LCHIP Historic-Resource Project Checklist

Grant payments for LCHIP Historic-Resource projects are made in three disbursements. Certain elements of the work must be completed before each payment is made. Once the work elements have been approved, it typically takes four to six weeks to process a request for disbursement.

1. First Disbursement Requirements (50% of grant award)

To receive your first grant payment, all eight of the following items must be submitted, reviewed and approved by LCHIP (and the Division of Historical Resources, "DHR") before the work begins. LCHIP and our partner DHR require up to 45 days to conduct the review of plans and scope of work. Both LCHIP and the DHR make every effort to perform this review as quickly as possible. You may be asked to revise your plan or scope of work in order to comply with the Secretary's Standards.

- ☐ Project Agreement: The Project Agreement is the contract between LCHIP and your organization. It explains, among other things, the scope of work and the grant disbursement schedule. The Project Agreement should be signed and returned to LCHIP.

- ☐ Plans and/or Detailed Scope of Work: These are the documents that describe in detail the work that will be performed. The more detail and description you provide, the easier and quicker the approval process will be. Full size plans, if available, are preferred. Please contact the office if you have questions about these requirements. YOUR PLANS MUST BE APPROVED BY LCHIP BEFORE YOU BEGIN THE WORK.

- ☐ Stewardship Plan: The Stewardship Plan explains how you will ensure that the property will be maintained in good condition over time. This plan will also be reviewed and approved by the Division of Historical Resources. See http://www.lchip.org/documents/Stewardship%20Plan%20Guidance%20Document.pdf for general information about stewardship plans, or you may contact the LCHIP office for sample Stewardship Plans.

- ☐ Proof of Insurance: Adequate insurance – including liability coverage – is required.

- ☐ Estimated Timeline: This should be a realistic schedule of all work from beginning through completion. Projects are expected to be completed within 24 months of the grant award date. If your timeline extends beyond this period, please include an explanation of why it does. We understand that this is an early estimate of the schedule. Changes in the project timeline (including extensions of the 24-month period) may be allowed on a case-by-case basis if deemed necessary.

- ☐ Proof of Match Funds: You must show LCHIP that you have an amount equal to your grant award secured before your first disbursement of funds. At least half of the match must be in cash. Depending on the source of funds, the proof of match may be bank statements, treasurer's reports, award letters for other grants, or statements from in-kind donors of the approximate value of their donation.

- ☐ List of Contractors to be Used on the Project: List the names of the individuals or firms that will work on the project. If the contractors have not been identified yet, please indicate when your decision will be made.

- ☐ Land Trust Alliance Standards**:** If you have not yet adopted the applicable Land Trust Alliance Standards, you must adopt them prior to the disbursement of the first grant payment. General information about the Land Trust Alliance Standards and how they apply to Historic Resource projects can be found at http://www.lchip.org/documents/LTA%20Standards%20for%20Historic%20Resource%20Applicants.pdf

2. **Second Disbursement Requirements (30% of grant award)**

To receive the second disbursement, you must have:

- ☐ 50% Complete Letter: Have your contractor/consultant send a letter stating that the project is 50% complete.

- ☐ Midpoint Site Visit: Contact LCHIP staff to arrange a site visit.

3. Final Disbursement Requirements (20% of grant award)

The final disbursement of your award is made when LCHIP is satisfied that all project requirements are finalized, including all seven of the items below. LCHIP requires at least 5 weeks to review these final items before the final disbursement is made. Please time your submittal accordingly.

- ☐ Final Project Budget: You must provide LCHIP with a final budget showing all project costs and sources of funding, together with invoices documenting significant expenses. This serves as final documentation of all matching sources, including cash and non-cash. Find a final budget worksheet at: http://www.lchip.org/index.php/for-applicants/for-historic-resource-applicants

- ☐ Baseline Documentation Report: The Baseline Documentation Report documents the work that was accomplished by your LCHIP grant and provides a clear record of the physical condition and historic character of your resource at the time of project completion. Thorough and accurate Baseline Documentation is an integral part of the stewardship of your resource and will make review and approval of future alterations to the resource easier. http://www.lchip.org/documents/Baseline%20Documentation%20Form.pdf provides instructions for completing the Baseline Documentation Report.

- ☐ Final Site Visit: LCHIP staff will conduct a final site visit upon completion of the project.

- ☐ Return "Project-in-the-Works" Sign: LCHIP provides temporary metal signs to some projects while they are underway. The sign promotes both the LCHIP program and the project. This sign must be returned to LCHIP before the project is considered complete. LCHIP reserves the right to withhold $100 from the final grant payment or invoice the grantee $100 if the sign is not returned.

- ☐ Signage Request Form: Provides information so that we can order a permanent metal plaque for you to display on the property, consistent with your Stewardship Agreement.

- ☐ Publicity: LCHIP requires the grant recipient to inform their state legislators when the project is completed, to issue a press release, etc.

- ☐ Stewardship Agreement Recorded: A Stewardship Agreement between LCHIP and the grant recipients is required for every restoration or rehabilitation project. The Stewardship Agreement will be recorded with the property deed, and will include the stipulation that the resource can only be sold if the new owner agrees to sign a new Stewardship Agreement with LCHIP. Length of terms of agreement between LCHIP and grant recipient will be linked to amount of grant received and may be adjusted to incorporate the expected lifetime of the restoration/rehabilitation project and size and scope of the activities for which LCHIP funds are utilized. LCHIP will provide the language for the Stewardship Agreement required for your project. The agreement must be signed by LCHIP and your organization and must be recorded at your county's Registry of Deeds before the final disbursement can be made and the project is considered complete.

For reference, model documents can be found on the LCHIP website at:
http://www.lchip.org/index.php/for-applicants/for-historic-resource-applicants
If you have any questions, please contact the LCHIP office at (603) 224-4113.