

State Historical Fund Reviewer Guide

January 2022 Changes - Scoring Criteria for the Competitive Application

The following information outlines SHF Guidebook changes released on January 6, 2022, and updated in October 2022. This addendum contains updated Scoring Criteria for the updated competitive application. Both the application questions **and** Scoring Criteria have been included here. Please reach out if you have any questions about these changes by contacting the [Engagement Team](#).

Diversity, Equity, and Inclusion – 10 points

The State Historical Fund is committed to diversity, equity, and inclusion rooted in [History Colorado's Anti-racism Grounding Virtues](#). One of our goals is to seek racial equity within our funding by providing grants that clearly benefit Black, Indigenous, and People of Color (BIPOC) communities.

****It is important to note that this guidance was created after the application went “live.” Be mindful that applicants did not have access to this metric, and you shouldn’t necessarily deduct points if they don’t hit the exact mark. We recommend you use this as general guidance to determine whether a project authentically earned points in the BIPOC section.****

The following list helps define “benefit” to assist in your scoring. A benefit is the end result of a project -

- Economic Development
 - creating a business space that employs primarily BIPOC individuals
 - affordable housing that primarily BIPOC communities will use
- Social Development
 - primarily BIPOC communities will use this place
 - project educates the public about BIPOC communities, their histories, and their impact on Colorado
 - project fosters BIPOC cultural ties and cultural identity to place and community
 - project facilitates community healing, often through archaeology or education
 - project addresses past injustices
- Environmental Development
 - the project creates energy efficiency to make utilities more affordable, address heat sink, and increase green space in places primarily used by BIPOC communities
 - illustrates how indigenous communities were stewards to the environment
- Health/Wellbeing
 - updating a building to make it more comfortable for primarily BIPOC communities to use
 - removing hazardous materials in a place that primarily BIPOC communities use

Questions: the following are questions from the application.

1. Does your project primarily benefit or focus on BIPOC (Black, Indigenous and People of Color) communities?
 - Yes
 - No

If the answer is No, this section is not eligible for points. ***If you can show that your project clearly benefits these groups, we invite you to fill in the questions below. If not, please continue on to the Project Team tab.***

1. Which communities will primarily benefit? Select all that apply:

- African, African-American, or Black
- American Indian, Native American, or Alaskan Native
- Asian, Asian-American, or Filipino
- Latino, Latinx, Hispanic, Chicano, or Latin American
- Middle Eastern, Arab, or Arab-American
- Native Hawaiian, or Pacific Islander
- Multi-racial or more than one identity
- Prefer to self-describe

Explain: (500 word limit for each):

1. How BIPOC communities will benefit from this project.
2. Did the BIPOC community take part in bringing the project together? If so, how?
3. Will BIPOC communities be involved during the project? If so, how?
4. Are there BIPOC partnerships? Describe the partnerships that are involved in this project.

SCORING CRITERIA – Diversity, Equity, and Inclusion – 10 points

- If the applicant answered “Yes” to “Does your project primarily benefit or focus on BIPOC (Black, Indigenous and People of Color) communities?” then review and score this section.
 - If the applicant answered “No” to that question, enter 0 (zero) points for this section, even if they filled out the BIPOC narrative questions that follow.
 - Do not include the BIPOC Information questions from the Organization and Contact Information section of the application as part of the score - they are for data gathering purposes only at this time.
1. Evaluate how strong and meaningful the project’s benefit is to BIPOC communities.
 2. How involved will BIPOC communities be before and during the project?
 3. How meaningful are the BIPOC partners’ involvement or contributions? Are BIPOC partners integral to the planning and success of the project or is involvement minimal?
 4. Are there two letters of support from the BIPOC communities involved in the project?

Use the examples below to help score this section. Projects that demonstrate clear benefits to the BIPOC community should be scored higher. Examples are broken down into project types.

