CLG GRANT PROJECT DIRECTOR'S MANUAL

A Program of the State Historical Society of Iowa in Cooperation with the National Park Service

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STATE HISTORIC PRESERVATION OFFICE OF IOWA
IOWA DEPARTMENT OF CULTURAL AFFAIRS

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Directing the Grant Project

What Needs to Happen for Successful Completion

The Local Project Director is the linchpin of the grant project—the liaison with all of the parties involved including the State Historic Preservation Office (SHPO), the consultant, Historic Preservation Commission, volunteers, property owners, elected local officials, City/County staff, the media and the public. The Local Project Director, with lots of help and support, keeps the project on track and on schedule.

Here's a handy checklist you can use to check off tasks as you complete them.

Task	Responsible party	Completed	Date completed
Two (2) copies of Grant-In-Aid-Agreement are signed by the Mayor or Chairman of the Board of Supervisors and returned to the State	Mayor's office or Supervisor's Office		
A hard copy file and an electronic folder on a computer is established and maintained for grant project-related paperwork	Local project manager		
The Historic Preservation Commission prepares a Request for Proposals (RFP) and a Subcontract for hiring a historic preservation consultant (if applicable)	HPC		
The State reviews and approves the RFP and Subcontract before they are sent to prospective consultants	State project manager		
The Requests for proposals (RFP) is sent to a minimum of three (3) qualified Historic Preservation Consultants	Local project manager		
The HPC Chair convenes Commission meeting to review proposals and select a consultant	HPC chair		
All consultants who submitted RFPs are notified of the selection and thanked for their proposal	Local project manager		
The subcontract is signed by both parties and copies distributed to consultant and state project manager	Mayor or chair of supervisors and consultant; Local project manager		
The local project manager, consultant and state project manager have a kick-off meeting;	Local project manager, consultant and state project manager		
Volunteers are recruited for the project	Local project manager		

Task	Responsible party	Completed	Date completed
The commission and volunteers meet with the consultant to start the project	All		
All volunteers are provided with CLG Grant Match forms for documenting their time, mileage, use of equipment, donated materials and that the volunteers understand how to complete these forms	Local project manager		
Completed CLG Grant Match forms from volunteers are collected each month	Local project manager		
Works with City Clerk or County Auditor tracking project match and expenditures; this will involve making sure that documentation of expenditures is retained as well as documentation of match	Local project manager		
Monthly Reports are submitted to the State Project Manager by the fifth of each month	Local project manager		
Project activities are organized and publicized, e.g., arranging for facilities and equipment, notifying participants, public and media	Local project manager		
Draft products are submitted to the State (Paula Mohr) and available for HPC and public review and comment	Consultant/Local project manager		
Review and comment on draft products	State project manager and HPC		
Any revisions requested by the State and HPC are made to draft products	Consultant		
Final products are submitted to the State (Paula Mohr) and HPC	Consultant/Local project manager		
After final projects are formally approved, consultant is paid and a copy of the invoice and voucher are retained	City Clerk or County Auditor		
Work with the City Clerk or County Auditor to prepare a *draft* Request for Reimbursement with attached documentation of expenditures and match and email to State project manager for review	Local project manager		
Have final Request for Reimbursement and attached documentation signed by mayor/chair of supervisors, make a copy for file and send original to Paula Mohr			
Process reimbursement payment	Paula Mohr		
Ensure that CLG grant products are filed in the commission's official property inventory and files	Local project manager		
Notify elected officials of completion of project and results of project			
Publicly thank and acknowledge all who worked on the project			

Administrative Matters

About that Grant-In-Aid-Agreement (Contract)

At the top of the first page of the contract is your contract number, e.g., **Contract No. 2015.04**. Please use the contract number as a reference number when you submit monthly progress reports and requests for reimbursement.

The first two pages summarize the contract. Exhibits A and B appear in all of the contracts and consist of the following:

EXHIBIT A. General Conditions

ARTICLE I - Amendment of Contract: How to change the contract.
ARTICLE II - Patent and Copyright: Discusses applicability of Patents and Copyright to grant products.
ARTICLE III - Accounts and Records: Discusses the grantee's responsibilities in terms of recording keeping and retention.
ARTICLE IV - Termination of Contract: How to cancel the contract
ARTICLE V - Interest of Officials and Others (Conflict of Interest): Defines what would be a conflict of interest.
ARTICLE VI - Assignment of Interest: Identifies the responsible parties.
ARTICLE VII - Subcontract: (For consultant, must be approved by the STATE): Specifies that the Subcontract with the Consultant must be approved by the State
ARTICLE VIII - Procurement of Professional Services and Equipment: (Hiring Consultant): Discusses hiring the consultant.

EXHIBIT B. SPECIAL CONDITIONS

ARTICLE I - Identification of Parties:
ARTICLE II - Designation of Officials: (to execute changes)
ARTICLE III - Additional Special Conditions:
ARTICLE IV - Conditions of Payment:
ARTICLE V - REQUIRED ACKNOWLEDGMENTS (must be on reports, hand-outs, promotional materials etc.)
ARTICLE VI - Equal Opportunity Acknowledgment (must be on reports, hand-outs, promotional materials etc.)
ARTICLE VII - Certification Regarding Lobbying
ARTICLE VIII - Equal Opportunity: Code of Fair Practices
ARTICLE IX - OMB Approval No. 0348-0040, Assurances-Non-Construction Programs*
ARTICLE X - U.S. DEPARTMENT OF THE INTERIOR CERTIFICATIONS REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS, DRUG-FREE WORKPLACE REQUIREMENTS AND LOBBYING*

*The Mayor or Chairman of the Board of Supervisors must sign both of these Articles

EXHIBIT C.

This section is the meat of your contract and applies specifically to your project. It contains the following:

A. Work Elements—this is the scope of work. It is based on your grant application and describes project goals and activities and the responsibilities of project personnel.
B. Products—this is a list of items that you are required to produce as part of the grant project. It also tells you how to distribute the items and how many you submit to the State.
C. Schedule—this is a list of deadlines that you are required to meet. It will help you keep the project moving on schedule.
D. Reimbursement Schedule—instructs you on how and when you can request reimbursement. Remember these are cost reimbursable grant projects. You cannot request reimbursement until you have expended money on the project. Make sure that the City Clerk or County Auditor understands that the City or County may have to carry some of the project costs until the end of the project at which time you can request reimbursement.
E. Coordination—this identifies the persons with the SHPO and your community who are responsible for the project. These persons include yourself, the CLG Project Director; the State Project Manager, one of the preservation professionals with the SHPO, and the CLG Coordinator.

