payment.*

Scenario #2: *If you receive an invoice from your contractor for \$10,000, and you have committed to a dollar-for-dollar **cash** match, the Trust may pay the entire invoice (minus the 10% retainage as applicable) once you provide substantiation of other **cash** expenditures **on the defined project** totaling \$10,000.*

Scenario #3: *If your match is **in-kind**, you will have to substantiate the value of the donated materials or services at the time you submit the request for payment. For*

*example, if you receive an invoice from your contractor for \$5,000, and you have committed to a dollar-for-dollar **in-kind** match, the Trust may pay the entire invoice (minus the 10% retainage as applicable) once you provide substantiation of in-kind materials or services totaling \$5,000.*

How do I show that I have spent my match? ~grants only~

- If you have committed a **cash** match: You will need to provide copies of invoices and cancelled checks to substantiate the cash spent **on the defined project**.
- If you have committed an **in-kind** match: You will need to substantiate the materials or services donated **for the defined project**. For *donated materials*, an invoice for materials or a signed statement from the donor would be required. For *donated professional services*, a signed statement from the donor, including the donor's customary hourly rate and number of hours donated, would be required. For *volunteer services*, a timesheet signed by the donor, including the donor's and grantee's signature, would be required.
 - The hourly rate for volunteer time is valued based on the rate for Maryland noted on the Independent Sector website (http://www.independentsector.org/volunteer_time).
 - Please note that any member of your organization's Board of Directors (or similar) can ONLY donate time at the volunteer rate, NOT at their customary hourly rate for professional services.
- **Because this is a matching grant, it is necessary for all matching funds provided by the grantee to be in place and accessible when the project begins. MHT uses partial and pro-rated disbursements as a means to ensure accountability for those goods and services acquired with State funds. Also, a cash match helps ensure adequate cash flow for the duration of the project.**

How do I claim my final payment, including the retainage?

- **Authorization for the FINAL disbursement of the grant funds will be withheld by the MHT Project Monitor UNTIL:**
 - A bring-to-date on the Certificate of Title has been submitted, and
 - A project completion report and photos have been submitted. (See also separate document "Completion Requirements".)

Who do I call with questions?

Anne Raines
Capital Grants & Loans Administrator
Maryland Historical Trust
100 Community Place
Crownsville MD 21032

410.514.7634
araines@mdp.state.md.us

MHT Capital Grants, MHT Capital Loans, & AAHPG Grants

Completion Requirements

The Completion Report is intended to provide a photographic record and capsule summary of the grant or loan project. Both a Completion Report acceptable to the Maryland Historical Trust and a bring-to-date on the certificate of title must be submitted prior to the release of the final disbursement of grant or loan funds. Incomplete reports may be returned, and funds withheld, until all requested corrections are made.

The Completion Report should use the attached form as a cover page. This form needs to be submitted with the following:

- **PHOTO DOCUMENTATION**
 - Please provide good quality digital images on a CD-rom or DVD. Images should include at least one overall photograph of each side of the building; representative interior photos; and several photos highlighting specific details or areas of interest, especially of elements for which MHT grant funds were used.
 - All images must be taken AFTER completion of the work.
 - The images must be clearly identified on the disk, and corresponding descriptions must be provided in hard copy. The descriptions of the photos must include the following information:
 - File name [i.e. Stone House 1.jpg (must correspond to the name of the file on the disk)]
 - Photographer
 - Date
 - Description of subject of photograph [i.e. "Rear of property after reconstruction of porch."
- **NARRATIVE**
 - Provide a brief narrative report and evaluation of the project including:
 - a discussion of the project as a whole
 - successes and/or problems encountered
 - a statement of the property's intended future use
 - best practices employed and lessons learned
 - additional work remaining to be done
- **BRING-TO-DATE ON CERTIFICATE OF TITLE**
 - This document demonstrates to MHT that the easement has been recorded and that all other interests have been subordinated to the easement.
- **REPORTS**
 - A copy of all test results and consultants' reports and final drawings associated with the project, as applicable. These may be provided on a CD-rom or DVD.

MHT Capital Grants, MHT Capital Loans, & AAHPG Grants Project Completion Report*

1. Property Data

Property Name	
Property Address	
City, State, ZIP	
County	

2. Type of Funding

(check one)	African American Heritage Preservation Grant <input type="checkbox"/>	MHT Capital Grant <input type="checkbox"/>	MHT Capital Loan <input type="checkbox"/>
-------------	---	--	---

3. Project Summary (approximately 60 words)

	Grant Funds Received	\$
	Actual Cash Match	+\$
	Actual In-Kind Match	+\$
	Other Project Costs	+\$
	Total Project Costs	=\$

4. Grant Applicant Data

Organization			
Type (check one)	Nonprofit <input type="checkbox"/>	Local government <input type="checkbox"/>	Business entity <input type="checkbox"/> Individual <input type="checkbox"/>
Federal Identification Number			
Contact Name			
Address			
City, State, ZIP			
Phone		Fax	
E-mail		Website	

5. Property Owner Data

Organization			
Contact Name			
Address			
City, State, ZIP			
Phone		Fax	
E-mail		Website	

**This form can be provided to you as a Word document or fill-in form – please contact your Project Monitor.*