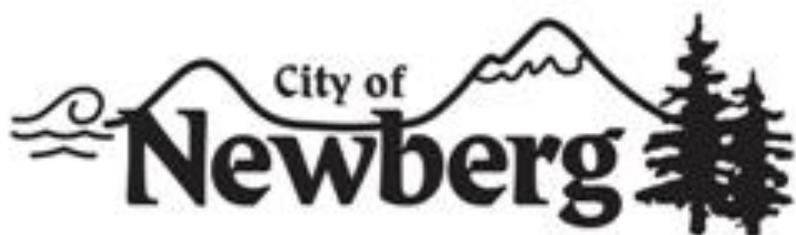


COMMUNITY DEVELOPMENT DEPARTMENT



OREGON

REQUEST FOR PROPOSALS
For Professional Consultant Services for a
Downtown Historic Resources Inventory Update

February 10, 2016

Address proposals to:

City of Newberg, City Hall, Community Development Dept.

Attention: Steve Olson, Senior Planner, 503.537.1215

Location: 414 E. First Street, Newberg, OR 97132, or PO Box 970, Newberg, OR 97132

Proposals shall be mailed or delivered to PO Box 970, Newberg, OR 97132, Attention: Steve Olson – Community Development Dept., Subject: **“Downtown Historic Resources Inventory Update”**. Respondents must submit four hard copies of the proposal. The City of Newberg reserves the right to reject any or all proposals.

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SECTION 1 - GENERAL INFORMATION

1.1 Proposal Request

Written proposals in response to this Request For Proposals (RFP) must be submitted in hard copy form no later the proposal due date of **2:00 p.m. local time on February 26, 2016**, to Steve Olson, City of Newberg. Please contact Steve Olson at 503-537-1215 or steve.olson@newbergoregon.gov for more information.

1.2 Proposer's Proposal

Proposers responding to this proposal request must follow the directions stated within this RFP. Adherence to these rules will ensure a fair and objective analysis of the proposals. Proposals should be prepared simply and economically. Special bindings, colored displays, promotional materials, etc., are not necessary. Emphasis should be on completeness, brevity, and clarity of the content.

Provide a clear and concise description of your firm's capabilities to meet the RFP requirements. **Proposers must demonstrate prior experience in this type of work within the last five (5) years. All responses must be made in the format outlined in Section 3.** Failure to comply with or complete any part of this request may result in the rejection of your proposal.

1.3 Schedule

Advertisement	February 10, 2016
Proposal Due at 2:00pm	February 26, 2016
Staff Recommendation	March 3, 2016
City Manager approval	* March 10, 2016
Final product due	July 1, 2016
Project completion	August 1, 2016

* These dates are approximate and subject to change.

1.4 Issuing Office

All correspondence pertaining to this RFP should be directed to Steve Olson, Community Development Dept., City of Newberg, PO Box 970, Newberg, OR 97132, steve.olson@newbergoregon.gov, Direct: 503.537.1215.

1.5 Submitting Proposals

Proposals must be submitted via hard copy only, to 414 E. First Street, Newberg, OR 97132, or PO Box 970, Newberg, OR 97132. Fax submissions or email copies will not be accepted. Proposals must be received by the date and time stated in the Schedule. Submittals that are late, incomplete, or misdirected will be considered non-responsive, **with no exceptions**. The City of Newberg relies on the City of Newberg's computer system's clock to determine the correct time and is not

responsible for any delays or difficulties experienced in the submittal of a Proposal. Please do not wait until the last minute to submit your proposal.

The proposal must be submitted in a sealed envelope, clearly marked as follows:

Attention: Steve Olson, Community Development Department
RE: Proposal to RFP: Downtown Historic Resources Inventory Update

Failure to clearly identify the Proposal in the subject line may cause misrouting of the Proposal and late delivery, resulting in disqualification.

1.6 Proposal Withdrawal

Any proposal may be withdrawn at any time before the "Proposal Due" date and time specified in **Section 1.3, Schedule**, by providing a written request for the withdrawal of the proposal to the City. A duly authorized representative of the firm shall execute the request. Withdrawal of a proposal will not prejudice the right of the proposer to file a new proposal on this or future projects.

1.7 Rejection or Acceptance of Proposals

The City expressly reserves the following rights to:

- a. Disregard any or all irregularities in the proposals.
- b. Reject any or all of the proposals or portions thereof.
- c. Base award with due regard to quality of services, experience, compliance with the RFP, and other factors as may be necessary under such circumstances.
- d. Reject all proposals and re-advertise at the City's sole discretion.
- e. Reject all proposals and complete the project with an in-house design.

1.8 Selection of Consultant

The City's Selection Committee will recommend to the City Manager that the contract award be made to the proposer that is in the Committee's opinion, best qualified.

1.9 Requirement of Insurance

The successful proposer will be required to meet the City's insurance coverage as described in the sample Professional Services Agreement (see **Appendix A**). Insurance coverage includes the following categories of insurance:

- a. Comprehensive general liability - \$2,000,000.00
- b. Professional liability - \$500,000.00
- c. Automobile liability - \$500,000.00
- d. Workers' compensation – As required by ORS 656.017
- e. Professional errors and omissions - \$500,000.00

The successful proposer shall provide certification of all coverages and shall name the City of Newberg as “an additional insured” on all except workers’ compensation insurance policies prior to signing the contract. The City is defined as the entity named on the declarations page of the coverage agreement and its officers, employees, and agents including volunteers, authorized to act on behalf of the City.

1.10 Execution of Contract

It is anticipated that the contract should be signed by the City Manager within a week of award of the contract.

1.11 Public Records

Any material submitted by the proposer shall become the property of the City unless otherwise specified. During the evaluation of proposals and the selection of the Consultant, the proposals shall be confidential. After the selection process has been completed, the proposals shall be open to public inspection. Proposals should not contain any information which the proposers do not wish to become public. If it is necessary to submit confidential information in order to comply with the terms and conditions of this RFP, each page containing confidential information should be clearly marked "NOT FOR PUBLIC DISCLOSURE CONFIDENTIAL TRADE SECRETS". The City accepts no liability for the inadvertent or unavoidable release of any confidential information submitted, and claims arising out of any public record request for such information shall be at the proposer's expense.

1.12 Tax ID Number

Proposals must state the proposer’s Federal/State of Oregon Taxpayer Identification Number.

1.13 Recycled Products Statement

Proposers shall use recyclable products to the maximum extent economically feasible in the preparation of the proposals, and the selected proposer shall continue the same practice in the performance of the contract work in accordance with ORS 279B.270.

