



## 2023 Heritage Partnership Grant Program Guidelines

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### **Partnership Grants for: Marketing and Promotion, Programming and Interpretation, Preservation Planning in the Upper Housatonic Valley National Heritage Area**

The 2023 Heritage Partnership Grant for Interpretation is intended to provide residents and visitors with new / expanded opportunities for deeper understanding of the Upper Housatonic River Valley. The grants will support research projects, interpretive exhibits, events and programming that provide informed and thoughtful exploration of the region's history, culture and natural heritage.

Heritage Partnership Grants are intended to fulfill the mission of Housatonic Heritage to provide a more complete understanding and enjoyment of the heritage area's themes of history, culture, scenic beauty (natural resources) and / or independent spirit.

The Housatonic Heritage Partnership Grant Program is a reimbursable, matching grant program for municipalities and qualified non-profit organizations whose activities support our mission to preserve and enhance the historic, cultural, and natural resources of the Upper Housatonic Valley National Heritage Area.

**Grant applications are accepted and reviewed on a rolling basis, though no later than March 31, 2023.** Please submit your application for eligible projects focused in one of three categories:

#### **1) Marketing and Promotion**

Grant-funded projects may include initiatives that promote Upper Housatonic Valley National Heritage Area sites as tourism destinations, projects or strategies that will increase visitation to sites, especially among diverse audiences, projects or strategies that include multiple heritage sites or partners and projects that promote a connection between heritage sites, landscape destinations, "main streets", or recreational opportunities. Other eligible projects may include:

- Broaden and diversify audience for the region's heritage sites, including innovative interpretation approaches and the use of digital tools for publishing. May include programs to increase awareness and understanding of the region's heritage. Examples include but are not limited to signage, brochures, maps, exhibits, public art installations, performance arts, and audio-visual programs.

## 2) Programming and Interpretation:

Increase awareness and understanding of the region's heritage. Examples include but are not limited to signage, brochures, maps, exhibits, public art installations, performance arts, and audio-visual programs. May include:

- Youth Engagement: Create or further develop opportunities for youth engagement with the region's heritage. Examples include but are not limited to historical research projects, after-school programs, natural science programs, building research and site visits, documenting oral histories and developing computer-based / digital resources.
- Education: Creating or further developing educational opportunities for youth and students of all ages. Examples include but are not limited to historical research projects, after-school programs, natural science programs, building research and site visits, documenting oral histories and developing digital resources. May include projects that create or further develop opportunities for public education about our history; programs and interpretive projects that connect heritage sites and local communities, experiential programming or interpretation, using technology to engage new audiences and visitors and living history programs and reenactments.
- Access and Inclusion: Enhance access to the many resources offered within the Upper Housatonic Valley National Heritage Area through structural or programmatic updates or transportation. Examples of this category can include projects such as multi-language interpretive materials, social justice-focused presentations, transportation for youth to access natural and cultural resources within the heritage area, or ADA improvements including wheelchair lifts, ramps, and interpretation aids.

## 3) Preservation Planning

Preservation planning costs, including planning costs associated with historic structure preservation, or to enhance historic structures, landscapes and cultural resources, or creating / updating publicly accessible (non-historic) facilities to improve audience experience. Eligible projects may also include nominating an eligible property to the National Register of Historic Places (or updating a current listing).

- Examples include but are not limited to preservation planning studies (historic resource inventory, historic structure report, structural assessment, paint analysis, historic landscape documentation and design), planning for exterior and interior rehabilitation or restoration (cladding, roofs, windows, masonry, paint, floors, wall coverings, decorative elements), and historic landscape restoration (fences, walls, plant material, installation). *Note: this is a planning grant only, and actual preservation costs are not provided in this grant round.*

*Note: For Preservation planning projects involving the restoration or rehabilitation of historic buildings or landscapes, or the development of plans (studies, plans, designs) to restore or rehabilitate historic structures or landscapes, the subject property must be listed or eligible for listing in the National Register of Historic Places. All proposed project work should conform to the Secretary of the Interior's Standards for the Treatment of Historic Properties.*

## **What Other Programs / Projects are Eligible?**

Eligible programs and projects under this grant program may include:

- Publicly accessible interpretive / informative exhibits or other deliverables that may be indoors or outdoors, permanent or non-permanent,
- Projects and programs that support Housatonic Heritage's 'Operation Pollination', including development of pollinator gardens, instructional / educational materials and programs, and other strategies for improving pollinator habitat and / or our understanding of the issues of pollinator decline.
- Events to inform, engage or otherwise expose the public to information about the heritage (history, culture, nature) of the Upper Housatonic Valley National Heritage Area,
- Publicly accessible programs to educate and inform the public about the region's heritage,
- Additional deliverables may include interpretive signs, printed collateral (including brochures & flyers), digital content,
- Updates and / or enhancements to existing interpretive signs, printed collateral (including brochures & flyers), digital content,
- Updates and / or enhancements to existing physical trail projects will be considered for grant funding, provided that the trails are accessible to the public, offer a meaningful heritage experience to visitors, and have been / are planned to be routinely maintained,
- Grant funding may be considered for the purpose of interpretive planning, design, or non-construction enhancements of existing physical trails, and / or researching, inventorying and creating thematic trails including interpretive brochures, maps, website, etc. and / or promoting both physical and interpretive trails within the 29 communities of the Upper Housatonic Valley region,

## **Eligible Expenses**

- Costs associated with planning, curating, designing, fabricating, installing exhibits,
- Personnel costs and costs associated with staff time and office expenses that are directly related to the planning and execution of exhibits, events and programs,
- Costs associated with conserving artifacts for the purposes of publicly exhibiting these materials, or for the purpose loaning them for related exhibits at another public exhibition,
- Costs for contracted professional services that may be required for studies, analysis, design, printing or other services required for the successful completion of the grant-funded project,
- Facility expenses for public presentations, exhibits, performances,

## **Ineligible Projects and Expenditures**

- Acquisition of property or facilities including buildings and sites,
- Equipment purchases (unless expressly allowed),
- Payment for previous activities,
- Projects and programs for the benefit of individuals, or upon private property,
- Reduction of existing debt,
- Political or religious activities,
- Support for existing staff unrelated to the proposed project,
- Additions to reserve funds or endowments of an organization,
- Projects or programs that will re-grant the funds received,
- Marketing specifically related to advertising "for profit" businesses.

### **Proposed projects must:**

- Be publicly accessible (not for private audiences or memberships) during regular days and hours that may correspond to the applicant organization's normal operating schedule,
- Reflect an informed approach to interpretation that incorporates the best available research and knowledge the region's history, culture and nature,
- Include a plan to promote, publicize and otherwise engage with its intended audience to the greatest extent possible.
- All projects must occur within the geographic boundaries of the Upper Housatonic Valley National Heritage Area.
- Housatonic Heritage Partnership Grant funds may NOT be used for organizational operating costs or to purchase an interest in real property.

### **Grant Amount**

Typical grants range from \$1,000 to \$10,000, though higher amounts will be considered. Awards will be based on the limit of available funds and will require a one-to-one match of nonfederal funds and in-kind match (may include donated goods and services, volunteer / staff time, etc.).

### **Match Requirement**

Grant applicants must provide a minimum 1-1 match to the grant request. The matching requirement may include applicant's operating funds, external grants, and / or in-kind value of contributed time and services. Matching local funds and donated services must be directly and demonstrably related to the grant during the grant period.

Cash expenditures may be for any direct purchase of items used in the project such as film, tapes, printing costs, storage containers, etc.

Donated services may include donated transportation costs and/or donated labor calculated at the normal hourly rate for professional consultants or at minimum hourly wage for volunteer assistants. The grantee must retain / provide documentation for all expenditures and for in-kind goods and services.

