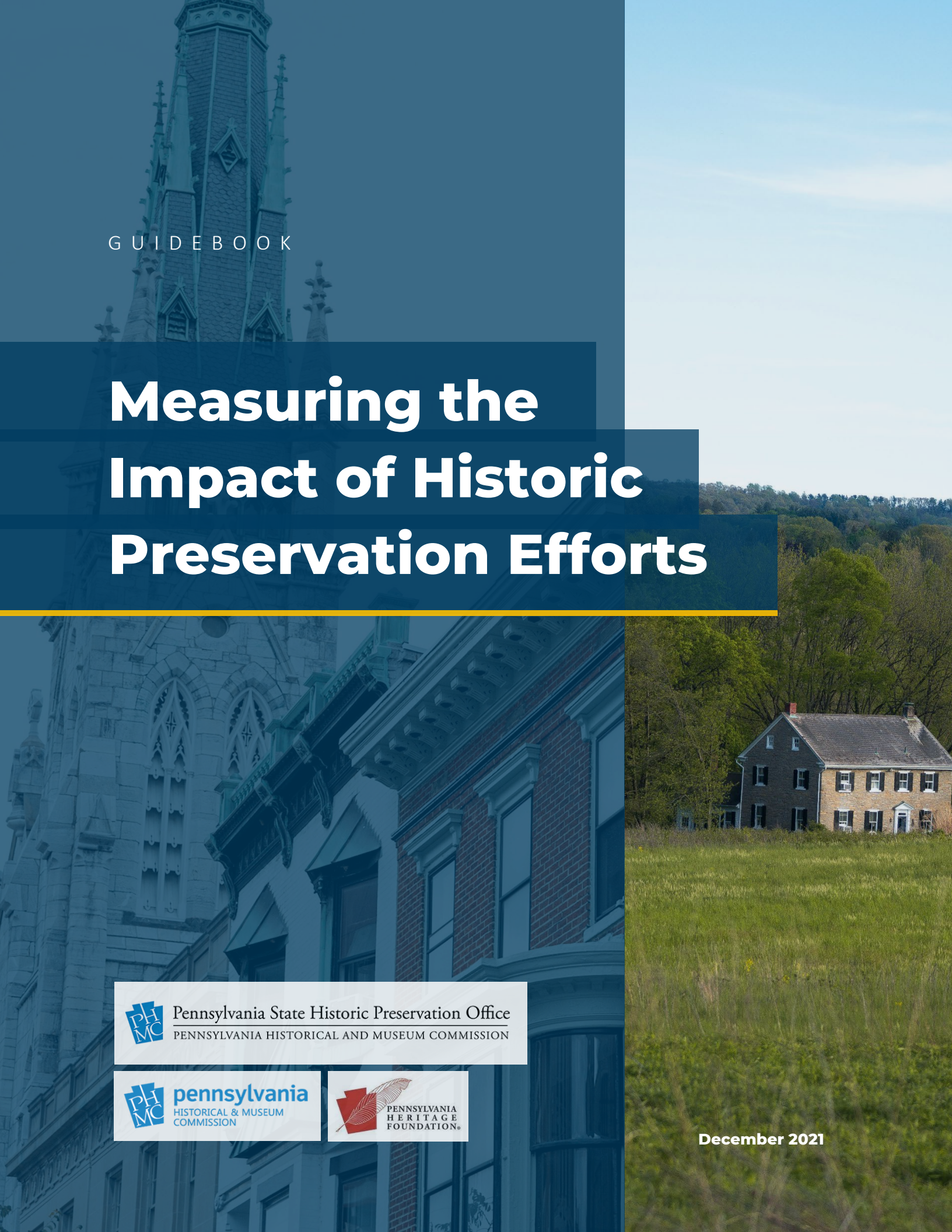




GUIDEBOOK

Measuring the Impact of Historic Preservation Efforts



Pennsylvania State Historic Preservation Office
PENNSYLVANIA HISTORICAL AND MUSEUM COMMISSION



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ABOUT THIS GUIDEBOOK

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Jon Stover & Associates (JS&A) is an Economic Development Consulting firm specializing in impact analyses and revitalization strategies. JS&A works to bridge the gap between the very different worlds of the private, nonprofit, and government sectors to create thriving local economies. For more information, please visit www.jonstoverandassociates.com.

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Measuring Impact

“Preservation connects people to place. Place grounds us to the past, the present, and the future. Pennsylvanians envision a future that includes the places old and new that make us who we are and embrace historic preservation as a means of expressing our individual and community identity and pride.”

Pennsylvania Historic Preservation Plan

Preserving and celebrating historic buildings and historic districts generate far-reaching effects on the character, environment, economy, and social fabric of communities.

