

Ohio Historic Preservation Office **Workshops**

Historic Preservation for
Local Governments

September 13, 2011



OHIO HISTORICAL SOCIETY
Ohio Historic Preservation Office



OHIO HISTORICAL SOCIETY

With the support of the
Ohio Historical Society's
Ohio Historic Preservation Office
and the U.S. Department of the Interior's
Historic Preservation Fund

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Ohio Historic Preservation Office

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Visit us at www.ohpo.org



Historic Preservation for Local Governments

September 13, 2011
Old Town Hall, Glendale

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www.ohiohistory.org

Historic Preservation for Local Governments

Why Preserve—Why Local?

Technical Preservation Services Department

Nathan A. Bevil
Certified Local Government
& Preservation Services Manager

Ohio Historic Preservation Office
Ohio Historical Society
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Why Preserve? Why Local?

What is Historic Preservation?

- Maintaining the historic built environment
- Using older buildings to:
 - create jobs
 - renew communities
 - protect our natural resources
- Protect community aesthetics

A Brief History of Preservation



Independence Hall, 1816

Mount Vernon, 1853

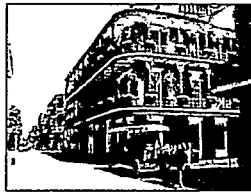


A Brief History of Preservation

Local Preservation Ordinances



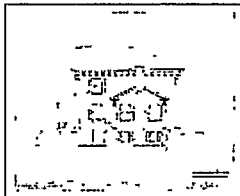
Charleston, 1833



New Orleans, 1936

Preservation's New Deal

- 1935 Historic Sites Act
- Historic American Buildings Survey

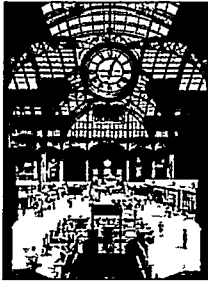


Modern Preservation Practice

- Urban Renewal in the Post-War U.S.
 - Housing Act of 1949 created cheap financing for housing and allowed for slum clearance in cities
 - Federal Highway-Aid Act of 1956 led to the creation of highways that drained residents from cities to the suburbs
 - As residents moved out, slums were created or perceived, creating more "reasons" to demolish older, inner-city neighborhoods

Modern Preservation Practice

Pennsylvania Station, New York City, 1963



Modern Preservation Practice

Pennsylvania Station, New York City, 1968



Modern Preservation Practice

- U.S. Council of Mayors meets in 1966 to discuss Urban Renewal
 - *With Heritage So Rich* is published the same year, outlining preservation policy
- 1966 National Historic Preservation Act
 - Created National Register and Section 106 process
 - Formally established Federal programs to *protect* historic resources

Modern Preservation Practice

Grand Central Terminal, 1913



Modern Preservation Practice

*Penn Central Transportation Co.
v. New York City*
1978



Why Local Preservation?



Preservation is Sound Public Policy

- Local government and citizens declare that they wish to save their unique and historic sites
- Local ordinances provide legal protection to historic sites and structures
 - Program is tempered by due process and a respect for private property rights
- Policies and programs are created at the local level, ensuring public input
- Local policy taps into your knowledge of the local community

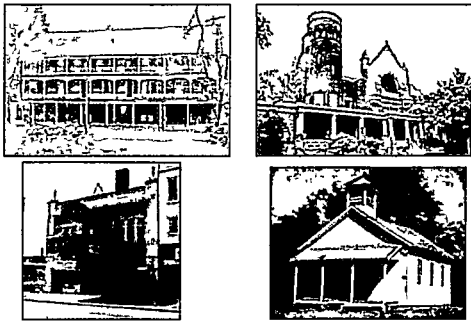
Preservation is Sound Environmental Policy

- Keeps debris out of landfills by recycling historic buildings
- Reduces sprawl and commute times by revitalizing dense, mixed-use neighborhoods
- Maintains current infrastructure
- Promotes healthier living through walkable communities

Preservation Benefits the Local Community

- Protects community history as recorded in the built environment
- Promotes human-scale development
 - Walkable, healthy neighborhoods
- Provides opportunities for public education
 - Student programs in local schools
 - Adult education through walking tours and brochures

Local Preservation is Strong





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Historic Preservation for Local Governments

Obtaining & Maintaining Certified Local Government Status

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Obtaining & Maintaining Certified Local Government Status

What is Certified Local Government?

- Federal-state-local partnership for protecting historic resources
- Emphasizes local responsibility for documentation of historic resources and for providing design review services
- Highlights the importance of local review in National Register nomination process



Brief History of Certified Local Government

- 1966 Historic Preservation Act
 - Created National Register of Historic Places and Section 106 Process to protect listed properties
- Cities desired local input in National Register process
- 1980 Amendments to 1966 Act created the CLG program

What Does CLG Mean For You and Your Community?

- Eligibility for CLG Grants
- Eligibility for training and technical assistance
- Review authority for local National Register nominations
- Additional benefits from Ohio Historic Preservation Office (OHPO)

How do I Obtain Certification?

- If you do not already have an established local ordinance and preservation program
 - Submit ordinance to OHPO before official council vote to ensure it meets federal and state guidelines
 - Run everything past attorney
 - After passage by council, submit to OHPO
 - Finish final paperwork
 - National Park Service review and approval

How do I Obtain Certification?

- If you have an established local ordinance and preservation program
 - Submit materials to OHPO for review
 - Make any necessary changes to meet federal and state guidelines
 - Resubmit materials along with agreement to certification
 - Final OHPO Review
 - National Park Service review and approval

How to Maintain Certification

Develop a Plan of Action

- Develop a realistic list of commission's goals
 1. Survey historic properties
 2. Identify eligible individual properties and historic districts for local listing
 3. Establish new landmarks and/or historic districts
 4. Develop design guidelines for historic districts and landmarks
 5. Education
- Establish timetable and performance measures to keep track of commission's progress



Commission Meetings

- Hold meetings at regular intervals, at a regularly scheduled time, in an accessible location
- Meetings must be announced beforehand to ensure interested citizens and participants are informed
 - Online
 - Newspaper
- Agenda must be included with announcements
 - List all cases coming before commission
 - You must keep to agenda when meeting—no surprise applications or agenda items

Commission Meetings

- Maintain complete, organized records to ensure compliance with due process requirements
 - Ensures that all affected parties are forewarned of action, and able to make comment
- Records help *prove* commission complies with due process requirements
 - Keep copies of announcement, agenda, letters to applicants, applications
 - Minutes
 - Reflect conversation held at meeting
 - Records votes, and justification for votes
 - Records accomplishments and problems
 - Information for showing benefits to city
 - Information for what needs to be fixed

Commission Membership

- Membership criteria is established in ordinance
 - Two professional members must be appointed
 - Ordinance may have other local regulations, including residency
 - "As available in community" provision means that all reasonable effort must be made to find accredited professionals
- State review maintains certification
 - Performance Evaluation notes whether professionals have been appointed
 - Yearly training proves that every member is aware of current trends
 - Replacement process (within 60 days) ensures that the commission is not operating at a disadvantage

Survey & Inventory

- Survey of Historic Resources
 - Establishes what resources are in community
 - Intensity depends on desired results
 - Reconnaissance – general overview of town
 - Intensive – Ohio Historic Inventory/Ohio Archaeological Inventory Forms and Survey Report
 - Important to act on collected survey information



Survey & Inventory

- Historic Resources Inventory
 - The written results of resource surveys comprise your historic inventory
 - Inventory results are collected on Ohio Historic/Archaeological Inventory Forms
 - Official state forms for inventory of survey information
 - Required by CLG Guidelines for survey projects
 - Available from Ohio Historic Preservation Office

Local Designation

- Local designation of landmarks and historic districts provides means for real preservation
 - Local designation triggers design review for alterations/changes as defined in your ordinance
 - NOT the same as National Register nomination/listing
 - Listing should not be tied to National Register nomination

Local Designation

- Follow procedure for locally designating districts and individual landmarks
 - Hold public meetings and inform all affected property owners to ensure all parties understand designation
 - Follow criteria for local designation found in ordinance
 - All property owners in individual landmarks and historic districts are treated equally under designation
 - Process identifies contributing and non-contributing properties; design review is mandatory for all buildings within a district

Design Guidelines

- Local Design Guidelines vs. Standards
 - Standards are general criteria against which work can be measured
 - Local guidelines are specific instructions for meeting the standards for locally designated landmarks and historic districts
 - Guidelines don't necessarily dictate a single solution but can allow for various solutions within defined parameters

Design Guidelines

- District/Landmark specific guidelines
 - Responds to survey results by referencing specific styles and details common to the district or landmark
 - Interpret Standards/Review Criteria in district
 - Should stress retention and repair
 - Replacing too much means you have a new building, not an historic one
 - Guidelines must be passed by City Council as law if commission is going to use them to make decisions
 - Public should be involved in writing design guidelines

Design Guidelines

- Design Guidelines can:
 - Help reinforce the character of a historic area and protect its visual aspects
 - Indicate the design approaches the community encourages or discourages
 - Serve as a tool for architects, designers, and homeowners in historic districts
 - Increase public awareness of design issues

Design Guidelines

- Design Guidelines cannot:
 - Limit or regulate where growth takes place
 - Control how space within a building is used
 - Guarantee high quality construction
 - Remove all reasonable use of property (taking)

Design Review

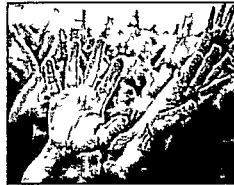
- Adhere to your ordinance and established rules & procedure
 - You are learning and establishing precedent
 - You are establishing authority
 - You must meet all due process requirements
- In making a decision focus on design guidelines and review criteria

Design Review

- All decisions must be grounded in either your ordinance or design guidelines that have been established by City Council
- Be mindful of takings, as defined in the Fifth Amendment to the United States Constitution
- Be careful with use of design guidelines
 - Owners must obtain a Certificate of Appropriateness even if following guidelines
 - Do not legislate taste
- Do not redo applicant's design

Education & Outreach

- Work with local government to ensure preservation policy is understood and enforced
- Work with property owners to make sure policies are understood and followed
- Work with citizens to appreciate historic preservation benefits to community





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Historic Preservation for Local Governments

Grant Writing and Certified Local Government Grants



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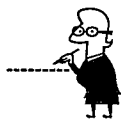
HISTORIC PRESERVATION FOR LOCAL GOVERNMENTS

Judy Krasniewski
Grants Manager
Education & Support Services
Ohio Historic Preservation Office

Grant Writing

&

Certified Local Government
Grant\$



GRANT WRITING ABCs

➤ GRANT = a formal request for funding

➤ GRANT APPLICATION = proposal

➤ GRANT ≠ fund raising

Grant writing ≠ Fund raising

start with project

\$s needed

identify funder

write application

research donors

identify their interests

general or specific

informal request or
letter

Funding Source\$ Eligibility Elements

- What types of projects are fundable?
- Who are eligible applicants?

Grantlish or Applicationese

The translation to application language:

Your Project

What do you want to do?
How is it going to be done?
When tasks are going to be done?
Who is going to do it?
How much does it cost?
What is the result?

In Application Language

Description
Method
Schedule
Personnel
Budget
Product/Outcome

Project Description

WORDS

↓
Text description
||

Narrative

concrete

Limit to aspects of problem
being addressed in proposal

NUMBERS

↓
Numeric description
||

Budget

realistic

Analogous to
activities

Description

- Be clear & concrete
- Limit text to this proposal
- Address project goals & objectives
- Identify need & proposed solution

Project Method

- How will the project be done?
- Which of the Secretary of the Interior's Standards will be met if it is a CLG grant?

Project Schedule

The when tasks will be done
project start date →→ end date

- List activities/tasks
- Include reports to funder
- Allow funder review time for draft products

Project Personnel

- Who is going to do the project?
 - ☐ in-house staff
 - ☐ hired consultant/contractor
 - ☐ volunteers



Project Budget

Shows understanding of:

- activities needed to accomplish project objective
- understanding of program's financial rules -- what grant can/cannot pay for, matching share

Project Result

- Outcome
- Product
- Deliverable



Application General Rules

- Ask questions or submit draft if allowed
- Use Selection Criteria as a guide
- If application checklist available, use it
- Meet submission deadline
- Provide number of application copies requested
- If not delivering in person, send so you have a tracking number

CLG Grant Funding Source

Historic Preservation Fund

- National Preservation Act of 1966
- As amended in 1980 – added local partnership
- Annual Congressional appropriation
- NPS allotment/distribution



How much \$?

NPS allotment to states & territories:

1. \$357,000
2. 1/3 on population; 1/3 on area; 1/3 on number of historic resources 50 years or older

If HPF >\$50 million

3. preservation initiatives

HPF Grant History – Ohio

<u>FFY</u>	<u>Ohio's Allocation</u>	<u>CLG Grant Level</u>
2002	\$ 926,537	\$ 92,654
2003	\$ 734,943	\$ 73,494
2004	\$ 757,221	\$ 75,722
2005	\$ 783,488	\$ 78,349
2006	\$ 789,605	\$ 78,961
2007	\$ 831,928	\$ 83,193
2008	\$ 892,834	\$ 89,283
2009	\$ 980,963	\$ 98,096
2010	\$1,093,803	\$109,380
2011	\$1,091,180	\$109,118
2012	\$?	\$?



