

# Oregon Historic Cemeteries Grant 2024 Guidelines

OREGON COMMISSION ON HISTORIC CEMETERIES, OREGON HERITAGE

*Oregon Parks and Recreation Department values and serves everyone and is committed to providing safe and equitable access to state parks and agency programs. The department will not tolerate racism, harassment, discrimination, or intimidation in any form.*

The Oregon Commission on Historic Cemeteries is pleased to announce the new round of Historic Cemeteries Grants. The purpose of the Historic Cemeteries Grants is to provide financial assistance in the following general categories: protection and security, restoration and preservation, education and training, research and interpretation. Eligible projects may include, but aren't limited to: security fencing or lighting, skilled monument repair or training, conservation of historic elements such as fencing, curbs, markers, etc., documentation and mapping, signage, landscape restoration, planning and interpretation. The funds allocated by the State through the Oregon Parks and Recreation Department will be available to support the preservation of listed historic cemeteries throughout Oregon.

Grants must be submitted through the [Oregon Parks and Recreation Department Grants Online](#) system.

## Grant Timeline:

- Deadline: April 2, 2024 (11:59 pm)
- Notification: End of May, 2024
- Project Start: July 1, 2024 with agreements fully executed and workplan approved.
- Project Completion and Reporting Deadline: April 30, 2025

## Financial Information:

### AWARD AMOUNT:

Generally, awards are \$1000-\$8000. The Oregon Heritage Commission attempts to fully fund grant requests. The funding is by reimbursement for work completed.

### MATCH:

A dollar match for funds requested is not required, though we encourage you to seek local funding and donations in addition to your grant request. Local support allows the program to assist more cemeteries, shows community value for the project, and makes the application more competitive.

- Match can be in the form of cash, in-kind donations and volunteer time.
- Rates for volunteer services may not exceed Oregon minimum wage, except in those instances in which the volunteer is using their professional skills for the grant assisted work. Then, documentation of their rate is required.
- Indirect costs (general operations costs associated with the grant funded project) or grant administration costs (staff time managing grant reporting and reimbursement) can be applied to the grant for funding or match,



only one can be used in the same grant. Both indirect costs and grant administrations costs are limited to 6% of the award amount.

### **BUDGET INFORMATION:**

Bids and estimates strengthen the grant request when applicable. If awarded the grant requires at least three estimates for work over \$25,000.

### **GRANT REPORTING AND PAYMENT:**

Awarded projects will be the subject of binding agreements between the State and the grantee. Grant funds are dispersed on a reimbursable basis. Details of payment arrangements and grant reporting are included in the grant guidelines.

## **Eligibility, Standards, Criteria, and Priorities:**

### **ELIGIBILITY:**

- **CEMETERIES:** Any cemetery or burial site which contains at least one burial of a person who died before the date that is 75 years before the current date.
- **APPLICANTS:** Individual citizens, organizations, schools, governments, and nonprofits may apply.
- **PROJECTS:** Projects that will begin and end during the grant cycle qualify. Grant cycle extensions are extremely rare.

### **PRESERVATION STANDARDS:**

The application must convey that any reparation will be completed using appropriate preservation practices. Please specify how the work will be completed and/or include references for past work completed using appropriate methods. The National Park Service, the Association for Gravestone Studies, the National Preservation Institute and the Oregon Commission on Historic Cemeteries all offer information on preservation practices in historic cemeteries.

### **CRITERIA:**

- The capability of the applicant to carry out the proposed project.
- The effectiveness of the proposed project to address the historic aspects and long term preservation of the cemetery.

### **PRIORITIES**

- Projects with a well-prioritized, clearly explained work plan with an appropriate level of detail and realistic cost estimates.
- Geographic diversity.
- Project readiness, including matching dollar share in-hand.
- Projects that are part of a long range plan.
- Projects that document, preserve, or interpret the history of voices previously marginalized or excluded. For example, this may include ethnicities, races, genders, classes, etc. or themes like labor, immigration, etc.
- Projects on publicly accessible cemeteries are not prioritized over cemeteries that are accessible by appointment only. The purpose of the program is the preservation of historic cemeteries.

### **ASSISTANCE:**

For grant questions, translation assistance, and OPRD: Grants Online support, contact: Kuri Gill,

[kuri.gill@opr.oregon.gov](mailto:kuri.gill@opr.oregon.gov), 503-986-0685.



## Application Process

**GRANT ANNOUNCEMENT:** The grant application will be announced through various media outlets. Grant application information and online system instructions can be found at <https://www.oregon.gov/oprd/OH/Pages/Grants.aspx#seven>.