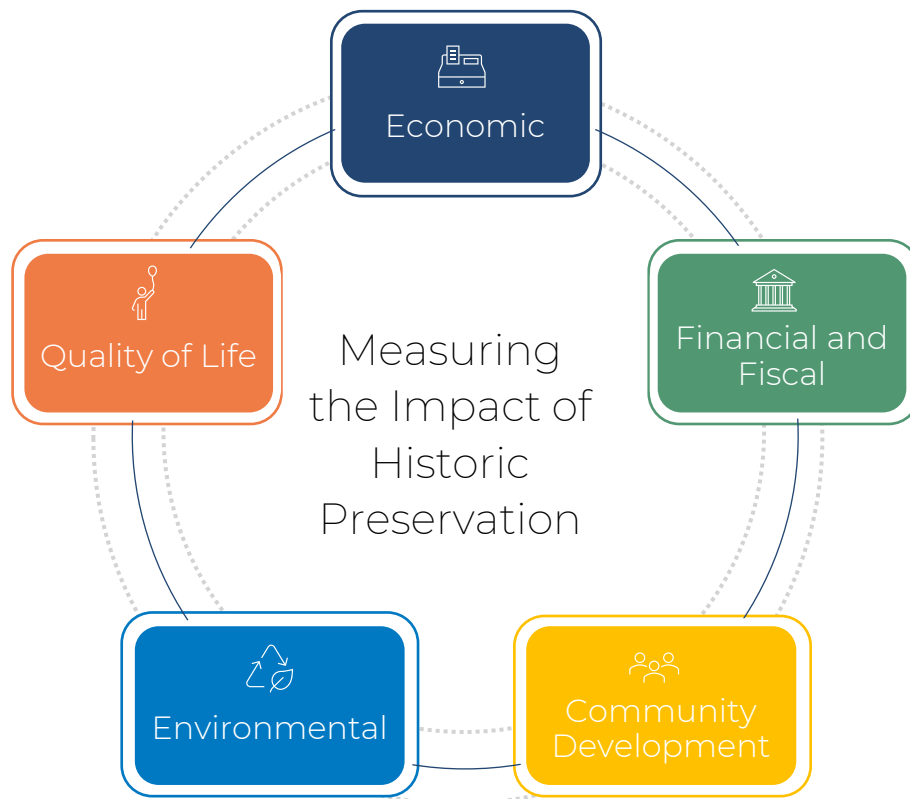
From attracting more visitors to historic downtowns to reducing construction debris, the impact of preservation can be measured across various levels and time periods. This complexity can make it difficult for municipalities, preservation groups, property owners, and other stakeholders to assess the total "value" of historic preservation comprehensively.

This guidebook serves as a resource to help Pennsylvania communities of all sizes understand a framework for measuring historic preservation's comprehensive impacts – both positive and negative. The guidebook explores five central themes of preservation's impact – economic, financial and fiscal, community development, environmental, and quality of life. For each theme, the guidebook details specific metrics to analyze to conduct place-specific impact assessments of historic preservation efforts.

By understanding the various impacts of historic preservation, local communities can better understand how preservation aligns with local planning goals and be well-positioned to make policy decisions around design guidelines, historic designations, zoning, support, and other preservation-related policies and programs.

Historic preservation efforts' far-reaching implications span the built and natural environment, influencing how people live, travel, spend, and connect to their communities.

This Guidebook explores five central themes that capture historic preservation's wide range of impacts:



Impact Metrics for all of Pennsylvania Communities

The five central metric themes measure the impact of preservation in Pennsylvania communities of all sizes, including:



Rural Townships

Rural areas often have specific landmarks that contribute to the area's character and attract visitors.



Small and Medium-Sized Boroughs

Small and mid-sized towns often feature historic downtowns that serve as key commercial hubs.



Large Cities and Urban Areas

Cities often have multiple historic districts and landmarks that contribute to a vibrant urban fabric.

Economic Development

Historic preservation efforts spur economic growth through job creation, supporting businesses, attracting people and tourists, and creating distinct, appealing places for businesses, residents, and visitors.

Preservation Industry

Historic preservation efforts help support a wide range of industries and professions, including historians, architects, curators, archeologists, and cultural resource professionals.¹ Advocacy and preservation projects help generate additional economic activity within these preservation-related industries. Common economic metrics include business counts and their revenue in the industry sectors.

Development Square Footage

Preserving historic properties may generate new development activity as vacant or underutilized properties go through development and construction efforts for revitalization and rehabilitation. Development square footage is a standard metric for measuring the total historic preservation efforts at the scale of a building, community, or even across a region.

Industry Employment

Key employment metrics include job creation, retention, and support, as well as employee compensation, including salary and wages. Measurable employment factors include not only direct historic preservation jobs but attributable sectors that support historic preservation, such as planning and construction jobs.

