How to Apply for a Special Category Grant

HISTORIC PRESERVATION GRANTS PROGRAM

Grants Staff

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Department of State

Division of Historical Resources

Bureau of Historic Preservation

Historic Preservation Grants Program

Recent Legislative Appropriations Special Category

FY 2026	$0
FY 2025	$8.4 Million
FY 2024	$8.4 Million
FY 2023	$21.5 Million
FY 2022	$0
FY 2021	$0
FY 2020	$5 Million
FY 2019	$2 Million

Program Governance

- Chapter 267.0617, Florida Statutes
- Chapter 1A-39, Florida Administrative Code
- Special Category Grant Guidelines

Special Category Grant Guidelines

- The Special Category Guidelines can be found on the DHR Grants Program webpage.
- The Guidelines contain information that pertains to the entire grant process – from application through funding and management.
- Prior to submitting an application, potential applicants should review these Guidelines, specifically noting sections regarding eligibility, project descriptions, match, and allowable expenses.

NOTE: Rule and Program Guidelines undergo yearly revision.

Application Requirements

Application Submission Period

Submission Period Opens:	Submission Period Closes:
June 1	July 10 (5:00 p.m. Eastern)

Applications will be evaluated on a competitive basis and the selected projects will be awarded funds for FY2028 (July 1, 2027 – June 30, 2028).

Applicant Eligibility

- To be eligible to apply for grant funding, applicants must be a public entity governed by a county, municipality, school district, community college, college, university or an agency of state government; or a Non-profit Organization.
- For further details, see Section IV of the Guidelines.

Application Restrictions

- Applicants may only submit one Special Category grant application per application cycle with the following exceptions:
  - State agencies, county or city governments, or universities may submit single applications from more than one division or department provided those divisions or departments are separate and distinct budgetary units and provided that applications do not address the same facility, project or site; and
  - Applicants must **NOT** have multiple active Special Category projects under contract at one time. Special Category projects have a grant period of 24 months. Unless an Applicant Organization has a smaller project that will be completed in a single year, new applications should be submitted every other year.

Special Category Grant Types

- Development – Preserve, restore, rehabilitate, or reconstruct a historic structure and/or site-specific planning required for these activities
  - Note: See guidelines for restrictions on activities on historic religious properties and cemeteries.
- Archaeological Research – For Phase I, Phase II, and limited Phase III terrestrial and underwater fieldwork, reporting, and conducting collection research
- Museum Exhibit – Establish/redesign a permanent museum exhibit in a Florida history museum, including research, design, fabrication, and installation
- Acquisition – Acquire historic properties or archaeological sites

Request Amounts

- Applicants may request up to $1,000,000 for all projects
- There is no minimum request amount

Match Requirements

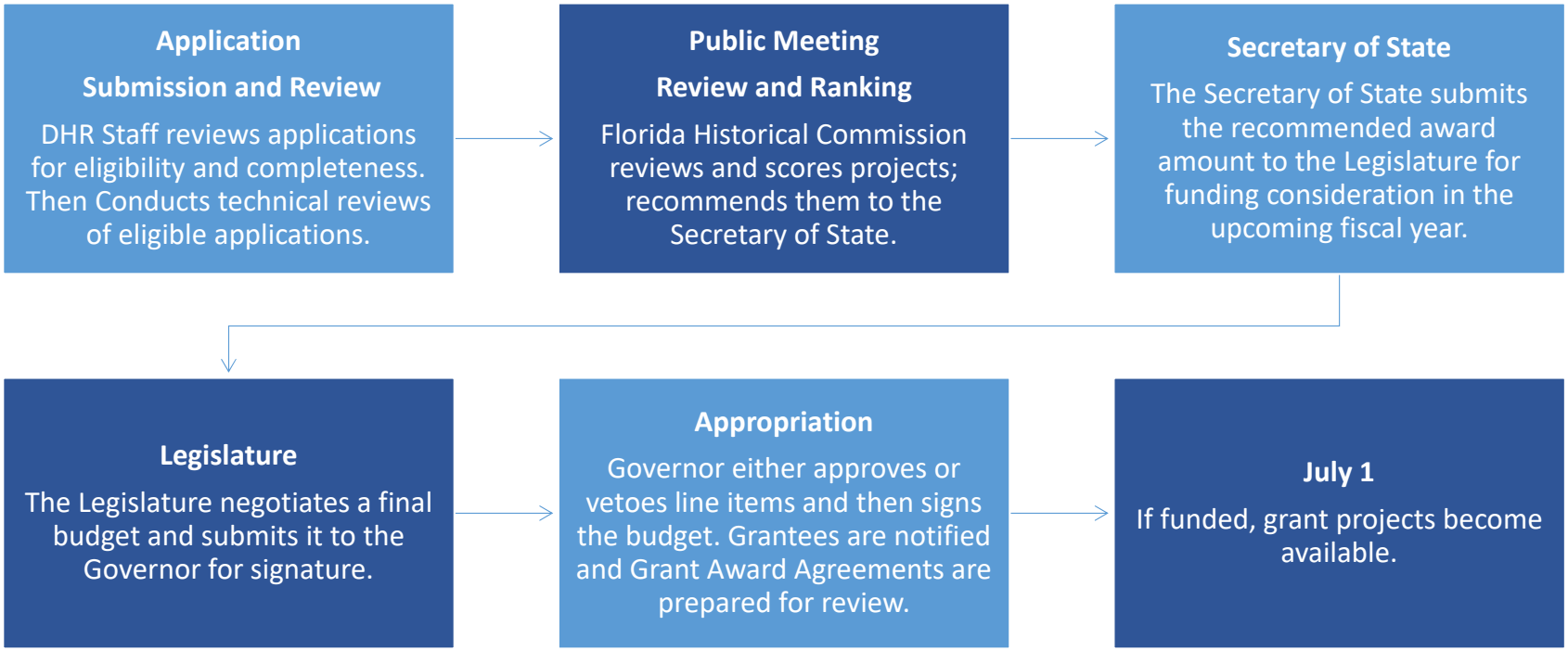
Summary of Match Requirements	Required Match
Projects not located in REDI qualified counties or communities	50%
Projects located in REDI qualified counties or communities	25%
Organizations that are state agencies, state colleges or state universities must meet the full match requirement, regardless of project location	50%

*REDI stands for Rural Economic Development Initiative

NOTE: At least 25% of the match provided must be cash-on-hand and only up to 75% may be in-kind.

Application Lifecycle

Application Cycle



Review Process – Staff Review

- The technical review of applications verifies:
  - Applicant is eligible
  - Proposed project is consistent with selected project type
  - Non-allowable expenses are not included
  - Match requirement fulfilled and appropriately documented
  - All supporting documentation has been provided
- Only documents that are provided in response to requests for clarification from staff will be considered after the application deadline.

Review Process – Florida Historical Commission (FHC)

- Ineligible applications will not be reviewed by the FHC or discussed at the public meeting
- Commissioners independently evaluate each application based on review criteria and are required to follow the Division's scoring instructions
- After each commissioner has evaluated the applications, there will be a public meeting to review, discuss, and score the applications
- Commissioners' scores will be averaged to determine the final score of each application

Criteria and Scoring

- Eligible applications will be reviewed based on 3 criteria
- Points for each criterion vary, with a total possible score of 100
- Applications must receive a minimum average score of 80 or higher to be recommended for funding
- Evaluation will be based on the information contained in the application and support materials

Criteria

Criterion 1: Historic Significance (up to 40 points)

- Historic significance, meaning beyond just the age of a resource, the relative importance of the property or site in connection with historical events, developments, or individuals. This may also refer to the relative importance of the information that forms the basis of a proposed museum exhibit or archaeological project.

