

# Finding the Funding:



Grants, Incentives and Partnerships

# Sources of Funding



- PHMC- Pennsylvania Historical and Museum Commission
- DCED- Department of Community and Economic Development
- DCNR- Department of Conservation and Natural Resources
- HUD- Department of Housing and Urban Development
- DVRPC- Delaware Valley Regional Planning Commission
- Preservation PA
- National Trust for Historic Preservation

# PHMC

## Keystone Historic Preservation Grant



- Grants are competitive and matching: 50/50
- Can match with CDBG funding
- Maximum award: \$100,000
- Grant awards are subject to the annual availability of funds from the Commonwealth of Pennsylvania
- Funding is based on the state fiscal year, July through June
- Must apply electronically

# PHMC

## Keystone Historic Preservation Grant



- For more detailed information, or to determine if your community is eligible for participation in the Keystone Historic Preservation Grant Program, please go to:
  - <https://www.phmc.pa.gov/Preservation/Grants-Funding/Pages/default.aspx>
- Construction and Planning grants available

# PHMC

## Cultural and Historical Support Grant



### Eligible Organizations

- **Museums** located in Pennsylvania with annual operating budgets exceeding \$100,000 (excluding capital and in-kind services) and at least one full-time professional staff person (or approved equivalent).
- **Official County Historical Societies.** If the operating budget is less than \$300,000, the organization must apply as an Official County Historical Society. Official County Historical Societies with operating budgets in excess of \$300,000 must apply as a Museum.

# PHMC

## Cultural and Historical Support Grant



### Goals

- Strengthen the Pennsylvania museum community
- Provide general operating support to museum and official county historical societies that are not supported by other state agency funding programs
- Provide financial support as unrestricted operating support to address primary needs of museums
- Allow applicants to determine and describe how they will use funds
- Keep application process fair and simple
- Determine award amounts using an equation based on a percentage of the previous year's operating budget
- Achieve geographical balance in the distribution of grants

# PHMC

## Cultural and Historical Support Grant



### Eligibility Requirements

- Museum
  - Must be located in Pennsylvania;
  - Must have tax-exempt status (501(c)(3)) with the Internal Revenue Service or be an entity of local government;
  - Must have been incorporated and have been exhibiting to the public for at least two years prior to the submission of the grant application; and
  - Must have an operating budget in excess of \$100,000;
  - Must have at least one full-time professional staff person (or approved equivalent);
  - Must be registered with the Pennsylvania Commission on Charitable Organizations, as required.

# PHMC

## Cultural and Historical Support Grant



## Eligibility Requirements

- County Historical Society
  - Same as 'Museum' plus:
  - If not tax-exempt, then be an entity of local government
  - Must have a designation of the organization as the official historical society for the county;
  - Must hold at least one public meeting per year;
  - Must have a properly adopted constitution and bylaws and have elected officers to conduct the business of the society;
  - Must have a permanent physical facility wherein books, documents, papers and other objects of historical interest are deposited and available to the public at least 100 days per year or by appointment;
  - Must sponsor programs relevant to county history including educational and public programs and have an active research and publications program.



# PHMC

## Cultural and Historical Support Grant



### Grant Awards

- **Museums** - The awards for Museums are based on a calculation that uses the operating budget from the most recently completed fiscal year. Based on projected funding scenarios, awards may range from 1% to 2% of annual operating budget depending on the number of eligible applicants. The maximum award for a museum is \$65,000.
- **Official County Historical Societies** - The awards for Official County Historical Societies range from \$2,500 to \$4,000.

**More information at:**

<https://www.phmc.pa.gov/Preservation/Grants-Funding/Pages/Museum-Support.aspx>

# PHMC

## Certified Local Government Grant Program



- The CLG Grant Program provides financial support to participating communities to develop the tools, products, programs, and services they need to administer their local preservation programs effectively and in accordance with the CLG Guidelines and Procedures.
- Project grants are for studies, plans, programs, and tools that help a community build capacity, implement effective preservation programs, and meet the Ongoing Performance Standards of the CLG program. These grants are generally for projects with larger budgets and longer timelines as opposed to short-term needs. Project grants may be up to \$25,000 and a cash match equal to either 10% or 25% of the total project cost, depending on the type of activity being funded. All project grants must produce tangible products and benefits.