1.14 Federal/State/Local Requirements

The selected proposer shall comply with all Federal, State and local laws, regulations, executive orders and ordinances applicable to the work under this contract, including, without limitation, the provisions of ORS 279B.220, 279B.230, 279B.235, and 279B.270. In addition, proposers agree to comply with:

- a. Title VI of the Civil Rights Act of 1964;
- b. Section V of the Rehabilitation Act of 1973;
- c. The American with Disabilities Act of 1990 and ORS 659.425;
- d. All regulations and administrative rules established pursuant to the foregoing laws; and

- e. All other applicable requirements of Federal and State civil rights and rehabilitation statutes, rules and regulations.

Proposer is subject to the Oregon Worker's Compensation Law and shall comply with ORS 656.017, which requires the provision of Worker's Compensation coverage for all employees working under this contract. The City's programs, services, employment opportunities and volunteer positions are open to all persons without regard to race, religion, color, national origin, sex, age, marital status, disability or political affiliation.

1.15 Payment

The City will pay the Consultant under contract for services performed based on the approved rates and the scope of work completed, after reimbursement by the State upon completion of the project. In addition to the reimbursement requested from the State upon completion of the project, the State allows the City to request a mid-project reimbursement from the State for costs accrued to date.

Payments for extra work not described in the PSA scope of services will only be made when authorized in advance and in writing by the City's Project Manager prior to such work being performed by the Consultant.

If the Consultant anticipates that the fee is going to surpass the not-to-exceed figure because a task has changed and is outside the scope, the Consultant shall notify the City in writing of the circumstances with an estimated amount that the fee is to be exceeded. The Consultant shall obtain written permission from the City before exceeding the not-to-exceed fee amount. If the Consultant does work that exceeds the maximum fee amount prior to obtaining the written permission, the Consultant waives any right to collect that exceeding amount.

SECTION 2 - SCOPE OF WORK

2.1 Invitation

The City of Newberg, a Certified Local Government (CLG), is requesting proposals from firms (hereinafter referred to as the "Consultant") qualified and interested in providing professional consulting services to the City for the purpose of the completing an updated historic resources inventory for downtown Newberg (hereinafter referred to as the "Project").

This RFP contains the necessary information to understand the basic scope of work and responsibility, the consultant selection process and the required documentation in submitting a proposal. Direct any questions to Steve Olson, Project Manager.

2.2 Overview

The City of Newberg has received a State CLG grant for the purpose of completing an updated historic resources inventory for downtown Newberg.

A city-wide historic resources inventory was completed for Newberg in 1985 and 1990, and used to create a Historic Landmark overlay zone for local historic landmarks. In addition, the State Historic Preservation Office (SHPO) performed a Reconnaissance Level Survey (RLS) for most of the downtown commercial area in August, 2013.

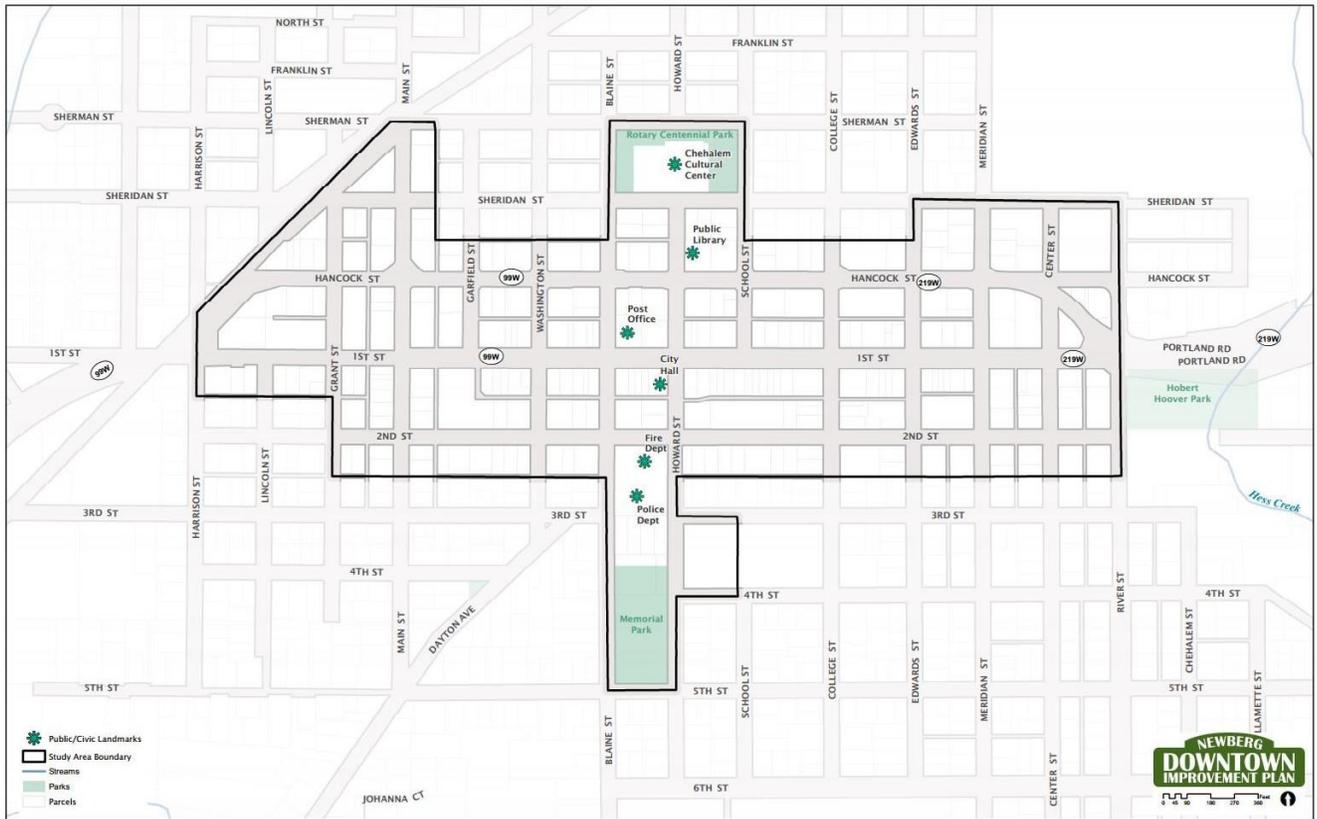
The purpose of this 2016 survey is to update the 2013 SHPO RLS, expand the RLS to cover the rest of the downtown commercial area, perform some additional Intensive Level Survey (ILS) work on properties that may be eligible to be added to the local Historic Landmark subdistrict or National Register, create a digital brochure and walking tour to help raise awareness of local historic resources, and explore the potential for a National Historic district designation downtown.