EXHIBIT D.

This is based on the budget page of your grant application. You may see some changes. These were made to correct some errors such as use of an incorrect rate for mileage.

Three things you need to know about the budget. First, the most important figure is your grant award. This amount cannot be increased; BUT, it can be decreased if you do not generate enough local match. Make sure that your cash and/or in-kind match equal forty (40%) percent of the total project costs (grant award + local match). We find that typically CLGs have no difficulty accumulating enough match.

Second, the specific amounts under the grant column can be changed. In other words, if you find that you do not need to spend money on mileage and this was going to be covered by the grant, you may reallocate that money to another legitimate, project-related expense. If you spend more than the grant award, you will not be reimbursed for the excess expenditure. However, the excess expenditure that you fund with your own cash can serve as local match.

Third, the specific amounts under the Cash and In-Kind Local Match Columns can be changed. What was presented in the grant application is considered an estimate, once the project gets underway, you may find that you will need more supplies or volunteer time than initially expected. If at the end of the project, the amounts expended for specific costs are not the

same as the projected amounts in the budget, it is okay! However, the total amount of local match must equal forty (40%) percent of the total project cost.

It is better to provide more local match than is needed, just to insure that you get fully reimbursed for the grant award.

Keeping Track of Expenditures and Match

As soon as the Local Project Director gets a copy of the fully signed copy of the contract, he/she should set up a meeting with the City Clerk or County Auditor. The contract with original signatures should be filed in the Grant Project file maintained by the City/County's financial manager.

The project director and financial officer need to decide on the best way to keep track of in-kind donations of time, mileage, equipment, facilities etc. as well as costs that will be charged to the grant. I suggest that the local project director and the financial officer go over the contract and the reporting forms that are in this manual and decide on how you will track project charges and in-kind donations. Listed below are forms that you can use to document in-kind donations to the project. Please feel free to duplicate these forms or use them as the basis for creating additional forms to show donations of mileage or use of facilities:

Value of Donated Labor
Value of Donated Equipment Use
Value of Donated Material
Request for Reimbursement form

Completing the monthly progress report ensures that you are on track with your match requirement. The progress report asks for a summary of project related work done during the month and a summary of grant expenditures and match. The monthly progress report forms help you and the State see where you are in the project schedule. They are a good reminder for both of us and often alert the State to difficulties. The progress report is due by the 5th of each month. It can be submitted electronically.

At the end of each month, the Local Project Director can collect the completed donation forms from volunteers (and hand out new ones), get an invoice from the consultant, and go over what was accomplished that month. A brief meeting would provide time for volunteers to share, ask questions, and receive the Commission's thanks and praise for their help. It also can be the time when volunteers bring in their notes, site forms, maps etc. A conference call provides an inexpensive and efficient way to involve the consultant in the meeting. If possible, try to collect the completed forms at the end of each month and have the consultant submit a summary of grant charges at the end of each month.

All aspects of the project must conform to the federal OMB Circulars A-87 and A-128. The terms of the grant contract require that the CLG agree to several provisions regarding administration of the project. These provisions are described in the following sections of the

contract: Exhibit A: Article III, Accounts and Records and Article VIII Procurement of Professional Services and Equipment; Exhibit B: Articles III and IV; and Exhibit C, Reimbursement Schedule.

These are cost-reimbursable projects. This means the city or county will first have to pay the costs incurred while doing the project and then be reimbursed by the State. To get reimbursed after approval of all draft products and at the end of the project, you will need to submit a completed Request for Reimbursement form, signed by the Mayor or Chairman, along with accompanying documentation (bills, invoices, completed donation forms). Send the Request for Reimbursement to Paula Mohr, State Historical Society of Iowa, 600 East Locust Street, Des Moines, Iowa 50319-0290.

HIRING THE CONSULTANT

Once you have received the fully signed contract, the next step is to hire your consultant. You will need to prepare a Request for Proposal (RFP) and a draft subcontract to be used in hiring the consultant for your project. Samples of both the Request for Proposal and the Subcontract are included in this booklet and have also been provided to you as separate Word documents. Please base your request for proposals on Exhibit C (Scope of Work, Products, and Schedule) and Exhibit D of the CLG Grant-in-Aid-Agreement.

We also recommend attaching Exhibits C and D to the Consultant Subcontract. Be sure to have the City/County staff member or official who is responsible for contracts look over the RFP and subcontract to make sure it conforms to local requirements. Once the draft RFP and subcontract are prepared, please email them to Paula Mohr for review, comment and approval.

Remember, selecting a consultant is supposed to be a competitive process so you will need to send the RFP to at least three qualified consultants. Remember to retain copies of the letters to the consultants in your grant file to document that you did this.

To prepare for selecting a consultant, the commission should develop selection criteria. For example, these might be:

- Meet the Secretary of the Interior's Professional Qualification Standards (mandatory criterion);
- Experience in completing projects that are similar in type and focus;
- Ability to work with volunteers;
- Training and presentation experience and skills;
- Writing skills (ask for a sample of work);
- Quality of References from other historic preservation commissions.

Consult with your State Project Manager for additional suggestions on the selection criteria. Please note that "price" was not included in the list because the Commission is not obligated to pick the lowest bid. Also, remember that Exhibit D, the project budget, is public information. Once the commission has picked a consultant, the commission should notify ALL consultants who submitted bids of your selection. Consultants need to know your decision as soon as possible in order to balance other work demands.

PROFESSIONAL QUALIFICATIONS STANDARDS
NATIONAL PARK SERVICE
CODE OF FEDERAL REGULATIONS VOLUME 36, PART 61

In the following definitions, a year of full-time professional experience need not consist of a continuous year of full-time work but may be made up of discontinuous periods of full-time or part-time work adding up to the equivalent of a year of full-time experience.