Business Growth, Attraction, and Retention

Vibrant historic districts attract enhanced commercial activity. Understanding this impact is commonly quantified by business attraction and retention. Although applicable to individual projects, these metrics are typically measured at the historic district level. Collecting data may require on-the-ground engagement with business owners.

(1) <https://www.nps.gov/subjects/historicpreservation/what-is-historic-preservation>

Economic Impact

Changes in a local economy attributable to historic preservation efforts – such as redevelopment projects or employment in a city's historic preservation office – generate economic impacts. An economic impact is the impact of spending in a particular industry or industries on a given area. Economic impacts can span from rural townships to collective regions or dense, urban areas. There are three different types of economic impacts:

Direct Impact

The businesses, revenue, jobs, wages, and other economic activity generated from the operations of historic preservation industries.

Indirect Impact

The supply chain of goods and services from other industries that enable activity in historic preservation. These impacts can be thought of as business-to-business expenses.

Induced Impact

The results, or spending, of increased personal income – salary and wages – caused by the direct and indirect impacts.

Tourism

Historic preservation and heritage visitors are leading drivers in Pennsylvania's tourism economy. Primary metrics for measuring tourism impacts include attendance figures and visitor spending dollars. Bringing more visitors to communities often means more spending dollars for local businesses as visitors spend money dining at restaurants, shopping at businesses, and on travel costs. The Commonwealth of Pennsylvania regularly provides up-to-date tourism spending information. Data collected through ticketed admissions to historic assets capture consumer information such as point of origin that can be fundamental in assessing tourism impacts.



Questions to Spark Research

How does historic preservation affect my community's economy?

What role does historic preservation play in bringing more visitors and customers to our local businesses?



SMALL & MEDIUM-SIZED BOROUGH SPOTLIGHT

The Downtown Bellefonte Main Street Program

Downtown Bellefonte, a certified Main Street program, helps preserve and utilize historic assets in its downtown commercial district. The organization promotes buildings' adaptive reuse potential and the vital role preservation plays in supporting its supply of downtown businesses.

The organization works with planning and code officials in the local borough government to help encourage and maintain historic assets and organizes local walking tours to help build appreciation and support for Bellefonte's Victorian architecture, its rich legacy as the home of several U.S. governors, and its connection to the Underground Railroad.



Data Insight: Conducting an Economic Impact Analysis

Economic impact analyses are a common tool for measuring and communicating how historic preservation efforts affect the local economy and support economic development efforts. These analyses vary in intensity and complexity but often require municipalities and organizations to hire outside consultants to conduct the study. Consider leveraging economic impact analyses that share stories and quantify the value of historic preservation for increased funding and grant support for preservation endeavors.

Fiscal and Financial

The preservation, restoration, and utilization of historic buildings and districts generate tax revenue at the state and local level while also helping secure grant funding and historic tax credits.

Tax Credits

The restoration of historically designed buildings or structures within historic districts is typically eligible for state and federal tax credits. These tax credits significantly boost the financial feasibility of many building renovations, encouraging local investments in preservation and restoration.

Pennsylvania's Historic Preservation Tax Credit (HPTC) allows individuals and businesses to receive a tax credit for up to 25% of qualified expenditures, up to \$500,000 in a single year. Federal Rehabilitation Tax Credits (RITC) provide a 20% credit for the rehabilitation costs of buildings listed on the National Register of Historic Places.

While these tax credits do not directly generate tax revenue for local or state governments, they enable tax-generating projects and are an essential metric when assessing the financial impact of local preservation efforts.

Grants

Investments in historic buildings or districts are eligible for a wide range of grants from the state government, the federal government, and nonprofit institutions. Grants can be used to help finance rehabilitation projects and fund local educational and cultural events. The total grant funds attributable to historic preservation is a key metric when assessing the financial impact of local preservation efforts.

Property Value Change

In order to understand the relationship between property tax revenue and historic preservation, communities can compare changes in commercial and residential property values within historic districts to properties outside districts. City or County Clerk offices can often provide historic property value data for such analyses.



Fiscal Impact

Investments in historic districts or historically designated buildings, such as renovating a building, generate a fiscal impact. A fiscal impact is the additional local and state tax revenue attributable to a specific event, program, development, or other type of investment. There are five different types of fiscal impacts:

Sales Tax

The additional local and state sales tax revenue attributable historic preservation projects and related industries.

Property Value Tax

The additional property tax revenue attributable to historic districts or investments in historic buildings. This impact is typically only at the municipal level.

Personal Income Tax

The attributable income tax revenue directly generated by historic preservation projects and related industries. This impact is typically only at the state level.

Corporate Profit Tax

The attributable business taxes directly generated by historic preservation projects and related industries. This impact is usually only for the state.

