BALTIMORE HERITAGE AREA ASSOCIATION, INC.

HERITAGE INVESTMENT Grant
Application & Guidelines (2019)

The Baltimore National Heritage Area's Heritage Investment Grant is a source of funding designed to provide strategic investments in cultural heritage tourism within the heritage area. The Heritage Investment Grant may be used to fund non-capital projects and for general operating support. Eligible activities must address or complete a priority activity identified in and consistent with the goals, objectives, strategies, and actions outlined in the 2013 Baltimore National Heritage Area Comprehensive Management Plan (available online at https://www.explorebaltimore.org/page/planning-documents). Generally, grants will be made as one-time awards and not for ongoing projects or activities that require a multi-year grant commitment. The following non-capital projects or activities within the BNHA may be assisted.

- **Planning** - Research, field investigation, data recovery, feasibility and planning studies, design documents, and other planning activities that support the heritage area.

- **Interpretation** - Interpretive exhibits, interpretive signage, pedestrian way-finding signage, interpretive brochures, educational programs and materials, other interpretive activities that support the heritage area. Interpretation projects must comply and support the Interpretive Framework for the heritage area as outlined in the 2013 Comprehensive Management Plan.

- **Programming** - Seminars, conferences, performances, reenactments, commemorations, or festivals within the heritage area.

- **Operating** - Grants to fund operating expenses of nonprofit organizations operating within the Baltimore National Heritage Area. Organizations are eligible for operating grants in the current cycle if 1) it has been two or more years since their last General Operating award from the Heritage Investment Grant and 2) that they have no other open/active Heritage Investment Grants.

**Who may apply** - To be eligible for a Heritage Investment Grant, applicant organizations must meet each of the following criteria:

- Be a nonprofit organization in good standing with the State of Maryland Department of Assessments and Taxation,
- Be qualified to do business in Maryland,
- Have the legal capacity and authority to incur obligations involved under the grant program,
- Be located within the boundary of the heritage area (or the program/activity will happen within the boundary of the Heritage area.)

**Who May NOT Apply** - The following types of organizations are not eligible to apply to the Heritage Investment Grant (this list is not meant to be exhaustive): units of government; organizations that are serving as fiscal agents or fiscal sponsors for an organization or program; individuals; organizations that are the primary responsibility of a government agency; organizations that are not in good standing with BNHA and/or not in compliance with previous grants; organizations that currently have an open Heritage Investment Grant with the BNHA.
Funding Restrictions
Organizations that received General Operating Support within the last year from the Heritage Investment Grant program are not eligible for General Operating Support in the current grant cycle. These organizations ARE eligible to apply for project funding IF their current operating grant is closed by the application deadline.

Organizations receiving Project Support are not eligible for General Operating Support in the same grant cycle.

BNHA non-capital project funds cannot be used to fund staff salaries or benefits, although staff salaries or benefits may be used in the applicant's cash-match portion.

BNHA funds cannot be used for religious ceremonies or events advancing or inhibiting a particular religious ideology; fundraising or advocacy of specific political causes or candidates; capital improvements (facilities and equipment); agent’s fees for programs contracted through commercial agencies; and travel outside of the U.S.

SELECTION CRITERIA –
Grant proposals will be reviewed using the criteria outlined below.

1. **Clarity** - Are the project/organization’s objectives clearly described?
2. **Consistency** - Is the project specifically identified in the 2013 Comprehensive Management Plan? If not, how is the project consistent with the goals and objectives of the Plan and why should this funding request receive priority at this time? For operating requests: Are the organization’s programs and/or activities consistent with the goals and objectives of the Management Plan?
3. **Urgency**: What is the downside to delaying this project or operating support? Why now?
4. **Project Design**: Are the budget, design, and personnel reasonable to accomplish the project or organization’s objectives?
5. **Leverage**: Does the project (or its products) or the organization’s activities significantly leverage private investment?
6. **Readiness**: Is the project or organization ready to proceed and can the objectives be accomplished in a realistic and timely manner? If the applicant currently has another BNHA grant, have deadlines been met?
7. **Heritage Tourism Value**: Does the project or organization’s activities significantly increase the Heritage Tourism economic activity within the heritage area? Does the applicant have a plan to attract visitors to their site or program?

GRANT AMOUNTS AND MATCHING REQUIREMENTS
Grants may not exceed $15,000. All grants must be matched in cash in an amount at least equal to the grant. If needed, 25% can be contributed as in-kind match.

