Michael Stacey

From: Jason L Tish <jason.tish@wisconsinhistory.org>
Sent: Wednesday, March 10, 2021 3:19 PM
To: Megan McBride; Peter Schleinz; Gene Hackbarth; Jason Flatt; Lauree Aulik; Sadowski, Matthew; Michael Stacey
Subject: CLG Grant - process outline

Hello Grant Recipients-

Congratulations again on being awarded a CLG subgrant for the 2021 cycle. As I prepare the implementation documents for this grant, I want to provide an overview of the grant process so you can start planning for your project.

There's nothing you need to do until I send you a contract, MOA, and Scope of Work for your signature. We also need to do some internal stuff here to properly pass along federal money, but that will be invisible to you.

So, here are the basics:

Step 1: Submit Application - Done

Step 2: Grant Award Decision - Done

Step 3: Sign implementation documents - I am currently drawing up contracts, MOAs, Scopes of Work, and state Purchase Orders for each awarded project. I will send drafts when they are ready. You can expect to receive draft documents within 30 days. We can negotiate these items if you'd like to amend them. When everyone is satisfied with them, they will need to be signed by city officials and your financial officer, and finally, us. Once we have signatures from you and us, I'll send copies of the executed documents for your records.

Step 4: Hire a consultant - When you get these implementation documents back with signatures from our office, you're ready to start your Request-for-Bids (RFB) process. Because the grant funding comes from a federal agency, CLGs must comply with federal procurement standards. They're not onerous. Your City's procurement process may already meet the standards. You just need to provide fair and open competition for consultants. I'll include these standards in the MOA. Also, consultants must meet the *Secretary of the Interior's Standards for Professional Qualifications for Archaeology or Architecture History*. We won't dictate who you hire for your project, but we will veto a consultant if they do not meet these standards. You are responsible for confirming that potential consultants meet these requirements. If there's any doubt you can refer a consultant to me to make this confirmation with them directly.

Step 5: Sign a contract - negotiate a contract with your selected consultant. Make sure that they are familiar with the MOA and Scope of Work. Also, please include me in any negotiations on the contract, so that I can catch any potential pitfalls with regard to the grant contract and MOA before they become a problem.

Step 6 - Kick off the project - For some projects, especially surveys and National Register district nominations, you'll need to do some public engagement so residents know how the project will affect them, and what to

expect during the project work. I am available to join these sessions. In the case of surveys and National Register district nominations I *will* attend kick-off meetings to discuss the background and implications of those projects.

Step 7 - Do the work! - work with your chosen consultant to get the work done that is outlined in the Scope of Work. Remember that the time City staff devote to working on the project is reimbursable with grant funding, so be sure to track staff time working on the project.

Step 8: - Progress reports and Reimbursement Requests - The MOA will require occasional progress reports. These will be due on the 15th of Oct., Jan., and Apr.. Think of these as check-ins. They don't need to be exhaustive, and there's no formal format you need to use. I'll remind you by email to provide an update directly to me (also by email), and that will be sufficient. These are just to make sure that things are going smoothly, and to catch any potential problems. When the work is complete, you'll need to submit a Project Completion Report. I'll send you a form for that, it may be an online form by then (I'm working on it). As you incur expenses related to the project you can submit Reimbursement Requests as often as you need to during the project work. You can request up to 75% of the grant amount during the course of project work - prior to completion. We will reserve 25% of the grant for the end of the project after all terms and conditions are met.

Step 9: - Finish the project - When the project is done, submit digital copies any deliverables to me for review. Give me 30 days to review the products (I may have you or the consultant make some edits or changes during that time). When the products are acceptable, I'll ask you to submit finalized digital copies (maybe some hard copies too, depending on the type of project you're doing), a *Project Completion Report,* and a *Reimbursement Request* for the final 25% of the grant.

As you approach the finish line there are couple of critically deadlines to be aware of. These are driven by federal budget deadlines and are not flexible.

- August 15, 2022 - all project work must be done by this date.
- September 15, 2022 - reimbursement forms for all project-related expenses must be submitted by this date. Grant funding that is not requested by this date will no longer be available for reimbursement.

I hope this is helpful as you start to make plans for getting your project done.

The next step is to work through the implementation documents with me. I'll be in touch soon to pass those to you for review and signature.

-Jason

Jason Tish
Certified Local Government & Preservation Education Coordinator
State Historic Preservation Office
Wisconsin Historical Society
816 State St, Rm 305, Madison WI 53706
Office: 608-264-6512
www.wisconsinhistory.org

I am currently working remotely due to the public health crisis of COVID-19. I have reduced access to my office phone, and some records. This may increase my response time to inquiries. I truly appreciate your patience as I do my best to respond with useful information in a timely manner.