A. History

The minimum professional qualifications in history are a graduate degree in history or closely related field; or a bachelor's degree in history or closely related field plus one of the following:

1. At least two years of full-time experience in research, writing, teaching, interpretation or other demonstrable professional activity with an academic institution, historical organization or agency, museum or other professional institution; or
2. Substantial contribution through research and publication to the body of scholarly knowledge in the field of history.

B. Archaeology

The minimum professional qualifications in archeology are a graduate degree in archaeology, anthropology, or closely related field plus:

1. At least one year of full-time professional experience or equivalent specialized training in archeological research, administration or management;
2. At least four months of supervised field and analytic experience in general North American archaeology; and
3. Demonstrate ability to carry research to completion.

In addition, to these minimum qualifications, a professional in prehistoric archaeology shall have at least one year of full-time professional experience at a supervisory level in the study of archaeological resources of the prehistoric period. A professional in historic archaeology shall have at least one year of full-time professional experience at a supervisory level in the study of archaeological resources of the historic period.

C. Architectural History

The minimum professional qualifications in architectural history are a graduate degree in architectural history, art history, historic preservation, or closely related field, with coursework in American architectural history; or a bachelor's degree in architectural history, art history, historic preservation, or closely related field plus one of the following:

1.At least two years of full-time experience in research, writing, or teaching in American architectural history or restoration architecture with an academic institution, historical organization or agency, museum, or other professional institution; or
2. Substantial contribution through research and publication to the body of scholarly knowledge in the field of American architectural history.

D. Architecture

The minimum professional qualifications in architecture are a professional degree in architecture plus at least two years of full-time professional experience in architecture; or a State license to practice architecture.

E. Historic Architecture

The minimum professional qualifications in historic architecture are a professional degree in architecture or State license to practice architecture, plus one year of the following:

1. At least one year of graduate study in architectural preservation, American architectural history, preservation planning, or closely relate field; or
2. At least one year of full-time professional experience on historic preservation projects. Such graduate study or experience shall include detailed investigations of historic structures, preparation of historic structures research reports, and preparation of plans and specifications for preservation project

SAMPLE REQUEST FOR PROPOSAL

The Greene County Historic Preservation Commission was awarded a Certified Local Government Grant from the State Historical Society of Iowa, to conduct an Intensive, Architectural and Historical, Survey and Evaluation Project of Center Township. The Greene County Historic Preservation Commission is now requesting any consultant qualified as an Architectural Historian and/or Historian who is interested in working with the Commission on this project to submit a bid.

All Bids should be submitted no later than April 1, 2016 to the following address:

John L. Casebolt
Greene County Historic Preservation Commission
818 East Kingsbury Street
Springdale, Iowa 50413
319/727-2921
JLC@aol.com

All bid proposals must provide for the completion of work outlined in the grant project's "Scope of Work," "Products," and "Schedule," and "Budget" respectively, attached hereto and incorporated herein by reference. Proposals must also include the consultant's professional qualifications and demonstrate that they have successfully completed a comparable project. (Attach a copy of Exhibits C and D of the Agreement]

The cash value of this project to the consultant is $7,433.

Questions on the project or the consultant's responsibilities should be directed to John L. Casebolt at the above address.

Greene County is an EQUAL OPPORTUNITY EMPLOYER. It will not discriminate against any proposal because of the applicant's race, creed, religion, national original, sex, age, physical, or mental disability.

_____

(name of person who is receiving the bid submittals)

_____

Date

REQUEST FOR PROPOSAL

The _____Historic Preservation Commission was awarded a Certified Local Government Grant from the State Historical Society of Iowa, conduct a _____ _____

_____

The _____Historic Preservation Commission is now requesting any qualified _____consultant who is interested in working with the Commission on this project to submit bids. All Bids should be submitted no later than _____to the following address:

All bid proposals must provide for the completion of work outlined in the grant project's "Scope of Work," "Products," and "Schedule," and "Budget" respectively, attached hereto and incorporated herein by reference. Proposals must also include the consultant's professional qualifications and demonstrate that they have successfully completed a comparable project.

The cash value of this project is $_____

Questions on the project or the consultant's responsibilities should be directed to the Project Director at the above address.

The _____is an EQUAL OPPORTUNITY EMPLOYER. It will not discriminate against any proposal because of the applicant's race, creed, religion, national original, sex, age, physical or mental disability.

_____

Project Director

_____

Date

INSTRUCTIONS FOR PREPARING A SUBCONTRACT WITH CONSULTANT

A CONTRACT FOR CONSULTING SERVICES TO ASSIST
Insert name of city or county
IN THE PREPARATION OF
Insert type of project, e.g. Prepare a National Register of Historic Places Nomination

This agreement, entered into this Insert number day of Insert Day of Week , 2016,
by and between
Insert Name of City or County,
hereinafter referred to as the Commission and
Insert Full Name of Consultant
hereinafter referred to as CONTRACTOR; witnessed:

In order to accomplish the objectives of a
Insert type of project
the COMMISSION and the CONTRACTOR for considerations and other conditions below, agree as follows:

1. The CONTRACTOR agrees to assist the COMMISSION in the performance of
   Insert type of project, after "as follows" list project activities
   as follows:

A. The CONTRACTOR will list specific activities that consultant will do
   i. as specified in the attached Contract between the COMMISSION and the State Historical Society of Iowa, hereinafter referred to as the State Contract.

B. The COMMISSION will provide suitable people, hereinafter referred to as "volunteers," to List specific activities that project director and volunteers will do

C. The CONTRACTOR will train the volunteers in the proper techniques for
   Insert specific activities or areas in which training will be provided

D. The CONTRACTOR will also periodically review the work product produced by the volunteers to determine its quality, and the CONTRACTOR will conduct additional training of the volunteers as necessary to maintain the quality of their work product as required by the State Contract.

E. The CONTRACTOR will prepare List products that consultant will prepare
   as required by the State Contract.

2. The COMMISSION will pay the CONTRACTOR an amount not to exceed Pay as shown in Contract Budget for services and expense reimbursement under this contract. The CONTRACTOR will be paid at a rate of AS SHOWN ON BUDGET per hour. The number of hours spent by the CONTRACTOR in fulfilling the terms of this Contract shall be reflected on a billing submitted to the COMMISSION. The billing shall specify hours by date and project phase.