Criteria

Criterion 2: Community Impact, Need, and Educational Potential (up to 30 points)

- Public good, including accessibility, educational potential, economic impact or any other public benefit resulting from the proposed Project.
- Need for the proposed project or activity, as it relates to the preservation of the history of Florida and/or its historical and archaeological resources. This may also refer to the need to update the outdated information and/or design of a museum exhibit.
- Compatibility with statewide historic preservation priorities established by the Division. These priorities are subject to change annually depending on regional or statewide concerns (e.g., disasters such as fire, flooding or hurricane damage).

Criteria

Criterion 3: Organization, Administration, and Technical Ability (up to 30 points)

- Administrative capability, staffing, and financial resources adequate to complete the proposed project and meet the administrative requirements of the grant.
- Quality of application, including the availability of professional and technical services required to carry out the proposed project.
- Appropriateness of the proposed project scope of work, budget, and timeline in relation to the property, site, resources, collections or information that forms the basis of the proposed project.

Legislative Funding Process

- Following the public meeting, the Division shall prepare a final priority list of all recommended applications for review and approval by the Secretary of State
- The Secretary of State will provide the Legislature with an approved list, ranked in order of total average score, for funding consideration
- Applications recommended for funding by the FHC and approved by the Secretary of State are not guaranteed funds
  - Funding for state grants is contingent on an annual appropriation by the Florida Legislature and, in addition, is subject to veto by the Governor
  - Applicants are encouraged to reapply for the project during the subsequent application cycle if grant funds have not yet been approved in the budget by the Governor by the application cycle deadline

Getting Started in DOSgrants.com

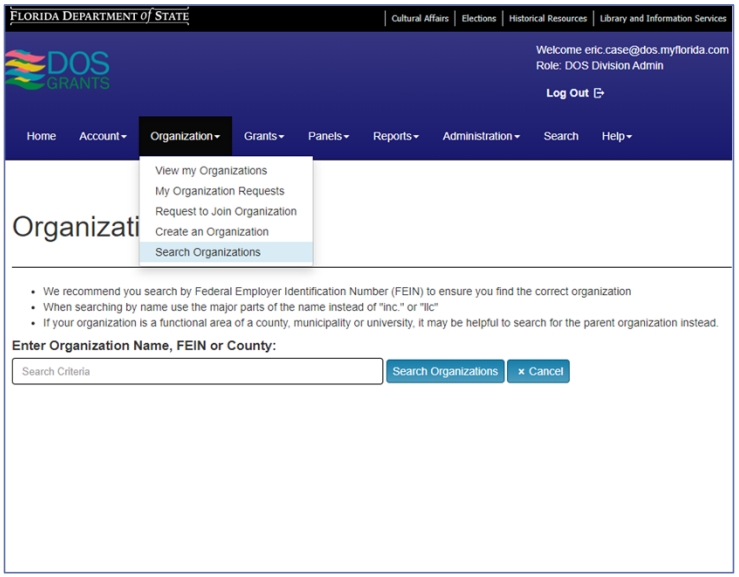
DOSgrants.com

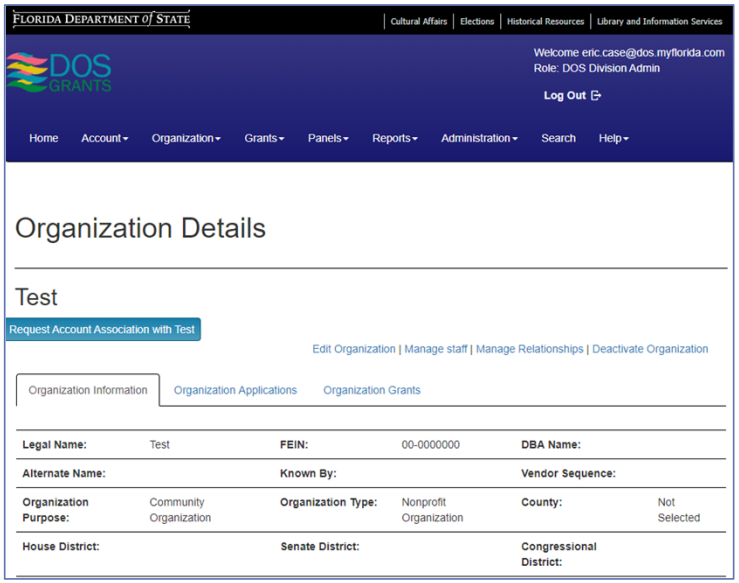
- Must complete an online application form at http://www.dosgrants.com by the application deadline (July 10, 5:00 p.m. Eastern)
- Applicants must have a dosgrants.com account

For more information on creating an account, click here.

Organization Association

- Applicants must be associated with an organization to apply for grants

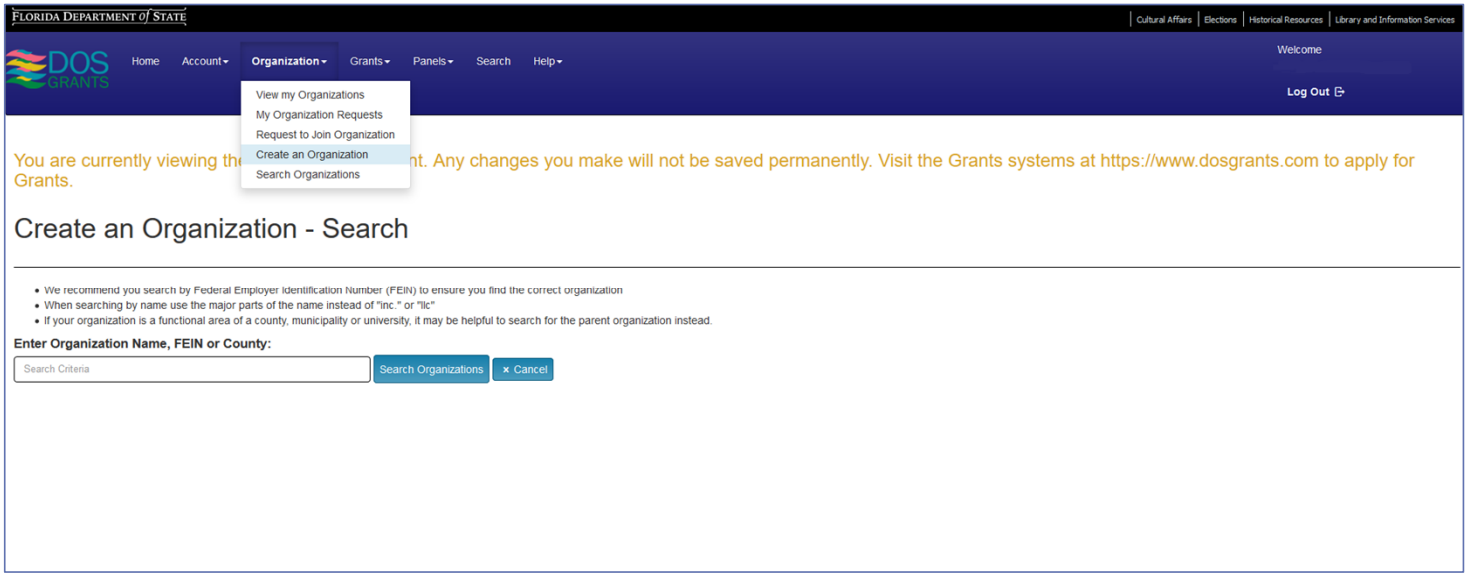




For more information, click here.