Certified Local Government Grant

Legal basis for the grant partnership

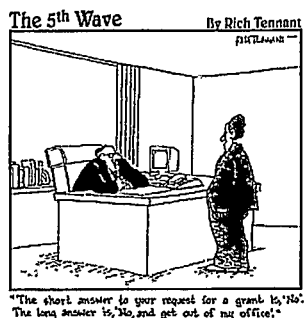
➤CFDA # 15.904

➤State program approved by NPS

Ohio Historic Preservation Office Administrator at State Level

- Only grant administered by OHPO
- Application assistance available
 - respond to questions
 - review draft applications
- Hands on administration during project
- Hand out = 10 step CLG grant administration process

This is **NOT** Our Philosophy



CLG Grant Uniqueness

- | | |
|----------------------|--|
| ▪ ELIGIBILITY | CLG communities only |
| ▪ MATCH | 60:40 |
| ▪ REIMBURSEMENT | After work is done |
| ▪ MINIMUM AWARD | \$5,000 [\$8,334 project]
1 exception in FFY 2012 |
| ▪ FUNDING CYCLE | Annual |
| Schedule | 17-month work period |
| ▪ PRODUCT ORIENTED | Result/Outcome |
| ▪ PERSONNEL | 48 FR 44716 qualified |
| ▪ SELECTION CRITERIA | Review basis |
| ▪ COMPETITIVE GRANT | Application & subcontracts |
| ▪ ADMINISTRATOR | Identified in application |

Annual Announcement

- OHPO annual funding priorities
- Examples of eligible activities
- Projected grant amount available
- Brief description of selection process
- Selection criteria
- Contact person for additional information
- Submission deadline

FFY 2012 CLG Grant Schedule

- Sept.13 Annual announcement
- Sept. 13 Application available
- January Reminder
- March 1 * Application deadline
- April OHSPAB/Award
- May 1 Project start date
- Sept. 30, 2013 Project end date

CLG Grant Administrator

- CLG Community
- Pooled [multiple CLGs]
- Third party administrator
[Must be identified in the grant application]

Project Products

- Product oriented – grant must result in something concrete
- Must meet appropriate Secretary of the Interior's Standards
- Must carry the NPS/OHS/OHPO funding acknowledgement and EEO statement
- 5 copies to OHPO/NPS with project completion report [3 hard copies & 2 on CDs]

CLG Grant – Eligible Projects

PLANNING

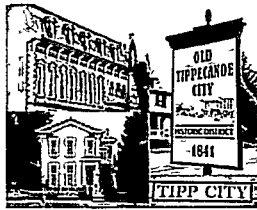
What resources you have
Public involvement
Set local goals & priorities

Types of Projects

Historic preservation plan
Updating local ordinance
Cultural resource management plan
Develop context for future survey & evaluation
Advance mapping & analysis technology such as GIS

Secretary of the Interior's Standards for Planning

Tipp City Historic Preservation Plan

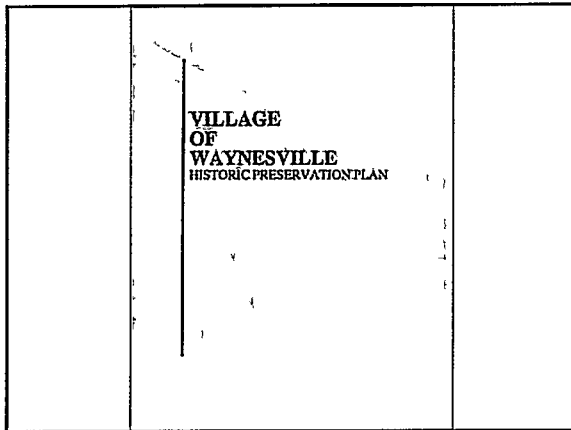


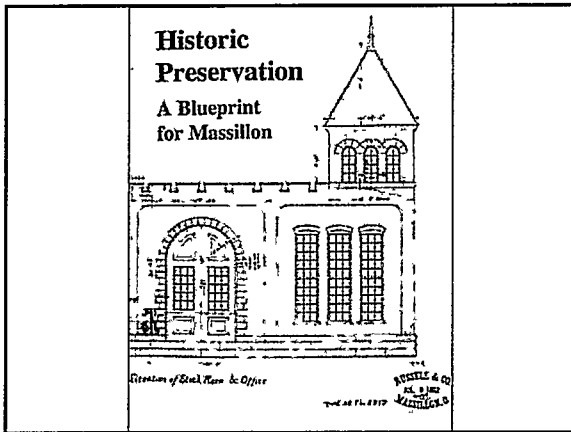


OHIO STATE REFORMATORY
Mansfield, Ohio

PRESERVATION MASTER PLAN

September 30, 1996





CLG Grant – Eligible Projects

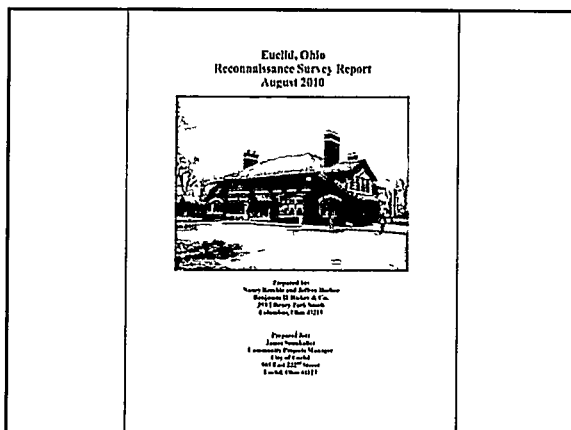
SURVEY

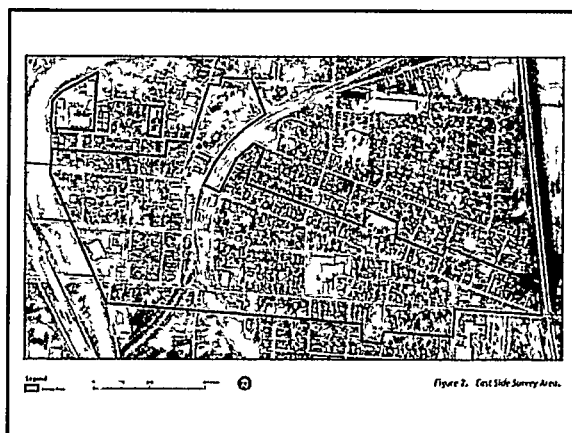
Identification & evaluation of resources
history-architecture
archaeology

Type of projects
Reconnaissance/Intensive survey
preparation of Ohio Historic Inventory or
Ohio Archaeological Inventory forms

Goal = determination for potential National Register eligibility

Secretary of the Interior's Standards for Identification & Evaluation





CLG Grant – Eligible Projects

REGISTRATION
Documentation of resources for eligibility for National Register of Historic Places & local designation

Types of projects
Preparing nominations & presenting to Ohio Historic Site Preservation Advisory Board or local commission for listing during project period

Preliminary Questionnaire submission required 3 weeks prior to grant application deadline for NR nomination projects

Secretary of the Interior's Standards for Registration

CLG Grant – Eligible Projects

PRE-DEVELOPMENT

Plan for a particular building or site

Project types

feasibility/adaptive reuse study
historic structure report
structural assessment report
development of bid-ready architectural drawings & specifications

Secretary of the Interior's Standards for Rehabilitation

FEASIBILITY STUDY for the CANAL WINCHESTER SCHOOL

Prepared for

College of Canal Winchester
Planning and Funding Department
35 South High Street
Canal Winchester, Ohio 43110

Submitted to
Frick Research Preservation Office
341 East National Street
Columbus, Ohio 43214-1116

Prepared by
Kathy Miller-Lane
Historic Preservation Consultant
112 Ashland Street
Columbus, Ohio 43214

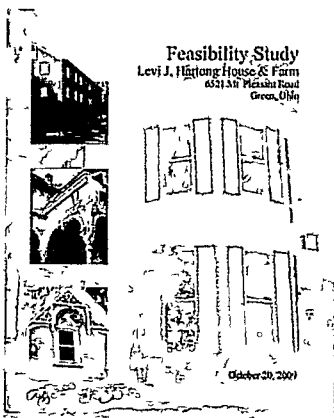
and
Andrew A. DeLoach
151 E. Main St., Ste. 206
Columbus, Ohio 43215

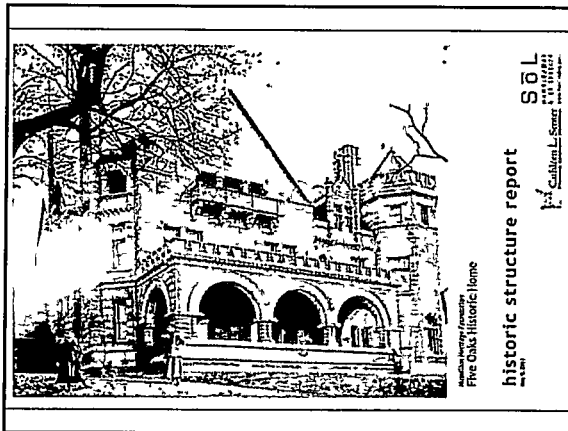
September 16, 2004

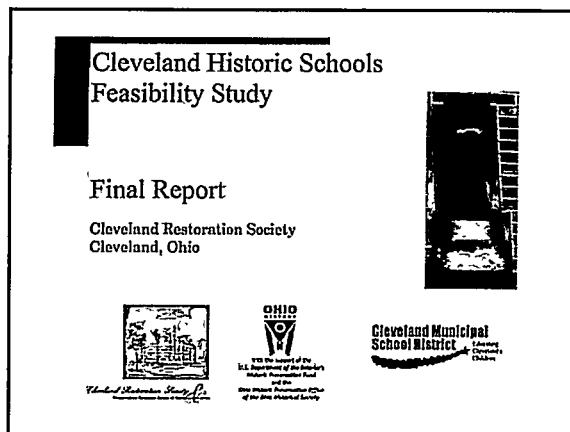


OHIO
DEPARTMENT OF
HISTORIC RESOURCES
151 E. Main St., Ste. 206
Columbus, Ohio 43215
www.dhr.state.oh.us

Feasibility Study Levi J. Hartung House & Farm 6521 S.W. Hickshire Road Greco, Ohio







CLG Grant -- Eligible Projects

DEVELOPMENT
Construction-related activities for restoration or rehabilitation of a National Register-listed property

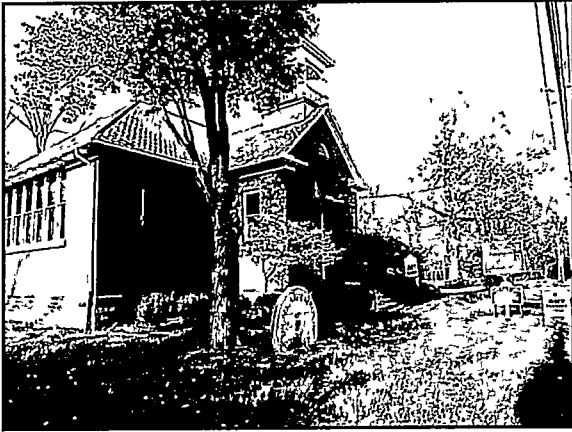
All specifications & drawings must be approved by OHPO prior to work

All work during project period & covenant term requires OHPO prior approval, regardless of funding source

Project sign acknowledging funding source required at site

Historic Preservation letter of agreement or covenant required prior to release of grant funds

Secretary of the Interior's Standards for Rehabilitation









CLG Grant – Eligible Projects

ACQUISITION

Purchase of a National Register-listed property threatened with demolition, impairment or other controllable damage

Contact grant manager for unique requirements such as appraisal

Secretary of the Interior's Standards for Rehabilitation

CLG Grant – Eligible Projects

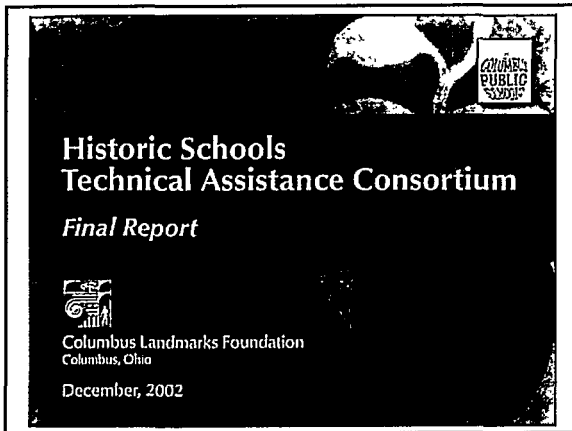
PUBLIC EDUCATION & OTHER

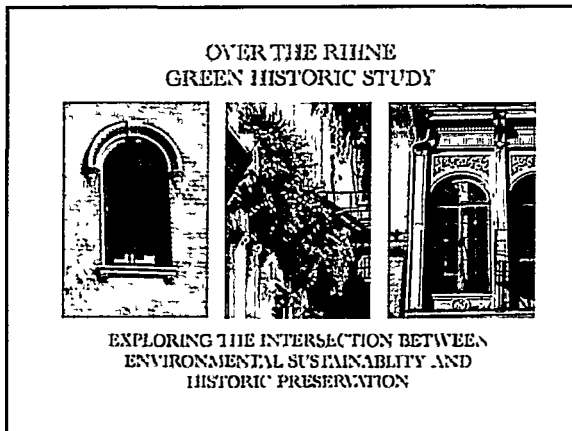
Education of public and community officials in historic preservation programs & treatment techniques

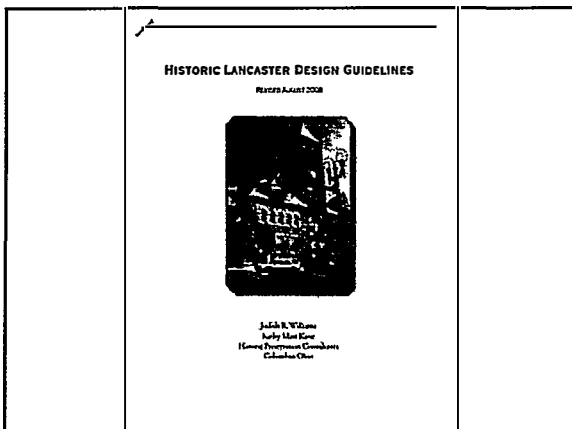
Project types

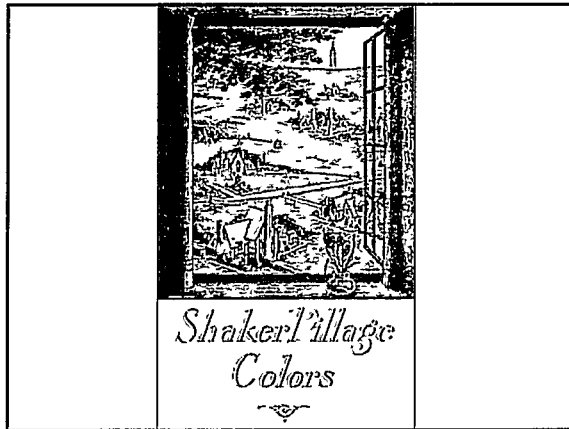
design guidelines
walking tour brochures
workshops & training

