

DOLLARS FOR HISTORIC PRESERVATION

This document includes a description of funding sources and programs that are available to assist historic preservation projects. In some cases, the suggested sources are not necessarily focused on historic preservation but may be tapped for projects that have multiple objectives. The various funding sources are organized by federal, state and foundation sources. In addition, some other tools have been provided that may be helpful.

Federal Grants

Grants.gov

Grants.gov is a source to find and apply for federal government grants. It is a central storehouse for information on over 1,000 grant programs and provides access to approximately \$400 billion in annual awards.

www.grants.gov

U.S. Department of Commerce, Economic Development Administration, (EDA)

The EDA provides funds for technical assistance, planning and the development of projects that result in the creation of new employment.

Eligible: see web site

Funding categories: technical assistance grants, capital grants and revolving loan funds

Funding available: technical assistance grants average about \$25,000, capital grants and revolving loan funds can be several thousand dollars

Match requirements: technical assistance grants require a small match, capital grants and revolving loans require 50% match

Application/Deadline requirements: requires a pre-application Form ED-900P

Contact information:

EDA office
(406) 441-1175

www.eda.gov.

Institute of Museum and Library Services (IMLS)

Provides funding for conservation assessments and projects to museums and libraries.

Eligible: museums and libraries

Funding categories: general survey, detailed survey, environmental survey, treatment, and training

Funding available: up to \$150,000

Match requirements: dollar for dollar non-federal to federal monies

Application/Deadline requirements: must apply on-line at www.grants.gov; deadline October 1, 2008

Contact information:

Institute of Museum Services
1800 M Street, 9TH Floor
Washington, D.C. 20036-5802
(202) 653-IMLS
www.imls.gov

Interpreting America's Historic Places

Supports public programs that exploit the evocative power of historic places to address themes and issues central to American history.

Eligible: historic preservation organizations, heritage tourism organizations, economic development agencies, communities, non-profit organizations, state, local and tribal governments

Funding categories: consultation and planning for exhibits, interpretive materials, heritage tourism partnerships, or other strategies for educating the public

Funding available: visit web site

Match requirements: no requirements but typically only fund 50-60 % of project budget

Application/Deadline requirements: on-line at www.grants.gov

Contact information:

National Endowment for the Humanities

1100 Pennsylvania, NW

Washington, DC 20506

1-800-NEH-1121

www.neh.gov/grants

info@neh.gov

National Endowment for the Arts

Supports artists and art organizations

Eligible: see website

Funding categories: arts education, dance, design, literature, local arts agencies, media arts, museums, music, musical theater, and visual arts.

Funding available: \$5,000 to \$200,000 depending on the type of grant program

Match requirements: see website varies

Application/Deadline requirements: on-line at www.grants.gov

Contact information:

(202) 682-5400

www.nea.gov

National Endowment for the Humanities

Dedicated to supporting research, education, preservation, and public programs in the humanities. They have several different grants available at www.neh.gov.

Preserve America (see also State Grants)

Preserve America offers grants that support preservation efforts through heritage tourism, education and historic preservation planning.

Eligible: SHPOs, THPOs, and Preserve America designated communities

Funding categories: Research & Documentation, Interpretation & Education, Planning, Marketing, and Training

Funding available: \$20,000 to \$250,000

Match requirements: dollar for dollar (cash or in-kind services) non-federal to federal monies

Application/Deadline requirements: Annually in June and December; application form available on-line

Contact information:

Preserve America Grants

National Park Service

1201 "Eye" Street, NW

6th Floor (ORG. 2256)

Washington, DC 20005

(202) 354-2020

www.preserveamerica.gov

Save America's Treasures

Offers grants to help ensure the long-term survival of the nation's irreplaceable historic and cultural legacy.

Eligible: SHPOs, THPOs, CLGs, educational institutions, nonprofit (501(c)(3)) organizations, and federal, state or local governments

Funding Categories: preservation and conservation of nationally significant historic properties and collections; property must be listed on the National Register of Historic Places; brick and mortar activities are supported

Funding available: \$25,000 to \$700,000

Match requirements: dollar for dollar non-federal to federal monies

Application/Deadline requirements: must apply on-line at www.grants.gov, deadline various annually

Contact information:

Save America's Treasures

National Trust for Historic Preservation

1785 Massachusetts Avenue, N.W.

Washington, DC 20036

(202) 588-6012

www.saveameericastreasures.org

USDA Rural Development

The U.S. Department of Agriculture offers a number of programs in the area of housing and rural community development that can be of assistance to preservation efforts.