Organization Association

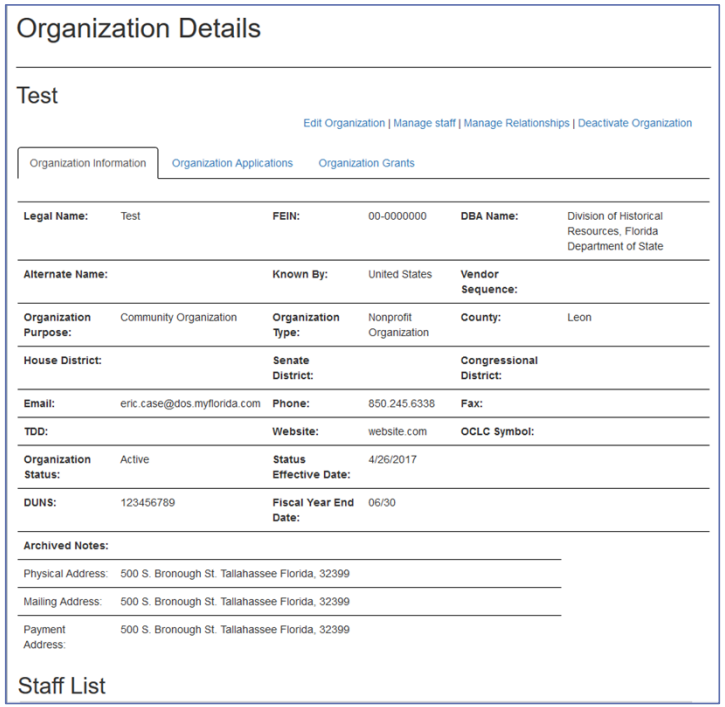
- If a profile for your organization does not exist, you must create one



For more information, click here.

Organization Profile

- Applicants should verify that the following information is included in the Organization profile:
  - Phone number (with extension if applicable)
  - Principal Address
  - Mailing Address
  - Website
  - Org Type
  - Org Category
  - County
  - Unique Entity Identifier (UEI) Number
  - Fiscal Year End Date



Organization Details

Test

Edit Organization | Manage staff | Manage Relationships | Deactivate Organization

Organization Information | Organization Applications | Organization Grants

Legal Name:	Test	**FEIN:**	00-0000000	**DBA Name:**	Division of Historical Resources, Florida Department of State
Alternate Name:		**Known By:**	United States	**Vendor Sequence:**	
Organization Purpose:	Community Organization	**Organization Type:**	Nonprofit Organization	**County:**	Leon
House District:		**Senate District:**		**Congressional District:**	
Email:	eric.case@dos.myflorida.com	**Phone:**	850.245.6338	**Fax:**	
TDD:		**Website:**	website.com	**OCLC Symbol:**	
Organization Status:	Active	**Status Effective Date:**	4/26/2017		
DUNS:	123456789	**Fiscal Year End Date:**	06/30		
Archived Notes:					
Physical Address:	500 S. Bronough St. Tallahassee Florida, 32399				
Mailing Address:	500 S. Bronough St. Tallahassee Florida, 32399				
Payment Address:	500 S. Bronough St. Tallahassee Florida, 32399				

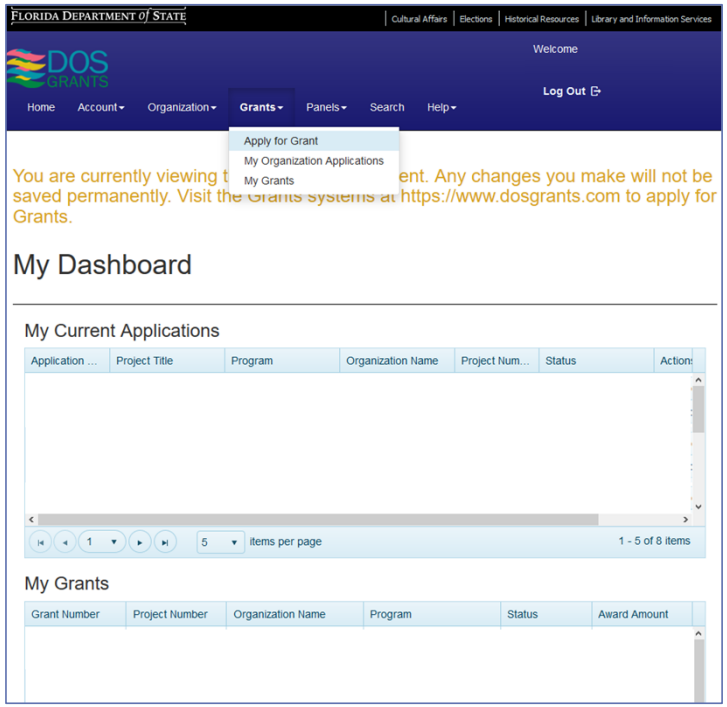
Staff List

Organization Roles

- Organization Manager
  - Permissions: May view, edit, and submit applications; May edit profile and add/edit staff
- Profile Editor
  - Permissions: May edit Organization Profile
- Grant Editor
  - Permissions: May edit applications but may not submit
- Submitter
  - Permissions: May view and submit applications
- Viewer
  - Permissions: May only view application details

Finding and Completing the Application

Application Location



Division: Historical Resources

Small Matching	The Department of State, Division of Historical Resources, provides state and federal funds for historic preservation. The purpose of this program is to provide funding, in the form of grants, to assist local, regional and state-wide efforts to preserve significant historic and archaeological resources, and to promote knowledge and appreciation of the history of Florida. This program provides historic preservation grants on a competitive basis. The program does not fund operational support for historic preservation organizations. The Legislature determines the amount appropriated annually for the program, and funding for all eligible applications is not guaranteed. The Small Matching Guidelines specify program policies and procedures. More information regarding the program is available here.	2/21/2020 - 4/3/2020	Apply Now
Special Category	The Department of State, Division of Historical Resources, provides state and federal funds for historic preservation. The purpose of this program is to provide funding, in the form of grants, to assist local, regional, and state-wide efforts to preserve significant historic and archaeological resources and promote knowledge and appreciation of the history of Florida. This program provides historic preservation grants on a competitive basis. The program does not fund operational support for historic preservation guidelines. The Legislature determines the amount appropriated annually for the program, and funding for all eligible applications is not guaranteed. The Special Category Guidelines specify program policies and procedures. More information regarding the program is available here.	2/26/2020 - 4/3/2020	Apply Now

Division: Library and Information Services

Section A: Organization Information

Organization Information

Division of Historical Resources - Special Category Grant

A. Organization Information
B. Project Information
C. Historical Significance
D. Project Specifics
E. Budget and Match
F. Property Information
G. Protection and Impact
H. Support Materials
I. Review and Submit

Test

Organization Information

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Application Instructions

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Applicant Information

a. **Organization Name:** Test
b. **FEID:** 00-0000000
c. **Phone number:** 850.245.6338
d. **Principal Address:** 500 S. Bronough St. Tallahassee, 32399
e. **Mailing Address:** 500 S. Bronough St. Tallahassee, 32399
f. **Website:** website.com
g. **Organization Type:** Nonprofit Organization
h. **Organization Category:** Community Organization
i. **County:** Leon
j. **DUNS number:** 123456789
k. **Fiscal Year End Date:** 0/0

Grant Experience

3. Applicant Grant Experience and History

3.1. Has the applicant received previous grant assistance within the past five years from any source? *

○ Yes

◉ No

3.2. If yes, for the most recent grants (up to 20), specify the year of the grant award, grant number, grant project name, the granting entity, the grant award amount, and its current status. Make sure to include any grants awarded by the Division or other State grants.