3. The COMMISSION shall reimburse the CONTRACTOR for automobile mileage, meals, and lodging necessary to complete the duties and responsibilities of the Contract. The rate of reimbursement for mileage will be As Shown On Budget per mile, From Budget for meals each day, and From Budget for lodging each night.

4. The terms of this agreement shall begin upon the execution of this contract by the Chief Elected Official (Mayor/Chairman of the County Board of Supervisors) and shall terminate on June 30, 2017.

5. The COMMISSION may terminate this agreement at any time by giving notice by certified mail to the CONTRACTOR at Insert Consultant's mailing address.
In that event, equitable adjustment shall be made for all work completed prior to termination. The adjustment shall be based upon the number of hours as certified by the CONTRACTOR times the hourly rate, plus expenses.

6. The CONTRACTOR may terminate this agreement by giving a 21-day notice by certified mail to the Chief Elected Official (Mayor/Chairman of the County Board of Supervisors). In that event, equitable adjustment shall be made for all work completed prior to termination. The adjustment shall be based on the number of hours worked as certified by the CONTRACTOR times the specified hourly rate, plus expenses.

7. Reproduction and use of the reports and documentation produced from this agreement shall be at the discretion of the COMMISSION.

8. The CONTRACTOR'S obligation and duties under this Contract shall not be assigned without the permission of the COMMISSION.

9. In performing the functions set forth in this agreement, it is understood and agreed that the CONTRACTOR is an independent CONTRACTOR and that all work performed hereunder shall be conducted in a professional and satisfactory manner. Furthermore, the CONTRACTOR shall hold harmless the COMMISSION for any injury or damage caused by the acts or omissions of the CONTRACTOR on employees or agents and the CONTRACTOR agrees to indemnify the COMMISSION for any such injury or damages.

10. This certification is required by Section 1352, Title 31, U.S. Code. The sub-grantee certifies, to the best of his or her knowledge and belief that:

(1) No federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, any officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan or cooperative agreement, the undersigned shall complete and submit Standard Form 1963 "Disclosure Form to Report Lobbying," in accordance with instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including subcontracts, sub-grants, and contracts under grants, loans, and cooperative agreements) and that all sub-recipients shall certify accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to civil penalty of not less than $10,000 and not more than $100,000 for each such failure.

IN WITNESS, WHEREOF THE PARTIES HERETO HAVE CAUSED THIS AGREEMENT TO BE EXECUTED THIS Day of Week signed by Chief Elected Official DAY OF Month, 2016.

Signature of Consultant
CONTRACTOR
Signature of Mayor if a City or Chairman of Supervisors if a County
CHIEF ELECTED OFFICIAL

ORGANIZING SURVEY, EVALUATION AND REGISTRATION PROJECTS

The consultant will meet with commission to go over project goals, activities and schedule. If volunteers are assisting the consultant, the local project director and commission members need to contact them, arrange for training and set up a schedule for doing project work following the training session(s). Below you will find some suggestions for mobilizing support and volunteers as well as undertaking the research, recordation and product preparation.

While the Grant Project is underway, the Local Project Director and historic preservation commissioners become **Ambassadors for Community Heritage**. To kick off the project, you might ask the Mayor or Chairman of the Board of Supervisors to provide an official endorsement. This gives the project legitimacy and visibility.

Be sure to promote the project to every community organization or group who will give you an audience. In particular, consult potential users of the project data: school teachers, churches, public library, the Chamber of Commerce, economic development agencies, community planning offices and property owners. The local newspaper is a great place to publish an article about the project and some photographs. Doing this publicizes the project as well as serves as a recruiting tool for volunteers and donations, both cash and in-kind.

Mobilize the Talent in Your Community by identifying people who have the time and ability to do any of the following:

- gather primary historical information (newspapers, public records, photographs, etc.); conduct oral history interviews;
- transcribe taped oral histories; organize research information; take good photographs; describe architectural and engineering details;
- draw maps; type, proofread and/or edit. Below you will find a list of job descriptions that you can use when recruiting volunteers. After you have developed the list, ask each of the people on the list if he or she is interested in donating in kind services to the project. If so, ask for a specific commitment.

Give Good Parties. Remember that Historic Preservation commissioners are community leaders. Their job is not to do everything, but to see that everything gets done. Nothing promotes *espirit des corps* more than essential "down time." Potlucks, work parties, recognition dinners, and breakfast meetings should be considered part of the process of historic preservation. These kind of events can be used to reward those dedicated volunteers; to keep community leaders informed of progress; and to keep the energy flowing. Work parties for jobs such as labeling or file preparation and filing can make tedious tasks go quickly.

Invite your state and federal senators and representatives to project events. Remember the CLG grant comes out of the Historic Preservation Grant from the federal government to the

State of Iowa. Elected officials at the state and federal levels need to know what kind of impact those federal dollars are having on historic preservation within their districts.

Volunteer Job Descriptions

Drivers: several people are needed to drive the consultant around the community/county, pointing out significant properties as well as generally providing additional background information for the consultant.

Archival Researchers: these researchers will be reading local history books, articles, diaries, and the microfilm of local newspapers. At least half a dozen people are needed for each project.

Photography Teams: two people per team, one person actually photographing, and the other recording information on the photo log sheets. Two or three teams are needed for each project.

Legal Researchers: these people will work at the county courthouse, locating the names of the property owners and actual legal descriptions for each of the properties recorded during the survey. One or two people are needed for each project.

Site Recorders: these volunteers will take the basic information from the photo log sheets, the photographers, and the legal information, and will fill out the information required on the individual site inventory sheets. Clear hand writing and an eye for detail are essential. Two or three people will be needed for each project.

Typists: these volunteers will be working from handwritten site inventory forms, and will type the information on forms provided by the state. Accuracy and patience are essential. Two or three typists are needed for each project.

Mapmakers: each site inventory form requires two maps, one that can be photographed, the other must be drawn. These volunteers will be drawing the maps (it can be done in pencil) on each of the individual site sheets. One or two people are needed for each project.

Photocopier: one person is needed for each project to run photocopies of the final site inventory forms. This is a one-time activity.