These services must be consistent and compatible with the standards and regulations of the State Historic Preservation Office (SHPO). This project is supported in part with grant funding from the SHPO and National Park Service (NPS).

Up to \$13,000 is available for consultant services.

2.3 Survey Area

The proposed survey area is located generally east of Harrison Street and west of River Street. It is south of Sherman Street and generally north of 3rd Street. The survey area is the same as the study area for the Newberg Downtown Improvement Plan project (a separate project that is currently underway -see the map below). This survey area is slightly larger than the area included in SHPO's 2013 downtown survey, which is why there is a need for some additional RLS work.



2.4 Scope of Work for Project

The project will include: Complete a Reconnaissance Level Survey (RLS) of approximately 15 properties in the downtown, and update the 2013 SHPO RLS. Complete Intensive Level Survey (ILS) of approximately 5-10 properties downtown. Develop a digital brochure about the downtown properties and connect it to an audio tour. Develop and present a walking tour and public presentation for local community groups. Prepare a report on the potential for a downtown National Register district, the expected benefits and impacts of a district, and the steps that would be needed to establish a district.

The completed surveys, brochure and report are due no later than July 1, 2016 and must be provided in both paper and digital form. Deliverables shall include the following:

1. The preparation of a Reconnaissance Level Survey (RLS) report for the downtown commercial properties inside the study area that were not considered in the 2013 SHPO RLS (estimated 15 sites), and an update of the 2013 RLS.
2. The preparation of an Intensive Level Survey (ILS) report for properties that may be eligible to be added to the City's Historic Landmark subdistrict, or, if already in the subdistrict, that may be eligible for inclusion in the National Register (estimated 5-10 sites). Property selection must be approved by city staff prior to survey.

3. RLS and ILS work must meet the standards and guidelines established by the SHPO, as outlined in the latest “Guidelines for Conducting Historic Resource Surveys in Oregon” including any supplements issued by SHPO (Reconnaissance Level Survey Standard Operating Procedures – current edition). Survey work must also be conducted in accordance with the Secretary of the Interior’s Standards and Guidelines for Historic Preservation and Archaeology (Federal Register, Vol. 48, No. 190, Sept. 29, 1983). Work that does not meet these standards is ineligible for reimbursement. The contractor performing and/or overseeing the RLS must meet the Secretary of the Interior's Historic Preservation Professional Qualification Standards (http://www.nps.gov/history/local-law/arch_stnds_9.htm).

4. Each of the properties in the ILS survey will be catalogued by the consultant using the City of Newberg’s Historic Resource Survey classification system as to its historic significance (Three categories: Primary, Secondary, and Contributing).

5. Public education: A digital brochure about downtown historic properties which is designed for viewing on smart phones and other mobile electronic devices. Connect it to existing audio tours. Develop a walking tour and public presentation for local community groups.

6. A report on the potential for a downtown National Register district to guide future preservation and planning work in Newberg. The report should examine the expected benefits and impacts of a district, and describe the steps that would be needed to establish a district.

Two copies of all materials should be generated (one for the City, one for SHPO). All original research materials collected for this project must be delivered to the City with the final product.

All reports and publications related to this project must give credit to the State Historic Preservation Office and National Park Service.

Staff and the Historic Preservation Commission (HPC) will work with the consultant throughout the process. Additionally, staff can provide assistance with mapping, administrative support, and the coordination of volunteer efforts.

2.5 Scope of Professional Services & Responsibility

The Consultant shall provide adequate personnel and resources to accomplish the objectives of this Project. Various tasks for this Project are outlined later in this section. Key personnel must be identified and the time allocated for each task needs to be clearly specified.

The Consultant is expected to provide a highly qualified and experienced team and be able to deliver satisfactory products and services.

All recommendations and information produced in this Project shall comply with applicable Federal, State and City regulations and requirements.

The City requires completion of the Project according to the timetable listed in Section 1.3.

Essential tasks are listed in the following pages and shall include:

Task A - Project Management

The Consultant shall act as a manager of the Consultant's team, including any sub-consultants. The Consultant shall manage and coordinate all components of the Project and take a proactive role in keeping all tasks on schedule and ensure timely completion of the Project.

The Consultant shall ensure full coordination with City staff and be responsive to any email and telephone discussions, in addition to the minimum meetings as listed under various tasks in the scope of work. The Consultant shall be in contact with the City frequently enough to ensure a timely City review of deliverables. The Consultant is expected to work with all stakeholders in a responsible manner. The Consultant shall perform all, but not limited to, the following sub-tasks:

A-1 Kickoff Meeting

The Consultant shall organize a kickoff meeting with City staff. Assume no more than four (4) hours for the meeting to achieve the following:

- Define project goals
- Outline project and management approach
- Identify roles and responsibilities
- Confirm scope and schedule

A-2 Administration

The Consultant shall update and email a detailed project schedule each month to the City's Project Manager. Provide high performance in project leadership, schedule management, tracking project budget and expenditures, quality control and assurance, maintaining accurate record keeping and follow-up on all action items. Deliver the entire project within the prescribed budget. Any possible modifications of the scope shall be identified in early stages such that action plans can be developed to avoid or minimize them.

Attend meetings as noted under various tasks. Prepare all project related agendas. All agendas and the supporting information shall be distributed via emails to the City's Project Manager at least one (1) business day prior to any meetings.

Submit a summary report of work completed by sub-tasks with each invoice. Indicate each individual's time spent on each sub-task since the previous invoice. Alert the City if any issues or concerns may affect the progress and/or cost of the project.

Task B – Stakeholder Involvement

This project is one that Newberg citizens have a considerable amount of interest in. There is a city Historic Preservation Commission, and the consultant should expect at least two meetings with this group. The City will complete the notices, agendas, and minutes for these meetings.

Task C – Deliverables

The Consultant shall provide the reports and brochures outlined in Section 2, subject to acceptance by the SHPO and City.

2.6 City's Responsibility

The City will perform the following tasks:

1. Provide a Project Manager responsible for the overall project management and coordination between the Consultant and the City, and with any of the City's other service providers.
2. Prepare all project-related meeting minutes.
3. Provide legal review of all contract documents.
4. Provide previous documents. If any of these documents are utilized, the Consultant shall verify to ensure the accuracy.
5. Make available City policies, regulations, guidelines and records such as as-built information and geographically referenced GIS maps, as available.
6. Assemble and transfer all required information and data, both hard copy and electronic, at no charge to the Consultant.
7. Coordinate communication among City staff and provide a unified guidance/direction to the Consultant.
8. Coordinate staff review. Staff review time for the deliverables will be 2 weeks.
9. Ensure that City staff members provide timely responses to questions, and be available for any meetings requested by the Consultant. Meetings between City staff and the Consultant take place at the Newberg City Hall Building, 414 E. First Street, Newberg, OR 97132.
10. Review and process Consultant's payment requests.
11. Perform other tasks as negotiated.
12. Create a project webpage on the City website and post updates.