**REGISTER ON TO APPLY ONLINE:** To access the application, register at [oprdragrants.org](http://oprdragrants.org). Please use the [OPRD: Grants Online instructions](#) or [video](#) to set up your account and password. If you have used the system before, there is no need to register again. If you already have an account and you do not see the application in your available grant options, then request through [Kuri.Gill@oprdragrants.org](mailto:Kuri.Gill@oprdragrants.org) or 503-986-0685 to add this grant option to your account. Log in using your email address and your password. See online [OPRD: Grants Online instructions](#) for or watch the [How to Navigate the OPRD Grants Online System](#) video for detailed directions to use the online grant system. General system information and additional tutorial videos can be found online. <https://www.oregon.gov/oprd/OH/Pages/Grants.aspx#one>

**NOTE:** Account registration can take up to three days and cannot be completed outside regular business hours.

**APPLICATION SUBMISSION:** Once you have a login, you will be able to create, edit, and submit your application. You can enter information, save, log out, log back in, enter more, etc. as many times as you would like before you submit. It will be helpful for you to know what to enter in the system if you use the [OPRD: Grants Online instructions](#).

The application must be complete and submitted online by the grant application deadline. Contact Kuri Gill, [kuri.gill@oprdragrants.org](mailto:kuri.gill@oprdragrants.org) or 503-383-6787, for accessibility or translation support.

**APPLICATION PREPARATION RESOURCES:** Please contact the grant coordinator to talk through project ideas. Also use Oregon Heritage resources to develop your application. The grant coordinator may also provide comments on the application up to two weeks prior to the deadline, as time allows.

- [Historic Cemeteries Grant Content Checklist – Appendix A](#)
- [Heritage Bulletins](#)
- [Oregon Heritage MentorCorps](#) for project advice. Use our project checklist to provide needed information in your application.

**APPLICATION QUESTIONS:** The following questions will appear on the online application.

- Contact Information – Much of this will be automatically completed.
  - Applicant – Organization
  - Project Contact – This is the person we contact to discuss details of the project. If you are submitting the application, but you will not be the project contact, the project contact must have an account in the system to be entered. Please request an account or use the online registration to create one.
  - Address
  - Reimbursement Contact – This is the person who we contact to handle the financial side, many organizations have a person managing the books who is not the project contact. The



reimbursement contact must have an account in the system to be entered. Please request an account or use the online registration to create one.

- Project Information
  - Project title – make a clear, short project title (ex. Jones Cemetery Fencing)
  - Brief Project Description – please keep this brief and specific. Only state what the project is, not why it is important.
  - Project start date, must be after the beginning of the grant period
  - Project end date, must be before the end of the grant period
  - Site name – Cemetery name
  - Site city/town/area
  - Site county
  - Site description – provide address and directions to cemetery
  - Site acreage – Site acreage – enter ‘1’
  - Latitude & Longitude – use the ‘find lat/long’ button fill this field.
- Financial Information
  - Requested amount
  - Match amount
  - Total amount
  - Budget grouped by category
    - Contractor/Consultant
    - Staff time
    - Volunteer time
    - Materials & equipment
    - Printing, publication & design
    - Travel
    - Other (specify)
  - Show source of funding using categories like, volunteer time, in-kind donations, staff time, organizational cash, donations, grants.
  - Budget must include both expenses and income sources of funding.
    - Rates for volunteer services may not exceed Oregon minimum wage, except in those instances in which the volunteer is using their professional skills for the grant assisted work. For example, if a carpenter or bookkeeper donates carpentry or bookkeeping services to the project, these services may be valued at the hourly rate the carpenter or bookkeeper would normally charge.
    - Contingency is not allowed to be funded by grant dollars and cannot be considered part of the required match amount.
    - Grant administration is limited to 6% of the project cost.
- Supplemental
  - Cemetery Information
    - Who is the cemetery owner?
    - If you are not the owner submit a letter of approval from the owner.
    - The applicant is (check all that apply): Nonprofit incorporated in the state of Oregon, 501(c)3, 501(c)13, local government, for-profit business, individual, other
    - Provide the date of the earliest death in the cemetery.
  - Grant Agreement Information
    - Grant Agreement Signer Name and Contact Information (provide signer name, title, email, phone number, and organization address)
  - Statewide Plan Goals
    - Oregon Heritage Plan Goals – Select all goals of the [Oregon Heritage Plan](#) that this project addresses.