Eligible: municipalities, counties, public subdivisions, special-purpose districts, Indian tribes and nonprofit organizations.

Funding categories: loan and grants are available for single family homes, apartments for low-income persons or the elderly, housing for farm laborers, childcare centers, fire and police stations, hospitals, libraries, nursing homes, schools, etc.

Funding available: depends on program, visit their website

Match requirements: see website

Application/Deadline requirements: see website

Contact information:

USDA Service Center (local)

www.rurdev.usda.gov .

State Grants

Community Development Block Grants (CDBG)

Designed to help communities with development needs

Eligible: incorporated cities and towns, counties, and consolidated city-county governments

Funding categories: housing and neighborhood renewal, public facilities, planning grants and economic development

Funding available: planning up to \$20,000, housing and public facilities up to \$450,000

Match requirements:

Application/Deadline requirements: see web site

Contact information:

Gus Byrom at (406) 841-2777

www.comdev.mt.gov/CDD_cdbg.asp

Community Transportation Enhancement Program (CTEP)

Provides funds to be used for enhancement projects including historic preservation

Eligible: local and tribal governments

Funding categories: pedestrian and bike trails, scenic easements, historic and archaeological sites, historic highway programs, landscaping and community beautification projects

Funding available: funding is based on population figures and distributed by county

Match requirements: 13.4% of project costs; must be non-federal dollars; some in-kind allowed but no labor

Application/Deadline requirements:

Contact information:

Montana Department of Transportation
Michael Wherley, PE mwherley@mt.gov
www.mdt.mt.gov/business/ctep

Land and Water Conservation Fund (LWCF)

Provides grants for the acquisition and development of public outdoor recreation areas and outdoor facilities.

Eligible: incorporated cities, counties, school districts, state agencies and tribal governments

Funding categories: development of parks, trails and other recreation-oriented sites (can be in conjunction with historic and prehistoric resources)

Funding available: \$75,000 per project

Match requirements: 50/50 cost share (matching) of funds

Application/Deadline requirements: see web site

Contact information:

Montana Department of Fish, Wildlife and Parks
1420 Sixth Avenue, PO Box 200701
Helena, MT 59620-0701
(406) 444-3750
www.fwp.mt.gov/recreation/grants/lwcf/factSheet.html

Montana Cultural Trust: Culture and Aesthetics Grant Program

The state makes grants to cultural and aesthetic projects every other year.

Eligible: person, association, group or government agency

Funding categories: operations, capital, special projects and endowment development categories for historic preservation activities

Funding available: visit web site

Match requirements: dollar for dollar

Application/Deadline requirements: typically due during the summer prior to the legislative session

Contact information:

Montana Arts Council
(406) 444-6430 or mac@mt.gov
www.art.mt.gov/about/about_culturalgrants.asp

Montana Preserve America

When available, the Montana State Historic Preservation Office (SHPO) offers Preserve America sub-grants to Montana communities that have Preserve America status and THPOs to support preservation efforts in accordance with the Federal grant program.

Eligible: Preserve America designated communities and THPOs in Montana

Funding categories: the categories vary depending on the SHPO grant's focus

Funding available: varies depending on the amount awarded to SHPO by the National Park Service

Match requirements: dollar for dollar (cash or in-kind services) non-federal to federal monies

Application/Deadline requirements: varies visit the SHPO Preserve America web site

Contact information:

State Historic Preservation Office (SHPO)
Montana Historical Society
PO Box 201202
Helena, MT 59620-1202
(406) 444-7715
www.mhs.mt.gov/shpo/preserveamerica

Renewable Resource Grant and Loan Program

Provides grants for historic preservation projects that emphasize renewable resource management and community development.

Eligible: subdivisions of state, local and tribal governments

Funding categories: grants and loan funding

Funding available: Grants up to \$100,000 per project; loans depend on the ability to repay

Match requirements:

Application/Deadline requirements: May 15th of even numbered years (2008, 2010, etc.)

Contact information:

Department of Natural Resources and Conservation

rfisher@mt.gov or pamsmith@mt.gov

www.dnrc.mt.gov/cardd/ResDevBureau/renewable_grant_program.asp

Rural Property Brick and Mortar Grant

Provides grants for the rehabilitation of historic rural, agricultural related buildings.