Survey/Planning Project

- **Weak** - we plan to put flyers up around town inviting the BIPOC community to a meeting
- **Better** - we have notified specific community groups or individuals that we want to work with during the project
- **Best** - we have relationships with BIPOC community groups or individuals and sought their feedback prior to and/or during the application process and will continue to collaborate with them through all aspects of the project

Archaeology

- **Weak** - our project will produce new data for the archaeology field and we will present at

conferences

- ***Better*** - we have a letter of support from a tribal member, and will hire a tribal intern to work on the project
- ***Best*** - we have relationships with BIPOC community groups or individuals and sought their feedback prior to and/or during the application process and will continue to collaborate with them through all aspects of the project

Physical Project w/non-BIPOC owner and applicant

- ***Weak*** - our organization is open to, or hosts, BIPOC community based exhibits and meetings in our space, but BIPOC education or use is not the building's primary use or organization's mission.
- ***Best*** - the building is located in an area that predominantly serves BIPOC communities, and regularly hosts and actively collaborates with the BIPOC community on telling their stories within the project building/space

Scoring Rubric:

9-10 points = Very good

8 points = Good

7 points = Fair/average

6 points = Shows potential

0-5 points = Insufficient

Project Team – 10 points

This section demonstrates the project team's ability to successfully complete and manage the grant project according to our program guidelines (1,000 word limit).

Questions: the following are questions from the application.

1. Briefly describe similar projects or grants the applicant has completed or managed.
2. List your project team members and include:
 - Each person's role and responsibilities for this project.
 - Their qualifications for carrying out this project.
 - Any other relevant experience with historic preservation, and/or grant finance and management

SCORING CRITERIA – Project Team – 10 points

1. What is the applicant's experience with similar projects or grants? Lack of SHF experience should not reduce the score.
2. Does the application demonstrate a qualified team with identified roles to successfully complete the project?

Scoring Rubric:

9-10 points = Very good

8 points = Good

7 points = Fair/average

6 points = Shows potential

0-5 points = Insufficient

Resource Description and Significance – 10 points

This section explains the history, appearance, and importance of the resource(s) (500 word limit).

Historic Designation Information: If the resource is designated, you can find the following information in the historic designation nomination. To get a nomination for resources designated at the local level, contact the local authority. For resources listed in the State or National Registers, see [Listed Properties](#).

1. Briefly describe the prehistory or history of the resource, survey area or archaeological site. If applicable, describe how the resource represents a historically excluded history or community. (For example, LGBTQ+, women's history, religious minorities, etc.)
2. In your own words, briefly explain why the resource, survey area, or archaeological site is important. (For example, the importance to a community, architectural or archaeological value.)
3. Briefly describe the appearance of the resource and how it has changed over time (refer to construction history on survey/site forms or nominations, if available).

SCORING CRITERIA – Resource Description and Significance – 10 points

1. Evaluate the resource's level of historical importance or potential significance. Resources representing historically excluded communities will score higher.
2. Based on the description and photos of the resource, if the resource has been changed, how well does it retain physical features (such as materials, location) that relate to its importance as a prehistoric or historic resource? If it does not retain physical features, does this project have the potential to reestablish some of those features? If you want to learn more about evaluating changes to historic resources, here is a link to [National Park Service Bulletin 15](#). See Chapter VIII: How to Evaluate the Integrity of a Property.

Scoring Rubric:

- 9-10 points = Very good
- 8 points = Good
- 7 points = Fair/average
- 6 points = Shows potential
- 0-5 points = Insufficient

Scope of Work and Budget – 15 points

This section is a clear list of tasks and reasonable costs to complete this project. The Project Budget should include all direct, grant administration, and contingency costs related to completing the scope of work and managing the grant. Your application should include clear calculations for each budget task and/or reference a contractor-provided bid or estimate.

In the Scope of Work and Budget template, provide the following information:

1. Identify a task title for each scope item and describe the relevant work required for the task. If necessary, include archaeological monitoring for any excavation or ground disturbing activities related to a built environment project.
2. Make sure the tasks and costs are eligible for our funding. Review the list of **Ineligible Projects and Costs**.
3. For archaeology projects, include curation or consultation with appropriate descendent communities, if necessary. This may include tribal consultation and/or consultation with other groups as appropriate. For example, projects at a Japanese internment camp should

include consultation with former internees and their descendants. Note: this is not needed for archaeological monitoring. Make sure attached bids match the scope of work and budget.