- Include More Voices – including the history documented, preserved and shared and including more voices in doing the work.
  - Increase Access to Heritage – including online access, physical access, removing barriers, etc.
  - Promote the Value of Heritage – including public engagement projects.
  - Pursue Best Practices – including work that increases organizational capacity and follows standards, supports staff and volunteer care and training, planning and partner development, diversity and inclusion efforts, etc.
- Oregon Preservation Plan Issues – Select all issues from the Oregon Preservation Plan that this project addresses.
  - Government Partnerships
  - Advocacy and Heritage Partner Networking
  - Public Outreach and Education
  - Professional Preservation Education
  - Information Sharing and Accessibility
  - Identification and Designation of Cultural Resources
  - Preservation, Rehabilitation, and Protection of Cultural Resources
  - Grants and Funding (not including use of this grant)
  - Economic Development
  - Statutes, Ordinances, Codes, and Processes
- Project Type
  - Historic feature preservation
  - Land survey
  - Archaeological services (survey, documentation, remote sensing)
  - Cemetery records collection & care
  - Digitization of records & mapping
  - Tree trimming & landscape
  - Signs
  - Security & safety
  - Interpretation
  - Community engagement & programming
  - Other
- Project Need
  - Describe need in terms of the condition of the cemetery.
  - Describe the historical and community significance of the cemetery. Include any special populations found in the cemetery, the value of the property to the community or the organization.
  - Describe any other needs related to the project or the problem to be addressed. For example, condition of records, access to information, security, lack of community support, etc.
- Project Value
  - Describe the expected effect of the project on the needs described above and the cemetery.
- Project Goals
  - Describe the project’s goals. Explain the MEASURABLE products or outcomes of the work. This may include number of monuments repaired, brochure published, information provided to the community, standards met, number of community members engaged, etc.

- Project Timeline - List your major objectives or tasks and approximate dates they will be completed.
  - Project Detail
    - Provide details about the execution of the project (when, where, how, etc.)
    - Provide information about the professionalism in how the work will be performed (how scans will be made and stored, how repairs will be made following preservation standards, how student programs will meet educational standards, interpretive themes, how partner organizations will be involved, quality of experience, historical information learned, relationships developed, etc.)
    - List any experts working on the project – their experience, qualifications, and how they will be involved.
    - Describe how the project will be monitored and evaluated.
    - Describe how the project will be maintained if applicable.
  - Ability to Complete the Project –
    - Describe your organization's history and past successes related to this project.
    - Describe any partnerships on this project, volunteer, or community support for this project.
    - Provide any other evidence of your ability to complete the project.
  - Organizational Impact
    - Explain how this project fits into organizational plans (strategic, interpretive, collection, outreach, etc.).
    - Why is this project a priority for the organization at this time? How will this move the organization forward?
  - Budget Narrative - Provide information about the appropriateness of the estimate (research, bids, qualified personnel, etc.) Describe other sources of funding (such as other grants) and indicate whether it is committed or not.
  - Use of grant funds – Specifically explain what parts of the project the grant will fund.
- Attachments: Refer to Appendix A for recommended attachments for different projects.
    - Required
      - Submit budget detail (this can be whatever format you chose, but should show expense detail)
      - Cemetery photos (entrance, general view, project area view if applicable)
      - Vicinity map
      - Completed W-9 <https://www.irs.gov/pub/irs-pdf/fw9.pdf>
    - If applicable to the project
      - Estimates
      - Equipment and supply specifications
      - Resumes of consultants and key staff and volunteers
      - Letter of commitment or support – from people or organizations with a clear connection to the project
      - Technical information, design, plans, etc.
      - Key pages of strategic, collections, interpretive or long-range plan.
- Submission
    - Double check your application, use the Historic Cemeteries Grant Application Checklist (Appendix A) to ensure you provide complete information.
    - Be sure to click submit, you will receive confirmation of the submission.

## Grant Review and Award Process

### GRANT REVIEW AND SELECTION:

- Technical review: Following the grant deadline the application will be reviewed by staff to make sure it is complete. You will be contacted if the application needs any technical revision.
- Committee review and scoring: Once applications pass the technical review a committee will review and score them using the following criteria and priorities.
- Oregon Commission on Historic Cemeteries Award: The recommendations are considered and the final selection is made by the Oregon Commission on Historic Cemeteries at a public meeting.
- Notification: Applicants will be notified of the committee and commission meeting dates and locations. Applicants may attend these meetings, but may not comment during the review process. Applicants will be notified by email following the Oregon Commission on Historic Cemeteries meeting.

**CRITERIA:** The review committee will consider the following in ranking the grant applications:

- The capability of the applicant to carry out the proposed project.
- The effectiveness of the proposed project to address the historic aspects and long term preservation of the cemetery.

### PRIORITIES:

- Projects with a well-prioritized, clearly explained work plan with an appropriate level of detail and realistic cost estimates.
- Geographic diversity.
- Project readiness, including matching dollar share in-hand.
- Projects that are part of a long range plan.
- Projects that document, preserve, or interpret the history of voices previously marginalized or excluded. For example, this may include ethnicities, races, genders, classes, etc. or themes like labor, immigration, etc.
- Projects on publicly accessible cemeteries are not prioritized over cemeteries that are accessible by appointment only. The purpose of the program is the preservation of historic cemeteries.

**GRANT AWARD:** The grant award will be made by the Oregon Commission on Historic Cemeteries. Applicants will be notified by email following the award decision.