SECTION 3 - PROPOSAL REQUIREMENTS AND EVALUATION

3.1 Proposal Submittal

To receive consideration, submit proposals in accordance with the following instructions:

Proposals should be prepared simply and economically, providing a straightforward, concise description of proposer's capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of the content.

The City, at its sole discretion, has the right to negotiate with any or all proposers regarding their proposals. Additionally, the City may reject or accept any or all proposals or parts thereof, submitted in response to this RFP.

The City recognizes that in the submittal of proposals, certain information is proprietary to the proposer and that the safeguarding of this information is necessary. Accordingly, the City will make every effort to prevent any disclosure of data supplied by any proposer where the proposer identifies those portions of its proposal that are proprietary. See **Section 1.13, Public Records**.

The proposal is due by 2:00 p.m., local time on February 26, 2016. Proposals submitted after this time may not be accepted. See **Section 1.5** for more information on the proposal submission.

3.2 Incurred Costs

The City is not liable for any costs incurred by proposers in the preparation and/or presentation of their proposals.

3.3 Content of Proposals and Evaluation Criteria

All proposals shall include the information identified in the following table and be presented in the order as indicated. The total number of pages for the proposal shall not exceed 10 pages, not including supplemental information. The supplemental information can include key individual resumes, and should not exceed 15 pages. The evaluation criteria and maximum possible points are noted for each item of information. An explanation of each item appears immediately in the following sub-sections.

CONTENT AND EVALUATION CRITERIA	MAXIMUM SCORE
1. Introductory letter	10
2. Key personnel qualifications	30
3. Project scope and understanding	30
4. Project schedule (11" x 17" allowed)	10
5. Additional supporting information & references	20
Totals	100

All supporting information shall be presented in a separate section at the end of the proposal. Front and back covers, as well as, section dividers are not counted in the page limit requirements. Each page shall be 8-1/2" x 11", unless otherwise noted. When using double-sided printing, each side of the page is counted as one page

3.3.1 Introductory Letter

The introductory letter shall include, but need not be limited to, the following information:

- The name of the firm, as well as, the signature, printed name and title, telephone and fax number of the officer authorized to represent the Consultant in any correspondence, negotiations and sign any contracts that may result.
- The address of the office that will be providing the service, a project manager's name, telephone number, fax number, and e-mail address.
- The Federal and State tax identification numbers, and the State of incorporation, if applicable, must also be included.
- Indicate whether the proposer is a "Resident Bidder" as defined in ORS 279A.120 and provide a statement that the proposal is valid for sixty (60) days after the submission deadline.

The proposer may use this section to introduce the proposal or to summarize the key provisions of the proposal.

3.3.2 Key Personnel Qualifications

Provide a statement that portrays how the qualifications and experience of the Consultant's and sub-consultant's key personnel relate to the described work. The City expects commitment and prefers no reshuffling of personnel during the Project. The response should address the following:

- A brief resume outlining the experience and qualifications of the person who would be directly responsible for this Project. Identify any applicable registrations. Indicate the number of other projects that will be managed by this person during the time he or she would be managing this Project.
- A listing of other individuals who would support and contribute to the Project until its completion, with a summary of each team member's area of responsibility, expertise, experience and qualifications for this work.
- Key personnel experience with this type of project, and familiarity with the City of Newberg. In particular, list experience in design of low impact development streets, dealing with the permitting of culverts and wetlands, and dealing with the public and stakeholders.

3.3.3 Project Scope and Understanding

The Consultant shall include a statement of understanding of the Project. Describe the approach and methodology of managing work tasks and coordination, sequence and control of field and office operations to accomplish the work in a timely manner. Indicate how the Consultant ensures project progress and quality control.

Also mention how and to what extent the need for utilizing City personnel to assist the Consultant within the duration of the Project and indicate the approximate time requirement.

Provide a detailed work plan that describes how the Consultant will organize and conduct the Project by tasks as described in **Section 2, Scope of Work**. This plan must include targeted completion dates of each deliverable. If the Project can or cannot be completed in the timeframe noted under **Section 1.3**, please indicate the proposed schedule.

3.3.4 Project Schedule

Prepare a project schedule for each significant segment of the work, from "Notice to Proceed" to completion.

3.3.5 Detailed Consultant Scope & Fee Negotiations

Provide a cost estimate showing description and budget for each task. Cost alone shall not determine the City's decision. Consultant selection will be based on qualifications per OAR Division 48.

3.3.6 Additional Supporting Information

Supporting materials should include only resumes, references and public client list. The reference list must include a minimum of three (3) clients with projects similar to this one. Please include the name, address, phone number, fax number and e-mail of the contact person for each reference. Detail the type of work done that

supports the listed mandatory requirements in this RFP. Indicate if the listed projects were delivered on time and on budget. The projects included as a reference should be projects which the key personnel were directly involved with. Indicate the role the key personnel held on those projects.

APPENDIX A: Standard City of Newberg Professional Services Agreement

AGREEMENT WITH _____ TO PROVIDE CONSULTING SERVICES TO THE CITY OF NEWBERG

THIS AGREEMENT is entered into this ___ day of _____, _____ by and between the City of Newberg, a municipal corporation of the State of Oregon, hereinafter called **City**, and

(Consultant's name)

(Address)

(Phone)

(Fax)

hereinafter called **Consultant**.

RECITALS:

1. **City** has need for the services of a **Consultant** with particular training, ability, knowledge, expertise and experience possessed by **Consultant**.
2. **City** has chosen the **Consultant** using the _____.(insert words addressing the screening and selection process) to provide services related to the XYZ Project.

NOW, THEREFORE, in consideration of mutual promises, covenants and agreements of the parties, it is agreed as follows.

1. **Effective Date and Duration:** This Agreement shall become effective on the date that this Agreement has been signed by every party hereto.

Unless, terminated or extended, this Agreement shall expire when the **City** accepts **Consultant's** completed performance or on _____, (insert date that work is completed in accordance with Schedule) whichever date occurs first. This fact notwithstanding, the services of **Consultant** shall be authorized and paid on a phase-by-phase basis as described in Exhibit "A".

Expiration shall not extinguish or prejudice **City's** right to enforce this Agreement with respect to any breach of a **Consultant** warranty or any fault or defect in **Consultant's** performance that has not been cured.