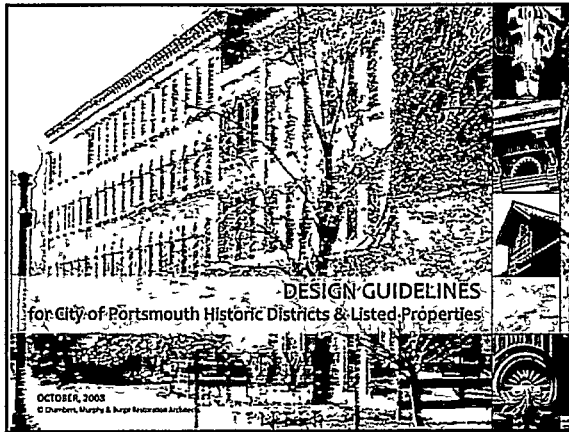
Secretary of the Interior's Standards for Historic Preservation

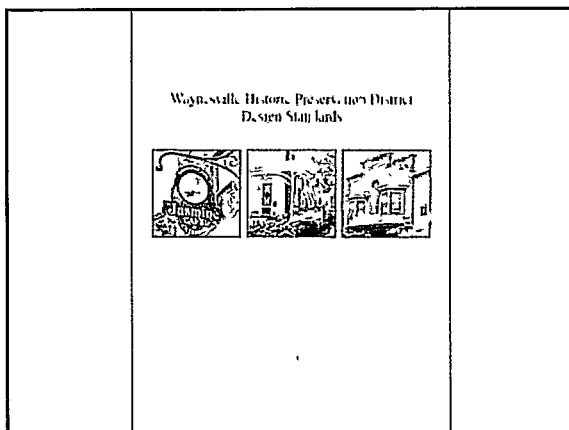












CLG Grant – CANNOT Fund

- Acquisition/repair of religious-owned property
- Archival research
- Curation/exhibition of artifacts after project period
- Honoria
- Interpretive expense\$
- Lobbying
- Fund raising
- Food/beverage\$
- Mitigation expense\$ [Section 106 consequences]

CLG Grant – APPLICATION

- Multi sections – straightforward
- Use selection criteria as guide
- Assistance available
- Ask questions
- Submit draft for review & comment
- Use complete application check list
- Meet submission deadline
- If sending, be able to track in case not delivered



CLG Grant – Project Co\$t

- 60:40 Match
60% of total project co\$t
- Personnel co\$t\$
dependent on how or if paid
 - ❖ In-kind
 - ❖ Ca\$h
 - ❖ Volunteer

CLG Grant -- Personnel Expen\$e\$

<u>Category</u>	<u>Who</u>	<u>Funding</u>
In-kind	→ your paid staff	CLG or match
Cash	→ hiring someone	CLG or match
Volunteer	→ nonpaid worker	Match only

CLG Grant --Valuing Volunteer Time

MUST BE INTEGRAL & NECESSARY PART OF APPROVED WORK

- Must get approved professional rate from OHPO if performing function in profession or use minimum wage rate of \$7.25
- If performing function out of professional field, minimum wage rate must be used
- Employees of consultants may not donate services as volunteer time
- Cannot count time of students if they are on federally-funded work/study or student loan program
- No prison labor

CLG Grant – Budget NO-NO\$

- Duplicate match
- No federal funds except CDBG
- Paid staff cannot augment with volunteer time
- Consultant employees restriction
- Food & beverage expenses [other than per diem]
- Students on federal work study or federal loan volunteer time cannot count
- Prison labor cannot be used

CLG Grant Administration

- OHPO can provide sample materials:
RFPs, subcontracts, time sheet formats
& then reviews grant specific prior to issuance
- OHPO reviews drafts of products
outlines, draft reports, drawings &
specifications

Purpose: to insure products meet the Secretary of the Interior's Standards

CLG Grant -- BENEFITS

- Specific project addressing local need
- Leverage other interest & fund\$
- Public awareness & involvement
- Public education opportunity
- Institutionalizes partnerships
- Preservation of community heritage

CLG Grant Program Continuum

- Find out what resources you have & what you want to promote =
PLANNING
- Identify & evaluate historic sites in your community = SURVEY
- Protect what you have = NOMINATION
- Determine best use of the properties = PRE-DEVELOPMENT
- Restore or rehabilitate properties = DEVELOPMENT
- Educate, promote, assist commission = PUBLIC EDUCATION



OHIO HISTORICAL SOCIETY

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Historic Preservation for Local Governments

Commission Relations with Local Government and the Public

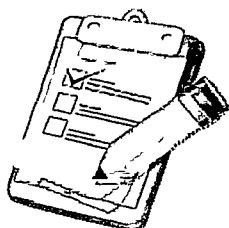
Technical Preservation Services Department

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Commission Relations
With
Local Governments
and Communities

Getting Your Program in Order



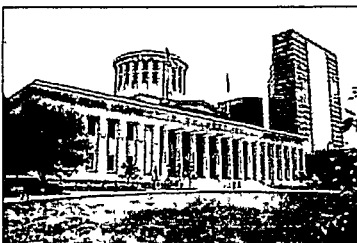
Getting Your Program in Order

- Know your ordinance and rules document
 - Your ordinance should be concise but complete, providing you with all the necessary powers to carry out your duties
- Know your role within the community and the local government
 - You are the local historic preservation experts
 - Everything you do should help historic property owners and other citizens understand historic preservation
 - With your ordinance, historic preservation is a declared local public policy
- Know your accomplishments
- Know your weaknesses

Steps in Organizing Your Preservation Program

- A *survey and inventory* is necessary to understand what resources you have in the community
- *Locally designated* landmarks and/or historic districts are where boards and commissions gain the ability to protect historic resources
- *Design guidelines* provide interpretation of your design review criteria
- An *historic preservation plan or plan element* will ensure that the local government has historic preservation policy in mind when completing its regular functions

Government Relations



Government Relations

- Make yourself known and establish your authority to the local government
 - Again, you are the local preservation experts, and the official government body
- Establish working relationships with important local figures
 - The mayor, manager, council, and any other boards or departments relevant to your work
- Share your goals and accomplishments
 - How can your regulatory authority assist in other departments and programs?

Working with the Mayor

- Schedule regular meetings, at least yearly, to discuss major projects and policies
- Provide training on historic preservation
- Keep mayor informed about projects, particularly those with political consequences
- Use your annual report to highlight accomplishments



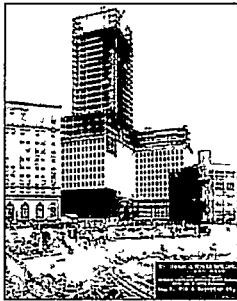
Working With Council

- Get a council member appointed to serve as liaison to board/commission
- Provide preservation education to council
 - Help them understand what it is that you do and why historic preservation is important to the community
- Develop mutual goals
 - How can historic preservation play a part in stated policies and plans adopted by the council?
- Regularly update council on new plans and prerogatives
 - Like the mayor, council needs to be aware of projects that may have some political ramifications

Working With Local Departments

- Meet with department heads and chairs
 - Planning, building, zoning, code enforcement, development
- Provide preservation training to all departments
 - They need to know their role within the historic preservation process
- Work to clarify your duties and procedures
 - Other departments need to know if the Certificate of Appropriateness is necessary before issuing permits
- Find ways to help reach goals
 - How can historic preservation help other departments reach their goals?

Building Community Relations



Moving Beyond Design Review

- Involving the community in performing survey work
- Exploring educational opportunities
 - Walking tours, brochures, working with local schools to develop educational programs
- Work on National Register nominations
- Integrating preservation into the community
- Keep informed on trends in historic preservation field
 - Including technical information that would be helpful to your design review process

Outreach to Property Owners

- Develop design guidelines that inform design process
 - Help property owners understand design review process and goals before starting a project
 - Guidelines should clarify how the commission will interpret ordinance-based criteria for evaluation
- Instruct new historic property owners
 - Provide training; prepare a welcoming packet of information to be distributed by realtors/banks
- Sponsor programs to educate property owners on how to appropriately work with historic buildings
 - Sponsor a Building Doctor Clinic
 - Attend an educational program and provide training yourself

Outreach to General Public

- Help citizens appreciate their architectural heritage through tours and educational programs
 - Encourage all citizens to attend meetings—they are held publicly for all to attend
- Provide information that all property owners can use
 - Energy audits and efficiency information
- Work with teachers to provide preservation education to children
 - Help integrate preservation into local history programs
 - Work on developing curriculum that uses historic buildings to teach non-history subjects

Outreach to Other Stakeholders

- Develop a rapport
- Identify areas for collaboration
- Provide clear information and evidence
- Use annual report to highlight successes

Outreach to Non-Profits

- Historical Societies
 - Information on historic buildings
 - Pictures and documentation for buildings
- Preservation Non-Profits
 - Help with technical assistance
- Community Development Corporations
 - Help develop economic and community development programs centered on historic preservation
- Main Street Program
- Neighborhood Associations

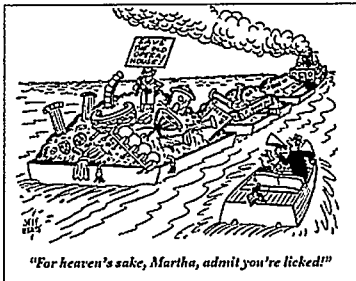
Outreach to Local Businesses

- Highlight tax incentives for historic rehabilitations
 - Understand both benefits and regulations
- Develop a revolving loan program for façade improvements
- Work with local businesses for blanket approvals for paint color or related small-scale renovations

Outreach to Realtors

- Conduct training for realtors on benefits and realities of historic districts and landmark designation
- Work with realtors to promote historic buildings to potential buyers
- Provide educational materials for realtors to distribute to potential buyers and new home owners

When it All Goes Wrong





OHIO HISTORICAL SOCIETY
Ohio Historic Preservation Office

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Historic Preservation for Local Governments

Preservation Economics

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Preservation Economics

Preservation Economics

- Historic rehabilitation has a significant positive effect on both the community and the local economy
- Your board/commission plays a role in both regulating that development as well as educating the public on the benefits of rehabilitation
- There are a variety of financial incentives to assist in rehabilitating historic buildings

Impact of Rehabilitation on Jobs

- More jobs are created by labor-intensive rehabilitation projects
 - In new construction labor and materials are split 50-50
 - In rehabilitation labor and materials are at 70-30
- Rehabilitation employs more skilled, higher-paying jobs
 - Projects require specialized knowledge of materials and techniques for appropriate rehabilitation
- Greater return on local job investment
 - Local labor spends pay locally
 - Local labor is taxed locally



Impact of Rehabilitation on the Local Economy

- Variety of building types and rent levels can create new business incubators downtown
- Wide range of building types and costs help in the development of a diversity of housing options
- Historic districts can help raise property values
 - Historic districts create a protection on individual investment
- Historic preservation is an incremental fix for large-scale neighborhood and city-wide revitalization
 - The local government is not required to provide a large up-front investment
 - Projects from a variety of developers and agencies spreads the burden around

Homeowner Rehab Benefits

- Historic materials are more durable, and can be more easily repaired or replaced than their modern counterparts
 - The initial cost may be more, but it is more cost effective to maintain historic materials
- Energy efficiency of historic building design can lower energy costs
 - Everything from awnings, shutters, and operable windows to the actual building site can increase efficiency
- Historic Districts and individual landmark designation can help improve the stability of a homeowner's investment



Business Benefits in Rehab

- Rehab projects may be eligible for tax credits
- Grant and loan programs for rehab may be available or may be created
 - Façade loans, revolving loan funds, etc.
- Downtown location can increase patrons through walkable community development
- Historic buildings are adaptable
 - With over 50 years of different uses, buildings can change to meet new needs

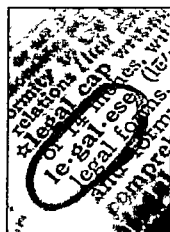


Board/Commission Responsibilities

- Provide education to property owners about both ordinance requirements and proper maintenance
 - How to care for historic building materials
 - Technical information on how to deal with deterioration and other problems
 - Ordinance provisions against improper maintenance and penalties for non-compliance
 - Sponsor home inspections to inform property owners of issues they will have to address

Ordinance Requirements

- Minimum maintenance requirements create a standard for building upkeep
 - Require that vacant building is secured and protected from weather and vandals
 - Requirements place responsibility for building on owner
 - Requirements may be coupled with penalties that allow the city/village to secure the building and charge the property owner



Ordinance Requirements

- Hardship claims are the property owner's recourse for a property beyond repair
 - Claims indicate that there is no economically feasible alternative to their proposal that meets the guidelines
 - Owner must prove that they bought the property with no intent to demolish, and that all reasonable alternatives have been exhausted
 - Burden of proof is placed on the owner

Sources of Funding

Tax Credit Programs

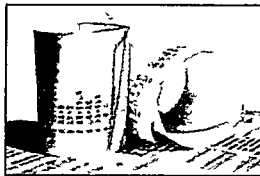
- Federal 20% Historic Rehabilitation Incentive Tax Credit
 - Building must be listed individually on the National Register, or as contributing to an historic district
 - Building must be depreciable/income-producing
 - Rehabilitation must meet the Secretary of the Interior's Standards for Rehabilitation
 - Rehabilitation must be substantial
 - Work is reviewed by the Ohio Historic Preservation Office and approved by the National Park Service

Tax Credit Programs

- 25% Ohio Historic Preservation Tax Credit
 - Administered by Ohio Department of Development in partnership with the Ohio Historic Preservation Office and the Ohio Department of Taxation
 - Competitive program, with limited funding both for individual projects and for the program overall
 - Work must comply with the Secretary of the Interior's Standards for Rehabilitation

Tax Credit Programs

- Federal and State Low-Income Housing Tax Credit
- Federal and State New Market Tax Credit Program
- Federal Brownfield Cleanup Tax Credits



Easement Programs

- Federal Easement Programs
 - Income and estate tax deductions for charitable contribution
 - Eligible for open spaces or building façades
 - Entire exterior of building must be protected
 - Organization must be established or appointed to receive the easement
- Local Easement Programs

Revolving Loan Program

- Money is distributed by an organization for rehabilitation
- Loan amount plus interest charged is returned to organization
- Loans may be from a foundation/nonprofit, or from local government
- Details of program depend on community need
 - Façade loan program may have small amounts for improvements
 - Larger rehabilitation projects may be feasible if funds and program allow

Funding Partnerships

- Main Street program
 - National Trust downtown revitalization program, administered by Heritage Ohio
- Community Development Corporations
 - Local nonprofit organizations that provide programs, services, and otherwise promote and support community development
- Habitat for Humanity
 - Low-income housing rehabilitation program

Federal Grant Programs

- Certified Local Government Grants*
- Neighborhood Stabilization Program
- Community Development Block Grants
- Department of Agriculture Rural Housing and Development
- National Endowment for the Humanities Challenge Grant*
- Preservation Technology and Training Grants
- Save America's Treasures
- Preserve America