**GRANT AGREEMENT:** Shortly after you are notified that you have been awarded a grant, you will receive a Grant Agreement. By signing the Grant Agreement, you attest to acceptance of a state grant for the purposes outlined in your grant application and those outlined in the Agreement. These guidelines are considered to be part of your Grant Agreement. Some of the items in the Agreement include:

- An approved Project Budget with line items specifying project expenses covered by grant funds and specific project expenses covered by the applicant match.
- Grant starting date and grant completion & final report date.
- Special conditions for the project.
- Specific language for the acknowledgement of public funds provided by the State of Oregon.
- Requirements for submitting reports and reimbursement requests.
- Requirements for inspections and audits.

Agreements can be completed electronically or by hard copy, but electronic is preferred.

- For hard copy agreements, wet signature is required. Please sign both copies of the agreement and return both copies. We will sign both and return one fully executed copy to you.



## GRANT REVIEW AND AWARD PROCESS

- For e-signature agreements we will need the email and name of the person with authority to sign. These will be sent through Adobe Sign by email for secure e-signature.

### AMENDMENTS TO THE AGREEMENT:

You may not, without prior written approval, make changes that would substantively alter the scope of work, timeline, or budget stipulated in the Agreement, or make any changes that authorized the award of the grant. The contract was with the assumption that the work would be completed as agreed. If an issue arises that you think may require an amendment, contact us immediately.

Submit requests for changes as a progress report in [OPRD GrantsOnline](#), staff will be notified there is a report to review. Be sure to submit and not just save the progress report. If the change is approved, an amendment may be required.





## Grant Management

### GRANT MANAGEMENT:

Because the Grant Agreement involves the use of public funds from the State of Oregon, you are expected to follow certain requirements for their use. These requirements will affect consultant or contractor selection, public notices, work plans, progress reports and reimbursement requests, project photographs, final reports and reimbursement requests, and recordkeeping.

### ***Consultants/Contractors***

Evidence of competition for direct negotiated professional services of under \$25,000 is not mandatory.

Services and materials that cost \$25,000 to \$75,000 must show evidence of competition, including soliciting proposals from at least three potential contractors. We must approve your selection prior to the consultant or contractor being hired. Please check the references of any contractor you review. To obtain approval please send the following to the Grants Coordinator through the online grants system, as a progress report:

- How contractor was solicited;
- Summary of experience and qualifications; and
- Why contractor was selected (references, quality, previous work, time frame, cost, etc.)

### ***Work Plans***

Work plans must be approved by Oregon Heritage before work begins. For approval submit the following to the Grants Coordinator:

If no changes have been made to the plan...

- An email indicating that the plan remains as proposed in the application

If the plan is different than the one proposed in the application...

- Work description including materials, tools and processes to be used
- Timeline

### ***Staff Time***

Documentation of staff time for grant funded work and for matching source work is required. Documentation must include the person, the tasks, hours, and rate for each employee.

### ***Volunteer Time***

Documentation of volunteer time for matching source work is required.

- Volunteer work may not be reimbursed by the grant.
- The volunteer rate is Oregon minimum wage.
- If a volunteer is using professional skills, the professional rate must be used. A document from that volunteer indicating the rate is required for each submission.
- Documentation must include the person, the tasks, hours, and rate for each employee.

### ***Indirect Costs***

Indirect costs are limited to 6% of the grant funds awarded.

### ***Public Notice Requirement***

It is in your best interest to spread the news about the grant award and the project progress.



## GRANT REPORTING AND REIMBURSEMENT

Upon grant award, at key project points and upon completion you should do the following.

- Send a news release to local media
- Inform your members and interested parties
- Post on social media
- Inform your public officials (local, state and federal)
- Have celebratory and/or informational events (construction tour, ribbon cutting, etc.)

During the life of the project, place a sign in a prominent and readable location on your site, stating: “This project has been funded in part by the Oregon Heritage Commission, Oregon Parks and Recreation Department.” A simple temporary sign is acceptable; call the grant coordinator for suggestions. The sign may also include other project supporters. Include a photograph of the sign in place with your final report. Exhibits, documents, publications, and publicity about this project must also include this funding credit.

You may be asked to contribute to the [Oregon Heritage Exchange](#) blog following project completion.

### ***Photographs***

Before, during and after photographs are required for the interim and final report reports that request reimbursement. These should include participants at events, people doing the work, etc. Photos are required in a digital format (300dpi or higher, jpeg or tiff).



## Grant Reporting and Reimbursement

### GRANT REPORTING:

All reports are submitted as a progress report through [OPRD GrantsOnline](#). See [OPRD Grants Online Reporting & Reimbursement Instructions](#) and the [video](#) for detailed instructions to complete your report online.