File Preparers: these volunteers will prepare the labels for file folders and file folders for the grant products that will go into the City/County Property Inventory file. The following products must go into the inventory: completed Site Inventory Forms, the photograph catalogue sheets, photographs, slides, project reports, National Register nominations, and additional information about properties such as maps, articles, notes. This can be a group activity and will take place at the very end of the project.

Filers: these volunteers will prepare the inventory files and actually file the materials in the City/County Property Inventory. This can be a group activity and will take place at the very end of the project.

Survey Basics

There are two distinct parts to conducting a survey and each requires specific tools and specific talents:

1) Research (both archival and legal)
2) Fieldwork

Legal Research

The legal research will be conducted in either the city hall or courthouse, depending on the type of survey and where your local records are housed. Someone who understands legal descriptions and is detail oriented must conduct this research. Different county offices provide different kinds of information. A few examples include:

Assessor's Office: Property tax information, legal description, and owner's name
Recorder's Office: Land transfer records trace ownership from initial purchase to present. May also provide information on mortgages, liens, etc.
Treasurer's Office: Tax Information
Clerk's Office: Birth, marriage, death, estates, etc.

Archival Research

The archival research will be conducted in local and state libraries, historical society museums/libraries, online, and perhaps in private homes using family collections of photographs, diaries, etc. Researchers must have a real curiosity about the past and in interest in facts. They must understand the difference between primary and secondary resources.

This is not an exhaustive list of resources available. You may well discover additional resources in your community.

Local & county histories
City directories
Atlases
Newspapers (bound, microfilm or online)
Census records
Reminiscences
Illustrated histories
Oral history interviews
Business Records
Private Collections
Historic photographs
Diaries
Letters

Abstract of Title

Increasingly, a great deal of research can be conducted online. Search engines provide quick access to information but it is critical to evaluate the credibility of what you find on the internet. Use these sources with caution and corroborate the information with other sources.

Note-taking Suggestions

The following reflects one consultant's preferences regarding note-taking. Be sure to check with your consultant on how he or she wants you to take notes. Some consultants may want the notes in electronic format.

Some consultants prefer that researchers use 3" x 5" or 4" x 6" lined index cards and a pen, ink lasts longer. Try to write clearly so that the information is easily readable. Some consultants find index cards easier to sort while writing the report or writing comments on the Site Inventory Forms. Sheets of paper with an array of notes on them are cumbersome to use. The consultant will need to be able to sort quickly by building type, by period, by subject, or by many other categories. The cards provide this flexibility.

Researchers will be assigned a specific book, or roll of microfilm, or bound volume of newspapers, for which they will be responsible. If research is from a book, please provide complete bibliographical information on the first note card. This consists of the author's last name, first name and middle initial; the title, the publisher, the place of publication, the year published. If the information comes from a periodical (newspaper or magazine), then you want to record, author, title, name of the newspaper/magazine, volume and number, page numbers, month and year of publication. If you are looking at microfilm, then you will also want to record the title and number of the roll as well as name of the company who produced it. The point is to provide enough information to be able to return to that source easily. Additionally, this information will form the basis of the bibliography for the project.

Example:
Maegher, Glenn B. and Munsell, Harry B. Ottumwa: Yesterday and Today.
Ottumwa, IA: Ottumwa Stamp Works, 1923.

The format for recording information on each card is:

> Source Author, Title, Date (year for books, month/day/year for newspaper)
> Page number, (if newspaper add column marker)
>
> Information. This can be a direct quote (please use quotation marks), or can be a summary of the information on that page. If the article is long, you may want to make note that a hard copy should be made from the microfilm, or a photocopy from the book. If the information is too long for one side of the card, use the back.

If a book page or newspaper column contains information on more than one subject, please use more than one card. If there is any doubt in your mind, use extra cards. For example, if there is information about the construction of Building A, put that on one card and put information about the owner of Building B on another card.

While you are writing, please keep in mind that another person will be using these cards to gain information; please make sure your handwriting is legible.

What kind of information are you looking for?

That is a difficult question to answer. We need information that is going to help us understand how and why your community/county grew and developed the way it did. What made your town or county the way it is today? Who are the influential people in terms of leading the town or county, promoting or stopping development, encouraging or discouraging change? When were the periods of major growth? Were there one or several industries that were important? Who were the builders and/or architects? (Many towns didn't have architects.) Did your town have a brick plant? If located on a river, what role did the river play? When did the railroad arrive? Is there a major road or highway linking your town with the rest of the world? Is it the county seat? Did the city or county attract particular ethnic, religious, or minority groups? If so, what kind of impact did they have? Another way to think about this is to gather information related to S-P-E-A-R. SPEAR is an acronym for the **S**ocial, **P**olitical, **E**conomic, **A**esthetic and **R**eligious history of your community.

In addition to getting "big picture information" on events and developments which shaped the city or county, you will also want to record details that pertain to particular buildings, structures, sites, objects or districts. Record information such as: when a particular building was constructed (even if you don't know exactly which building it is), who the builder was (that is, the person physically doing the building, not the owner of the building). Also record the owner, if there is a notice of a grand opening. Record disasters (date and type) such as floods, fires, tornados, ice storms. Record the dates of "improvements." For example, when Main Street was paved or when the water and electrical systems were installed. Sometimes articles about citizen anger over muddy streets, accidents, crime will precede improvements. Note if there is a new business/industry in town, a new school being built, or a bridge being erected. Include information about residences as well: when they are being built, if there is large note concerning a party given by a prominent citizen, when someone landscapes their yard, buys an automobile, adds a garage.

If you are doing newspaper research, the first thing to do is scan the entire paper to locate the local news page; this is often page three, and the local news column, often columns one and two. Once you have located these you can go directly to them and not have to read every pages of every issue. In your first newspaper, look at all of the local ads, and make note of these on cards. For instance, if there are twelve business card size ads for attorneys, make a note of it. If the local dry goods store has a half page ad, the carriage works has a one column ad three inches long, and a doctor advertises that he had a remedy for everything that could

possibly be wrong with you, note all of these. As you go through later issues of the paper, you don't need to mention all of the ads, just those that change. Many newspapers published a summary of the year's events at the end of the year or in early January. You will want to read those accounts carefully.