**Exception:** All funding requests of $5,000 or less will not require a cash match. The match can be entirely with in-kind services (donated time, donated goods etc.)

Applicants MUST download and the [BNHA Application Budget Excel template](#) for their proposal budget. Upload the completed budget template in the appropriate section of the online submission.

**Ineligible Match:** Federal funds, expenditures made prior to the award of the grant or after the completion of the grant period, expenditures that do not relate to the grant project

**Documentation of Match:** It is encouraged, but not necessary to have matching funds in-hand, or firmly committed at the time of application. Acceptable documentation of match may include:
- Financial or Bank Statement from applicant organization
- Letter of commitment from donor
- Award letter or grant agreement from matching entity
Other Project Costs ("Over Match"): If the total project budget is expected to cost more than the total grant request and required match combined, those additional costs should be listed on the application budget as Other Project Costs. Applicants are not required to provide documentation for Other Project Costs.

Ineligible Match:

- Federal Funds
- Expenditures made prior to the award of the grant or after the completion of the grant period
- Expenditures that do not relate to the grant project

Examples of Cash Match:

- Cash expenditures
- Support from a non-federal grant or loan fund (e.g. MHAA grants)
- Staff salaries for work specifically on the project

Examples of In-Kind Match:

- Volunteer time for work on the project (see http://independentsector.org/volunteer_time for current value of volunteer time in Maryland)
- Donated professional services (can be valued at their professional rate, but only if working on the project in their professional role (i.e. architect donating architectural design services)
- Donated materials/supplies

Documentation of Match - It is encouraged, but not necessary to have matching funds in-hand, or firmly committed at the time of application. Acceptable documentation of match may include:

- Financial or Bank Statement from applicant organization
- Letter of commitment from donor of money, in-kind services or staff time
- Award letter or grant agreement from matching entity

Other Project Costs ("Over Match") - If the total project/operating budget is expected to cost more than the total grant request and required match combined, those additional costs should be listed on the application budget as Other Project Costs. Applicants are not required to provide documentation for Other Project Costs.

GRANT TERMS AND CONDITIONS - All grantees will be required to enter into a grant agreement with the BNHA, which generally contains the following standard terms and conditions:

- **Grant Term** – All grant funds must be expended within 24 months of the date of the award, unless the BNHA agrees in writing to an extension of the grant period. A written interim progress report will be submitted at the end of year one, and again at the end of the project. Please note, projects must start on/after September 15, 2019. Any projects funds used before this date will not be reimbursed.
- **Grant Disbursements** – Two disbursements will be made: 50% of award amount will be disbursed at signing of the grant agreement (and federal funds available) and second disbursement will be made at the completion of the project - reimbursing the grantee. The match must be used and documented and all receipts and proof of payment must be submitted in order to be reimbursed. Advance disbursements of grant funds may be made on a case-by-case basis. Disbursements will be made upon request for payment submitted by the grantee in a form satisfactory to BNHA and fulfillment of the other requirements of the grant agreement.
- **Insurance Requirement** – General Liability Insurance will be required for all non-capital projects.
• Nondiscrimination – Each applicant shall comply with all applicable federal, state and city laws and policies and programs regarding drug, alcohol, and smoke-free work places, disabled access and equal opportunity for employment, housing, credit practices and prohibiting discrimination on the basis of race, color, creed, religion, national origin, gender, sexual orientation, marital status, familial status or physical and/or mental disabilities in any aspect of the grant project.
• Project Sign or Acknowledgment – Grant recipients are required to provide appropriate acknowledgment of BNHA assistance.

GRANT SCHEDULE

• April 15, 2019 - Applications available for online submission
• June 5, 2019 - Application submission deadline at 11:59 pm EST
• June 2019 - Panel review period begins
• July 1, 2019 - Grant awards announced
• August 2019 – grant agreements drafted and signed - pending federal funds available.
• September 15, 2019 – September 15, 2021 approximate grant period; All funded activities must occur during the grant period.

APPLICATION SUBMISSION

Heritage Investment Grant applications must be completed online through the BNHA grant portal. To submit a request for funding, applicants must create an account with BNHA Grants. This account will allow applicants to save draft proposals before the submission deadline. Application instructions are included in the online application.

APPLICATIONS DUE

Applicants must submit completed online application with uploaded support documents by 11:59 p.m. by June 5, 2019. Questions? Please contact Danielle Walter-Davis, Grants Administrator, Baltimore National Heritage Area, dwalterdavis@baltimoreheritagearea.org or 410.878.6411 ext. 5.