State Grant Programs

- Department of Development
 - Comprehensive Downtown Revitalization (Tier I & II)*
 - Economic Development Program
 - CDC Microenterprise Business Development Program
- Ohio Arts Council
 - Sustainability
 - Project Support
- Governor's Office of Appalachia
 - Area Development
 - Commercial Investment Fund
- Clean Ohio
 - Brownfield Revitalization
 - Farmland Preservation

Grant Programs

- National Trust for Historic Preservation Programs
 - National Trust Community Investment Corporation
 - Jeffris Heartland Fund
 - The Johanna Favrot Fund for Historic Preservation*
 - The Hart Family Fund for Small Towns
 - Cynthia Woods Mitchell Foundation for Historic Interiors*
 - National Trust Preservation Funds*
- Foundation Grants
 - Geographic and program specific grant programs

Questions





OHIO HISTORICAL SOCIETY
Ohio Historic Preservation Office

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Historic Preservation for Local Governments

Design Review, Green Building Practices and the Secretary of the Interior's Standards for Rehabilitation

Technical Preservation Services Department

Ohio Historic Preservation Office
Ohio Historical Society

Judith L. Kitchen, Department Head

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6/11

The Importance of Design Review:

Our Shared Responsibility
for Historic Places

The Secretary of the Interior's Standards for Rehabilitation



Helpful guidance for the successful rehabilitation of
historic buildings

Rehabilitation:

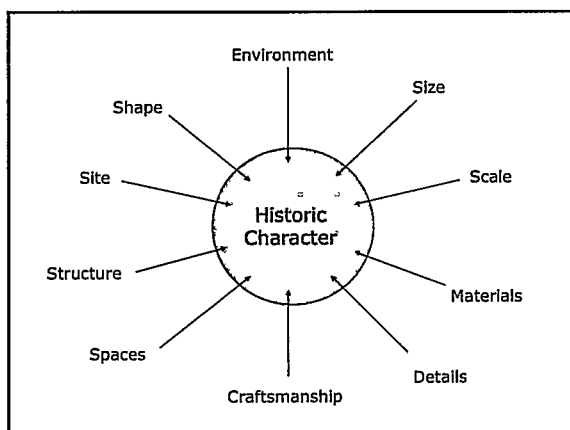
Returning a property to a state of utility through repair or alteration, making possible an efficient contemporary use, while preserving features significant to its history, architecture and culture.

Standards for Rehabilitation

The Standards for Rehabilitation are ten common-sense principles emphasizing the preservation of historic character, repair rather than replacement and compatibility of alterations.

They apply to all types of historic buildings.

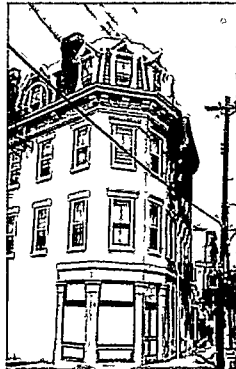
They pertain to exterior and interior features and spaces.



Standard 1 - Find a compatible use.



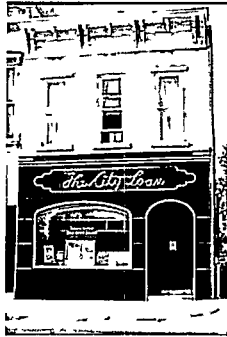
Standard 2 - Preserve historic character.



Standard 3 - Don't create a false sense of history.



Standard 4 - Preserve additions that have gained significance.



Standard 5 - Preserve distinctive features.



Standard 6 - Repair rather than replace. Match closely if repair is not possible.



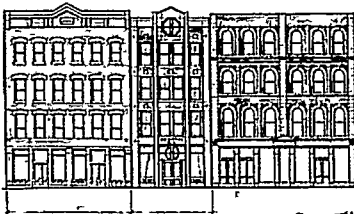


Standard 7 - Do not cause damage to historic building materials.

Standard 8 - Protect significant archeological resources.



Standard 9 - Ensure that additions are compatible.



Standard 10 - Ensure that additions are reversible.

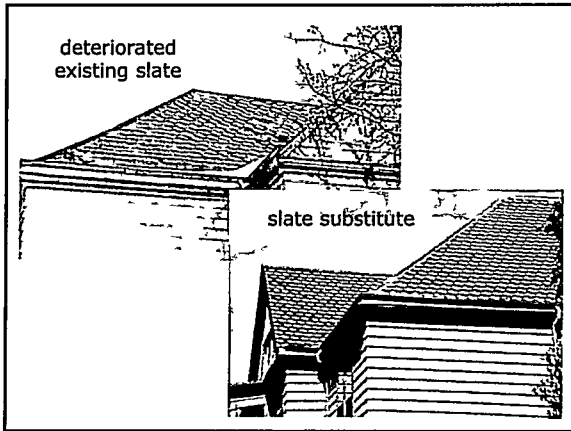


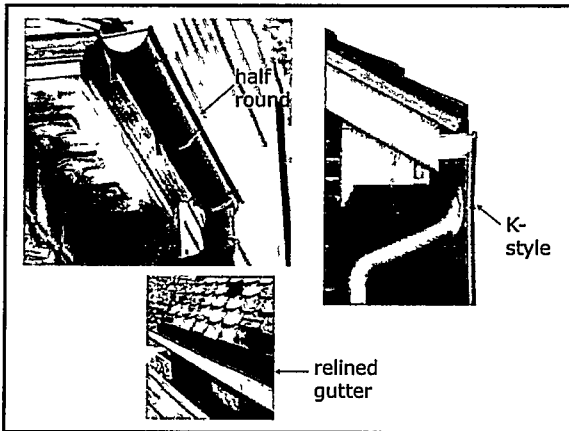
Design Guidelines 1

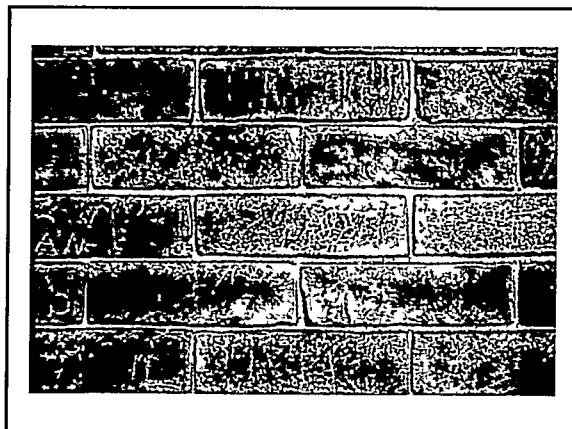
- Learn from the experiences of other similar-sized communities, so that you have a realistic timetable and budget.
- There will be some overlap, but each historic building and district will likely need its own set of guidelines.
- Make the guidelines easy for a property owner to understand but specific enough for an architect to use effectively.
- Make the guidelines publication or booklet itself well-organized and well-designed, so that it is attractive, easy to handle and use.
- Address both rehabilitation and new construction, including additions and new buildings.
- Include basic information on the history of the buildings and their physical character—what makes them historic.
- Include information on how to research a historic property in your community.

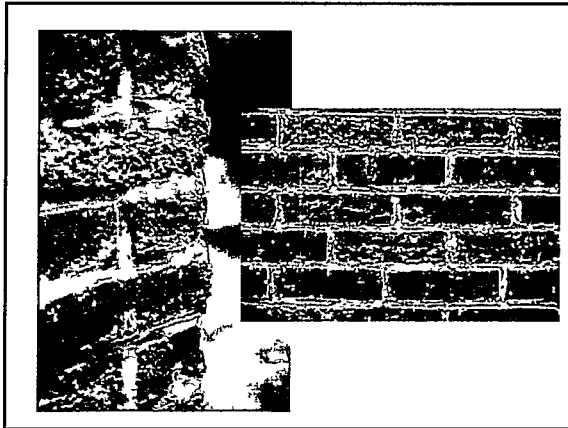
Design Guidelines 2

- Stress retention of historic materials over replacements or cover-ups and the wisdom (and economy!) of making fewer, rather than more, changes to properties.
- Include recommended and not-recommended treatments for building materials and parts, but stress the recommended methods.
- Allow for some flexibility, particularly in areas such as signage and paint colors. Also recognize that every time period has significant architecture, and most historic areas have important later buildings.
- Produce the guidelines in cooperation with neighborhood groups, with plenty of input from property owners.
- Distribute the guidelines widely to owners, libraries, real estate sales offices and neighborhood gathering places, and conduct workshops or programs about using the guidelines.
- Learn from your mistakes, updating the guidelines as needed. Better solutions to problems and better products are constantly being found and produced.

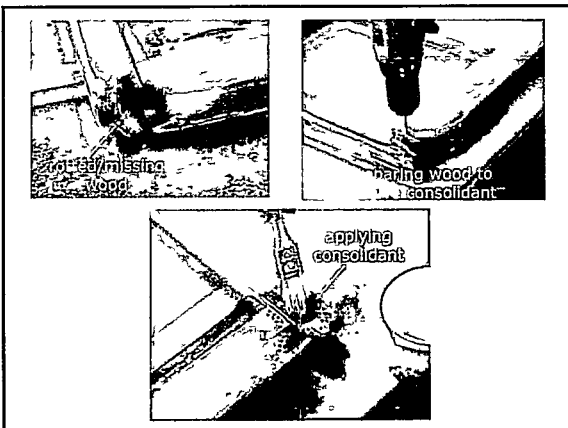


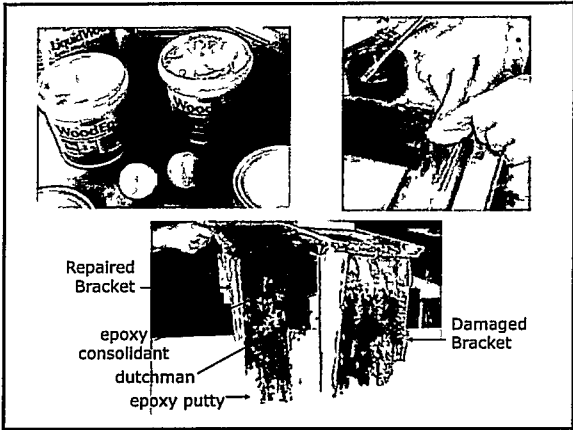




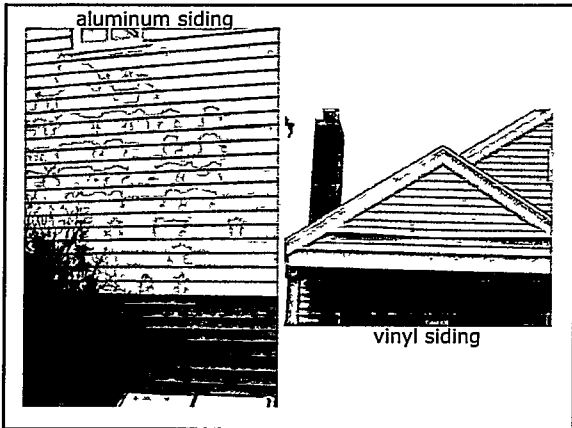


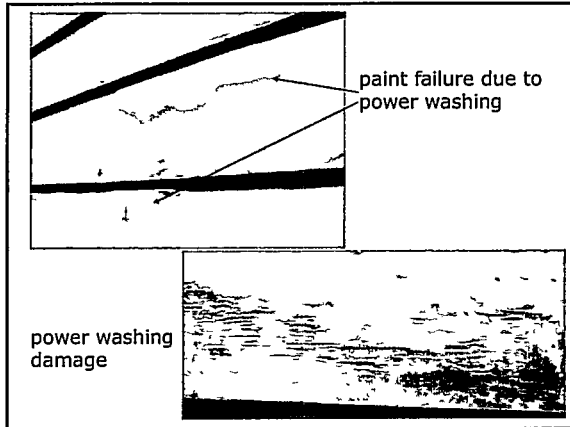


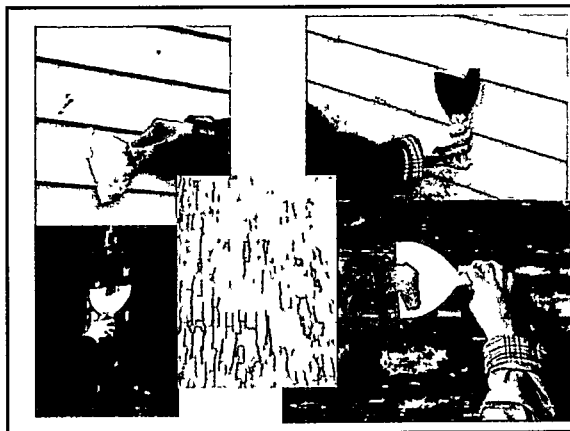


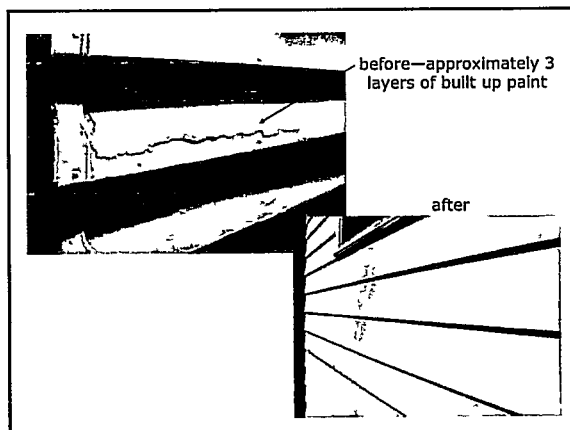


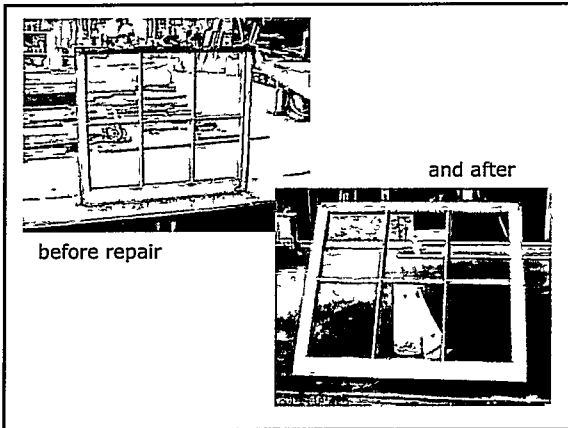














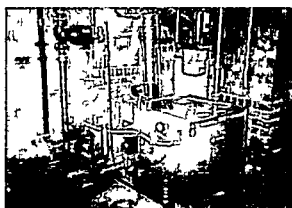
Green Building Practices 1

- Use local labor and materials.
- Repair and reuse, don't remove and throw out.
- Recycle any discarded materials.
- Inspect your building often and make needed repairs immediately, so that small projects do not turn into major ones.
- Use your building's passive, built-in energy saving features.
- Call on professionals to assess, remove, encapsulate or repair dangerous materials or building systems.
- Use environmentally safe, people-friendly products, equipment and procedures.