The following are examples:

Ottumwa Daily Courier
Vol 20, no. 15, Page 3 column 1
28 January 1873
"S.L. McGavic is planning to build on the Bluff this season, near Jefferson."

Ottumwa Weekly Courier
Volume 25, no 50, P3c2
15 November 1875
A whole column describing in detail the exterior and interior of the new Lilburn Building on Main Street
(make a hard copy of this).

Ottumwa Democrat
Volume 40, no 2P5
18 February 1893
This page is covered with ads for local businesses. Six new lawyers have been added, Donelan's Store has a quarter page, a new brick plant has opened (Morey Brick and Tile), and J. W. Garner has been running the same ad since June!

Ottumwa Mercury
Volume 17, no 3, P6c3
3 April 1887
"New spring hats have arrived at Mrs. Jeffer's in the Union Block."

Keosauqua Republican
vol 1, no 1Column 2, 16 July 1896
"The Bonaparte Record put out a trade edition last week with illustrations of some of the business houses and residences of that place, along with a number of portraits of citizens."

Van Buren Record
Real Estate
30 July 1931 - Mr. & Mrs. Robert Winslow have started the erection of a new residence in East Bonaparte, on lots east of Rosena Mahler residence.

10 Sept. 1931 real estate transfer.
Margaret E Roberts and husband Albert .G. Roberts to Vale R. Winslow tract 87 x 216 ft. east of Block 38 Bonaparte. (Matt Matibell house 1991)

Keosauqua Republican (Ken Micro roll no 5)
Volume 7, no 4, Column 4 Page?
22 Feb. 1883
"Bonaparte"
Dr. Blackmer will soon complete the erection of an elegant residence on lots near the depot.

Scrapbook "D", Bonaparte Library
April 1915
"New School Building"
Directors of Independent District of Bonaparte taken steps to replace school building election called 29 April 1915 to vote bonds for $18,000 which with insurance will count a $25,000 structure. Proposed 2 story & basement structure 135-ft length, 62-ft depth by Underhill & Dean Architect of Kansas City, MO.

Iowa Falls Sentinel
Locals - col. 1 ,
November 14, 1905

"Rock Run"
"Few of our people realize the beauty spot we have here in Rock Run Canyon. Men who have traveled all over this country declare there is no other such a rupture in old Mother Earth between two great mountains. Strangers who visit this city are delighted with this deep natural gorge. The canyon and part on the east side belong to L. E. Jones and it is his purpose to maintain the primitive condition of those natural haunts."

Iowa Falls Sentinel
Locals col. 1
January 2, 1906
The front of the building to be occupied by the Citizens Savings Bank will be changed and the entrance made at the east corner. The large safe will be placed in front on the west side.

Iowa Falls Sentinel #37

April 25, 1905
Professional Directory - col. 1 pg. 1

1. Insurance
   John J. Carleton, Agt.
   (over First National Bank)
2. Dr. R. J. Allison - Dentist
   (office over First National Bank)
   Platework, crown, bridge, etc.)

Ottumwa Daily Courier
P3c1

15 July 1893
"Architect Ernest Koch is soliciting bids for the brickwork for the T. D. Foster residence on the Bluff. Bids may be left at his office in the Hofmann Block."

If you run into problems, or have questions, call your project director, or contact the consultant. You may have lots of questions as you get started, don't be afraid to ask. If you have doubts about what is important enough to record, go ahead and record it. If you read something that is of interest to you, copy it down. It is much better to have too much information, than not enough. Remember that we may not need all of this information this year, but next year it may be important. There is no reason to read all of this material twice. Make good notes the first time through.

When you have completed your research assignment, please deliver all of your notes to the project director. Don't worry about organizing them; chronological order is best for the first review by the consultant.

Maps

Maps play an important role in every type of cultural resources survey, whether it is archaeological, architectural or historical, and whether it is a windshield, reconnaissance, or intensive survey. There are a variety of different kinds of maps, which can be used for different purposes. Some of there are:

PLAT MAPS

These may be historic or current. These will provide legal descriptions. Plat maps exist for both urban and rural areas. These can be located in local libraries, city and county engineer's offices, county historical societies, and some private collections.

UNITED STATES GEOLOGICAL SURVEY (U.S.G.S.) MAPS:

The U. S. Geological Survey provides these. Although there are several types of maps provided by this agency, the two ordinarily used for survey purposes are the county topographical map, and the 7.5-minute quadrangle map, which also shows topographical features. These show you what the landscape looks like, both natural and manmade features. U. S. G. S. maps are available from the Iowa Geological Survey Bureau in Iowa City, or from map stores.

DEPARTMENT OF TRANSPORTATION (D.O.T.) MAPS:

These are the county maps produced by the Iowa Department of Transportation. Although all roads are marked, these maps are very basic and are most helpful in the beginning phases of a rural survey. Full size copies (approximately 18" x 24") are available in your local library, city or county engineer's office, or through the Department of Transportation are smaller 8 1/2 "x 11" copies.

FIRE INSURANCE MAPS:

These were prepared for fire insurance companies to provide them with information concerning the location, size, and building material of buildings and houses, which they might be insuring. Although there were at least two small companies producing these maps in Iowa in early 20th century, the major source of these was a nation-wide firm, the Sanborn Fire Insurance Company. These maps were updated every 5-8 years beginning c. 1880 and running through c. 1930 and graphically illustrate a community's growth. These are only available for towns. The Historic Preservation Office has a Microfiche set of Sanborn maps, while the Iowa City Center and Des Moines Reading Room of the State Historical Society have original color copies and microfilm versions. Online access to Iowa's Sanborn fire insurance maps is now available free of charge through the State Library of Iowa website at: http://www.statelibraryofiowa.org/services/resources/sanborn-login.
A State Library Card is required for access to this online collection. Anyone who lives in the State of Iowa may apply for a State Library Card through this link: http://www.statelibraryofiowa.org/services/state-library-card

HISTORICAL ATLASES

During the last quarter of the 19th century, the Midwest fell in love with the "county histories" and "historical atlases." The historical atlas is a like a plat map with illustrations for it shows the location of houses, orchards and other features. These can be wonderful resources for tracing ownership and the lay out of properties. Be aware that atlases were published through subscriptions with patrons underwriting the publication cost. While all property owners generally are shown on the maps, only the patrons are featured in biographies, special lists or on illustrations.