# PHMC

## Certified Local Government Grant Program



### **Eligible CLG Grant Activities**

- Shared Services / Circuit Rider
- Planning
- Design Guidelines / Design Assistance
- National Register Nominations / Multiple Property Documentation
- Cultural Resource Survey
- Revitalization / Reuse Studies
- Public Education and Training

# PHMC

## Certified Local Government Grant Program



### **Ineligible Activities**

- Certified Local Government Grants may not be used to fund the following:
- Acquisition of historic properties; and
- Development / construction projects for historic structures / properties including stabilization, rehabilitation, restoration and reconstruction.

CLG funded activities must meet the goals and objectives of the Pennsylvania Historic Preservation Plan.

### **More information at:**

<https://www.phmc.pa.gov/Preservation/Grants-Funding/Pages/Certified-Local-Government.aspx>

# Historic Preservation Tax Credit



## Overview

- The Historic Preservation Tax Credit (HPTC) provides tax credits to qualified taxpayers who will be completing the restoration of a qualified historic structure into an-income producing property. All projects must include a qualified rehabilitation plan that is approved by the Pennsylvania Historical and Museum Commission (PHMC) as being consistent with the standards for rehabilitation of historic buildings as adopted by the United States Secretary of the Interior.

# Historic Preservation Tax Credit



## Uses

- Tax credits may be applied against the tax liability of a qualified taxpayer which includes an individual, corporation, business trust, limited liability company, limited liability partnership or any other form of legal business entity. The tax credits awarded to a qualified taxpayer shall not exceed 25 percent of the qualified expenditures as determined by the application in connection with the completed project. The total tax credits awarded to a qualified taxpayer may not exceed \$500,000 in any fiscal year.

# Historic Preservation Tax Credit



## Eligibility

- Those eligible to apply are qualified taxpayers which include an individual, corporation, business trust, limited liability company, limited liability partnership or any other form of legal business entity. Qualified taxpayers must be subject to the Personal Income Tax, Corporate Net Income Tax, Capital Stock-Franchise Tax, Bank and Trust Company Shares Tax, Title Insurance Companies Shares Tax, Insurance Premiums Tax, Gross Receipts Tax, or Mutual Thrift Institutions Tax.

# Historic Preservation Tax Credit



## How to Apply

- Qualified taxpayers will apply through DCED's electronic Single Application system. Applicants will also be required to submit supporting documents to complete the application. Supporting documents include: photographs of the building and its surroundings, a map showing the boundaries of the historic district and the location of the building and a statement of historic and architectural significance. All applications will be reviewed on a first-come, first-served basis by date received.

## More information at:

<https://dced.pa.gov/programs/historic-preservation-tax-credit-hptc/>



# DCED

## Keystone Communities Program



### Keystone Communities Program:

- Keystone Elm Street
- Keystone Main Street
- Keystone Enterprise Zone
- Keystone Community

### Uses

- A flexible tool for use in community and economic development for a variety of uses including planning activities, façade grant programs, accessible housing programs, and development grants.

# DCED

## Keystone Communities Program



### Eligibility

- Units of local government (counties, cities, boroughs, townships, towns, and home rule municipalities)
- Redevelopment and/or housing authorities
- Nonprofit organizations to include economic development organizations, housing corporations, etc.
- Community development corporations
- Business improvement districts, neighborhood improvement districts, downtown improvement districts, and similar organizations incorporated as authorities

### More information at:

<https://dced.pa.gov/programs/keystone-communities-program-kcp/>

# DCNR

## Community Conservation Partnerships Program



DCNR's Bureau of Recreation and Conservation (BRC) assists local governments and recreation and conservation organizations with funding for projects related to:

- Parks
- Recreation
- Conservation

Applications for DCNR's Community Conservation Partnerships Program grants are accepted once a year, typically during the spring.