2. **Termination:** This Agreement may be terminated at any time by mutual, written consent of the parties. The **City** may, at its sole discretion terminate this Agreement in whole or part upon a 30-day written notice to **Consultant**. The **City** may terminate immediately upon notice to the **Consultant** that the **City** does not have funding, appropriations, or other necessary expenditure authority to pay for **Consultant's** work. The **City** may terminate Agreement at any time for material breach, unless **Consultant** has cured such defect or deficiency within

a reasonable period of time following notice of such claim.

3. **Scope of Work:** The **Consultant** agrees to provide the services provided in the Scope of Work which is Exhibit "A" and attached hereto and incorporated by this reference. The **Consultant** represents and warrants to the **City** that the **Consultant** can perform the work outlined in the Scope of Work for the fee proposal amount.

4. **Compensation:** The **Consultant** agrees to perform the work for a not-to-exceed fee as indicated in their professional fee proposal obtained in the Scope of Work. The not-to-exceed figure is as follows:

\$ _____

The **Consultant** shall not exceed the fee for any task included in the fee proposal amount. If the **Consultant** foresees that the fee is going to exceed the not-to-exceed figure because the task has changed or is outside the scope, the **Consultant** shall notify the **City** in writing of the circumstances with an estimated amount that the fee is to be exceeded. The **Consultant** shall obtain written permission from the **City** before exceeding the not-to-exceed fee amount. If the **Consultant** does work that exceeds the maximum fee amount prior to obtaining the written permission, the **Consultant** waives any right to collect that fee amount.

Additional Work Not Shown within the Scope of Work: If City requests or requires work to be done not within the Scope of Work of this project, the **Consultant** shall notify the **City** of such work, provide an estimated fee amount, and obtain written instructions to proceed with work in the form of an Agreement amendment prior to proceeding with work and incurring any costs on behalf of the **City**. If **Consultant** proceeds with work prior to obtaining permission and/or Agreement amendment, the **Consultant** waives any right to collect fees for work performed.

6. **Agreement Documents:** This Agreement consists of the following documents which are listed in descending order of preference: This Agreement, Attached Exhibits, and _____ (insert any other documents that should be referenced) Work is under the sole control of **Consultant**, however, the work contemplated herein must meet the approval of the **City** and shall be subject to **City's** general right of inspection and supervision to secure the satisfactory performance thereof.

7. **Benefits:** **Consultant** will not be eligible for any federal social security, state workers compensation, unemployment insurance, or public employees' retirement system benefits from the Agreement payment except as a self-employed individual.

8. **Federal Employment Status:** In the event any payment made pursuant to this Agreement is to be charged against federal funds, **Consultant** certifies that he or she is not currently employed by the federal government and the amount charged does not exceed his or her normal charge for the type of services provided.

9. **Consultant's Warranties:** The work to be performed by **Consultant** includes services generally performed by **Consultant** in his/her usual line of business. The work performed by the **Consultant** under this Agreement shall be performed in a good and businesses-like manner in accordance with the highest professional standards. The **Consultant** shall, at all times, during the term of this Agreement, be qualified, be professionally competent, and duly licensed to perform the work.

10. **Indemnity:** **Consultant** shall defend, indemnify and hold harmless **City** from and against all liability or loss and against all claims, suits, actions, losses, damages, liabilities, costs, and expenses of any nature whatsoever resulting from, arising out of, or relating to the activities of the **Consultant**, or its officers, employees, subcontractors, or agents under this Agreement.

11. **Independent Contractor:** **Consultant** is not currently employed by the **City**. The parties to this Agreement intend that the **Consultant** perform all work as an Independent Contractor. No agent, employee, or servant of **Consultant** shall be or shall be deemed to be the employee, agent or servant of **City**. **City** is interested only in the results obtained under this Agreement; the manner and means of conducting the work are under the sole control of **Consultant**, however, the work contemplated herein must meet the approval of the **City** and shall be subject to **City's** general right of inspection and supervision to secure the satisfactory performance thereof.

12. **Taxes:** **Consultant** will be responsible for any federal or state taxes applicable to payments received under this Agreement. **City** will report the total of all payments to **Consultant**, including any expenses, in accordance with the Federal Internal Revenue Service and the State of Oregon Department of Revenue regulations.

13. **Insurance:**

a) **Consultant**, its Subconsultants, if any, and all employers working under this agreement are subject employers under the Oregon Workers' Compensation Law and shall comply with ORS 656.017, which requires them to provide workers' compensation coverage for all their subject workers; or by signing this Agreement, **Consultant** represents that he or she is a sole proprietor and is exempt from the laws requiring workers' compensation coverage.

b) **Consultant** will, at all times, carry a Commercial General Liability insurance policy for at least \$1,000,000.00 combined single limits per occurrence for Bodily Injury, Property Damage, and Personal Injury. If the policy is written on the new occurrence form then the aggregate limit shall be \$2,000,000.00. The **City**, its agents, employees and officials all while acting within their official capacity as such, shall be named as an additional insured on the insurance specified in this paragraph.

c) **Consultant** will, at all times, carry a Professional Liability/Errors and Omission type policy with limits of at least \$500,000.00. If this policy is a "claims made" type policy, the policy type and company shall be approved by the City Manager prior to commencement of any work under this Agreement.

d) **Consultant** shall furnish the **City** with Certificates of Insurance upon execution of Agreement. Such Certificates of Insurance evidencing any policies required by this Agreement shall be delivered to the **City** prior to the commencement of any work. A 30-day notice of cancellation clause shall be included in said certificate. The **City** has the right to reject any certificate for unacceptable coverage and/or companies.

14. **Assignment:** The parties hereto each bind themselves, their partners, successors, assigns and legal representatives of such other party in respect to all terms of this Agreement. Neither party shall assign the Agreement as a whole without written consent of the other.

15. **Ownership of Work Product:** All original documents prepared by **Consultant** in performance of this Agreement, including but not limited to original maps, plans, drawings and specifications are the property of **City** unless otherwise agreed in writing. Quality reproducible copies of final work product, including digital files of text and drawings, shall be provided to **City** at the conclusion or termination of this Contract. **City** shall indemnify and hold harmless **Consultant** and **Consultant's** independent professional associates or **Subconsultants** from all claims, damages, losses and expenses including attorney fees arising out of the City's use of any instruments of professional service for purposes outside the scope of this Contract.

16. **Entire Agreement:** This Agreement constitutes the entire Agreement between the parties and supersedes all prior agreements, written and oral,

courses of dealing, or other understanding between the parties. No modification of this Agreement shall be binding unless in writing and signed by both parties.

17. **Notification:** All correspondence and notices related to this Agreement shall be directed to the project manager for the party to whom the correspondence or notice is intended. If directed to the **City:** City of Newberg, P.O. Box 970, Newberg, Oregon 97132, Attn: Steve Olson. If directed to the **Consultant:** Attn: _____ at the address listed above. Each party shall be responsible for notifying the other of any changes in project manager designation.