+ Add new record

#	Year	Grant No.	Grant Project Name	Granting Entity	Grant Amount	Open / Closed	Actions
1	2019	Grant 1	Project 1	Agency 1	$100,000.00	Closed	Edit Delete
2	2021	Grant 2	Project 2	Agency 1	$75,000.00	Closed	Edit Delete
3	2021	Grant 3	Project 3	Agency 2	$200,000.00	Open	Edit Delete

1 20 items per page 1 - 3 of 3 items

Corresponding criteria:

- Organization, Administration, and Technical Ability

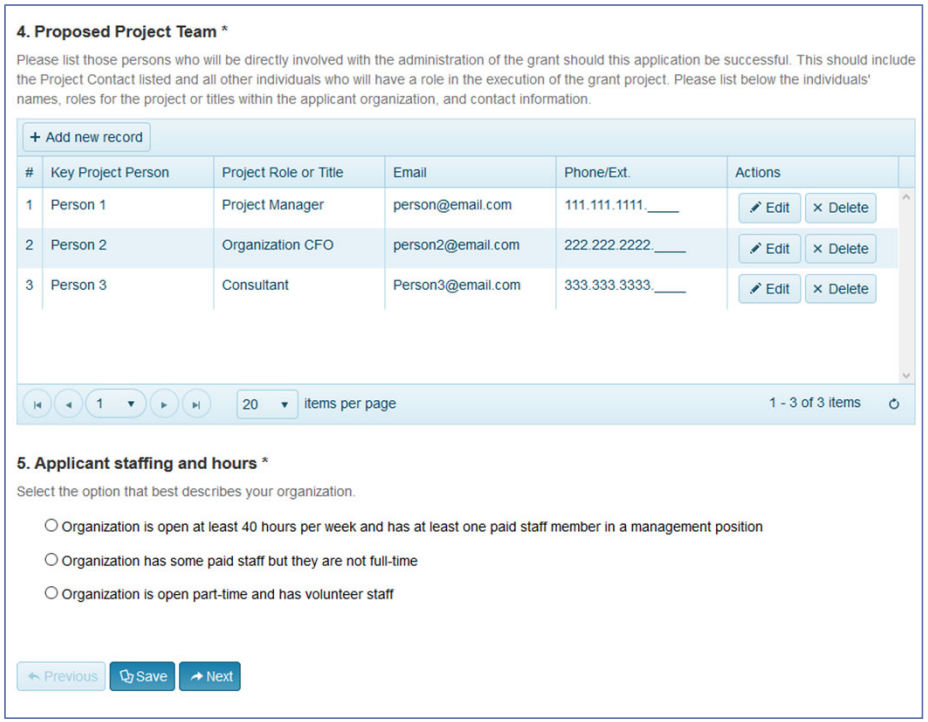
Project Team

- Proposed Project Team
  - Those who will be directly involved with the execution of the grant project
  - Upload curricula vitae/resumes of the proposed project team members to the Support Materials section of the application

Note: All services must be combatively procured

Corresponding criteria:

- Organization, Administration, and Technical Ability



4. Proposed Project Team *

Please list those persons who will be directly involved with the administration of the grant should this application be successful. This should include the Project Contact listed and all other individuals who will have a role in the execution of the grant project. Please list below the individuals' names, roles for the project or titles within the applicant organization, and contact information.

+ Add new record

#	Key Project Person	Project Role or Title	Email	Phone/Ext.	Actions
1	Person 1	Project Manager	person@email.com	111.111.1111.____	Edit × Delete
2	Person 2	Organization CFO	person2@email.com	222.222.2222.____	Edit × Delete
3	Person 3	Consultant	Person3@email.com	333.333.3333.____	Edit × Delete

1 20 items per page 1 - 3 of 3 items

5. Applicant staffing and hours *

Select the option that best describes your organization.

- ○ Organization is open at least 40 hours per week and has at least one paid staff member in a management position
- ○ Organization has some paid staff but they are not full-time
- ○ Organization is open part-time and has volunteer staff

Previous Save Next

Section B: Project Information

Project Information

- Select the project type for which grant funds are requested
  - Applications for which the Scope of Work does not agree with the selected project type will be declared ineligible
- Enter the project title
  - Read, reread, and re-reread
  - The title entered here is what will remain with the project
- Describe the Physical Context of the Resource

1. Project Type *

Select the project type for which grant funds are requested. If you are unsure of which type to select, please refer to the definition beneath each project type.

○ Development Projects

Development activities geared at preservation of properties open to the public, including: restoration, rehabilitation, reconstruction, and site-specific planning required for these activities Exception: Activities on religious properties are limited to building exterior envelope, excluding accessibility upgrades, and structural elements of the building.

○ Archaeological Research Projects

Archaeological research projects including: research and field investigations tied to large area surveys or excavation, analysis and publication of findings.

○ Museum Exhibit Projects

Museum exhibit projects for Florida history museums, including: research of exhibit content, exhibit design, fabrication, and installation.

○ Acquisition Projects

Acquisition of a single historic property or archaeological site, or group of such, in which all the resources have the same owner. For archaeological sites, an exception to the single owner provision may be made if the archaeological site extends on land that is contiguous, but owned by different property owners.

2. Project Title and Location Information

The title should reflect the name of the property, site, area, museum, or exhibit, and the goals of the proposed project. The title should be consistent with previous applications/awards. (For example, Smith House Rehabilitation, South Mill Archaeological Excavation, etc.)

2.1. Project Title - 250 characters maximum *

2.2. Name of Property (if applicable)

2.3. Street Address (primary location where the proposed project will be carried out) - 250 characters maximum

2.4. City (location of the proposed project) - 250 characters maximum *

2.5. Primary County (location of the proposed project) *

Not Selected

Section C: Historical Significance

Historical Significance

- Indicate the type of historical designation the resource has received
- Provide a summary/narrative of the history of the resource (be it tangible or intangible). For example:
  - Why and how is the resource important to the community?
  - Are any historical figures/events associated with the resource?

Corresponding criteria:

- Historical Significance

Section D: Project Specifics

Scope of Work

- Briefly describe the scope of work for the project for which funding is requested
- This is a task-orientated question
  - What product or goal is your organization wanting to complete?
  - What steps do you need to take to accomplish the goals?
  - What professional or technical services will be used?

Corresponding criteria:

- Organization, Administration, and Technical Ability

Non-allowable Expenses

Section VIII of the guidelines provides a non-exhaustive list of expenses that may not be paid for with grant or matching funds, including the following:

- Work that does not comply with the Secretary of the Interior's Standards (as applicable)
- Work completed outside of the grant period
- Entertainment, food, beverages, plaques, awards, or gifts
- Total administrative and project management costs exceeding 5% of the grant funds requested
- Indirect costs, i.e. costs that are not readily identifiable as expenditures for the materials and services required to complete the scope of work
- Maintenance of cars, boats, trailers, or other vehicles
- Activities related to the interiors of religious properties or properties whose owners have a religious affiliation
- Furniture and equipment
- Supplies that will not be consumed during the course of the project
- Attending/hosting conferences, summits, workshops, or presentations
- Tuition waivers, fees, and other non-grant related costs associated with employing students
- Travel expenditures, including those of personnel responsible for items of work approved by the Division, administrative personnel, or (sub)contracted employees, either for purposes of work on-site or research off-site

Timeline

- Use this section to demonstrate that the project can be completed within the grant period (24 months)
- Major project elements to consider:
  - GAA execution
  - Procurement
  - Completion of each scope of work item

Corresponding criteria:

- Organization, Administration, and Technical Ability

Application Questions Specific to Project Type

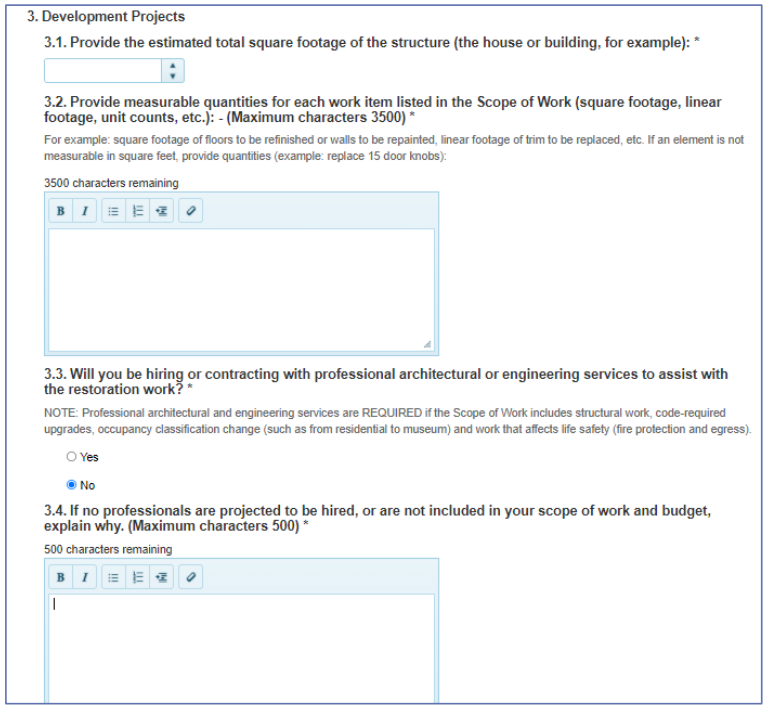
Development

- Provide the estimated square footage of the structure
- Provide measurable quantities of each item listed in the scope of work
- Will you be hiring a historic preservation architect?
  - If not, why?

Architectural services are required unless specifically given a waiver by the Division

Corresponding criteria:

- Organization, Administration, and Technical Ability



3. Development Projects

3.1. Provide the estimated total square footage of the structure (the house or building, for example): *

3.2. Provide measurable quantities for each work item listed in the Scope of Work (square footage, linear footage, unit counts, etc.): - (Maximum characters 3500) *

For example: square footage of floors to be refinished or walls to be repainted, linear footage of trim to be replaced, etc. If an element is not measurable in square feet, provide quantities (example: replace 15 door knobs):

3500 characters remaining

3.3. Will you be hiring or contracting with professional architectural or engineering services to assist with the restoration work? *

NOTE: Professional architectural and engineering services are REQUIRED if the Scope of Work includes structural work, code-required upgrades, occupancy classification change (such as from residential to museum) and work that affects life safety (fire protection and egress).

Yes

No

3.4. If no professionals are projected to be hired, or are not included in your scope of work and budget, explain why. (Maximum characters 500) *

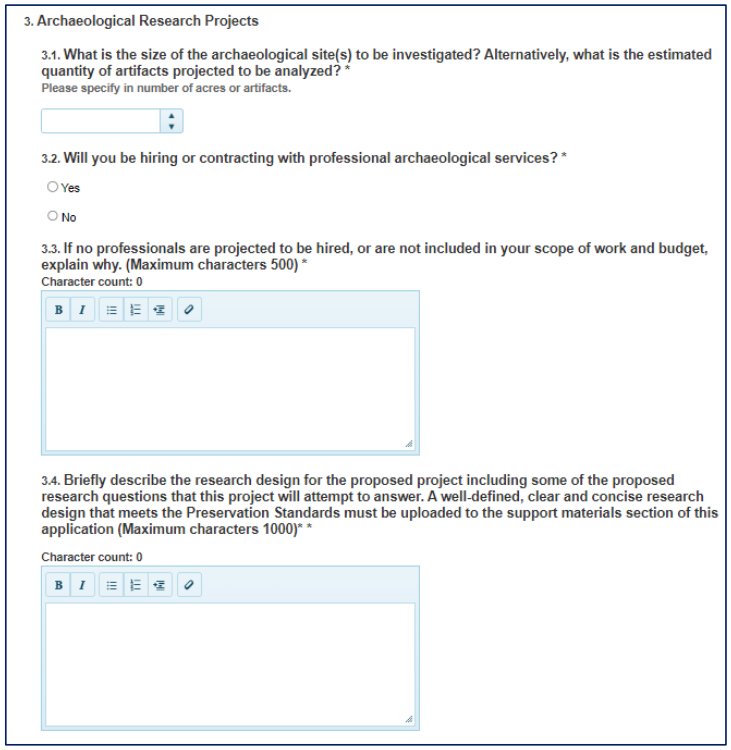
500 characters remaining

Archaeological Research

- What is the size of the archaeological site to be investigated or quantity of artifacts to be analyzed?
- Will you be hiring professional archaeological services?
  - If not, why?
- Describe and upload the project Research Design that meets preservation standards
- Describe the proposed methodology for answering the research questions
- Describe the curation plan for archaeological specimens and records
- Are human remains known or expected to be present on sites or areas to be investigated?

Corresponding criteria:

- Organization, Administration, and Technical Ability



3. Archaeological Research Projects

3.1. What is the size of the archaeological site(s) to be investigated? Alternatively, what is the estimated quantity of artifacts projected to be analyzed? *

Please specify in number of acres or artifacts.

3.2. Will you be hiring or contracting with professional archaeological services? *

Yes

No

3.3. If no professionals are projected to be hired, or are not included in your scope of work and budget, explain why. (Maximum characters 500) *

Character count: 0

3.4. Briefly describe the research design for the proposed project including some of the proposed research questions that this project will attempt to answer. A well-defined, clear and concise research design that meets the Preservation Standards must be uploaded to the support materials section of this application (Maximum characters 1000)* *

Character count: 0

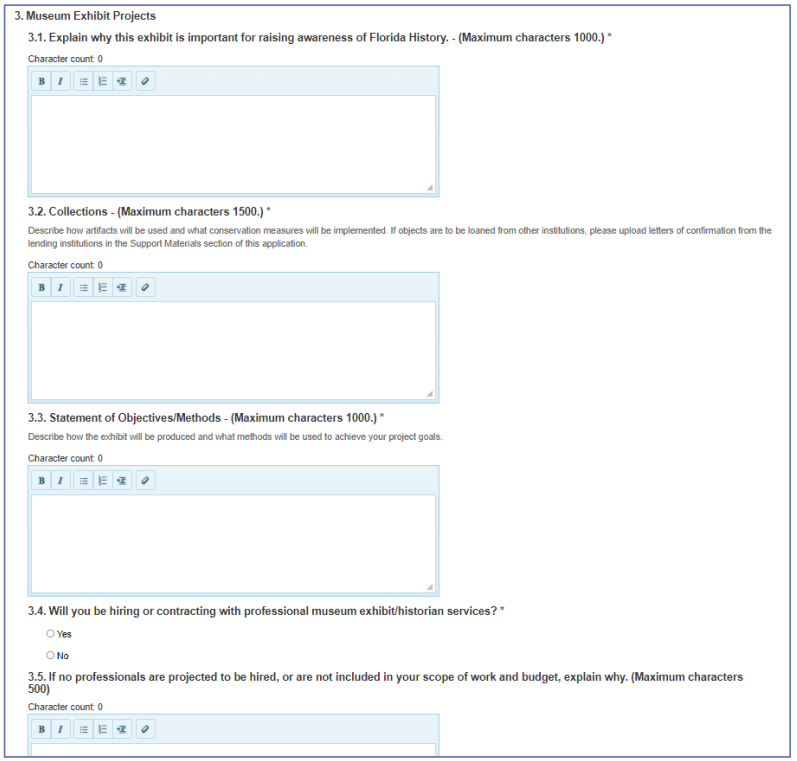
Museum Exhibit

- Explain why this exhibit is important for raising awareness of Florida History
- Describe how artifacts will be used and how they will be conserved
- Describe how the exhibit will be produced and what methods will be used
- Will you be hiring professional museum exhibit/historian services?
  - If not, why?