**Interim reports:** Grant reports are required once during the grant cycle. You will be sent a report reminder to submit it. Interim reports are submitted through [OPRD GrantsOnline](#) as a progress report. Reports must include:

- Start and end dates for the reporting period.
- The current status of the project and summary of work completed and work remaining, a timeline for completion, and any issues or challenges.
- Submit supporting attachments like photographs of work in progress and people doing the work, screen shots of digital work or websites, inventory documents, promotional materials, exhibits, programs, participant evaluations, professional review, inspection results, etc. Any appropriate evidence that work was completed.
- Estimated amount of grant funds expected in the next grant period.
- Oregon Heritage staff will review and approve reports. A site visit may be required for approval, but this is rare with strong documentation submitted. You will be notified if a site visit must be scheduled. A report is required to submit a reimbursement request.

**Final report:** A final report is required within 30 days of completing the project or by the final deadline on your grant agreement, whichever is first. Final reports are submitted as a progress report through [OPRD GrantsOnline](#). Reports must include a summary of work completed and any changes to the original plan. Check the box for 'Final Report'. Submit supporting documentation including:

- Photographs before, during and after the project is complete (300 dpi or higher).
- Copies of articles, press releases, flyers, research materials, screen shots of cataloging records, sample of monument condition reports, results of public events (number of people, impact to cemetery, etc.) related to the project.
- Contractor specifications and invoice, inspection report, and other evidence of work completed.
- **Grant Impact Form (Appendix B) required** – This information is used to measure the value of our grant programs. Complete this using the [online survey](#).

Oregon Heritage staff will review and approve reports. A site visit may be required for approval, but this is rare with strong documentation submitted. You will be notified if a site visit must be scheduled.

Additional resources for reporting:

- [Grant reporting and reimbursement checklist](#)
- [OPRD Grants Online Reporting and Reimbursement Instructions](#)
- [How to submit a progress report](#) – Video Tutorial

### GRANT REIMBURSEMENT:

Grant funds are dispersed on a reimbursable basis. A project report and a reimbursement request are required to receive a reimbursement. Both must be submitted through [OPRD GrantsOnline](#). See [OPRD Grants Online Reporting & Reimbursement Instructions](#) for detailed instructions or the [video](#) to complete your reimbursement request online.

*The reimbursement request must include expense information for the period the request covers, including costs covered by match.*



## GRANT REPORTING AND REIMBURSEMENT

Enter project expenses in the project expense section. Include all costs for the project, including match source funded expenses and volunteer time. Only the match amount must be provided, not the matching source. Expenses may be grouped by expense category:

- Contractor/Consultant
- Staff time
- Volunteer time
- Materials & equipment
- Printing, publication & design
- Travel
- Other (specify)

Submit the following required attachments.

- Copies of invoices or receipts for expenses over \$500
- Itemized list of expenses under \$500
- Volunteer time tracking
- Staff time tracking
- Evidence of in-kind donation value
- See OPRD Grants Online Reporting & Reimbursement Instructions  
<https://www.oregon.gov/oprd/OH/Documents/OPRDOOnlineGrantReimbursementReportingInstructions.pdf>  
for a detailed guided to completing your report online.
- See Grant Reporting and Reimbursement Checklist for additional guidance.  
<https://www.oregon.gov/oprd/OH/Documents/ReportingReimbursementChecklist.pdf>
- How to submit a reimbursement request – video tutorial
- DO NOT submit canceled checks as proof of payment. This is a privacy protection issue. Only proof of expense is required.

### THINGS TO KNOW:

- Interim reimbursements may be requested as work is completed.
- Match requirements should be met with each request.
- Full reimbursement is allowed when work is complete and the match requirements are met. OPRD may withhold up to 10% of the award amount until that time.

**PAYMENT:** Once complete progress reports and reimbursement requests are submitted, they will be reviewed by OPRD staff – program staff and finance staff. Reimbursements are in the form of a check. State agencies and universities are required to submit an invoice for electronic funds transfer. The process takes 2-4 weeks.

**EXTENSIONS:** Extensions are extremely rare due to state accounting requirements. Please communicate early in the grant period to discuss scope of work changes to avoid extension or cancellation.

**AUDITS:** A field or desk audit may be made after completion of the project to verify your expenditures. The auditor will contact you several days in advance to arrange a convenient time if a field audit is necessary. To expedite this audit, all supporting documents should be readily available.

**RECORD KEEPING:** Keep records of your grant management for five years. For details about accounting procedures see Appendix C.

### ASSISTANCE:

Grant questions and OPRD: Grants Online: Kuri Gill, [kuri.gill@oprd.oregon.gov](mailto:kuri.gill@oprd.oregon.gov), 503-986-0685.



# APPENDIX A

## HISTORIC CEMETERIES GRANT CONTENT CHECKLIST

To be as competitive as possible, be sure to include the following information in your grant application. For additional support take advantage of our [Heritage Bulletins](#).