4. Make sure attached bids match the scope of work and budget.
5. For physical work projects, costs for general conditions, overhead and profit, permits, and bonding must be clearly broken out. **Bonding** is required for all construction contracts of more than \$150,000.
6. Include an amount for **contingency** that is reasonable for the type of project; typically 10–20%.
7. If **Grant Administration** is included, provide the method of calculation here or in a bid. Up to 15% of the total direct costs is allowed, but the average range is 3–10%. Justify costs higher than 10% in the comments section of this scope of work.
8. The cash match should be at least the minimum required (25% of the project total for nonprofit or governmental owners, and 50% of the project total for private and for-profit owners; [BIPOC projects](#) -0% for nonprofit/ government owners with an annual operating budget of less than \$250,000, 5% for nonprofit/government owner with an annual operating budget over \$250,000, or 10% for private owner. BIPOC projects: be sure that the cash match in the budget matches the option selected in the Diversity, Equity, and Inclusion section.).
9. If you request a cash match waiver (any cash match amount less than the minimum required), explain why the minimum cannot be met and the efforts your organization made to find funds or other community resources. Please also attach a current IRS form 990 for Non-Profits or a copy of your Annual Budget for Governmental Entities.
10. Double-check that your Grant Request Amount plus Cash Match add up to the Project Total AND that the Grant Request Percent plus the Cash Match Percent add up to 100%.

SCORING CRITERIA – Scope of Work and Budget – 15 points

1. Does the Scope include all the relevant tasks to complete this project, including archaeological monitoring, if necessary? (If it includes irrelevant tasks or is missing tasks, it should be noted and scored lower.)
2. Are the tasks eligible for SHF funding? Read the list of Ineligible Projects and Costs on page 40 and pages 55-56 of the Application Guidebook.
3. If proposals or bids are attached, do they match the Scope of Work and Budget? If they are not attached, score at your discretion based on the information available.
4. Are the costs reasonable to complete this project? If not, clearly explain why you do not believe them to be reasonable.
5. For archaeology projects, is tribal consultation or curation included, if necessary?
6. Grant Administration is not required, however if included, is the cost reasonable and calculation provided here or in a proposal? (Up to 15% of the Project Subtotal is allowed, but an average range is 3% to 10%).
7. If contingency is included, is the amount reasonable for the type of project? (typically 10-20% of the Project Subtotal is the average range). For all physical work, contingency is highly recommended.
8. Is the cash match at least the minimum required?
 - Non-BIPOC projects:
 - 25% of the project total for non-profit/government owners

- o 50% of the project total for private and for-profit owners
9. If a cash match waiver for non-BIPOC projects is requested, is it justified?

****Note:** Projects requesting BIPOC cash match do not need to request a waiver.**

BIPOC Cash Match

If you are requesting the BIPOC cash match, please attach two letters of support from the BIPOC communities the project benefits. Please also indicate your category of cash match by selecting one of the options:

- BIPOC projects:
 - o 0% for non-profit/government owners with an annual operating budget up to \$250,000
 - o 5% for non-profit/government owners with an annual operating budget over \$250,000
 - o 10% for private owners

Scoring Rubric:

14-15 points = Very good

12-13 points = Good

11 points = Fair/average

10 points = Shows potential

0-9 points = Insufficient

Project Description – 20 points

This section illustrates your understanding of preservation and archaeology approaches, methodologies, and techniques as they relate to your project (1500 word limit).

Verify that the project description correlates directly with the scope of work. If you listed an activity or task in the scope, describe it in this section.

Your description should make clear that your project meets the [Secretary of the Interior's Standards and Guidelines for Archaeology and Historic Preservation](#) and/or the [Colorado Cultural Resource Survey Manual](#).

1. List the steps you completed that led to this grant project.
2. Clearly explain this proposed project:
 - Describe the tasks that will be completed.
 - Explain how the components of the project will be executed.
 - Discuss why the specific treatments, strategies, or methods were chosen.
3. Briefly list future phases or programming directly related to this project.
4. Describe how you will financially commit to this project or resource going forward.
5. Depending on your type of project, attach photos that:
 - Illustrate the condition of the resource(s), including overall and detailed views; or
 - Illustrate a representative sample of the resource(s) to be researched; or

- Illustrate potential outcomes of the project; and
 - Include captions.
2. If previous planning documents exist for this project, attach the most recent and relevant sections of those documents that support this proposed project (e.g., historic structure assessment, construction documents, survey forms, reports).