Eligible: barns, grain elevators, and farm outbuildings built 50+ years ago, preference given to National Register (NR) listed buildings

Funding categories: not applicable

Funding available: \$5,000 to \$15,000

Application/Deadline requirements: grant application due March/April (check web site)

Contact information:

Pete Brown

State Architect

State Historic Preservation Office

Montana Historical Society

(406) 444-7718

www.mhs.mt.gov/shpo/

Special Events Grants Program (SEGP)

Supports sustainable economic development through the creation and/or substantial enhancement of an annual on-going event.

Eligible: Montana nonprofit entity, city, county, or tribal government

Funding categories: not applicable

Funding available: \$2,500 up to \$80,000 (depends on funding amount in any given year)

Application/Deadline requirements: December annually, application from Travel Montana

Contact information:

Travel Montana

(406) 841-2870

www.travelmontana.mt.gov

Tourism Infrastructure Improvement Program Grant (TIIP)

Awards grants for tourism related activities such as project construction (brick and mortar) associated with building new and/or rehabilitating older tourism and recreation attractions, historical sites or artifacts, and costs associated with purchasing new attractions.

Eligible: nonprofit organizations and communities

Funding categories: create or improve attractions and services that will entice visitors to Montana

Funding available: \$20,000 to maximum amount of grant funding annually

Match requirements: \$1 for every \$2 in grant funds (must be cash)

Application/Deadline requirements: August 1st annually; application from Travel Montana

Contact information:

Montana Department of Commerce

Tourism Infrastructure Development

(406) 841-2795

www.travelmontana.mt.gov

Foundations and Organizations

Hundreds of private foundations nation-wide have grant giving programs in the areas of historic preservation (capital, education, interpretation, advocacy), archaeology, paleontology, museum development and management, economic development, local capacity building, housing, and other related programs. Listed below are just a few foundations/organizations that may be helpful.

Charles M. Bair Family Trust

Dedicated to philanthropic work in Montana

Eligible: charitable organizations (501(c)(3)) located in Montana; preference given to applicants in Yellowstone, Meagher and Wheatland counties.

Funding categories: educational institutions, hospitals and organizations provided health related services, cultural organizations including historical centers and museums, civic service and human service organizations

Funding available: not available

Application/Deadline requirements: application and cover letter; March 1st annually

Contact information:

www.charlesmbairtrusts.org

email: penny.doak@usbank.com

(406) 657-8139

Butte Citizens for Preservation and Revitalization, Inc.

Provides grants for façade improvements to historic properties in Butte

Eligible: see web site

Funding categories: supports exterior painting, cleaning and wall stuccoing; replacement or repair of original architectural features; improvements to windows, awnings and doors

Funding available: \$1,000 in façade work per address

Application/Deadline requirements: application required, see web site

Contact information:

Butte CPR

Kelly Rose

(406) 498-4366

www.buttecpr.org/grants.htm

Getty Foundation

Assists colleges and universities in the U.S. with preservation of their historic buildings, sites, and landscapes

Eligible: see website

Funding categories:

Funding available: \$25,000 to \$250,000

Application/Deadline requirements: not accepting applications from organizations as of Sept. 2008. Check web site in early 2009.

Contact information:

www.getty.edu/grants/conservation/

Foundation Center

A comprehensive database on U.S. grantmakers and their grants, www.foundationcenter.org.

Humanities Montana

An independent nonprofit organization that offers grants and services for the humanities in Montana.

Eligible: non-profit, schools, colleges, and universities, museums, libraries, and historic preservation societies, state or local government agencies, unions, business and professional groups, and social service organizations, community, religious, or tribal groups, non-commercial media firms, and *ad hoc* groups.

Funding categories: conferences, exhibits, lectures, media distribution, museum assistance, planning, oral history and workshops

Funding available: see web site

Application/Deadline requirements: varies see web site

Contact information:

Humanities Montana

1-800-624-6001

info@humanitiesmontana.org

www.umt.edu/humanitiesmontana

J.M. Kaplan Fund

Supports grants to organizations working with neighborhood groups to preserve and revitalize buildings important to local histories

Eligible: see web site

Funding categories: architecture, conservation of land and buildings

Funding available: Not specified

Application/Deadline requirements: Letter of Inquiry

Contact information:

Angela Carabine

Grants Manager

J.M. Kaplan Fund

261 Madison Avenue, 19th Floor

New York, NY 10016

www.jmkfund.org/

Lee Foundation

Supports capital campaigns and building renovation related to community development.