### Headstone and historic feature resetting and repair

- ✓ Current condition
- ✓ How the features in the project were selected and prioritized
- ✓ Historical and organizational significance of the cemetery and features
- ✓ Details about how the work will be done: methods, materials, expertise, etc.
- ✓ Estimated number of features to be repaired, leveled, or reset

### Fencing

- ✓ Need for headstones
- ✓ How you will treat original headstones, if any
- ✓ Design of headstone
- ✓ Estimated number of headstones to place

### Information Kiosk

- ✓ Need for kiosk
- ✓ Material that will be posted
- ✓ Location within the cemetery
- ✓ Kiosk design

### Cemetery Sign

- ✓ Need for sign
- ✓ Sign design
- ✓ Location within the cemetery

### Interpretive panel, brochure, website

- ✓ Need for interpretation
- ✓ Information to be included
- ✓ If it is interpreting a previously untold or limited history of a population or theme, describe how it was excluded and why it should be included now
- ✓ Design or design plan
- ✓ How it will be promoted
- ✓ Number of panels or copies of brochures

### Cemetery records

- ✓ Need for records project
- ✓ Number of records to be organized
- ✓ Methodology – process, database specifications, what will be tracked, etc.
- ✓ If it is a previously undocumented or researched history, describe how it was excluded and why it should be included now



### Survey

- ✓ Need for survey
- ✓ Scope of the project (markers, maps, county records, etc.)
- ✓ Expertise to be used

### Tree trimming, removal and landscape care

- ✓ Need for trimming or removal
- ✓ Number of trees to be trimmed or removed
- ✓ Discussion of whether or not they were purposefully part of the cemetery or volunteer. If they were purposeful, how will this change the historic character and what will be done to mitigate that change?
- ✓ Expertise in establishing the need to trim or remove and expertise in the actual work

### Ground Penetrating Radar & other remote sensing for burial location

- ✓ Need for burial location (future burials, construction, or other ground disturbing activity)
- ✓ Scope of the project (location for activity)
- ✓ Soil and other conditions under consideration
- ✓ Type of remote sensing and its efficacy based on soil and other conditions
- ✓ Expertise to be used

# APPENDIX B

## Oregon Heritage Grant Impact Form

Thank you for completing this form. This is valuable information we use to improve our programs and document their value. Don't worry if your project did not address some of the questions, we are attempting to track the performance of our grants overall. If you want to include additional detail, please use the comment boxes. Please complete this survey [online](#).

### Project Impact Form

<p>In three sentences or less, what was the impact of the grant funds?</p>		
	No	Yes
<p>Did the grant directly affect your ability to complete the project? If yes, how?</p>		
<p>Comments:</p>		
<p>Select the Oregon Heritage Plan Goal that your project most addressed and explain how it did that.</p>	<ol style="list-style-type: none"> <li>1. Include more voices</li> <li>2. Increase access to heritage</li> <li>3. Promote the value of heritage</li> <li>4. Pursue best practices</li> </ol>	
<p>Comments:</p>		
<p>Select the Oregon Historic Preservation Plan Issue that your project most addresses and explain how it did that.</p>	<ol style="list-style-type: none"> <li>1. Government Partnerships</li> <li>2. Advocacy and Heritage Partner Networking</li> <li>3. Public Outreach and Education</li> <li>4. Professional Preservation Education</li> <li>5. Information Sharing and Accessibility</li> <li>6. Identification and Designation of Cultural Resources</li> <li>7. Preservation, Rehabilitation, and Protection of Cultural Resources</li> <li>8. Grants &amp; Funding</li> <li>9. Economic Development</li> <li>10. Statutes, Ordinances, Codes, and Processes</li> </ol>	
<p>Comments:</p>		



# APPENDIX C

## RECOMMENDED ACCOUNTING PROCEDURES

In any program where reimbursement is requested for a portion of project costs, or matching share is claimed, adequate records are essential. There should be definite supporting evidence for EACH item of cost claimed, estimates are not sufficient. While these may not be required for reporting purposes, they are recommended for your record keeping in case of audit. The procedures below may not apply in every case, so look through them and identify and use those that are relevant to your project.

Contact Kuri Gill at [Kuri.Gill@opr.d.oregon.gov](mailto:Kuri.Gill@opr.d.oregon.gov), or phone 503-986-0685 if you have questions.

In order to promote a better understanding of the records required and to avoid the possibility of having costs disallowed at the time of audit, the following accounting procedures are suggested:

- Establish a separate account for each agreement project.
- Maintain the account so that it includes the project name, and lists payment for salaries and wages, contracts, equipment, materials and supplies, and other items that conform to categories listed on the grant reimbursement request.
- Each entry in the account must be cross-referenced to a voucher, payroll invoice or other supporting document. Each payment must be supported by a cancelled check or warrant, available in the grantee's records in the event of an audit. **DO NOT SUBMIT CANCELED CHECKS.**

The following paragraphs provide you information about the specific budget categories:

### **Professional Contractor or Consultant**

Proper contractor or consultant selection procedures must be followed and proper documentation maintained for audit, or contract costs are subject to disallowal.