IN WITNESS WHEREOF, the parties have executed this Agreement on the date first above mentioned.

CONSULTANT

By: _____
Name: _____
Title: _____
Date: _____

Division Approval: _____

CITY OF NEWBERG

By: _____
Name: _____
Title: _____
Date: _____

Recommended for Approval By:

Doug Rux
Community Development Director

Approved as to form:

Truman A. Stone
City Attorney

Deschutes County, Oregon - Historic Landmark Locations

Historic Preservation of Architecturally Significant Buildings and Sites

Structures Places Sites

 1 Original Sisters High School	 2 Hardy Allen House	 3 Leitbauer Store
 4 Hotel Sisters	 5 Allen Drugstore	 6 Cloverdale School
 7 Terrebonne Ladies Pioneer Club	 8 Leitbau Bank & Trust	 9 Tumalo Community Church
 10 Young School	 11 Eastern Star Grange	 12 Alfalfa Grange
 13	 14	 15



2015 Certified Local Government Grants

Grant Requirement Manual

APPENDIX B

This program receives Federal financial assistance for identification and protection of historic properties. Under Title VI of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, and the Age Discrimination Act of 1975, as amended, the U.S. Department of the Interior prohibits discrimination on the basis of race, color, national origin, disability or age in its federally assisted programs. If you believe you have been discriminated against in any program, activity, or facility as described above, or if you desire further information, please write to: Office for Equal Opportunity, National Park Service, 1829 C Street NW, Washington, D.C. 20240.

The activity that is the subject of the publication has been financed in part with Federal funds from the National Park Service, Department of the Interior, as provided through the Oregon State Historic Preservation Office. However, the contents and opinions do not necessarily reflect the views or policies of the Department of the Interior, nor does the mention of trade names or commercial products constitute endorsement or recommendation by the Department of the Interior.



State Historic Preservation Office
Oregon Parks and Recreation Department

Cover Photo: *Deschutes County CLG project*

Introduction

Congratulations on receiving a grant from the State Historic Preservation Office (SHPO). The Certified Local Government (CLG) grant program is funded by a Federal apportionment to Oregon through the National Park Service, Department of the Interior. You must comply with all Federal laws governing the administration of sub-grants as noted in the CLG Grant Agreement and this Manual.

These grants must have a 1:1 match. The grant cycle is 17 months if the grant agreement is signed promptly.

We want to help your approved project succeed. While we attempt to make the grant requirements clear and easy, we are responsible to the public for the appropriate handling of state and federal funds. Grant funds will be provided to you as reimbursement for appropriately completed and reported work. Please use this manual to navigate the grant process.

If you have more questions after reading this manual please contact: Kuri Gill at Kuri.Gill@oregon.gov or (503) 986-0685.

Grant Agreement

It is very important to read and be familiar with all elements of the CLG Grant Agreement, as it is the legal document defining your project activities. This Manual lays out additional guidance for requirements of the grant. Non-compliance with the terms of these documents will cause problems with paying you for your work, and may even jeopardize receiving a grant in the future.

Shortly after you were notified that you had been awarded a grant, you received a Grant Agreement. By signing the Grant Agreement, you attested acceptance of a state grant for the purposes outlined in your grant application and those outlined in the Agreement. This manual is considered to be part of your Grant Agreement.

Some of the items in the Agreement included:

1. An approved project budget with line items specifying project expenses.
2. Project Starting Date, Project Completion Date and the date final reports are due.
3. Special Conditions for the project.
4. Specific language for the acknowledgement of public funds



Canby

- provided by the State of Oregon and the National Park Service.
- 5. Requirements for submitting reports and billings.
- 6. Requirements for inspections and audits.

Amendments to the Agreement

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

The Grants Coordinator must be notified as soon as possible of expected under expenditures of grant or match funds. Any unspent CLG Grant funds must be reobligated to other projects; otherwise, they are lost to the people of Oregon, and returned to the federal government.

**Grant Management
Consultation with SHPO**

SHPO staff has expertise in all types of typical CLG projects. While ongoing communication with the CLG Coordinator is required, you will be working closely with other staff assigned by SHPO in the program areas related to your project.

For example:

- Ian Johnson - National Register, Ordinance, Education
- Joy Sears - Restoration & Rehabilitation
- Kuri Gill - Education, Review & Compliance, Planning, etc.
- Diana Painter - Survey, National Register
- Jason Allen - Survey
- Mike Gushard - Education

Work Plans

Work plans for all projects must be approved by the SHPO staff before work begins. For example: for Historic Rehabilitation projects, submit the following to the Grants Coordinator:

- 1. Before photographs
- 2. Plan drawings
- 3. Work description including materials, tools and processes to be used
- 4. Timeline

SHPO staff must approve drafts of publications and interpretive panels prior to production.



We are here to help!



Port Orford

Hiring Consultants/Contractors

The grantee is responsible for all contractor and consultant oversight. A consultant or contractor is any individual or firm who is not a staff member on the permanent payroll of the grantee's organization. If you plan to use a consultant or contractor to carry out any tasks in your project, the selection must be consistent with Oregon State policies and the Secretary of Interior's Historic Preservation Professional Qualification Standards (http://www.nps.gov/history/local-law/arch_stnds_9.htm).

These provisions apply to the hiring of consultants or contractors when the funds to pay their fees are either CLG Grant Funds, or are part of the non-federal matching share of a CLG grant. Depending on their involvement in the project, your staff may be required to meet the Secretary of Interior's standards for historic preservation professionals also.

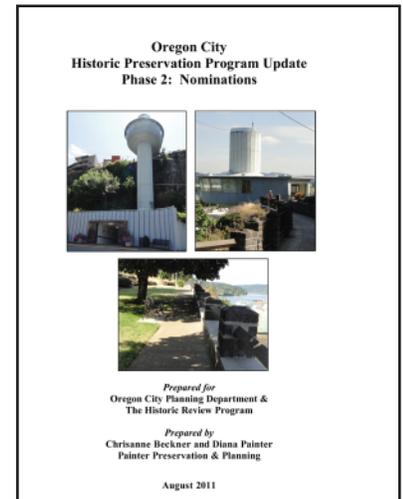
Grantees shall maintain documentation on file to support all hiring and contracting procurements involving Federal and matching funds, including evidence that the services of the consultant are needed and cannot be met by current staff whose salaries are paid in part under the grant. Documentation must include:

1. How contractor was solicited and selected;
2. Why contractor was selected (references, quality, previous work, time frame, cost, etc).