Green Building Practices 2

- Use and keep caulking and weatherstripping in good repair.
- Use storm windows rather than discarding and replacing repairable historic windows.
- Install attic insulation first, with proper ventilation, then basement insulation and ventilation, and pipe and duct insulation.
- Use extreme caution if you decide to install wall insulation, to avoid creating problems.
- Set the thermostat as low as possible (wear a sweater) in the winter and as high as possible in the summer.

updating and reusing
original features



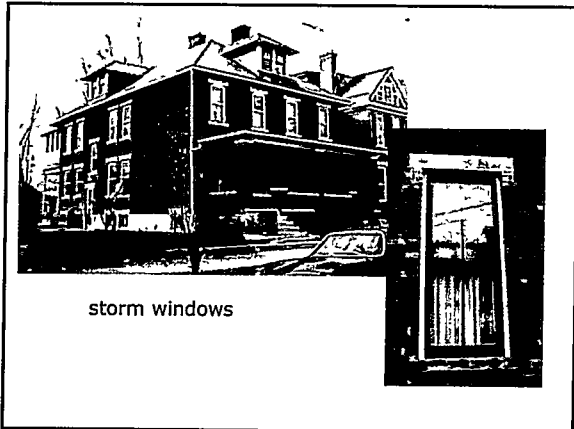


caulking

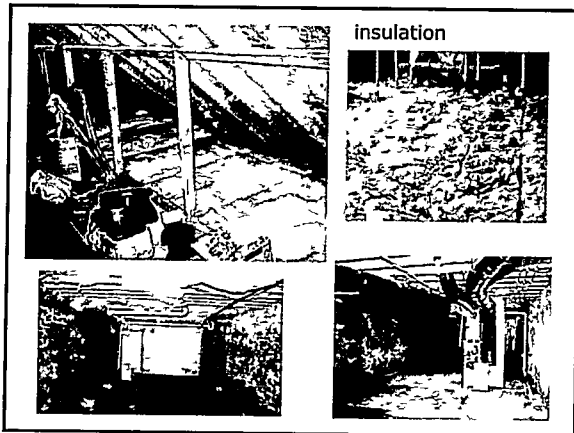


weatherstripping

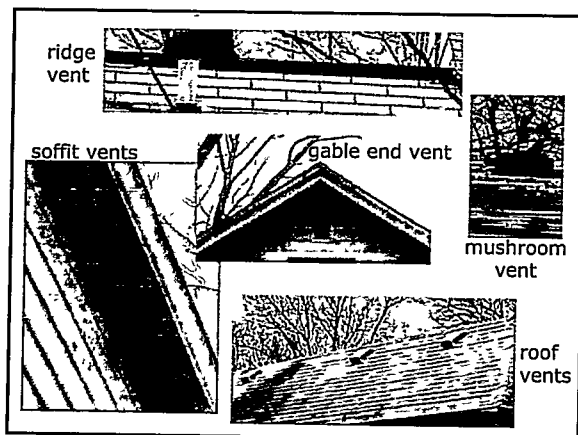




storm windows



insulation



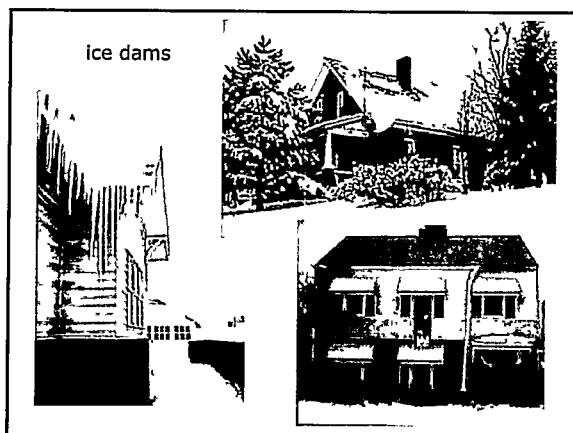
ridge vent

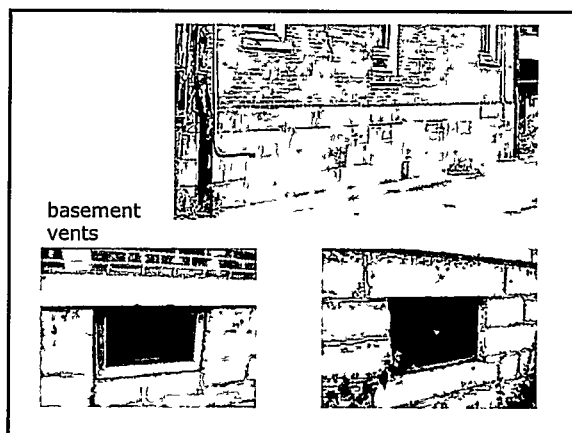
soffit vents

gable end vent

mushroom vent

roof vents





Ohio Historic Preservation Office
Ohio Historical Society



Historic Preservation for Local Governments

Appendices

Federal Requirements for Certification of Local Governments

A community must address the following minimum goals to demonstrate to the State and NPS that they are committed to historic preservation.

- Enforce appropriate State or local legislation for the designation and protection of historic properties. In most cases this is done in the form of a local ordinance.
- Establish a qualified historic preservation commission.
- Maintain a system for the survey and inventory of local historic resources.
- Provide for public participation in the local historic preservation program, including participation in the National Register process.
- Follow any additional requirements as outlined in the State's Procedures for Certification.

State Requirements for Certification of Local Governments

- A. The local government shall ***enforce appropriate state or local legislation for the designation and protection of historic properties.*** The minimum requirements for local legislation for designation and protection of historic properties by certified local governments in Ohio are:
1. A statement of purpose
 2. Definitions
 3. Specific membership and duties of review body
 4. Designation procedures for local landmarks and districts
 5. Criteria for designation of local landmarks and districts
 6. Provisions for public hearing on designation, and public notification
 7. Mandatory review of alterations, demolitions or new construction to listed landmarks and within listed historic districts
 8. Specific guidelines to be used by the review body, such as the Secretary of the Interior's *Standards for Rehabilitation* and the Advisory Council on Historic Preservation's *Treatment of Archaeological Properties: A Handbook*
 9. Specific timeframes for reviews and consideration of alternatives
 10. Penalties for non-compliance

As a general guideline the statute must contain criteria which will substantially achieve the purpose of preserving properties of historic significance. The OHPO can provide examples of local ordinances to use as models.

- B. The local government shall ***have established an adequate and qualified historic preservation review commission by State or local legislation.***

The National Historic Preservation Act Amendments of 1980 defines a historic preservation review commission as a "board, council, commission, or other similar collegial body which is established by State or local legislation as provided in Section 101(c), (1) (B), and by the members of which are appointed, unless otherwise provided by state or local legislation, by the chief elected official of the jurisdiction concerned from among –

- (A) professionals in the disciplines of architecture, history, architectural history, planning, archaeology, or related disciplines, to the extent such professionals are available in the community concerned, and

- (B) such other persons as have demonstrated special interest, experience, or knowledge in history, architecture, or related disciplines and as will provide for an adequate and qualified commission.

Minimum requirements for local review commissions for certified local governments in Ohio are:

1. At least 5 members, all of whom have demonstrated special interest, experience, or knowledge in history, architecture, or related disciplines.
2. At least 2 preservation-related professional members to the extent such professionals are available in the community (this shall include the professions of architecture, architectural history, history, archaeology, planning, or related disciplines).
3. At least 2 year terms of office which are staggered.
4. Rules of procedure, including a section addressing conflict of interest, established and made public.
5. At least 4 meetings per year, held at regular intervals, in a public place, advertised in advance and open to the public.
6. Review decisions made in a public forum, applicants notified of meetings and advised of decisions.
7. Written minutes of actions of the commission available for public inspection.
8. Written annual report of commission activities, cases, decisions, special projects and qualifications of the members, etc., kept on file and available for public inspection.
9. Vacancies on the Commission filled within 60 days, unless extenuating circumstances require a longer period. An extension may be given in writing upon petition of the city.

Duties of local review commissions included at a minimum:

1. conducting or causing to be conducted a continuing survey of cultural resources in the community according to guidelines established by OHPO;
2. making recommendations for designation of local landmarks and historic districts to the appropriate local governing body;
3. establishing and using written guidelines for the conservation of designated local landmarks and historic districts in decisions on requests for permits for alterations, demolition or additions to listed landmarks, buildings, and sites within historic districts;
4. acting in an advisory role to other officials and departments of local government regarding the protection of local cultural resources;
5. acting as a liaison on behalf of the local government to individuals and organizations concerned with historic preservation; and
6. working toward the continuing education of citizens within the CLG's jurisdiction regarding historic preservation issues and concerns.
7. reviewing all proposed National Register nominations for properties within its jurisdiction. Upon written agreement between the CLG and the OHPO, the CLG may substitute review procedures which expedite the National Register review requirements as described in Section 5 below.
8. when a commission considers a National Register nomination and other actions (e.g., an archaeological site) which are normally evaluated by a professional in a specific discipline (e.g. archaeologist), and that discipline is not represented on the commission, the commission shall see expertise in this area before rendering its decision. Commissions may see the assistance of academic or consulting archaeologists. The OHPO suggests that local governments try to find interested individuals with expertise in archaeology to serve on the commission. Alternately, commissions should explore the possibility of sharing this expertise among several communities.
9. conducting or encouraging members to attend educational sessions at least once a year, or in-depth consultation with the OHPO, pertaining to the work and functions of the commission or on specific historic preservation issues. Barring extenuating circumstances, all

commission members should attend such a session at least once yearly. The OHPO will provide orientation materials and training for local commissions.

10. additional responsibilities may be undertaken by the commission upon mutual written agreement between the OHPO and the CLG. A written agreement will address what duties are to be performed, what staff assistance is needed to perform the work, and what level of activity in each area of responsibility will be maintained. All delegated responsibilities must be complementary to and carried out in coordination with those of the State Historic Preservation Office as outline in 36 CFR 61.3(b).
- C. The local government shall ***maintain a system for the survey and inventory of historic properties.***
1. The local government shall initiate or maintain a process approved by the OHPO for the survey and inventory of cultural resources within its jurisdiction. The OHPO will consult with the local government in undertaking survey activities which will meet the needs of the local community and the OHPO.
 2. A detailed inventory of the designated districts, site, and/or structures under the specific jurisdiction of the local government shall be maintained.
 3. All inventory material shall be:
 - a. Maintained securely and be accessible to the public, except that access to archaeological site locations may be restricted.
 - b. Recorded on Ohio Historic Inventory, Ohio Archaeological Inventory forms, and/or forms compatible with the OHPO's computerized inventory and therefore compatible with the comprehensive preservation planning process.
 - c. Available through duplicates (with contact prints) to the OHPO.
 - d. Updated periodically to reflect changes, alterations, and demolitions.

The Certified Local Government is encouraged to produce a community-wide historic preservation plan, which meets the Secretary of Interior's Standards for Preservation Planning. Such a document should include a methodology for organizing existing survey data and for establishing goals and objectives for identification, evaluation, registration, protection, and management strategies which are compatible with local needs. This plan should provide a mechanism whereby all relevant agencies and departments take into account historic preservation concerns whenever cultural resources may be affected. Input from the general public, other agencies or departments of the CLG, relevant professionals within the community, and the OHPO is also encouraged.

- D. The local government shall ***provide for adequate public participation in the local historic preservation program, including the process of recommending properties to the National Register.***
1. All minutes of historic preservation commissions shall be publicly announced, be open to the public, and have a previously advertised agenda. Public notice must be provided prior to any special meetings.
 2. Careful minutes of all decisions and actions of the commission including the reasons for making these decisions must be kept on file and available for public inspection.
 3. All decisions by a commission shall be made in a public forum and applicants shall be given written notification of decisions of the commission.
 4. The rules of procedure adopted by the commission shall be available for public inspection.
- E. The local government shall satisfactorily perform the responsibilities listed in points A-D.

Benefits of Participation in the Certified Local Government Program

Eligibility for the Certified Local Government Grant Program

Access (for two) to the Ohio Historic Preservation Office's Online Mapping System

Free copies of Ohio Historic Inventory and Ohio Archaeological Inventory Forms

Discounts on Ohio Historic Preservation Office workshops and webinars

Increased participation by the Ohio Historic Preservation Office in technical assistance to your local preservation program

Access to the seasonal *Network* Newsletter

A Brief Historic Preservation Bibliography

Architectural History

How to Complete the Ohio Historic Inventory

Stephen C. Gordon (Ohio Historic Preservation Office, Ohio Historical Society, 1992)

A Field Guide to American Houses

Virginia & Lee McAlester (Alfred A. Knopf, 1984)

What Style Is It?: A Guide to American Architecture

John C. Poppeliers (Wiley & Sons, 1993)

General Historic Preservation

Historic Preservation: An Introduction to its History, Principles, and Practice, 2nd Ed.

Norman Tyler (W. W. Norton & Co., 2009)

With Heritage So Rich, 3rd Ed.