Payments made by the grantee should be supported by a statement or invoice from the consultant. The consultant hours do not need to be broken down if contracted in a lump sum, since the consultant agreement should state a total contracted amount. Payments made include fee for service, salary, per diem, payment for the travel, or other allowable services.

### **Employees**

When a staff member is involved in a grant project, payrolls should be signed by an authorized person and wages paid should be supported by time and task tracking records for each employee.

Records (daily, weekly, or monthly) must show total daily hours for each project and description of work performed.

Fringe benefit rates should be developed using actual costs, and individual components should be identified.

Documentation should show how rate or cost was derived. This amount must be traceable through the grantee's records.

### **Travel**

State guidelines require that all mileage rates do not exceed the maximum state rate, which is generally the same as the standard Internal Revenue Service rate. The reimbursement request must show the name of the individual, time of departure and return, dates, mileage (odometer readings or locations), meals claimed, and purpose. A copy of lodging receipts for overnight travel must be maintained. Contact Kuri Gill at [Kuri.Gill@oregon.gov](mailto:Kuri.Gill@oregon.gov) or (503)986-0685 for current rates.

### **Materials and Equipment**

#### **Value and Use of Owned Equipment**

Equipment value (for owned equipment) should be supported by time records and by a schedule of hourly rates developed from actual historical costs, or in the event no previous cost data exists, from reasonable estimates of such factors as useful life, annual hours or use, insurance premiums, etc. These estimated rates must be adjusted each year based on the previous year's actual costs.





### Equipment Rental (Outside)

Payments made by the grantee for equipment rented for specific project area are generally allowable under state regulations. Payments made by the grantee must be supported by a statement or invoice from the vendor that indicates the time period the equipment was rented.

### Materials and Supplies

Supplies and materials charged to the project must be supported by supplier's invoices or receipts. The original or a photocopy of the cancelled checks must be available for a field audit. **DO NOT SUBMIT CANCELLED CHECKS IN YOUR REIMBURSEMENT REQUEST.**

### Printing, Publication Design, etc.

If you make, design or print a publication as part of your project, include those costs here. The costs can only be paid if a statement recognizing the grant contribution is included.

### Value of Contributed Goods and Services

#### Valuation of In Kind Contributions from Third Parties

The value of labor, materials, equipment usage, etc., donated by sources other than the grantee may be included on the Payment Request Form only if documented. Documentation can be a sheet with work done and hours worked recorded and signed by the project manager and the volunteer.

#### a. Valuation of volunteer service

- Volunteer services may be furnished by professional and technical personnel, consultants, and other skilled and unskilled labor. Volunteered services may be counted as matching share if they are a necessary part of the project.
- Rates for volunteer services may not exceed Oregon minimum wage, except in those instances in which the volunteer is using their professional skills for the grant assisted work. For example, if a carpenter or bookkeeper donates carpentry or bookkeeping services to the project, these services may be valued at the hourly rate the carpenter or bookkeeper would normally charge.

In such cases, the donor must sign a brief statement that notes the donor's usual occupation, intent to donate their usual services, and the date. These statements are then submitted with the reimbursement request.

b. Donated Materials Invoices, where applicable, must be marked "donated" and signed, and submitted with the reimbursement request.

c. Donated Equipment Invoices, where applicable, must be marked "donated" and signed, and submitted with the reimbursement request.



# APPENDIX D

## OREGON ADMINISTRATIVE RULE HISTORIC CEMETERY GRANTS

### 736-054-0000

#### Purpose

The purpose of this division is to establish the procedures and criteria that the Oregon Commission on Historic Cemeteries will use in recommending Historic Cemetery Grants pursuant to ORS 97.780(3).

Stat. Auth.: 390.124(1) & 390.131

Stats. Implemented: ORS 97.780

Hist.: PRD 2-2005, f. & cert. ef. 3-23-05

### 736-054-0005

#### Definitions

As used in this division, unless the context requires otherwise, the following definitions apply:

(1) "Commission" means the seven-member body appointed by the Director of the Oregon Parks and Recreation Department (OPRD) to carry out the responsibilities of ORS 97.772 to 97.784.

(2) "Grant" means an award from the Historic Cemetery Grant program.

(3) "Historic Cemetery" means the definition provided in ORS 97.772.

(4) "Project Completion" means satisfaction of all requirements of a grant agreement as determined after review or inspection by OPRD.