Eligible: no information

Funding categories: arts/cultural programs, higher education, environment, human services, and community development

Funding available: up to \$40,000

Application/Deadline requirements: none

Contact information:

Publisher Helena Independent Record

(406) 447-4000

John D. and Catherine T. MacArthur Foundation

Grants to preserve and improve privately owned affordable rental housing

Eligible: see website

Funding categories:

Funding available: \$250,000 to \$5 million

Application/Deadline requirements: Letter of Inquiry, file on-line

Contact information:

www.macfound.org

4answers@macfound.org

Charlotte Martin Foundation

Supports projects that celebrate the heritage and cultural diversity of a community.

Eligible: see web site

Funding categories: art, music, dance, literature, ethnic and regional heritage

Funding available:

Application/Deadline requirements: no deadline, must apply electronically

Contact information:

info@charlottesmartin.org

www.charlottesmartin.org

Jerry Metcalf Foundation

Supports historical research and preservation.

Eligible: nonprofit organizations (501(c)(3))

Funding categories: historical research and preservation; visual, performing and literary arts

Funding available: \$1,000 to \$50,000

Application/Deadline requirements: March 15, application required

Contact information:

(406) 443-6206

smokey@mcn.net

www.jerrymetcalffoundation.org

MJ Murdock Charitable Trust

Provides grants to support community issues.

Eligible: nonprofit organizations (501(c)(3))

Funding categories: culture and the arts, human services, health care, community and faith based organizations

Funding available: up to \$1 million

Application/Deadline requirements: Letter of Inquiry, no deadline

Contact information:

(360) 694-8415

www.murdock-trust.org/grants/general-grants.asp

The National Trust for Historic Preservation (NTHP)

The National Trust for Historic Preservation (NTHP) provides funding for historic preservation projects in a number of categories. Funds for NTHP programs derive from Trust memberships, charitable contributions and Congressional appropriation through the National Historic Preservation Fund. The financial assistance programs of NTHP include the following:

National Preservation Loan Fund (NPLF)

Preservation Services Fund (PSF)

Johanna Favrot Fund

Critical Issues Fund

Contact information:

www.preservation.org

Save Our History

Provides grants to inspire youth to become preservationists of tomorrow.

Eligible: museums, historic sites, historic societies, preservation organizations, libraries and archives

Funding categories: must partner with local schools or youth groups

Funding available: generally \$10,000

Application/Deadline requirements: January

Contact information:

www.saveourhistory.com
info@saveourhistory.com

Steele-Reese Foundation

Supports rural projects and communities in Montana

Eligible: charitable organizations

Funding categories: education, health, social welfare, humanities and the environment

Funding available: \$5,000 to \$150,000

Application/Deadline requirements: no deadline, requires a proposal, see web site

Contact information:

Jeanne Wolverton

Western Director

(406) 722-4564

jeannew@blackfoot.net

Tourism Cares

Distributes charitable grants to worthy nonprofit organizations worldwide to protect, restore and conserve sites of exceptional natural, cultural, or historic significance.

Eligible: nonprofit organizations (501(c)(3))

Funding categories: capital improvement of cultural or historic sites, education of host communities

Funding available: typical grants of \$10,000; up to \$100,000 in some instances

Application/Deadline requirements: February 1st, May 30th, October 1st

Contact information:

www.tourismcares.org

Native American Programs

A number of federal agencies administer programs in economic development, housing, training, technical assistance and research specifically for Native Americans. Specific program information may be obtained by contacting the offices listed in the following sections:

HPF Grants to Indian Tribes, Alaska Natives, and Native Hawaiian Organizations

Supports historic preservation projects and programs and promotes the continuation of living cultural traditions. Categories of funding include, in priority order: Historic Preservation Projects; Non-Construction; Cultural Needs Assessments; Documenting Your Community's Traditions; Historic Preservation Projects & Construction; Collections Management and others. Contact:

Hampton Tucker

NPS ~ Preservation Assistance Division

1201 Eye Street NW

Washington D.C. 20013-7127

Assistant Regional Director

Cultural Resources and Partnerships

Intermountain Regional Office

12795 W Alameda Parkway

PO Box 25287

Denver CO 80225

Program Manager

Cultural Resources and National Register Programs

Sante Fe Support Office

2968 Rodeo Park Drive West

Santa Fe NM 87505

Native American Programs

Promotes self-governance, business and economic development through the provision of training, technical assistance, research, demonstrations and evaluation activities to public and private non-profit organizations.