NOTE: The purchase of artifacts or objects for museum collections or exhibits is non-allowable pursuant to program guidelines.

Corresponding criteria:

- Organization, Administration, and Technical Ability



3. Museum Exhibit Projects

3.1. Explain why this exhibit is important for raising awareness of Florida History. - (Maximum characters 1000.) *

Character count: 0

3.2. Collections - (Maximum characters 1500.) *

Describe how artifacts will be used and what conservation measures will be implemented. If objects are to be loaned from other institutions, please upload letters of confirmation from the lending institutions in the Support Materials section of this application.

Character count: 0

3.3. Statement of Objectives/Methods - (Maximum characters 1000.) *

Describe how the exhibit will be produced and what methods will be used to achieve your project goals.

Character count: 0

3.4. Will you be hiring or contracting with professional museum exhibit/historian services? *

Yes

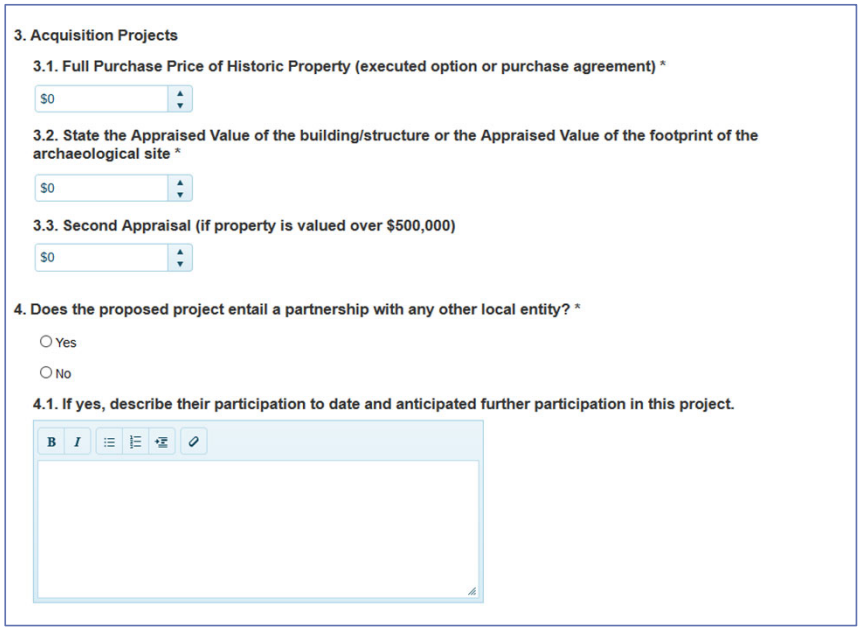
No

3.5. If no professionals are projected to be hired, or are not included in your scope of work and budget, explain why. (Maximum characters 500)

Character count: 0

Acquisition

- What is the full purchase price of the Historic Property?
- What is the appraised value of the property?
- What is the value of the property in the second appraisal if over $500,000?


3. Acquisition Projects

3.1. Full Purchase Price of Historic Property (executed option or purchase agreement) *

$0

3.2. State the Appraised Value of the building/structure or the Appraised Value of the footprint of the archaeological site *

$0

3.3. Second Appraisal (if property is valued over $500,000)

$0

4. Does the proposed project entail a partnership with any other local entity? *

Yes

No

4.1. If yes, describe their participation to date and anticipated further participation in this project.

Corresponding criteria:

- Organization, Administration, and Technical Ability

Need for Project

- Discuss the need for the proposed project or activity, as it relates to the preservation of the history of Florida and/or its historical and archaeological resources, including any immediate threats to the subject of the proposed project, which may be:
  - a historical property/ies;
  - historic resources or materials;
  - archaeological sites; or
  - historical information

  This may also refer to the need to update the outdated information and/or design of a museum exhibit.

Corresponding criteria:

- Community Impact, Need, and Educational Potential

Section E: Budget and Match

Match Requirements and Types

- Projects have a standard match requirement of 50%. Projects located in REDI-designated counties or communities may provide a reduced match of 25%.
- Types of Match
  - Cash-on-hand
    - At least 25% of required match must be cash
    - Work done by salaried employees during paid hours counts as cash
      - Reminder: if the work is administrative, total cost may not exceed 5% of the grant funds requested
  - In-kind
    - Donated services, goods, and/or property

NOTE: Documentation is required for all match at the time of application

Budget Table

- Budget items should correspond to scope of work items

2. Project Budget and Match

2.1. Grant Funds and Match *

List your work items and associated estimated expenses and how they will be paid (from match, the grant, or both). Only include expenses that are specifically related to the project. Refer to the program Guidelines for examples of non-allowable expenses (available at Flheritage.com/grants). Expenses may include an actual amount to be paid or the value of an in-kind contribution.

Special Category grants require a 100% (i.e., 1:1) match unless exempted as per the program Guidelines. Organizations applying for projects located within REDI Communities are eligible for the match reduction (to 25% of the grant amount request); exception: applicants that are agencies of state, state colleges and state universities are not eligible for the REDI match reduction.

Round amounts to the nearest dollar. Rows must have a value in Grant Funds, Cash Match or In-Kind Match. If all three columns are 0 or blank, the row will not be saved.

The amount of grant funds requested in this application will be the total in the "Grant Funds" column. The total amount of the "Cash Match" column must equal or exceed 25% of the total combined match (cash and in-kind).

+ Add new record

#	Work Item	Grant Funds	Cash Match	In-Kind Match	Total	
1	Task 1	$100,000	$100,000	$0	$200,000	Edit × Delete
2	Task 2	$100,000	$150,000	$0	$250,000	Edit × Delete
3	Task 3	$150,000	$50,000	$25,000	$225,000	Edit × Delete
4	Task 4	$150,000	$100,000	$75,000	$325,000	Edit × Delete
		$500,000	**$400,000**	**$100,000**	**$1,000,000**	

1 20 items per page 1 - 4 of 4 items

- Note: Basic architectural services for development projects must be priced in accordance with the DMS fee curve. Additional services should be identified in the scope of work

Corresponding criteria:

- Organization, Administration, and Technical Ability

Section F: Property Information

Property Information

- The site proposed for the project must be owned by a government agency or a non-profit organization to be eligible. Applicants must list the name of the property owner and choose the appropriate owner type. If the applicant is not the owner, property owner concurrence must be confirmed in the form of a letter.
- Does your organization own the property:
  - Yes
  - No
- Name of Property Owner
- Type of Ownership
  - Non-profit organization
  - Government agency
  - Private individual or for-profit entity (exceptions for Archaeological Research and Acquisition projects)

The Owner Concurrence Letter/Lease Agreement shall be uploaded in the Support Materials section of the application

Section G: Protection and Impact

Protection and Impact

- Local Protection
  - Indicate the level(s) of local protection afforded the project historic property or site:
    - Local Ordinance Design Review
    - Preservation or Conservation Easement
    - Protective/Restrictive Covenant
    - Maintenance Agreement/Long Term Lease
    - Other
    - None
  - Upload a copy of the local protection documents to the Support Materials section, if applicable.

Corresponding criteria:

- Historical Significance

Protection and Impact

- Annual Visitation
  - Questions to consider:
    - How many people visit your site/website?
    - What is the approximate annual distribution of the materials your organization produces?
    - How have you determined these results?
- Anticipated Economic Impact
  - Questions to consider:
    - How many jobs will be created as a result of the project (during and/or after)?
    - Will your project contribute to your community's heritage tourism?
    - Will your project attract/benefit local businesses?