Stat. Auth.: ORS 390.124 (1) & 390.131

Stats. Implemented: ORS 97.780

Hist.: PRD 2-2005, f. & cert. ef. 3-23-05; PRD 2-2008, f. & cert. ef. 2-15-08

### 736-054-0010

#### Intent

(1) The Commission intends to coordinate restoration, renovation, or maintenance of the state's historic cemeteries and to recommend projects and funding that help maintain and improve such historic cemeteries. Grants may be recommended in the following general categories:

(a) Protection and security;

(b) Restoration and preservation; and

(c) Education and training.

(2) The Commission may determine each funding cycle the types of projects, areas of focus, or thematic concentration that will determine what will be considered eligible to be recommended for project funding.

(3) The Commission may consider geographic distribution in reviewing grant applications.

(4) The Commission may recommend funding a grant application either in whole or in part.

(5) The Commission will give preference to applications that include cash or in-kind match. The Commission may nevertheless recommend grant funding for a project that does not include a cash or in-kind match.

(6) The Commission may establish minimum or maximum grant award amounts.

Stat. Auth.: ORS 390.124 & 390.131

Stats. Implemented: ORS 97.780

Hist.: PRD 2-2005, f. & cert. ef. 3-23-05; PRD 2-2008, f. & cert. ef. 2-15-08

### 736-054-0015

#### Eligibility

(1) Site -- To be eligible for a Grant, a burial place or cemetery must meet the definition of an historic cemetery as provided in ORS 97.772.

(2) Applicant -- The Commission may consider a grant application from any entity that meets the requirements of this section, including, but not limited to: an individual, a non-profit or other public or private organization, schools, state agencies, local governments, and tribal governments.



- (a) An applicant for a grant must demonstrate that an auditable fiscal agent will receive and expend the grant funds.
- (b) An applicant for a project that will affect property not owned by the applicant must provide the Commission with a copy of written authorization from the fee owner of the site of the project unless the cemetery is not owned or is abandoned.

Stat. Auth.: ORS 390.124 & 390.131

Stats. Implemented: ORS 97.780

Hist.: PRD 2-2005, f. & cert. ef. 3-23-05; PRD 2-2008, f. & cert. ef. 2-15-08

### **736-054-0020**

#### **Application Process**

- (1) When the Historic Cemetery Grant program has funds to award, the Commission will announce through a variety of media the availability of, application procedures for, deadlines and other information for applying for Historic Cemetery Grants.
- (2) Applicants will submit an application in a format prescribed by the Commission.
- (3) An application that contains multiple work items must be structured so that the Commission may award partial funding to a specific work item proposed in the application.
- (4) Multiple applications by the same entity are not allowed.

Stat. Auth.: ORS 390.124 & 390.131

Stats. Implemented: ORS 97.780

Hist.: PRD 2-2005, f. & cert. ef. 3-23-05

### **736-054-0025**

#### **Evaluation of Applications**

- (1) Eligible applications received by the announced deadline will be evaluated by a Historic Cemetery Grants review committee, appointed by the Commission chair and containing at least one member of the Commission.
- (2) The review committee will rank applications in order of priority based on the following criteria:
  - (a) Whether the application meets the Commission's funding priorities for that funding cycle;
  - (b) Whether the application has demonstrated the need for the project;
  - (c) Whether the applicant has demonstrated that adequate budget and financial controls are in place to properly administer the grant; and
  - (d) Any other criteria determined by the Commission prior to the announcement of the availability of grant funding, and which are contained in that announcement.
- (3) The review committee shall recommend to the Commission grant funding recommendations up to the amount of funds that may be available in that biennium. The review committee may also rank several alternates in priority order that would be funded if any of the recommended grants are not awarded.

Stat. Auth.: ORS 390.124 & 390.131

Stats. Implemented: ORS 97.780

Hist.: PRD 2-2005, f. & cert. ef. 3-23-05; PRD 2-2008, f. & cert. ef. 2-15-08

### **736-054-0030**

#### **Award of Grants**

- (1) The Commission will review the recommendations of the Historic Cemetery Grants review committee and make its recommendations to the OPRD director. The Commission shall act by motion and vote at a public meeting.
- (2) Awards will be subject to binding grant agreements between the OPRD and the grant recipients. The grant agreement will specify the terms and conditions of the grant award, generally including:
  - (a) The total project costs, the match or share to be provided by the grant recipient if any, and the amount of the grant;
  - (b) A statement of the work to be accomplished;
  - (c) Products to be delivered; and
  - (d) When the grant-assisted project may begin and a schedule for accomplishing work, reporting on progress, delivering products, and project completion.
- (3) Generally, grants will be awarded at the beginning of the biennium.



Stat. Auth.: ORS 390.124 & 390.131  
Stats. Implemented: ORS 97.780  
Hist.: PRD 2-2005, f. & cert. ef. 3-23-05