**More information at:**

<https://www.dcnr.pa.gov/Communities/Grants/Pages/default.aspx>

# DCNR

## Community Conservation Partnerships Program



**pennsylvania**  
DEPARTMENT OF CONSERVATION  
AND NATURAL RESOURCES

### **What Types of Projects Can Be Funded?**

Community Conservation Partnerships Program grants can fund:

- Planning, acquisition, and development of public parks
- Recreation areas
- Motorized and non-motorized trails
- River conservation and access
- Conservation of open space

Grants also support regional and statewide partnerships that build capacity to better develop and manage resources.

# DCNR

## Community Conservation Partnerships Program



### Who Is Eligible to Apply for a Community Conservation Partnerships Program Grant?

Eligible applicants for Community Conservation Partnerships Program funding include:

- Counties
- Municipalities
- Municipal agencies
- Nonprofit organizations
- State Heritage Areas
- Prequalified land trusts
- For-profit enterprises (for some grant types)

Most programs require a minimum cash or noncash matching contribution from the applicant that is equal to 50 percent of the project cost.

# HUD

## Community Development Block Grant (CDBG)



The Community Development Block Grant (CDBG) program is a flexible program that provides communities with resources to address a wide range of unique community development needs. Beginning in 1974, the CDBG program is one of the longest continuously run programs at HUD. The CDBG program provides annual grants on a formula basis to 1209 general units of local government and States.

# HUD

## Community Development Block Grant (CDBG)



### Eligible Activities

- Acquisition of real property, relocation and demolition, rehabilitation of residential/nonresidential structures, construction of public facilities and improvements, such as water and sewer facilities, streets, and neighborhood centers, and the conversion of schools for eligible purposes, handicap access to public buildings, streets, curbs and sidewalks, historic preservation, planning and fair housing. In addition, CDBG funds may be used to pay for public services within certain limits, and for activities relating to energy conservation and renewable energy resources.

# HUD

## Community Development Block Grant (CDBG)



### Delaware County

- Chester City, Haverford Twp and Upper Darby Twp have their own allocation based on population size
- Rest of the county shares the county allocation
- Organized by the Office of Housing and Community Development (OHCD)
- Only Municipalities can apply for programs
- Historic Preservation falls under 'blight removal'
  - Regular maintenance (i.e. painting) or interior work not eligible

**More information at:**

<https://www.delcopa.gov/hcd/cdbg.html>



# DVRPC

## Municipal Funding Resource

---

- Database of grant programs in a variety of topics
- Choose topic (i.e. Historic Preservation) and Location (i.e. Delaware)
- Includes some grants previously mentioned but also smaller private grant programs
- Read all the eligibility requirements- some only available to municipalities, some only to non-profits, or National Trust members

**More information at:**

<https://www.dvrpc.org/asp/MCDResource/>

# Other grant resources



- **Candid** (formerly Grant Space and Foundation Center)- training and information on applying for grants- <https://candid.org/>
- **Free Library of Philadelphia**- Business Resource and Innovation Center- <https://libwww.freelibrary.org/programs/bric/>
- **Preservation PA**- <https://www.preservationpa.org/funding/>
- **National Trust for Historic Preservation**- <https://forum.savingplaces.org/build/funding/grant-seekers>
- **Ethel Sergeant Clark Smith Memorial Fund**- for SE PA but mainly Delaware County- <https://www.wellsfargo.com/private-foundations/smith-memorial-fund-ethel-sergeant-clark/>



These grants, in collaborative partnerships with state and local government, businesses and community development organizations can work magic!

Original Presentation:

2003 Heritage Commission Seminar- Jessica Levengood, DCPD

Updated 2021