#### **Match Funding Requirement:**

- Applicant must have sufficient funds on-hand to cover the entire cost of the project
- Applicant must be able to provide evidence of applicant's ability to provide one-to-one matching

#### **Match Funding Must:**

- Be verifiable from your records
- Be necessary and reasonable for proper and efficient completion of the project

#### **Match Funding Must Not:**

- Be included as direct contributions from any other federally assisted program
- Be paid by the federal government under another award
- Include operating costs of the organization and routine repair and facility costs not directly related to the grant project
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#### **Cash and In-Kind Match Funding:**

- All matching funds must be applied to the project AFTER the date of contract signature by the grant recipient
- Matching funds can be cash or in-kind contributions of time, materials, or services

- Cash matches require that real money change hands, and must be documented by copies of invoices or receipts and evidence of payment (cancelled checks, bank statements)
- In-kind matches must be documented and directly attributable to the project
- In-kind matches may include personnel time for employees, board members, and volunteers as well as contributions of services, materials and supplies
- The following is a recommended format for valuing and documenting in-kind matches:

**Contributed Time**

Name of Individual: \_\_\_\_\_  
 Hours \_\_\_\_\_ x \$ \_\_\_\_\_/hour = \$ \_\_\_\_\_

**Contributed Materials and/or Services**

Types of Materials and/or Services: \_\_\_\_\_  
 Value: \$ \_\_\_\_\_

*The value of volunteer time is generally calculated by using the rates provided by Independent Sector ([www.IndependentSector.org](http://www.IndependentSector.org)). As of April 18, 2022 the latest value of a volunteer hour is estimated to be \$29.95.*

**Reimbursement**

Grant monies will be disbursed upon receipt of evidence that the applicant has met agreed-upon program goals (or some part thereof) and have spent local match funds and/or donated services. Forms are provided to document donated services such as mileage and labor (professional salary rates must be verified with documentation acceptable for auditing purposes). Copies of canceled checks and receipts documenting expenditures of funds may be required.

Please use the Time and Expense Sheet and Reimbursement Request Summary Forms for this purpose. If the grant has been submitted to a sponsoring entity by another organization, the sponsoring entity is responsible for submitting the reimbursement requests and providing the appropriate documentation. Any request must include evidence of compliance with all applicable laws and regulations.

**Public Engagement**

Please be sure to specify how your project / program will publicize, engage and generally reach its proposed audience. Grant applications will be evaluated on the project / program's ability to connect residents and visitors to the history and heritage of the Upper Housatonic Valley, and increase awareness, appreciation and use of the scenic, cultural, historic, recreational and natural areas within the Upper Housatonic Valley region.

**Who's Eligible?**

This grant program is available to qualifying non-profit organizations, educational institutions and / or municipalities that demonstrate a need in one or more of the grant topic areas (as noted above). Upper Housatonic Valley National Heritage Area (UHVNHA) staff is available for a pre-application conference call to discuss the proposed grant concept, outcomes and eligibility.

- **Municipalities, accredited educational institutions and not-for-profit corporations** located within the geographic area of the UHVNHA, as defined by Public Law 109-338, may apply.

- **Geographic Area of the UHVNHA:** Includes these Connecticut towns: Canaan, Colebrook, Cornwall, Kent, Norfolk, North Canaan, Salisbury, Sharon, and Warren. Massachusetts towns are Alford, Becket, Dalton, Egremont, Great Barrington, Hancock, Hinsdale, Lanesboro, Lee, Lenox, Monterey, Mount Washington, New Marlboro, Pittsfield, Richmond, Sheffield, Stockbridge, Tyringham, Washington, and West Stockbridge.
- **Municipality:** A local public authority or public benefit corporation, a county, city, town, village, school district, supervisory district, district corporation, improvement district within a county, city, town or village, or American Indian nation or tribe recognized by the state or the United States for a program or project that will occur within the boundaries of the UHVNHA.
- **Not-for-profit Corporation:** A corporation formed pursuant to the not-for-profit corporation law and qualified for tax-exempt status under the federal internal revenue code.

Applicants may form a partnership with other organizations (can include for-profit entities ((businesses)), qualifying non-profits, municipalities and school systems) to develop and implement their grant-funded program / project.

Preference will be given to projects that use creative methods to teach and nurture a sense of understanding and responsibility for area resources.

### **Timeline**

Timeline for Heritage Partnership grants:

- Grants will be awarded on a rolling basis as applications are received, however applications received after March 31, 2023 will not be considered under this grant round.
- Work must be completed, and reimbursement requested by September 30, 2023
- Final Reports due no later than 90 days after an event or completion of the project or no later than September 30, 2023, whichever comes first.