Byrd Wood, ed. (National Trust for Historic Preservation, 1999)

A Richer Heritage: Historic Preservation in the Twenty-First Century

Robert E. Stipe, ed. (University of North Carolina Press, 2003)

How Buildings Learn: What Happens After They're Built

Steward Brand (Penguin Books, 1995)

Ohio Historic Preservation Office

www.ohpo.org

National Trust for Historic Preservation

www.preservationnation.org

Heritage Ohio

www.heritageohio.org

Preservation Ohio

<http://preserveohio.com/>

The National Alliance of Preservation Commissions

www.uga.edu/napc

The Secretary of the Interior's Standards for the Treatment of Historic Properties

<http://www.nps.gov/hps/tps/standguide/>

National Park Service Local Historic Preservation Planning Program

<http://www.cr.nps.gov/hps/pad/LocalPresPlan/intro.html>

National Park Service: Technical Preservation Services Online Training Program

http://www.nps.gov/hps/tps/online_ed.htm

PreserveNet

<http://www.preservenet.cornell.edu/>

National Park Service: Certified Local Government FAQ
<http://www.nps.gov/hps/clg/faqs.html>

Ohio Historic Preservation Office CLG Program
<http://www.ohiohistory.org/resource/histpres/toolbox/clg/>

Preservation Economics

The Economics of Rehabilitation
Donovan Rypkema (Preservation Books, 1997)

The Economics of Historic Preservation: A Community Leader's Guide
Donovan Rypkema (Preservation Books, 2005)

Revitalizing Main Street: A practitioner's guide to comprehensive commercial district revitalization
Dono, Andrea A. and Linda S. Glisson, eds. (Preservation Books, 2009)

National Park Service: Historic Preservation Tax Incentives
<http://www.nps.gov/hps/tps/tax/>

Ohio Historic Preservation Tax Credit
<http://www.development.ohio.gov/Urban/ohptc/>

National Park Service: Historic Preservation Grants
<http://www.nps.gov/hps/hpg/index.htm>

Preservation Law

Procedural Due Process in Plain English: A Guide for Preservation Commissions.
Bradford J. White and Paul W. Edmondson. (Preservation Books, 2008)

Law and the Historic Preservation Commission: What Every Member Needs to Know
James K. Reap and Melvin B. Hill, Jr. (Cultural Resources Partnership Notes, National Park Service, 2007)

Takings Law in Plain English
Christopher J. Duerksen and Richard J. Roddewig. (American Resources Information Network, 2002)

Layperson's Guide to Preservation Law: Federal, State, and Local Laws Governing Historic Resource
Julia Miller. (Preservation Books, 2008)

Characteristics of Effective Local Historic Preservation Legislation
Judith L. Kitchen (Ohio Historic Preservation Office, Ohio Historical Society, 1989)

The Politics of Historic Districts
Bill Schmickle (AltaMira Press, 2007)

Heritage Resources Law: Protecting the Archeological and Cultural Environment
Sherry Hutt et al. (Wiley & Sons/Preservation Press, 1999)

National Trust for Historic Preservation Legal Defense
<http://www.preservationnation.org/resources/legal-resources/>

National Park Service: Park & Historic Preservation Laws E-Library
<http://www.cr.nps.gov/history/hisnps/fhpl.htm>

Technical Preservation

The Secretary of the Interior's Standards for Rehabilitation and Illustrated Guidelines for Rehabilitating Historic Buildings
W. Brown Morton, III, et al. (National Park Service, 1997)

Caring for Your Old House
Judith L. Kitchen (Wiley & Sons, 1991)

Old Building Owner's Manual
Judith L. Kitchen (Ohio Historic Preservation Office, Ohio Historical Society, 1983)

Preservation of Historic Architecture: The U.S. Government's Official Guidelines for Preserving Historic Homes
United States Department of the Interior (Lyons Press, 2004)

The Secretary of the Interior's Standards for Rehabilitation & Illustrated Guidelines on Sustainability for Rehabilitating Historic Buildings
<http://www.nps.gov/history/hps/tps/download/guidelines-sustainability.pdf>

Planning Successful Rehabilitation Projects, National Park Service
<http://www.nps.gov/history/hps/tps/tax/guidance.htm>

Interpreting the Standards Bulletins, National Park Service
<http://www.nps.gov/hps/tps/tax/ITS/itshome.htm>

Index to Technical Preservation Publications, National Park Service
<http://www.nps.gov/history/hps/tps/topics/index.htm>

Preservation Briefs, National Park Service
<http://www.nps.gov/hps/tps/briefs/presbhom.htm>

Green Preservation

National Trust for Historic Preservation Green Lab
<http://www.preservationnation.org/issues/sustainability/green-lab/>

NAPC Guidelines for Solar Panels in Historic Districts
<http://www.uga.edu/napc/documents/SolarPanelGuidelines.pdf>

Certified Local Government Program Glossary

Key: Terms can have special meanings (different from the standard meaning) depending on the contexts in which they are used. Terms having special applications are identified by the following source-related keys:

- (60) 36 CFR 60; National Register Related
- (61) 36 CFR 61
- (67) 36 CFR 67; Tax Related
- (800) 36 CFR 800; Advisory Council Related
- (S&G) Secretary's Standards and Guidelines
- (Grant) Related to Certified Local Government Grant Program

Acquisition Project. A grant project which has for its purpose obtaining fee title, or interest other than fee title, of real property (including the acquisition of development rights or remainder interest). For CLG grant assistance, property must be on the National Register of Historic Places.

Active. Pertaining to an item, report, project, grant, etc., that is in the process during any part of the reporting period; e.g., an application for the preliminary certification of rehabilitation that has been received by the State but the recommendations for which have not yet been forwarded to NPS, a grant in progress during the project period, prior to the project end date.

Actual. The real and verifiable expenses incurred during the grant project period reported on the project completion report.

Adaptive Use. Rehabilitation of a historic building for a use that is different from its original use. (e.g. turning a warehouse into loft apartments.)

Administrative Progress Report. A report to be submitted to the Ohio Historic Preservation Office by the grantee which states the progress on all aspects of grant project work. The due dates for these reports are stated in the grant work schedule as established in the work plan. At least one administrative progress report is required during the grant period: if the project period extends over federal fiscal years a Federal Fiscal Year Report is a required as an administrative progress report.

Adverse Effect. The finding of a Section 106 review in which it is determined that the proposed Federal action will adversely affect historic properties.

Advisory Council on Historic Preservation (ACHP). Federal agency that advises the President and Congress on historic preservation policy, and serves on the federal level as an advocate for preservation. In addition, the Advisory Council reviews controversial and precedent-setting Section 106 cases. It was established under Section 201 of the Act.

Allowable Cost. Those eligible, reasonable, necessary, and allocable expenses that are permitted under the appropriate Federal cost principles, in accordance with the CLG program policy, within the scope of the project or program and authorized for CLG participation.

Americans With Disabilities Act (ADA). Federal act, passed in 1991, that prohibits discrimination to persons with disabilities by requiring that buildings and sites open to the public be made accessible (e.g. museums, hotels, and restaurants). Special consideration is given to historic buildings when full accessibility would compromise historic integrity.

Annual Announcement. The annual communication from the OHPO to all CLGs regarding the annual CLG grant program. It includes selection criteria, estimate of funds available, application submission deadlines, and contact for additional information.

Appraisal of Real Property. A standardized procedure to establish the current fair market value of real property in accordance with the Uniform Relocation Assistance and Real Property Acquisition Policies Act. Appraisals must be performed by a certified professional real property appraiser.

Audit. A systematic financial and program review or assessment to determine and report whether: (1) financial operations are being properly conducted, (2) financial reports are being presented fairly, and (3) applicable laws and regulations are being complied with.

Award. Official pronouncement by the state historic preservation office of a grant amount for a project to be funded by the CLG program.

Budget. The financial plan for expenditure of both Federal and nonfederal funds for project; developed by cost components and listed in the grant application, project notification, work plan, and grant agreement.

Certificate of Appropriateness (COA). Document issued by the local preservation board/commission that indicates approval of proposed changes to a landmark or to a building within an historic district. Other similar terms, such as Certificate of No Effect, may also be use depending on individual ordinance language.

Certified Historic Structure. (67) A building (and its structural components) which is of a character subject to the allowance for depreciation provided in the Internal Revenue Code which is either (a) individually listed in the National Register; or (b) located in a registered historic district and certified by the Secretary as being of historical significance to the district. Portions of larger buildings, such as single condominium apartment units, are not independently considered certified historic structures. Rowhouses, even with abutting or party walls, are considered as separate buildings. For purposes of the charitable contribution provisions only, a certified historic structure need not be depreciable to qualify, may be a structure other than a building, and may also be a remnant of a building such as a facade, if that is all that remains. For purposes of the other rehabilitation tax credits under the Internal Revenue Code, any property located in a registered historic district is considered a certified historic structure so that other rehabilitation tax credits are not available; exemption from this provision can generally occur only if the Secretary has determined, prior to the rehabilitation of the property, that it is not of historic significance to the district.

Certified Local Government (CLG). A local government (city, village, township, or county) preservation program that meets the National Park Service and Ohio Historic Preservation Office requirements for certification in the CLG Program.

Certified Local Government Program. A partnership program between federal, State, and local governments that highlights the importance of historic preservation activities at the local level. Local programs are certified by the SHPO and the National Park Service to: have a qualified commission, a local ordinance, a process for surveying historic properties, and established public participation requirements.

Certified Rehabilitation. (67) The rehabilitation of a certified historic structure which the Secretary had certified as being consistent with the historic character of the structure and, where applicable, with the district in which a structure is located.

Chief Elected Local Official. 1) (61) The elected head of a local government. 2) (60) The mayor, county judge, county executive, or otherwise titled chief elected administrative official who is the elected head of the local political jurisdiction in which a property is located, who has signature authority for the jurisdiction.

Code of Federal Regulations (CFR). A series published by the Federal Government which contains codification of the general and permanent rules published by agencies of the Federal Government.

Competitive Negotiation. A method of procurement used when the nature of services or products needed precludes development of a precise description or specification that will enable prospective suppliers to have an identical understanding of the requirement. Competitive negotiation is used when formal advertising is not appropriate, and is normally the method used for obtaining professional services for non-construction work.

Compilation Statement. An independent examination for organization's financial statements—required of a grant administrator when no audit report is available.

Comprehensive Plan. Documents adopted by a local government to establish policies that guide community development in both the public and private sectors.

Comprehensive Statewide Historic Preservation Plan. (61) Required by the Act, the Comprehensive Statewide Historic Preservation Plan is a major tangible product of the State's Historic Preservation Planning Process. The State Plan is a document that articulates a vision of the future for historic preservation across the State and identifies goals and strategies for achieving them in the future. The State Plan is a tool for the State Historic Preservation Office and others throughout the State for guiding effective decision-making on a general level, for coordinating Statewide preservation activities, and for communicating Statewide preservation policies, goals, and values to the preservation constituency, decision-makers, and interested and affected parties across the State.

Conflict of Interest. A situation when a person may benefit (through financial or personal gain) from the position he/she holds with respect to the HPF assisted program or may be unable to make impartial decisions or render impartial advice due to outside relationships or other activities with other persons.

Considered Eligible. Those properties that both the SHPO and the Federal agency agree should be considered eligible for listing in the National Register of Historic Places, but have not been forwarded to NPS for a formal Determination of Eligibility. These are not Determinations of Eligibility.

Contractor Performance Report. A report submitted by the grantee to the Ohio Historic Preservation Office, along with the project completion report, which describes subcontractor's tasks, performance evaluation, and subcontract amount.

Contributing Property (Resource). A property or resource that has historical significance through location, design, setting, materials, workmanship, feeling, or association, and adds to the sense of time and place and historical development in a historic property (i.e., a National Register eligible property or resource). See 36 CFR 67.5 "Standards for Evaluating Significance within Registered Historic Districts."

Cost-Plus-a-Percentage-of-Cost Contract. A cost-reimbursement contract whereby the contractor is reimbursed for costs plus a fixed percentage of costs. Its effect is to increase the profits of a contractor in proportion to the contractor's increased costs. Its use is prohibited by law [41 U.S.C. 254b and 10 U.S.C. 2306(a)] in Government contracting, and prohibited by 43 CFR 12.76(f)(4) and by 43 CFR 12.944(c) in grantee or subgrantee contracting.

Covenant. A legal document executed between the State (OHS/OHPO) and the property owner in which the property owner of record encumbers the title of the property with a covenant running with the land, in favor of and legally enforceable by the State. The property owner of record (and, if applicable, the holder of the mortgage) must be the executors of the covenant whether or not the owner is the grantee.

Cultural Resource. Any district, site, building, structure, or object significant in American history, architecture, archaeology, engineering, or culture at the national, State, or local level.

Demolition by Neglect. The destruction of a building through abandonment or active refusal to provide maintenance. (See also Minimum Maintenance)

Designated Administrative Agent. A third party or organization which is identified by a CLG in its grant funding application to administer the grant for which the CLG is seeking project funding.

Designated Third Party. Any organization legally distinct from the grantee (whether or not affiliated with the grantee but cannot be part of the same organizational budgetary unit of government) or any individual not employed by the grantee other than a consultant or volunteer acting directly under the grantee's direction or control.

Designation. Act of recognizing buildings, sites, or structures as historic and placing them under the protection of an historic preservation ordinance.

Determination of Eligibility. (60) A decision by the Department of the Interior that a district, site, building, structure, or object meets the criteria for evaluation although the property is not formally listed in the National Register of Historic Places. A determination of eligibility does not make the property eligible for such benefits as grants, loans, or tax incentives that have listing on the National Register as a prerequisite.

Development Project. A project which has for its purpose the protection, rehabilitation, restoration, or reconstruction of a historic property listed in the National Register of Historic Places.

Direct Cost. Any cost that can be specifically identified with a particular project or program. Direct costs include, but are not limited to, salaries, travel, equipment, and supplies directly benefiting a particular project or activity.

District. (60) A geographically definable area, urban or rural, possessing a significant concentration, linkage, or continuity of sites, buildings, structures, or objects united by past events or aesthetically by plan or physical development. A district may also comprise individual elements separated geographically but linked by association or history.

DUNS Number. A unique nine digit identification number provided by Dun & Bradstreet (D&B) for each physical location of a business/agency/organization. The number is assigned free for all organizations required to register with the U. S. federal government for contracts or grants. To register go to www.ccr.gov or call 1-866-705-5711. The number must be renewed annually.

Easement. The right of one person to use the property or property rights (e.g., the right of access, the right to limit exterior alterations) of another for a stated term. The owner retains the major interest and can live in the property, will the property to another, or sell the property. Transfer of title does not affect the easement, which remains in effect for the stated term.

Economic Hardship. A) Situation where an owner is denied all reasonable use and return on their property due to the application of a historic preservation law (a taking). This term may be further clarified by the historic preservation ordinance and specific criteria established to determine an economic hardship case, including alternative solutions and the extent to which the hardship is self-created. B) Where, because of the specific characteristics of the property, compliance with local laws or guidelines would create or be an economic hardship.

Eligible Property. Property that has been reviewed by the National Park Service and meets the criteria for National Register listing, but is not formally listed (e.g. due to a lack of owner consent).

Eminent Domain. The action of government to take private property for the public good with due monetary compensation based on fair market value.