Administration for Native Americans
Department of Health and Human Services
Room 344-F, 200 Independence Avenue SW
Washington D.C. 20003
1-877-922-9262
www.acf.hhs.gov/programs/ana/

Indian Grants for Economic Development

Improves Indian reservation economies by providing seed money to attract financing from other sources for developing Indian owned-businesses. There is available funding up to \$250,000 per project. Contact:

Director, Office of Economic Development
Bureau of Indian Affairs; Department of the Interior
Room 4060, 1849 C Street- NW
Washington D.C. 20240
(202) 208-5324
www.doi.gov/bia

Public and Indian Housing

Provides housing for Indian families and individuals using various HUD programs.
Contact:

Assistant Secretary for Public and Indian Housing
Department of Housing and Urban Development
451 Seventeenth Street-SW
Washington D.C. 20410
(202) 708-1112
www.hud.gov/offices/pih/ih/codetalk/

Indian Housing Assistance

Intended to substantially eliminate substandard Indian housing. There is available funding: up to \$45,000 per project.

Indian Loans-Economic Development

Provides Indians, Alaska natives, tribes and Indian organizations with assistance to obtain financing from private and government sources. Available funding is in excess of \$1million per project.

Other Tools

Center for the Rocky Mountain West

The Center for the Rocky Mountain West was authorized by the Board of Regents and created at the University of Montana in 1992 as forum to explore, examine and articulate an inclusive regional history population. The Center examines the region, identifies patterns of history and culture and provides the opportunity to shape the regional identity and values in the growth of the region. For information about this contact:

Center for the Rocky Mountain West
Milwaukee Station, 2ND Floor, U of M
Missoula, MT 59812-3096
(406) 243-7700
www.crmw.org

Tax Credits

The Federal Historic Preservation Tax Incentives program encourages private sector rehabilitation of historic buildings and is one of the nation's most successful and cost-effective community revitalization programs. It generates jobs and creates moderate and low-income housing in historic buildings.

- In general, a tax credit is a dollar-for-dollar reduction in the amount of taxes you owe.
- The amount of credit under this program equals 20% of the qualifying costs of your rehabilitation.
- A project must be “substantial” in that your qualifying rehabilitation expenses must exceed the greater of \$5,000 or the adjusted basis of the building.
- Your building needs to be certified as a historic structure by the National Park Service.
- Rehabilitation work has to meet the Secretary of the Interior’s *Standards for Rehabilitation* as determined by the National Park Service.

Local Government Initiatives

Montana statute provides for a series of local funding mechanisms that can be used for historic preservation and related activities. These mechanisms require the approval of the local governing body and in certain cases, the taxpayers that might be affected by the program.

Tax Increment Financing

Under the Montana Urban Renewal Law, communities may establish tax increment districts to revitalize blighted neighborhoods and central business districts. Tax increment financing means that new property tax dollars resulting from increases in the market value of real property may be directed to the neighborhood where the real property is located. The base property tax (before any improvements to real property) continues to be distributed to the local government and school districts. However, tax dollars accruing from increases in property values (from rehabilitation, new construction, etc.) are available for reinvestment in the neighborhood and can only be spent in the neighborhood where they are generated.

A tax increment program is authorized for 15 years or longer if the revenue is pledged to the payment of urban renewal bonds. A community must identify the neighborhood or business district where the program will be implemented. Funds have been used to improve the neighborhood infrastructure, for grants and loans to improve historic buildings, to manage Main Street programs and for events. Tax increment programs depend on substantial investment in property but can work in small and medium-sized communities that are experiencing some growth. Tax increment financing can assist communities in directing growth to older, historic areas where infrastructure is already in place and patterns of use have been established. Information can be obtained from communities that have tax increment financing in place including Missoula, Great Falls, Billings, Kalispell, Butte and Helena.

Special Districts for Business Improvement, Parking & Other Infrastructure

Neighborhood residents and downtown property owners can elect to levy special taxes on themselves for special activities and capital improvements. Business Improvement Districts, for example, can fund downtown revitalization activities, promotions and events. Parking Districts can assist development efforts in locating parking lots in a manner consistent with good community design and respectful of the

historic streetscape. Older Neighborhoods can benefit from improvements to streets and sewers, lighting, public parks through this self-funding mechanism.

To date, Helena and Great Falls have adopted Business Improvement Districts. Local Government Assistance Division of the Montana Department of Commerce, (406-444-3757), can provide assistance in the establishment of special districts for infrastructure improvement.

Local Mill Levy

Montana law permits a local government to levy up to two mills (1/1000 of the taxable value of a community) for any museum, facility for the arts or collection of exhibits. Funds can be used for operations, capital improvements and program development. For information, contact the Montana Arts Council, (406-444-6514).