Corresponding criteria:

- Community Impact, Need, and Educational Potential

Protection and Impact

- Benefits to Underrepresented Communities
  - Questions to consider:
    - Will your project allow you to better comply with ADA requirements?
    - Will your project include multilingual content?
    - Is an underrepresented community the subject of or related to the proposed scope of work?
- Educational Benefits and Public Awareness
  - Questions to consider:
    - Are you providing educational materials?
    - Will your project increase awareness of historic preservation or Florida history?
    - Will the property that is the subject of the project be used for educational purposes?

Corresponding criteria:

- Community Impact, Need, and Educational Potential

Section H: Support Materials

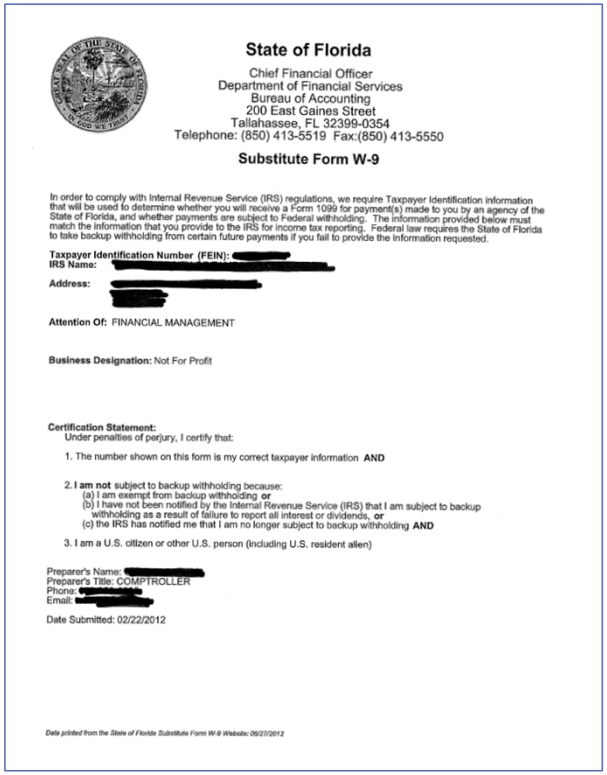
Uploading Documentation

- All supplementary information must be uploaded to dosgrants.com as part of the application
  - Exception: Letters of Support may be mailed to the Division– must be received at least one month prior to the public meeting
- Attachments consisting of multiple files must be combined into a single file. For example:
  - Letters of Support can be scanned into a single PDF
  - Photos can be combined into a single PPT, DOC, or PDF
- Name each file to reflect its contents. For example:
  - Monticello Historic District Map
  - Polk County Courthouse Conditions Assessment
  - Historic Virginia Key Beach Newspaper Articles

Support Documentation

- H1. Non-Profit Status
- H2. Florida Substitute W-9 Form
  - Must be obtained from the Department of Financial Services (https://flvendor.myfloridacfo.com/)

    NOTE: This is **not** the same as the federal W-9 form.



State of Florida

Chief Financial Officer
Department of Financial Services
Bureau of Accounting
200 East Gaines Street
Tallahassee, FL 32399-0354
Telephone: (850) 413-5519 Fax:(850) 413-5550

Substitute Form W-9

In order to comply with Internal Revenue Service (IRS) regulations, we require Taxpayer Identification information that will be used to determine whether you will receive a Form 1099 for payment(s) made to you by an agency of the State of Florida, and whether payments are subject to Federal withholding. The information provided below must match the information that you provide to the IRS for income tax reporting. Federal law requires the State of Florida to take backup withholding from certain future payments if you fail to provide the information requested.

Taxpayer Identification Number (FEIN): [redacted]
IRS Name: [redacted]

Address: [redacted]

Attention Of: FINANCIAL MANAGEMENT

Business Designation: Not For Profit

Certification Statement:
Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer information **AND**
2. **I am not** subject to backup withholding because:
   (a) I am exempt from backup withholding **or**
   (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of failure to report all interest or dividends, **or**
   (c) the IRS has notified me that I am no longer subject to backup withholding **AND**
3. I am a U.S. citizen or other U.S. person (including U.S. resident alien)

Preparer's Name: [redacted]
Preparer's Title: COMPTROLLER
Phone: [redacted]
Email: [redacted]

Date Submitted: 02/22/2012

Date printed from the State of Florida Substitute Form W-9 Website: 06/27/2012

Support Documentation

- H3. Documentation of Confirmed Match
  - Cash Match
    - At least 25% of match must be cash-on-hand and documented by one or more of the following:
      - Bank statements/letters
      - Letter from financial official
      - Funding resolution (Municipalities and Counties only)
      - Letter from authorized official confirming appropriation (State entities only)
      - Award letters from other, non-state grants
      - Budget reports
  - Additional cash match above the required 25% cash-on-hand may be documented by irrevocable pledges
    - Pledges may not be anonymous and must contain the dollar amount pledged
    - Only up to 75% of the match may include irrevocable pledges

NOTE: All match must be documented at the time of application

Support Documentation

- H3. Documentation of Confirmed Match
  - In-kind Match
    - At the time of application, up to 75% of match may be in-kind and must be documented by one of the following:
      - Letters/invoices detailing specific value of services, goods, and/or property to be donated
        - Anonymous letters will not be accepted
        - The value of professional services may be calculated by wage rates normally paid for professionals skilled in the service provided
        - The value of volunteer services may be calculated by using state or federal minimum wage (whichever is higher)
    - In-kind donations must occur during grant cycle

NOTE: All match must be documented at the time of application

Support Documentation

- H4. Letters of Support
  - **The Applicant Organization must submit a minimum of three (3) letters of support, endorsement or resolution to be eligible for Special Category grant funding.** If three (3) letters are not submitted with the application or received by the Division as required by the program guidelines, the application will be ineligible.
  - Must be submitted up to 30 days prior to date of the review and ranking meeting
  - Letters should be current and specific to the project being applied for in this grant cycle
  - Consider requesting letters from state legislators, local officials, local community, organization members
  - Form letters are discouraged

Support Documentation

- H5. Photographs
  - Submit multiple photographs that provide insight into the project (location, resource, need for project funds)
  - Include photographs that describe the context your resource exists within (also known as the project's setting)
  - As applicable, adhere to the Guidelines for Submitting Photographs

John C. Williams House Photographs

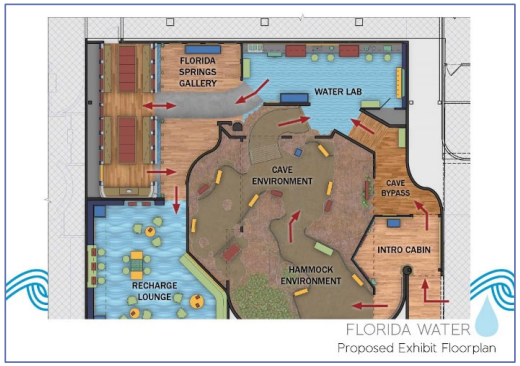
24.

25.