Expenditures. All allowable disbursements chargeable to the approved budget of a grant project plus the recorded dollar value of all unpaid invoices for materials received and services rendered, and all valued in-kind or volunteer services and materials applied to the operation of projects.

Feasibility Study. A detailed physical investigation and analysis of a historic property conducted to determine the financial, technical, or economic advisability of a proposed project and/or alternative courses of action.

Federal Fiscal Year. The federal fiscal year is the 12-month period from October 1 through September 30.

Federal Fiscal Year Report. A required report submitted by the grantee to the OHPO which identifies all tasks and expenses start date through September 30 (Federal fiscal year period) and provides financial records to document costs incurred to date.

Finding. Factual or legal determination made by an administrative body or court upon deliberation.

Flood Plain. The area along waterways subject to periodic inundation.

Formal Advertising. A competitive procurement method which is normally used when the nature of the product or service permits development of a precise description or adequate specifications so that prospective suppliers will be enabled to have an identical understanding of the requirement. Bids are solicited publicly through advertising and by issuing "Invitations for Bids." In response to the solicitation, "formal" sealed bids are submitted which are not subject to negotiation or change. The sealed bids are opened publicly on a specified date and are read aloud. A firm fixed-price contract is awarded to the responsible bidder (see definition) whose bid, conforming to the material terms and conditions of the invitation for bids, is lowest in price. Formal advertising is normally the required method of procurement for construction work.

Funding Acknowledgement of Assistance Statement. A required acknowledgement of National Park Service, Ohio Historical Society, and Ohio Historic Preservation Office support must be made in connection with the publication of any printed, audio-visual, or electronic material developed under any activity supported by HPF grant funds.

This project was made possible in part by a grant from the U.S. Department of the Interior's Historic Preservation Fund, administered by the Ohio Historic Preservation Office of the Ohio Historical Society. U.S. Department of the Interior regulations prohibits unlawful discrimination in departmental federally assisted programs on the basis of race, color, national origin, age or disability. Any person who believes he or she has been discriminated against in any program, activity, or facility operated by a recipient of Federal assistance should write to: Director, Equal Opportunity Program, U.S. Department of the Interior, National Park Service, P.O. Box 37127, Washington, D.C. 20013-7127.

For each project verify with the Ohio Historic Preservation Office the proper wording prior to release.
The Ohio Historical Society visual logo with text below should also be on all printed material.

General Conditions for Construction Contracts. Costs incurred by a general contractor for common elements to be used by other contractors or subcontractors. Included are temporary heat, power, lighting, water, sanitary facilities, scaffolding, elevators, walkways, railings, and office and storage space necessary for performance of contract work at the project site. (These items are distinct from "contingencies," which are unallowable.

Grant. An award of financial assistance paid by the Federal Government under the National Historic Preservation Act to the state to carry out specific objectives for a specified period of time consistent with the terms of an approved budget and executed grant agreement. The term does not include any Federal procurements subject to the procurement regulations in 41 CFR, nor does it include technical assistance or other assistance in the form of revenue sharing, loans, loan guarantees, interest subsidies, insurance, or direct congressional appropriations.

Grantee. The term generally means the department or agency of State government, Federally recognized Indian tribal government, or other direct recipient of HPF grant assistance from NPS. Primary recipients are States, as defined in the Act, tribes, and the National Trust for Historic Preservation. The organizational entity to which a grant is awarded is responsible and accountable to the Federal Government both for the use of the funds provided, including cash and non-cash contributions applied in support of the grant, and for the performance of grant-supported programs, projects, or activities. The grantee is the entire legal entity even if a particular component is designated in the grant award document. See *Subgrantee*.

Historic Context. A structured framework for organizing information about historic, prehistoric, and cultural resources based on a shared theme, time period, and geographical area. Historic contexts are those patterns or trends in history by which a specific occurrence, property, site, or place is understood and its meaning (and ultimately its significance) within prehistory or history is made clear. In National Register Multiple Property Submissions, historic contexts provide for a standardized means of describing, comparing, and explaining the significance of a wide variety of properties. When the historic context contains goals and priorities for the identification, evaluation, registration, and treatment of historic properties, it plays an important role in preservation planning and decision making.

Historic District. (67) A geographically definable area, urban or rural, that possesses a significant concentration, linkage, or continuity of sites, buildings, structures, or objects united by past events or aesthetically by plan or physical development. A district may also comprise individual elements separated geographically but linked by association or history. See *Registered Historic District*.

Historic Preservation. Broad term sometimes shortened to "preservation" that includes identification, evaluation, recordation, documentation, curation, acquisition, protection, management, rehabilitation, restoration, stabilization, maintenance, research, interpretation, conservation, and education and training regarding the foregoing activities, or any combination of the foregoing activities.

Historic Preservation Fund. (61) The source from which monies are appropriated to fund the program of matching grants-in-aid to the States (and other authorized grant recipients) for carrying out the purposes of the Act, as authorized by Section 108 of the National Historic Preservation Act.

Historic Preservation Review Commission (Local Commission). (61) A board, council, commission, or other similar collegial body which is established by State or local legislation as provided in Section 101(c)(1)(B) of the Act, and the members of which are appointed, unless otherwise provided by State or local legislation, by the chief elected official of the jurisdiction concerned from among:

- (A) professionals in the disciplines of architecture, history, architectural history, planning, prehistoric and historic archeology, folklore, cultural anthropology, curation, conservation, and landscape architecture or related disciplines, to the extent such professionals are available in the community concerned, and
- (B) such other persons as have demonstrated special interest, experience, or knowledge in history, architecture, or related disciplines and as will provide for an adequate and qualified commission.

Historic Property. Any prehistoric or historic district, site, building, structure, or object included in, or eligible for inclusion in the National Register, including artifacts, records, and material remains related to such a property or resource. Some jurisdictions may define historic as any property over 50 years old.

Historic Rehabilitation Tax Credit. Program that offers a dollar-for-dollar reduction in tax burden for qualified rehabilitation expenditures on a certified rehabilitation of a certified historic structure. Federal program allows for a 20% credit of qualified rehabilitation expenditures and requires substantial rehabilitation and a income-producing use. The competitive Ohio Historic Preservation Tax Credit allows for a 25% credit on qualified rehabilitation expenditures.

Historic Structure Report. The report required prior to development of a historic resource when the work involves fabricating significant missing architectural or landscape features, recapturing the appearance of a property at one particular period of history, or removing later additions.

Identification. (S&G) Identification is undertaken for the purpose of locating historic properties and is composed of a number of activities which include, but are not limited to archival research, informant interviews, field survey, and analysis. Within a comprehensive planning process, identification is normally undertaken to acquire property-specific information needed to refine a particular historic context or to develop any new historic contexts.

I-Form. Internet-based application for collecting archaeological and architectural/historic inventory data. Based on Ohio Historic Inventory Form and Ohio Archaeology Inventory Form.

Indirect Costs. Costs incurred for common or joint objectives, and which therefore cannot be identified specifically with a particular project or program without effort disproportionate to the results achieved. These costs are allocated to the various classes of work in proportion to the benefit to each class. The cognizant Federal agency must approve a rate based on a cost allocation plan. This rate must be stated in the grant application if it is to be included as an expense under CLG grant.

In-Kind Contributions. The value of non-cash contributions provided by the grantee or non-Federal third parties. In-kind contributions may consist of charges for nonexpendable personal property, and the value of goods and services directly benefitting and specifically identifiable to the grant program.

Integrity. (S&G) The authenticity of a property's historic identity, evidenced by the survival of physical characteristics that existed during the property's historic or prehistoric period.

Intensive Level Survey. Systematic, detailed field (and archival) inspection of an area designed to identify fully the architectural, archeological, and historic properties; and calculated to produce a level of documentation sufficient, without any further data, to evaluate National Register eligibility (and nominate if appropriate).

Inventory. 1) (S&G) A list of historic properties determined to meet specified criteria of significance. 2) A list or compilation of what is known about resources within a specified jurisdiction. An inventory includes historic properties and other properties that have been evaluated but not found to be historic.

Invitation for Bids (IFB). A set of documents which includes a description of the product or service desired and all other information needed to enable a prospective contractor to submit a bid. The invitation for bids is the specific term applied to the solicitation used in contracts involving Federal funds when the formal advertising procurement method is used.

Invoice. The financial document which requests disbursement of the CLG award to the grantee. Partial or full payment can be made after documentation substantiating project expenses have been incurred and paid by the CLG and draft or fund grant meet the Secretary of the Interior's Standards as listed in the grant agreement.

Landmark. A site or structure that has been designated by the local, state, or federal government to be worthy of preservation. It must go through a legal process, and meet the criteria established by the local ordinance or other law.

Lobbying. Any activity designed to influence an officer or employee of an agency, a member of local, state, or federal legislature, or an officer or employee of a local, state, or federal legislature, to favor or oppose any legislation (including appropriation), whether before or after the introduction of any bill or resolution proposing such legislation. In accordance with 18 U.S.C. 1913, costs associated with lobbying efforts are unallowable as charges to HPF grants.

Local Government. (61) A city, village, county, parish, township, municipality or borough, or any other general purpose political subdivision of any State.

Memoranda of Agreement (MOA). Written agreements between the SHPO and a Federal agency involving a single Federal undertaking. Any project-specific or programmatic memoranda of agreement signed by the SHPO that is produced when a project triggers Section 106, or any proposal for such an agreement in which the SHPO concurs in writing (review and compliance cases, such as Section 106, Section 4(f), etc.). (See 36 CFR 800; also see *Programmatic Agreement*).

Minimum Maintenance. Ordinance requirement that a property be kept in good repair, avoiding serious deterioration. (See also Demolition by Neglect)

Mitigation. Any action which reduces or eliminates adverse impacts resulting from a proposed action. Mitigation may include project redesign or relocation, data recovery and documentation, etc. See 36 CFR 800.

Monitoring. A process whereby the programmatic and business management performance aspects of a grant are reviewed by means of the collection and assessment of information gathered from various reports, audits, site visits, and other sources. Certified Local Government grants are monitored by OHPO via mandatory administrative progress reports submitted by the grantee.

Multiple Property Submission. A Multiple Property Submission for nominating properties to the National Register is one which includes all or a defined portion of the cultural resources identified in a specified geographical area. A Multiple Property Submission consists of a Multiple Property Documentation Form, NPS-Form 10-900-b, together with individual registration forms.

National Environmental Policy Act (NEPA). 1969 federal law requiring the consideration of potential impacts of federal actions/undertakings on the environment. Historic and cultural resources are considered part of the environment.

National Historic Preservation Act, as Amended (1980) (NHPA, The Act). 1966 federal law that establishes historic preservation as federal policy. Created the National Register of Historic Places, the Advisory Council on Historic Preservation and the Section 106 process, the federal-state partnership for historic preservation, and the CLG program.

National Park Service (NPS). The bureau of the Department of the Interior through which the Secretary of the Interior administers the National Historic Preservation Program.

National Register Criteria. The established criteria for evaluating the eligibility of properties for inclusion in the National Register of Historic Places.

National Register of Historic Places. The national list of districts, sites, buildings, structures, and objects significant in American history, architecture, archeology, engineering, or culture, maintained by the Secretary of the Interior under authority of Section 101(a)(1)(A) of the Act.

National Register Questionnaire. The format issued by OHPO to gather information to help determine whether a property is likely to be eligible for listing on the National Register of Historic Places. This initiates the nomination process. Required for nomination applications (National Register or local); must be submitted three (3) weeks before CLG grant application is due.

Negotiated Procurement. A procurement method, normally competitive, which is used when the nature of a product or service precludes the development of specifications or a precise description enabling all prospective suppliers to have an identical understanding of the requirement. Requests for Proposals are circulated to at least three firms. Responses to solicitation (proposals) are not opened publicly; contents are generally not revealed prior to award; and they may be changed following evaluation, discussion, and negotiation.

No Adverse Effect. The finding of a Section 106 review that the proposed Federal project will not adversely affect historic properties located within the impact area of the project.

Nonprofit Organization. For purposes of the CLG grant program, a nonprofit organization means any corporation, trust, foundation, agency, or other organization which: (1) has been recognized by the Internal Revenue Service as being entitled to exemption under Section 501(c)(3) of the Internal Revenue Code, or (2) is not organized for profit and no part of the net earnings of which inures, or will inure upon dissolution, to the benefit of any private shareholder or individual.

Notice of grant availability. Annual announcement by the SHPO required by the National Park Service to declare amount of CLG funds available for the next round of CLG funding consideration.

OHSPAB. Ohio State Historic Site Preservation Advisory Board. See State Historic Preservation Review Board.

OMB Circular A-21. This Circular establishes principles for determining costs applicable to grants, contracts, and other agreements with educational institutions. For purposes of HPF grants, these cost principles apply to third parties that are educational institutions receiving HPF grant funds through agreements with grantees or through direct grants from CLG as administrative agent for a CLG program.

OMB Circular A-87. This Circular establishes principles and standards for determining costs applicable to Federal grants and contracts with State and local governments, and Indian tribes.

OMB Circular A-102. Promulgates the standards for establishing consistency and uniformity among Federal agencies in the administration of grants to State and local governments, and Indian tribes. Implemented by the Department of the Interior and codified as 43 CFR 12.1-92.

OMB Circular A-110. Promulgates standards for obtaining consistency and uniformity among Federal agencies in the administration of grants to, and other agreements with, public and private institutions of higher education, public and private hospitals, and other quasi-public and private nonprofit organizations. Implemented by the Department of the Interior and codified as 43 CFR 12.901-972.

OMB Circular A-122. Stipulates principles and standards for determining costs applicable to Federal grants and contracts with nonprofit organizations. For purposes of HPF grants, these cost principles apply to nonprofit organizations receiving HPF grant funds through grant or contract agreements with grantees or through direct grants from NPS.

OMB Circular A-133. Refers to the required audit requirement for recipients of federal funds which includes CLG monies. The circular now in effect stipulates requirements grantees who expend \$500,000 of Federal assistance annually to have a single or program specific audit for this year if less than \$500,000 in federal awards are expended, the recipient entity is exempt from federal audit requirements for that year, except in lieu of Section .215 "Relation to Other Audits," but records must be available for review and audit by appropriate officials of the federal agency (NPS), pass-through entity (OHS), and General Accounting Office (GAO). A statement of federal awards is on the coversheet of the CLG application.

Ohio Archaeological Inventory Form (OAI). An OHPO data collection format for gathering information about an archaeological site, required format for products developed for CLG grant funded archaeological survey projects.