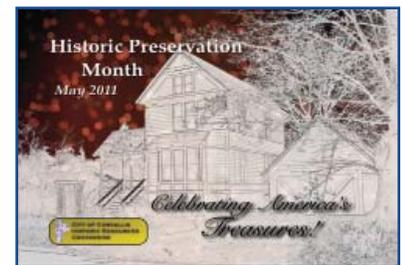
SHPO may request that the Grantee check the Consultant's references, if evidence of this is not submitted with the approval request. This is good hiring practice.

The Grantee has the responsibility for project completion, as they are under contract with the SHPO. Management of the consultant contract is included in this responsibility. The Grantee needs to maintain regular contact with the consultant to receive progress reports and assure that the agreed upon timeline is being met, and that the products meet their contracted obligations.

All work carried out by the contractor or consultant must be submitted first to the grantee, not to SHPO. When the Grantee approves the work, the Grantee will submit the report, any documents that are products, photos, and the payment request to SHPO. In no case does the contractor or consultant submit work or reports directly to SHPO; drafts for SHPO review must also come from the Grantee.



See Heritage Bulletin #8 for more information about working with contractors and consultants. Available at www.oregonheritage.org.



Public Notice Requirement

All grant or match-funded publications, literature, and videos must be reviewed, revised if needed, and approved in draft form by SHPO prior to final publication. This includes context statements, pamphlets, brochures, booklets, interpretive panels, exhibits, etc.

Acknowledgment of Support

An acknowledgment of NPS support must be made in connection with the publication or dissemination of any printed, audio-visual, or electronic material based on, or developed under, any activity supported by HPF grant funds. Projects that must include this are newsletters, brochures, plans, reports, etc. This acknowledgment shall be in the form of the following statement:

The activity that is the subject of this [type of publication] has been financed [in part/entirely] with Federal funds from the National Park Service, U.S. Department of the Interior. However, the contents and opinions do not necessarily reflect the views or policies of the Department of the Interior, nor does the mention of trade names or commercial products constitute endorsement or recommendation by the Department of the Interior.

(Only relevant portions of the required statement need to be used as appropriate depending on the content of the publication; e.g., if there are no commercial products, then that part of the statement can be omitted.)

Nondiscrimination Statement

Publications and audio-visual materials must also include the following nondiscrimination statement:

This program receives Federal financial assistance for identification and protection of historic properties. Under Title VI of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, and the Age Discrimination Act of 1975, as amended, the U.S. Department of the Interior prohibits discrimination on the basis of race, color, national origin, disability or age in its federally assisted programs. If you believe you have been discriminated against in any program, activity, or facility as described above, or if you desire further information, please write to: Office for Equal Opportunity, National Park Service, 1849 C Street NW, Washington, D.C. 20240.

Public information

Press releases, publications, and any other public dissemination of information (including electronic materials such as World Wide Web



Fossil



pages) by a grantee made possible by grant assistance shall acknowledge Department of the Interior, National Park Service grant support by use of the above statements.

We cannot reimburse for projects that don't include the above statements.

Copies of publications

Upon publication, a minimum of one electronic copy and three hard copies must be submitted to SHPO. Two copies of the publication will be furnished by SHPO to NPS, which will furnish one copy to the Department of the Interior's Natural Resource Library for deposit. Of the copies retained by SHPO, one will be filed with the contract and the other will be placed in the resource library. Publications covered by this section include any publication produced as a result of research or any other work funded in whole or in part by CLG grants, except National Register Nominations and Inventories, which conform to their own submission requirements.

Preservation Agreement Requirement

All development or rehabilitation projects require a Preservation Agreement between the SHPO and the property owner. An example Preservation Agreement is available as a fillable form on the HPD Grants website: http://www.oregon.gov/OPRD/HCD/SHPO/pages/clg_Tools.shtml

Photographs

Before, during and after photographs are required for the interim and final report reports that request reimbursement. Please send a printed copy with the final report. We prefer photos in a digital format (300dpi). If you provide a digital copy, then the hard copy can be printed from a computer. If you are not providing a digital version, the photo must be professionally printed.

Calendar & Timeline

- Grant Funds Available – April 1, 2015 with a fully signed grant agreement
- Progress Report - June 30, 2015
- Grant Project Completion Deadline – August 31, 2016*
- Final Report & Billing Deadline – September 20, 2016

* Schedule any contracted work well before the project completion deadline so you have time to review the product and request any changes before it is turned into SHPO.



Ideas for photos – building condition, contractors at work, artifact condition, historic feature condition, collections facilities, people doing data entry or scanning, volunteer group shots, celebration of completion events, etc.)



CLG Grant Reporting & Billing

Project Reports

A interim and final report form will be emailed to you. Please fill them out in electronic form, if possible, and email them. An interim project report is required on June 30th.

Please include:

1. what has been accomplished on the project to date;
2. any problems or concerns you might have;
3. any OPRD assistance needed.

The Report Form follows the work itemization in your application and Agreement. This report is not intended to be a time consuming procedure. Information to complete it should be collected on an ongoing basis throughout the project. Each report stands on its own. Do not repeat information and expenditures previously reported.

****NOTE: WE MAY SWITCH TO ONLINE REPORTING DURING THIS GRANT CYCLE, YOU WILL BE NOTIFIED AND ASSISTED.****

Submitting an interim reimbursement request

Partial payments may be requested throughout the duration of the grant period on the project report form. The current interim or final project progress report form must be used, and all requested information must be entered.

The entire final payment will be withheld until all products are received, and approved by SHPO. No more than 50% of the expenditures to date will be paid in any payment, to assure the required 50/50 minimum match.

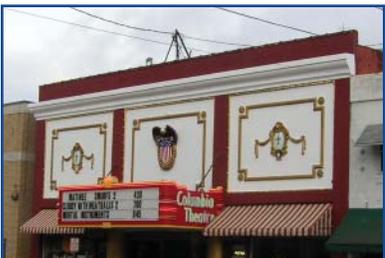
Remember to submit all document or video drafts to SHPO for review, revision if necessary, and approval prior to publication. Review by professional staff may take two weeks.

Final Products

Federal Guidelines make it very clear that the product is the measurable result of CLG projects. Products must meet the Secretary of Interior's Standards for the applicable project objectives. It is very important that you complete each element agreed upon in the Agreement. If goals are not met, it is SHPO's responsibility to withhold final reimbursement, or request re-payment of funds. Your ability to secure future grants from SHPO may also be affected.