SCORING CRITERIA – Project Description – 20 points

1. Based on past work and future plans, is this proposed project the next logical step?
2. Evaluate how well this section clearly explains the tasks listed in the Scope of Work and Budget, how the components of the project will be accomplished, and why the specific treatments, strategies, or methods were chosen.
3. Did the applicant identify committed financial sources for future work or continuing maintenance, such as future repainting or the cost to continue to host a website?
4. How well does supporting documentation 1) illustrate the condition of the resource(s), 2) provide a representative sample of the resource(s) to be researched, 3) demonstrate potential outcomes of the project, and 4) illustrate on-going success? Please note: Historic Structure Assessments are not a prerequisite for construction projects.
5. Does the Project Description correlate with the Scope of Work? If not, list the differences.
6. Does the Project Description make clear that the project meets the Secretary of the Interior's Standards and Guidelines for Archaeology and Historic Preservation?

Scoring Rubric:

- 18-20 points = Very good
- 16-17 points = Good
- 14-15 points = Fair/average
- 13 points = Shows potential
- 0-12 points = Insufficient

Urgency – 15 points

This section illustrates the critical need for completing this project (1000 word limit).

Provide the following information, as it may apply to your project:

1. The physical conditions of the resource that make the project urgent. For example, if the grant is not funded now:
 - The conditions that could cause a public health or safety concern.
 - The conditions that will quickly deteriorate.
 - The conditions that will further damage the resource.
2. All current or potential threats to the resource(s) or program.
3. Any community participation, partnerships, or cash match funds that might be in jeopardy or dependent on this grant.
4. Whether this project will be delayed if this grant is not awarded.
5. Other valid reasons for urgency.

SCORING CRITERIA – URGENCY – 15 points

For the following questions, evaluate the level of urgency.

1. How urgent are the physical conditions of the resource (e.g., if the grant is not funded now will it cause a public health or safety concern, will it quickly deteriorate, or will further damage occur)?
2. How urgent are the external threats to the resource(s) or program? (e.g., proposed development, vandalism, lack of political support, aging community members)
3. What community participation, partnerships, or cash match funds are in jeopardy or dependent on this grant being awarded?
4. Will this project be delayed if this grant is not awarded?
5. Did the applicant identify other compelling reasons for urgency?

Scoring Rubric:

- 14-15 points = Very good
- 12-13 points = Good
- 11 points = Fair/average
- 10 points = Shows potential
- 0-9 points = Insufficient

Public Benefit, Project Promotion, and State Preservation Plan – 20 points

This section illustrates: (1) how the public benefits from and supports the project (750 word limit), (2) how you will promote the project (300 word limit), and (3) the project's relationship to the [Colorado Statewide Preservation Plan](#) (200 word limit).

Community Support & Benefit of Project

1. Explain how the public supports and benefits from this project. Things to consider:
 - The use of the resource or project products.
 - The source(s) of the cash match and whether it was provided by the community.
 - Non-monetary ways the community supports this project.
 - Enhancement of historic preservation, economic development, and heritage tourism.
 - Encouragement of existing or new partnerships.
 - Increasing historically excluded community engagement in preservation. For example, LGBTQ+, women, religious minorities, etc.
2. **Highly recommended:** Attach at least five recent letters of support (dated within the last six months) from people and organizations who will use this resource, community members, and elected officials.

Project Promotion

1. Explain how you will promote this project, such as:
 - Public events or celebrations
 - Physical and digital media
 - Presentations/tours

- Other

State Preservation Plan

1. Explain how this project will directly support at least two goals in the [2020 Colorado Statewide Preservation Plan](#).

SCORING CRITERIA – Public Benefit, Project Promotion, and State Preservation Plan – 20 points

1. For the following questions, evaluate the strength of public benefit and community support.
 - Will the project provide good public use or will the public be able to access the products developed with this project?
 - Is the cash match for this project provided by the community?
 - Does the project illustrate community support in ways other than monetary?
 - Will this project enhance public appreciation of historic preservation, economic development, and/or heritage tourism?
 - Are there good partnerships in place or will new partnerships be encouraged by this project?
 - Does this project benefit historically excluded communities and cultures? For example, LGBTQ+, women, religious minorities, etc.
 - Are letters of support attached? If so, do the letters of support demonstrate strong public support and are they from a variety of people and organizations who will use this resource, community members, elected officials, etc.? (Applicants are instructed that letters are not required, but it is highly recommended to include at least 5.)
2. How well does the applicant plan to promote the project?
3. Does the applicant explain how the project will directly support at least 2 goals in the [2020 Statewide Preservation Plan](#)?

Scoring Rubric:

- 18-20 points = Very good
- 16-17 points = Good
- 14-15 points = Fair/average
- 13 points = Shows potential
- 0-12 points = Insufficient