Unless otherwise stated, all photos are from May 2019

Support Documentation

- H6. Representative Image
  - A single recent representative image of the front of the property or project
  - This WILL be used to represent your project while your project is discussed during the public meeting.
  - Side-by-side allowable, collages discouraged
- H7. Proposed Project Team Supporting Documentation



Support Documentation

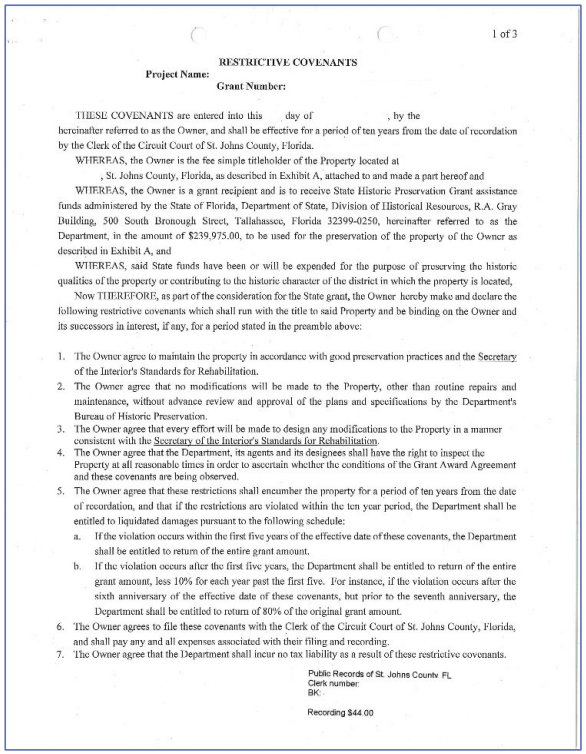
- H8. Architectural Drawings/Design Documents (for Development Projects only, if available)
- H9. Appraisal(s) and Purchase Documents (for Acquisition Projects only)
- H10. Archaeological Supporting Documents (for Archaeological Research Projects only)
  - **Must include research design.** Research designs must include map(s) showing specific project location(s), information about known archaeological sites in or near the project area, proposed methodology, specific research question(s), anticipated results, and resumes of key project personnel that have the required experience and training to successfully complete the proposed work.
- H11. Scientific Diving Safety Documentation (for Archaeological projects that include underwater research only)
- H12. Exhibit Supporting Documents (for Museum Exhibit Projects only)

Support Documentation

- H13. Documentation of Need
  - Publications
  - Professional assessment documentation
  - Meeting minutes
  - Public notices
  - Additional photographs as necessary

Support Documentation

- H14. Local Protection
  - Local Ordinance Design Review
  - Preservation or Conservation Easement
  - Protective/Restrictive Covenant
  - Maintenance Agreement/Long Term Lease
  - Other



RESTRICTIVE COVENANTS

Project Name:

Grant Number:

THESE COVENANTS are entered into this day of , by the hereinafter referred to as the Owner, and shall be effective for a period of ten years from the date of recordation by the Clerk of the Circuit Court of St. Johns County, Florida.

WHEREAS, the Owner is the fee simple titleholder of the Property located at , St. Johns County, Florida, as described in Exhibit A, attached to and made a part hereof and

WHEREAS, the Owner is a grant recipient and is to receive State Historic Preservation Grant assistance funds administered by the State of Florida, Department of State, Division of Historical Resources, R.A. Gray Building, 500 South Bronough Street, Tallahassee, Florida 32399-0250, hereinafter referred to as the Department, in the amount of $239,975.00, to be used for the preservation of the property of the Owner as described in Exhibit A, and

WHEREAS, said State funds have been or will be expended for the purpose of preserving the historic qualities of the property or contributing to the historic character of the district in which the property is located,

Now THEREFORE, as part of the consideration for the State grant, the Owner hereby make and declare the following restrictive covenants which shall run with the title to said Property and be binding on the Owner and its successors in interest, if any, for a period stated in the preamble above:

1. The Owner agree to maintain the property in accordance with good preservation practices and the Secretary of the Interior's Standards for Rehabilitation.
2. The Owner agree that no modifications will be made to the Property, other than routine repairs and maintenance, without advance review and approval of the plans and specifications by the Department's Bureau of Historic Preservation.
3. The Owner agree that every effort will be made to design any modifications to the Property in a manner consistent with the Secretary of the Interior's Standards for Rehabilitation.
4. The Owner agree that the Department, its agents and its designees shall have the right to inspect the Property at all reasonable times in order to ascertain whether the conditions of the Grant Award Agreement and these covenants are being observed.
5. The Owner agree that these restrictions shall encumber the property for a period of ten years from the date of recordation, and that if the restrictions are violated within the ten year period, the Department shall be entitled to liquidated damages pursuant to the following schedule:
   a. If the violation occurs within the first five years of the effective date of these covenants, the Department shall be entitled to return of the entire grant amount.
   b. If the violation occurs after the first five years, the Department shall be entitled to return of the entire grant amount, less 10% for each year past the first five. For instance, if the violation occurs after the sixth anniversary of the effective date of these covenants, but prior to the seventh anniversary, the Department shall be entitled to return of 80% of the original grant amount.
6. The Owner agrees to file these covenants with the Clerk of the Circuit Court of St. Johns County, Florida, and shall pay any and all expenses associated with their filing and recording.
7. The Owner agree that the Department shall incur no tax liability as a result of these restrictive covenants.

Public Records of St. Johns County FL
Clerk number:
BK:

Recording $44.00

Support Documentation

- H15. Owner Concurrence Letter
  - For site-specific projects – Applicant, if not the owner:
    - Has permission of the Property Owner to conduct the proposed Project;
    - The owner is in concurrence with the application and agrees to sign a Restrictive Covenant as required by the program guidelines; and
    - The owner is a public entity or non-profit
    - Lease, if applicable
- H16. Optional Materials
  - Articles about the Applicant Organization, project proposal, events, etc.
  - National Register listings
  - Organization materials (brochures, event flyers, etc.)
  - Existing conditions assessments

Note: See Section IV.9 of Guidelines for information regarding Restrictive Covenants

Common ways to improve applications

- Read the program guidelines
- Start your application early
- Submit more than one photograph in the photographs attachment
- Make sure the correct project type is selected
- Do not list project team members or community partners without their knowledge
- Make sure there is consistency between scope, timeline, and budget
- Submit at least 3 letters of support
- Make sure your estimated costs are reasonable and allowable
- Provide the correct Florida Substitute W-9 form (and not the Federal W-9)
- Make sure your support letters are **current**
- Review the application for completeness and professionalism and remember to check your spelling
- Respond to DHR Staff requests for Information
- Do not wait until July 10th to submit the application

Additional Resources

Important Sources of Information

- Special Category Grants Guidelines
  - https://dos.fl.gov/historical/grants/special-category-grants/
- Department of State grants portal
  - https://dosgrants.com/
- Division of Historical Resources Grants Program website
  - https://dos.fl.gov/historical/grants/
- Email list to receive grants news
  - https://myflorida.us10.list-manage.com/subscribe?u=c0f01c8e7fa3df2ddee8db9b1&id=b802e81a3b
- SubstituteW-9 registration and information
  - https://flvendor.myfloridacfo.com/

How to Manage Your Grant Webinar

- After new grants are awarded, the Division will host "How to Manage Your Grant" webinars to aid Grantees in understanding and complying with responsibilities and requirements. Some of the subjects to be discussed will include:
  - Grant Award Agreements
  - Deliverables
  - Reporting Expectations
  - Deadlines
  - Requesting payment
  - Close-out

Contact Information

Division Contact:

1.800.847.7278 or 850.245.6333

Historic Preservation Grants Supervisor:

Eric Case, 850.245.6338 eric.case@dos.fl.gov

Historic Preservation Grants Specialists:

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Steven Kurisko, 850-245-6466 steven.kurisko@dos.fl.gov

Pauline Rivera, 850-245-6393 pauline.rivera@dos.fl.gov

Clay Rowlette, 850-245-6310, clay.rowlette@dos.fl.gov

Olivia Wichowski, 850-245-6427 olivia.wichoswki@dos.fl.gov

Alexa Wilson, 850-245-6372 alexa.wilson@dos.fl.gov

Physical Address:

Division of Historical Resources

R.A. Gray Building, 4th Floor

500 S. Bronough St.

Tallahassee, Florida 32399

Historic Preservation Grants Program Email:

DHRgrants@dos.fl.gov

Department of State Online Application and Grants System:

DOSgrants.com

FLORIDA DEPARTMENT OF STATE

DIVISION OF

Historical Resources

flheritage.com