### **Additional Grant Requirements:**

- Acknowledge Housatonic Heritage's support in all press opportunities and materials publicizing or resulting from grant activities,
- Use the Housatonic Heritage logo where appropriate (brochures, websites, newsletters, etc.); logo is available for download from our website,
- The Housatonic Heritage logo must be placed prominently to indicate that your grant-funded project is part of a larger / regional program of interpretation, along with language to the effect of 'in partnership with Housatonic Heritage',
- Provide digital photographs of completed project or program activities,
- Provide Housatonic Heritage with copy of all original work (DVD, brochures, photographs, etc.)

### **Application Requirements**

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We want the application process to be as easy and quick as possible. Please fill out the Application Form with the basic information that we'll need to know about you, your proposed project and your partners (if any).

**Forms may be downloaded at: <https://housatonicheritage.org/grant-program/>**

The narrative section of the application (Project Summary) should be no longer than three (3) pages and must include a detailed proposal outlining the nature of the project, including: the budget form, budget narrative, evidence of matching funds and supporting materials.

Supporting materials (if applicable) **must not exceed** five (5) pages. Do not include materials such as DVDs, CDs, VHS tapes, oversized posters/maps (larger than 11x17 tablet size) etc. as they will not be accepted or reviewed.

All applications must contain the following information. Applications that lack any of these requirements may be removed from consideration.

**I. Application Form**

Complete and sign the Application Form.

**II. Project Summary (narrative)**

On a separate page(s) provide one paragraph with a clear and concise summary of the project. Begin by completing this sentence:

“The (name of your organization) seeks an UHVNHA Partnership grant to \_\_\_\_\_”.

Provide this additional information about your project, using these *suggested* topics:

1. A brief summary of the project, including any partnerships or other people to be involved, important dates (i.e. opening / closing dates, program dates, etc.), proposed audience(s), locations and any additional information that will assist the grant reviewers to determine how it will benefit the participants, the residents of your town and / or the general public.
2. A description of the main activities to be carried out.
3. A description of the project’s outcomes and deliverables, as well as the implementation plan and timetable for achieving them. Include start and end dates.
4. The names and titles of the key personnel overseeing the project and other people involved (including advisors and / or consultants)
5. A discussion of your organization’s capacity to carry out the project, including the personnel involved, their roles, and their relevant experience and completion of similar projects.
6. A detailed project budget (see next item below) including the total cost of the grant-funded project / program

**III. Project Budget Form**

It is important to submit an accurate, detailed budget for the project. Please download and use the UHVNHA Project Budget Form (one page), available from our website – OR – use your own spreadsheet (Excel or similar) as long as you follow the same general format. List all sources of estimated funding, including the grant amount being requested from UHVNHA. Note that project income must equal project expenses. Indicate if the income is cash or in-kind.

#### **IV. Project Budget Narrative**

Provide a brief written explanation for each line item of the Project Budget Form.

#### **V. Evidence of Matching Funds & Tax Exemption Letter**

Submit a one-page letter signed by the applicant organization's responsible Officer certifying that the applicant will provide a one-to-one match for the UHVNHA grant and also has sufficient funding available to cover the total cost of the project. Indicate the source of the matching funds.

Provide a copy of the applicant's IRS non-profit determination letter.

#### **VI. Supporting Materials (If Applicable)**

Demonstrate support for the project / program by submitting materials such as recent letters of commitment from project partners, recent letters of support from municipal and elected officials, press clippings, project photographs, evidence of feasibility (planning studies), and any other pertinent information. The supporting material **must not exceed** five (5) pages.

#### **VII. Submission**

Please submit a complete original application (PDF format preferred) with all supporting documentation by Email. **Materials must be received no later than 11:59 PM EST on Friday, March 31, 2023.** Grant applications should be sent by email to Housatonic Heritage: [Info@HousatonicHeritage.org](mailto:Info@HousatonicHeritage.org)

NOTE – This grant program is administered by the Upper Housatonic Valley National Heritage Area (Housatonic Heritage) and is a federally-funded 50% matching grant reimbursement program established as permitted under Public Law 109-338 to support the implementation of the approved management plan.

Applicants must be a municipality, accredited educational institution or nonprofit organization. Please note that grant disbursement is subject to authorization of federal funds for Upper Housatonic Valley National Heritage Area for the fiscal year in which this grant program is made available, and the availability of sufficient allocated funds.



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