Online sources for maps:

David Rumsey Map Collection (good source for *Andreas' Atlas* as well as other maps and images): www.davidrumsey.com/

Iowa Department of Transportation Historic Auto Trails: http://www.iowadot.gov/autotrails/indexauto.htm

Iowa Geographic Map Server: http://ortho.gis.iastate.edu/

Sources for Image Research

American Terra Cotta Company Database (photographs of completed buildings including those in Iowa): http://special.lib.umn.edu/manuscripts/digital/atcsearch.html

Curt Teisch Postcard Collection: http://www.idaillinois.org/cdm/search/collection/zlakecou103

Family Old Photos (see collection of Iowa photographs and postcard including images of cities and towns): http://www.familyoldphotos.com/3c/ia/iowa-index.htm

Iowa Department of Transportation Historic Photographs: http://165.206.203.102/ERMSPortal/HistoricalPhotos_Home.aspx

Iowa Heritage Digital Collections: http://www.iowaheritage.org/

Library of Congress (see especially American Memory and Prints and Photographs Division): www.loc.gov

Minnesota Historical Society Visual Resource Database (includes many Iowa views):

http://collections.mnhs.org/visualresources/search.cfm?bhcp=1

New York Public Library (see especially Digital Collections which include Iowa stereo views): www.nypl.org

Penny Postcards (a state-by-state collection arranged alphabetically): http://www.rootsweb.com/%7Eusgenweb/special/ppcs/ppcs.html

Sources for Legal Research

Researching the records found at the offices of the county auditor, treasurer, recorder or assessor can provide the name and address of the current and previous property owners as well as the legal description for an individual property. This information will be recorded on 3" x 5" cards, one card for each property. The following is needed for urban properties: Town, original plat or addition, block, lot, any partial lots included.

For example,
Bob Jones, 15 Court Ave, Ottumwa, Iowa 53000
City of Ottumwa, Fulton Addition, Block 3, lots 4 & 5, Wapello County Deed Book 80, 1995-2000, p 10.

First Federal Bank Corporation, 15 Grand Avenue, Des Moines, Iowa 51504
City of Ottumwa, Original Plat, Block 28, lot 7 & N1/2 lot 8, Wapello County Deed Book 75, 1950-1955, p. 45.

For rural properties include: County, township, township & range, section to the quarter section.

For example,
City of Ottumwa, 17 Main Street, Ottuwma Iowa 53000.

Wapello, Richland Twp, T73N R14W Sec. 36 SE 1/4 (location of the Ottumwa Municipal Golf Course).
Wapello County Deed Book 44, 1935-1940, p. 200

The legal description is necessary to complete National Register nominations. If this information is accurately provided during the survey, the nomination phase is accomplished more easily.

Legal records can also provide information about individuals and events as well as the ownership and transfer of property. If time permits, these records can shed light on those who built, developed and used properties in the community. The Federal population census, agricultural census and industrial census also can be a useful resource for reconstructing social networks and neighborhoods, determining occupations, incomes; assessing farm production and productivity as well as that of particular businesses.

Fieldwork

In Iowa, the best time to do the fieldwork portion of a survey, particularly photography, is when the trees have no foliage and there is no snow cover. Generally, this means in the late winter-early spring period, ca. March to May, or in the fall-early winter period, ca. October to December. This is necessary to ensure that residences and ancillary buildings will not be obscured by foliage. Obviously, this is not as important in a survey of a business district.

Like the research portion of the survey, fieldwork is basically divided into three parts:

1) Photography

A team of two people, one to photograph and one to complete the catalogue form.
Each frame shot is recorded on a photo log sheet (even the views of your thumb!). The equipment needed includes:

A good digital camera (preferably with interchangeable lens)
Photo log sheet on clipboard

For surveys, only exterior photos are needed (only for individual National Register nominations are interior views included). A good shot of the front (façade) of the house or building is needed for each site. Ideally, this would be a diagonal view showing both the front and one side. Additional photos may be taken of details if appropriate. Streetscapes are needed for each block in an intensive survey to provide an idea of the neighborhood.

2) Recording
This can be done by one or two people. Using the Iowa site inventory form as a guide, describe the building materials from foundation to roof, number of stories, important details and visible

alterations. Do this for the primary structure, outbuildings, and landscape features. The equipment needed will include:

Iowa Site Inventory forms on a clipboard
A pencil and eraser

3) The mapping portion can be done at a later date if necessary. The Iowa Site Inventory forms call for a plat map and sketch map. The sketch map may be drawn by hand, showing the location of the house/building on the lot, adjacent buildings, location of driveway, street, etc. Although this does not have to be absolute scale, it is best to have it approximate. The site forms require measurements of the major buildings. This can be done in the field with a tape measure, on a Sanborn maps or a modern aerial.

In the field mapping is best done with two people. The equipment needed will include:

A pencil and easer
Clipboard with graph paper
Straight edge/ruler
100' tape measure

PREPARING THE DRAFT AND FINAL PRODUCTS

After the consultant, commission members and volunteers have completed their assigned tasks, the local project director should check Exhibit C of the contract to verify the draft products that will have to be submitted to the State. Make sure that all of these will be produced. Typically, the consultant writes the draft project report with volunteers assisting in production. Volunteers usually complete the site inventory forms and the consultant edits them.

After all the required draft products are prepared, the local project director or the consultant sends them to the State project manager for review and comment. The local project director retains one copy of the draft products for the commission's review and comment and makes one copy available for public review and comment (schedule public meeting for discussion of project and results and to let public know about the project). If a delay in submitting draft products is anticipated, the local project director should contact the State Project Manager and negotiate a revised timetable.

The State may request revisions and the public may have comments that should be incorporated into the final products. Before submitting the final products to the State, please review them to make sure they address the requested revisions and additional comments are included.

The submission of draft products allows the State to review and provide constructive comment on the draft products. State review is done to insure that the products meet federal and state standards and that the products are properly formatted, organized and contain the information that you will need when you employ them in the future.