Ohio Historic Inventory Form (OHI). An OHPO data collection format for gathering information about a historic property, required format for products developed for CLG grant funded history/architecture survey projects.

Penn Central Case. *Penn Central Transportation Co. v. New York City*, 438 U.S. 104 (1978); the landmark U.S. Supreme Court decision that declared historic preservation to be a valid use of government powers. It established the takings clause of the Constitution to take effect when all reasonable use of a property is removed by a zoning classification, not just the highest and best use.

Plans and Specifications. The detailed working drawings and technical specifications necessary to determine the scope of the work and provide a firm basis for competitive bidding and contractual obligations for proposed construction work. For a CLG funded development project these plans and specifications must be approved by OHPO prior to the initiation of the work.

Police Power. Authority inherent in state government (and often passed to local governments) to regulate, protect, and promote the public health, safety, morals, and general welfare. It is the basis for all zoning legislation.

Pre-Development Work. The historical, architectural, and/or archeological research necessary to properly document proposed construction work on a historic structure or site performed prior to the commencement of development, i.e., feasibility study, historic structure report, development of drawings and specifications. (To be eligible for CLG Grant, property must also be listed or eligible for listing on the National Register of Historic Places.)

Preservation. The act or process of applying measures necessary to sustain the existing forms, integrity, and materials of an historic property. Work, including preliminary measures to protect and stabilize the property, generally focuses upon the ongoing maintenance and repair of historic materials and features rather than extensive replacement and new construction. New exterior additions are not within the scope of this treatment; however, the limited and sensitive upgrading of mechanical, electrical, and plumbing systems and other code-required work to make properties functional is appropriate within a preservation project. (See also Historic Preservation.)

Preservation Agreement. A legal document executed between the State (OHS/OHPO) and the public or private property owner. This agreement is not recorded with the deed and therefore is not enforceable on future owners. If a publicly-owned property does not have a deed, then a Preservation Agreement, instead of a covenant, must be executed for the duration.

Prior Approval. The written approval required from the OHPO before certain activities may be undertaken, funds expended, equipment purchased, or when the CLG award exceeds \$25,000 the National Park Service. i.e., plans & specifications for a development project change in any grant agreement terms such as project period, scope of work, or budget.

Procedural Due Process. Constitutional protection of rights from government action. Requires a course of formal proceedings carried out regularly, freely, and in accordance with established rules and procedures. Rules should include advance notice and an opportunity for affected parties to be heard.

Professional Qualification Requirements. CLGs are required to seek out board/commission members in preservation related professions. Accepted professions include: architectural history, architecture, historic preservation, planning, archaeology, and other related fields. (Grant) The minimum qualified staff required to administer the CLG grant under rules of the preservation program. Professions include architecture, historic architecture, archaeology, architectural history, and history. Most professions require a master's/terminal degree or a bachelor's degree and two years full-time experience. (See 36 CFR 61).

Program Area. CLG grant projects must fit within one of these eligible project types: survey, registration, planning, pre-development, development, acquisition, and education (other). Each program area has a defined set of application requirements and desired outcomes.

Program Income. The proceeds from the sale, transfer, or disposition of real and personal property; royalties, patents and copyrights; the sale of publications; and permit fees realized from grant-assisted activities during the grant period. Proceeds from the sale, transfer, or disposition of real and personal property shall be handled in accordance with the procedures of 43 CFR 12.65, 43 CFR 12.71, and 43 CFR 12.72. A synonym for program income is grant-related income.

Programmatic Agreement (PA). Written agreement between the SHPO, a Federal agency, and the Advisory Council on Historic Preservation involving a type of activity or resource. PAs are published in the Federal Register; deal with types of activities, rather than specific projects; may be initiated by either the SHPO or a Federal agency; are signed by the Federal agency representative and the SHPO and ratified by the Chairman of the Advisory Council on Historic Preservation (ACHP).

Project. A project is any operation with the following elements: 1) a scheduled list of component activities, 2) a logical sequence or ordering of these activities, 3) a statement of the time required to perform each activity, and 4) an indication of activity costs in the case of resource allocation problems. For HPF grant purposes, a project is an organized activity carried out to reach a defined goal, usually under a grant, with a specified terminal point. The term "project" also applies to any HPF-assisted activity conducted through subgrants/contracts.

Project Completion Report. The grant close out report submitted to OHPO thirty days after the end of the grant period. (Form provided by OHPO.)

Project Costs. The allowable costs as set forth in the applicable Federal cost principles, incurred by the grantee or subgrantee in accomplishing the objectives of a grant during the project period. This includes allowable and necessary in-kind contributions made by third parties.

Project End Date. The date at which the project period for the grant expires. This date is listed in the grant agreement.

Project Notification. - A formal statement of the CLG project including CLG award, proposed local match, budget, scope of work, project period, certification statement, and standards to be met by the project submitted to the National Park Service for approval. Any CLG grant exceeding \$25,000 requires National Park Service approval of this document prior to beginning of any project work. Any changes to the project notification components listed require a "project notification amendment" and National Park Service approval prior to initiating the change.

Project Start Date. Beginning date for the grant project period as stated in the grant agreement or formal project certification.

Project (or Grant) Period. The total time for which a project (or grant) has been approved by the grant award agreement and subsequent amendments for support with CLG funds and during which all work is to be accomplished.

Public Education. The provision of information, techniques, processes, requirements, etc., concerning the elements of the National Historic Preservation Act and the State and local programs operated under its requirements.

Public Participation. Active involvement of a wide range of public, private, and professional organizations and individuals is essential to the success of State Historic Preservation Office or other grantee programs. The term also includes activities directly related to involving the public in the Statewide Historic Preservation Planning Process, as well as in the identification, evaluation, or protection of a historic or archeological resource. The grantee's Open Project Selection process is an element of public participation. Other elements may include: the development of a public participation program/plan that provides an opportunity for citizens to participate in the development of the annual HPF grant application and/or provides citizens with adequate information concerning program emphasis or purposes and funding requirements; provides for public meetings or hearings to obtain the views of citizens on the substance of the program, including consideration of environmental and other possible effects; and/or provides an opportunity for the public to submit comments.

Reconnaissance Level Survey. Small-scale archival or field research, designed to provide a general impression of an area's architectural, archeological, and historical properties and their values, but not calculated to produce a level of documentation sufficient to determine a property's eligibility or to nominate a property to the National Register.

Reconstruction. The act or process of depicting, by means of new construction, the form, features, and detailing of a non-surviving site, landscape, building, structure, or object for the purpose of replicating its appearance at a specific period of time and in its historic location.

Registered Historic District. (67) Any district listed in the National Register or any district: a) which is designated under a State or local statute which has been certified by the Secretary as containing criteria which will substantially achieve the purpose of preserving and rehabilitating buildings of significance to the district; and, b) which is certified by the Secretary as meeting substantially all of the requirements for the listing of districts in the National Register.

Rehabilitation. The act or process of returning a property to a state of utility through repair or alteration which makes possible an efficient contemporary use while preserving those portions or features of the property which are significant to its historical, architectural, and cultural values.

Reimbursement Grant. Payment to grantees after costs incurred and paid by grantee with the provision of appropriate financial documentation.

Request for Proposal (RFP). A set of documents which includes a sufficiently detailed description of the product or service desired to enable a prospective contractor to submit a proposal which includes information that procurement and technical personnel need to evaluate proposals submitted. The request for proposals is the specific term applied to the solicitation used in contracts involving Federal funds when negotiated procurement procedures are used. (Must be approved by OHPO prior to issuance of projects funded in part with CLG grant.)

Research Method Report. This format is a statement of objectives or research design which encompasses project objectives, methodology to be used and expected results as enumerated in the Secretary of the Interior's Standards for Identification. Report is required for survey projects.

Restoration. The act or process of accurately depicting the form, features, and character of a property as it appeared at a particular period of time by means of the removal of features from other periods in its history and reconstruction of missing features from the restoration period. The limited and sensitive upgrading of mechanical, electrical, and plumbing systems and other code-required work to make properties functional is appropriate within a restoration project.

Secretary's Standards and Guidelines. The Secretary of the Interior's Standards and Guidelines for Archeology and Historic Preservation which provide technical information about historic preservation activities and methods. The Standards and Guidelines are prepared under the authority of Section 101(f), (g), and (h), and Section 110 of the Act. The subjects covered in the Standards and Guidelines include: Preservation Planning, Identification, Evaluation, Registration, Historic Research and Documentation, Architectural and Engineering Documentation, Archeological Documentation, Treatment of Historic Properties, Professional Qualifications, and Preservation Terminology.

Section 106. Portion of the National Historic Preservation Act that requires all potential federal undertakings be reviewed for its effects on National Register listed or eligible properties. If a negative impact is necessary, it requires that the project be mitigated in some manner. Governed by 36 CFR 800.

Selection Criteria. The parameters established through a process public participation for reviewing CLG applications and thereby selecting prospects to receive CLG grant funds. The criteria are divided between administrative and programmatic. Each criterion is weighted. These are provided to the applicants in the application packet.

Site Plan. Proposed development plan, submitted to the local planning board or other local entity, that addresses issues such as site of proposed buildings, landscape design, pedestrian and vehicular access, etc.

State Historic Preservation Officer (SHPO). The term "SHPO" means State Historic Preservation Officer or office. "SHPO"/"OHPO" is used interchangeably throughout this document to refer to Ohio's State level organization that will oversee HPF programs.

State Plan. The comprehensive statewide preservation plan required by the Act. See *Comprehensive Statewide Historic Preservation Plan*.

Subgrant. An award of financial assistance made under a grant to an eligible subgrantee by a grantee.

Subgrant Agreement. The formal contract between the Ohio Historical Society and subgrant recipient or designated administrative agent, stating the schedule, project period, budget, scope of work and general regulations governing the administration of the subgrant.

Sunshine Laws. Collective name for Ohio's Open Records and Open Meetings legislation. These laws require public bodies to hold meetings in a public forum, and to record all proceedings and decisions made during proceedings.

"Taking". Government confiscation of private property without just compensation.

Undertaking. Undertaking means a project, activity, or program funded in whole or in part under the direct or indirect jurisdiction of a Federal agency, including: (a) those carried out by or on behalf of the agency; (b) those carried out with Federal financial assistance; (c) those requiring a Federal permit, license, or approval; and (d) those subject to State or local regulation administered pursuant to a delegation or approval by a Federal agency. See 36 CFR 800.

Work Plan. A final statement of the scope of work, budget, schedule and products submitted by the grantee following notification by the OHPO of the grant award. This is the basis of the developing the grant agreement (contract) between OHS and grant recipient for the CLG award and the project notification to the National Park Service, if required.

Zoning. Restriction of land use, building use, and construction to benefit the "general welfare." Laws may control lot size, height of buildings, setback requirements, and other changes.

Historic Preservation Funding Related Websites

www.achp.gov/funding.html

Sources of Financial Assistance for Historic Preservation Projects on Advisory Council for Historic Preservation web site

www.ehow.com/list_6834144_national-trust-grants.html

Description of grant programs of the National Trust for Historic Preservation

<http://www.preservationnation.org/resources/find-funding/nonprofit-public-funding.html>

National Trust for Historic Preservation Nonprofit organization and public agency funding information

<http://www.ohiohistory.org/resource/histpres/docs/fund.pdf>

Ohio Historic Preservation Office funding sources list.

Certified Local Government Grant Websites

<http://www.ohiohistory.org/resource/histpres/toolbox/clg/clg-07.html>

Annual funding announcement for Federal fiscal year 2012

<http://www.ohiohistory.org/resource/histpres/docs/clg/clg-13.pdf>

Federal fiscal year 2012 CLG grant application form

<http://www.ohiohistory.org/resource/histpres/docs/clg/clg-10.pdf>

Federal fiscal year 2012 grant application instructions

<http://www.ohiohistory.org/resource/histpres/docs/clg/clg-07.pdf>

OHPO nomination questionnaire form required for all nomination projects. Must be submitted to OHPO 3 weeks prior to grant application deadline

HPF GRANT ADMINISTRATION The 10-Step Method

State Historic Preservation Officer announces awards

Grantee accepts grant by returning Work Plan and Signed Required NPS forms

Grantee signs grant agreement & returns to Grants Manager

Grantee begins work

Developing RFP if consultant or contractor to be hired, writing specifications for tasks if a development project, or begin work if the project is being performed in house

First Administrative Progress Report
[Due 60 days after project start date]

Federal Fiscal Year Financial Report

Work Continues
Draft products being submitted to OHPO for review

Second Administrative Progress Report
[if project work continues beyond 1-year from start date]

Final products submitted for approval

Project Completion Report
[Contractor Performance Report & Invoice]
[Preservation Agreement or Covenant if a development project]

What Are the Professional Qualification Standards?

An Explanation of 36CFR61

When filling out the biennial Certified Local Government Performance Evaluation, one of the most frequent questions is "what does that Secretary of the Interior's Professional Standards mean?" The short answer is that these qualifications are the basis the federal government uses to determine whether someone meets the educational or experience-based threshold for being a preservation/archaeological professional.

The qualifications are based on how the federal government interprets each of the preservation fields. These qualifications are important to understand, since the CLG Program requires that at least a good-faith effort is made to have preservation professionals on your local board/commission. Furthermore, these qualifications help in choosing contractors and consultants for the CLG Grants Program. It is important for you and your commission to become familiar with the standards, and to refer to them when necessary.

Code of Federal Regulations; Section 36, Part 61

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:

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

Substantial contribution through research and publication to the body of scholarly knowledge in the field of history.

Archeology

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

At least one year of full-time professional experience or equivalent specialized training in archeological research, administration or management;

At least four months of supervised field and analytic experience in general North American archeology, and;

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:

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

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:

At least one year of graduate study in architectural preservation, American architectural history, preservation planning, or closely related field; or

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.

Ohio Certified Local Governments List

Akron, Summit County

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Department of Planning & Urban Development
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Alliance, Stark County

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Planning & Development Office
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Alliance, Ohio 44601-2400

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Aurora, Portage County

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Avon Lake, Cuyahoga County

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Berea, Cuyahoga County

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Brookfield Township, Trumbull County

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Ohio Certified Local Governments List

Canal Fulton, Stark County

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Canal Winchester, Franklin County

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Canfield, Mahoning County

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Cincinnati, Hamilton County

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Cleveland, Cuyahoga County

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Columbus, Franklin County

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Dayton, Montgomery County

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Green, Summit County

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Ohio Certified Local Governments List

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Olmsted Falls, Cuyahoga County

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