St. Helens



When the project is completed, submit a final report summarizing the project using the final report form and necessary attachments including photographs. Your final reimbursement request and report documents must be submitted within twenty (20) days following the agreed project end date. This must include:

1. Final Project Report & Billing Form
2. Project summary
3. Before, during and after photographs
4. Copies of projects like brochures and research summaries
5. Copies of contractor/consultant invoices
6. Receipts or accounting documentation of smaller expenses

Audits

A financial audit of your grant may be conducted following the submission of your final products and payment requests after the grant period ends. Also, the SHPO program is audited at least every four years, and your project may also be audited as a part of that review. Your financial records should be retained for a period of seven years, or for three years following the final audit.

In Field Monitoring

You may receive approximately one or more site inspections involving both the project coordinator and/or persons conducting the work. Typically, the meeting might consist of a visit to the project area; a review of the boundaries, concentrations or types of resources, discussion of the progress of the project, or attendance at a public hearing or meeting. Record keeping and financial systems may be examined. In-field monitoring will be scheduled in advance of the meeting.



If you have more questions after reading this manual, please contact:

Kuri Gill at Kuri.Gill@oregon.gov or (503) 986-0685

APPENDIX B

SUPPLEMENTAL INFORMATION

Allowable Costs

Expenditures may be charged to this grant only if they:

1. are in payment of an obligation incurred during the contracted grant period,
2. are necessary to the accomplishment of approved grant objectives, and
3. conform to the “Standards for Allowability of Costs” and “Matching Share Standards” in the NPS Historic Preservation Fund Grants Manual, Chapters 13 & 14. These chapters are available as a separate document on the Heritage Program Grants page: <http://www.oregon.gov/OPRD/HCD/grants.shtml>

Note Regarding Federal Employees: You may not use any Federal grant funds or matching funds to pay any expenses of current employees of the Federal Government. This is in accordance with 18 USC 209 stating that a Federal employee can't receive supplemental compensation for their services in their capacity as Federal Government employees.

Federal Requirements of the Grant

1. Federal Administrative Requirements. The provisions of Office of Management and Budget Circulars A-87, A-102, and A-110, apply to CLG grants. Failure to comply with these Circulars may be the basis for withholding payments for proper charges, recovery of such funds, and the termination of financial support. Most of the circulars are on the Web, at <http://www.whitehouse.gov/OMB/circulars/>.
2. Environmental Requirements. Activities funded by CLG grants shall be conducted in full accord with the policies and provisions of the National Environmental Policy Act of 1969 (Public Law 91-190), the Coastal Zone Management Act, and the Floodplain Management Act, as applicable.
3. Equal Opportunity. Equal Opportunity information must be posted in all project offices and sites. All activities assisted under the HPF grant program are subject applicable Federal laws as stated in your contractual agreement, including the provisions below:
 - a. Title VI of the Civil Rights Act of 1964, 78 Stat. 241, as amended, which provides that no person on the grounds of race, color, age, national origin, or handicap shall be excluded from participation in, be denied the benefits of, or be subject to discrimination under any activity receiving Federal financial assistance.
 - b. DI Form 1350, Assurance of Compliance (with Title VI, Civil Rights Act of 1964)
 - c. Property acquired or developed with HPF assistance shall be open to entry and use by all persons, regardless of race, color, age, national origin, or handicap who are otherwise eligible. Discrimination on the basis of residence, including preferential reservation or membership systems, is prohibited, except to the extent that reasonable differences in admission or other fees may be maintained on the basis of residence.

SUPPLEMENTAL INFORMATION

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. 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@oregon.gov, or phone 503-986-0670 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:

1. Establish a separate account for each agreement project.
2. 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 billing form.
3. 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.

Following is information about the specific budget categories:

Professional Contractor or Consultant

1. Proper contractor or consultant selection procedures must be followed and proper documentation maintained for audit, or contract costs are subject to disallowal.
2. 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.
3. Payments made include fee for service, salary, per diem, payment for the travel, or other allowable services.

Volunteer Time

1. 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.
2. 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. A packet of forms are available from your grant coordinator for use by grantees who are tracking values of volunteer work and donations to projects. The forms are, for the most part, self explanatory.
3. Rates for volunteer services may not exceed 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 included in the payment request support documentation.

SUPPLEMENTAL INFORMATION

Employees

When a staff member is involved in a grant project, their time on the project must be clearly tracked electronically or on a timesheet, showing hours on their usual job and hours on the project separately. Total hours may not exceed 40 hours/week, with the only exception being the well documented time at meetings occurring outside normal work hours. Payrolls need to be signed by an authorized person.

Time and Attendance

1. Records (daily, weekly, or monthly) must show total daily hours for each project and description of work performed.
2. Fringe benefit rates should be developed using actual costs, and individual components should be identified.
3. 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. In November 2011, this rate was 51 cents per mile. 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.

Current State of Oregon rates are:

Breakfast = \$11.50

Lunch = \$11.50

Dinner = \$23

Lodging = \$77

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. The State has developed a form that may be used for this purpose; copies are available from the grants coordinator.

Equipment Rental (Outside): Payments made by the project sponsor for equipment rented for specific project area are generally allowable under state regulations. Payments made by the project sponsor must be supported by a statement or invoice from the vendor that indicates the time period the equipment was rented.

Supplies

1. Supplies and materials charged to the project must be supported by purchase orders and supplier's invoices.
2. The original or a photocopy of the cancelled checks must be available for a field audit.

SUPPLEMENTAL INFORMATION

3. Printing, Publication Design, etc.
4. 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

1. 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.
2. Volunteer services may be furnished by professional and technical personnel, consultants, and other skilled and unskilled labor.
3. Volunteered services may be counted as matching share if they are a necessary part of the project. A packet of forms are available from the grants coordinator for use by grantees who are tracking values of volunteer work and donations to projects. The forms are, for the most part, self explanatory.
4. Rates for volunteer services may not exceed 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 included in the payment request support documentation.
5. Donated Materials Invoices, where applicable, must be marked "donated" and signed, and attached to the Payment Request Form.
6. Donated Equipment Invoices, where applicable, must be marked "donated" and signed, and attached to the Payment Request Form.

Professional Qualifications Standards

Note: Consultants hired for CLG projects should meet the following qualifications.

The following requirements are used by the National Park Service, and are published in the Code of Federal Regulations, 36 CFR Part 61. The qualifications define minimum education and experience required to perform identification, evaluation, registration, and treatment activities. In some cases, additional areas or levels of expertise may be needed, depending on the complexity of the task and the nature of the historic properties involved. 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.

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, historic 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.

SUPPLEMENTAL INFORMATION

Archeology

The minimum professional qualifications in archeology are a graduate degree in archeology, 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 archeology, and
3. Demonstrated ability to carry research to completion.

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

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.

Architecture

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

Historic Architecture

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

1. At least one year of graduate study in architectural preservation, American architectural history, preservation planning, or closely related 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 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 projects.