The survey and evaluation report and completed site forms will be the foundation for future National Register nominations and local historic landmark and district designations. The National Register nominations provide the critical information needed for appropriate maintenance of the property and selecting alternative uses, if needed. The nominations will be used when locally designating properties or undertaking some other form of protection. The completed Site Inventory forms, nominations, and reports as well as the photographs will play a critical role in various future city or county planning and development activities. This is why it is important to prepare and file all of the products when the grant project ends.

REIMBURSEMENT AND REIMBURSEMENT FORMS

You may request reimbursement of seventy (70) percent of the grant award, after you have received a letter from the State indicating that all of the draft products have been submitted and are approved. In order to get reimbursed, the City/County will have to spend 70% of the grant award in reimbursing your consultant for salary, travel, per diem, and other costs and the City/County will need to show that there is local match. You may complete a Request for Reimbursement form and have the have the chief elected official (Mayor or Chairman) sign the form. Attach documentation of expenditures in the form of invoices paid, cancelled checks, etc and documentation of match, cash and or in-kind. Send the signed and completed Request for Reimbursement with all attachments to the State Project Manager.

If your consultant requests payment beyond the amount in the subcontract, you are not obligated to pay. However, if you feel the consultant deserves extra and the City/County is willing to furnish it, you may pay it. Talk with your state project manager, if you have questions about consultant's billing or payment.

Once the final products are submitted to the State and the State has approved them, you may submit another request for reimbursement for the balance of the grant. Follow the same steps, complete the form, attach documentation of expenditures and match, have the Mayor or Chairman sign the form, and submit the signed, completed form with attachments to the CLG Coordinator.

CERTIFED LOCAL GOVERNMENT GRANT PROJECT REQUEST FOR REIMBURSEMENT

City or County: _____

Federal ID # (use only last four digits)_____**Grant #** _____

Mailing Address: _____

_____

Expenditure or activity	*Expense funded by the CLG Grant (an expense documented with an invoice)*	*CLG Match*	
		Cash (expense funded with money other than the CLG grant and documented with an invoice)	*In-Kind (the value of donated time, materials, mileage, space, etc.)*

Expenditure or activity (continued)	*Expense funded by the CLG Grant (an expense documented with an invoice) (continued)*	*CLG Match (continued)*	
		Cash (expense funded with money other than the CLG grant and documented with an invoice) (continued)	*In-Kind (the value of donated time, materials, mileage, space, etc.) (continued)*
Subtotals	CLG grant total	Cash match total	In-kind match total
TOTALS	***CLG GRANT***	***APPLICANT MATCH TOTAL (CASH + IN-KIND MATCH)***	

****Supporting Documentation for all cost and match claimed must be attached and labeled****

I certify that this Request for Reimbursement represents actual expenditures carried out within the period of the project. This needs to be signed by your elected official (mayor or chair of the Board of Supervisors).

Signature _____***Date*** _____

_____

(Please type name and title)

Approved by:

_____ _____

State Project Manager Date

_____ _____

State CLG Coordinator Date

_____ _____

DSHPO Date

The completed reimbursement form and supporting documentation should be submitted to:

Paula Mohr
State Historical Society of Iowa
600 East Locust Street
Des Moines, IA 50319-0290

VALUE OF DONATED LABOR

TIME SHEET
CERTIFIED LOCAL GOVERNMENT GRANT

Retain for Audit

PROJECT NAME AND NUMBER

NAME OF PERSON CONTRIBUTING DONATED TIME

KIND OF WORK PEFORMED
(PHOTOGRAPHY, RECORDING, RESEARCH, ETC.)

Hourly Rate-- Based On:

A person donating time to a project will be paid at the hourly wage established for Iowa by the Independent Sector(http://www.independentsector.org/volunteer_time) unless he/she is professionally skilled in the work they are performing on the project. When this is the case, the wage rate this individual is normally paid for performing this service may be charged to the project.

DATE	Total Work Hours	Hourly Rate	Value (Donated Hours X Rate)
		TOTAL VALUE	

SIGNATURE REQUIRED VERIFYING RECORD:

SIGNATURE OF PERSON DONATING TIME **DATE**

SUPERVISOR VERIFYING ACCURACY **DATE**

VALUE OF DONATED EQUIPMENT USE
CERTIFIED LOCAL GOVERNMENT GRANT

Retain for Audit

PROJECT NAME AND NUMBER: _____

_____
DONOR'S NAME

Value of Donated Equipment Use				
Date	**Type and Description of Equipment**	**Total Hours of Use**	**Value of Donation (Hours of Use X Hourly Rate*)**	**Equipment Operators Signature**
			TOTAL VALUE	

***Hourly rate should be based on local rate charged for rental of equipment**

_____
SIGNATURE OF PERSON DONATING EQUIPMENT **DATE**

_____
SUPERVISOR VERIFYING ACCURACY **DATE**

VALUE OF DONATED USE OF FACILITIES
CERTIFIED LOCAL GOVERNMENT GRANT

Retain for Audit

PROJECT NAME AND NUMBER

DONOR

Value of Facility					
Date	**Description Grant Related Activity**	**Facility Name**	**Hours Used**	**Rental Rate**	**Value (Hours x Rental Rate)**
				TOTAL VALUE	

SIGNATURE OF PERSON DONATING FACILITY **DATE**

SUPERVISOR VERIFYING ACCURACY **DATE**

VALUE OF DONATED MILEAGE, CERTIFIED LOCAL GOVERNMENT GRANT

Donor name: _____

Date	Destination or project activity	# of miles	Rate per mile 0.39	Value
			TOTAL VALUE	

_____

SIGNATURE OF PERSON DONATING MILEAGE **DATE**

_____

SUPERVISOR VERIFYING ACCURACY **DATE**

VALUE OF DONATED MATERIAL
CERTIFIED LOCAL GOVERNMENT GRANT

Retain for Audit

PROJECT NAME AND NUMBER

DONOR

Value of Material			
Description of Material Donated	**Date of Donation**	**Basis of Value**	**Current Fair Market Value**
		TOTAL VALUE	

SIGNATURE OF PERSON DONATING MATERIAL **DATE**

SUPERVISOR VERIFYING ACCURACY **DATE**