Licenses and Fees

Redevelopment and renovations of historic buildings generate various local revenue through building permits and other development-related fees. Local planning departments are a great source for information and data regarding what licenses and fees would be required for certain projects and provide estimates as to how much revenue is typically generated through various types of property renovations.



Questions to Spark Research

Does historic preservation increase property values in my community? Are property values higher in historic districts?

What's the fiscal impact of specific proposed historic preservation rehabilitation project?

URBAN CITY SPOTLIGHT

Leveraging Historic Tax Credits to Adaptively Reuse Historic Buildings In Philadelphia

As one of the oldest cities in the United States, Philadelphia is a leader in leveraging historic tax credits to fund adaptive reuse projects that preserve and restore historic buildings throughout the city. In 2021, projects in Philadelphia secured \$1.5 million in tax credits from Pennsylvania's Historic Tax Credit program. These credits helped catalyze nine restoration projects that will total \$72.6 million in construction costs.

The development and construction of these projects will not only have local economic impacts and generate additional tax revenue for the City of Philadelphia but also add valuable uses to surrounding communities, including a new charter school, housing, and a small business incubator.



Data Insight: How to Measure Fiscal Impact

When assessing the fiscal impact of historic preservation efforts, communities can assess the fiscal impact attributable to a particular investment or program or evaluate the total tax revenue generated by a historically-designated district. For example, a fiscal impact analysis could measure the revenues or fees directly produced by a new development or downtown festival or assess the share of local property tax revenue that is from properties within historic districts. Both approaches can help communities understand the fiscal contribution of historic preservation.

Community Development

The impacts of preservation efforts extend beyond the built environment supporting both places and people. Preservation strengthens social connections, aligns with local planning goals, and bolsters the livability of our communities.

Population and Demographics

In recent years, historic preservation efforts have evolved beyond simply protecting and maintaining historic buildings and districts into a successful tool for community development. Demographic and population data are key pieces in assessing how preservation efforts align with local community development goals. These foundational data points can be used through comparative assessments of historic preservation districts and neighborhoods and tracking long-term community resiliency trends.

Key demographic data points provide insights on population volume and growth trends, including household sizes and composition, housing units by ownership and tenure, home values, household incomes, age and sex cohorts, and race and ethnicity.

Abundant and easily accessible demographic data is publicly and freely available online through the Census Bureau and American Community Survey as well as many other digital platforms.

Housing Units

Preservation initiatives that generate new housing units and promote housing development increase the supply of housing options in communities. This metric can be tracked on a project-by-project basis or district and community-wide. Reliable sources for this metric include direct conversations with developers, development applications to city or county planning departments, and local media coverage.

Affordability

Housing affordability is a pressing issue for many communities, particularly in areas experiencing rapid population growth. Assessing the relationship between historic preservation and affordability is an important step towards crafting effective housing, land use, and preservation policy. Affordability indexes, housing costs to income ratios, and portfolio of affordable housing options are key indicators for measuring housing affordability.

Community Retention

Community retention efforts strive to minimize and avoid displacement and gentrification as communities evolve and change. United by a place-based focus, retention and historic preservation initiatives can partner to protect current populations and retain historic assets and character. Tracking shifts in residential duration and tenure, as well as shifts in local demographics, can help measure community retention while being proactively cognizant of preservation initiatives that may exacerbate displacement.

Community Events, Programming, and Amenities

Public events held at historic properties and in historic districts help community members connect with one another. These events can not only create quality social experiences but can support local businesses and economies. Attendance counts, demographic information collected during ticketing, and behavior patterns, including length of visit and spending patterns, allow for robust assessments of the impacts of such events.

Communities can document and assess the availability of community amenities and uses, including public spaces, gathering and third-place, and parks. The presence of these amenities – rooted in Pennsylvania’s historic places – plays a key role in civic-mindedness and community pride.

Retail Businesses

Retail businesses and commercial amenities help establish circular local economies and provide residents with job opportunities and vibrant downtowns. Measuring and tracking new and retained retail businesses within historic districts can help assess how historic preservation can protect, encourage, and support healthy commercial environments.



Questions to Spark Research

Are there demographic patterns or trends that occur in historic preservation districts compared to other parts of my community? Do historic districts lead to higher or lower levels of turnover and moving?

How does a specific event celebrating historic preservation improve our community and city?



SMALL & MEDIUM-SIZED BOROUGH SPOTLIGHT

Erie’s Design Guidelines, Historic Preservation Taskforce, and Historic Review Commission

In 2019, the City of Erie established a new Historic Preservation Task Force, charged with developing a historic preservation plan to identify community goals, policy tools, and funding opportunities to enhance historic preservation in the city. Plans such as this are critical for understanding how preservation can fit into larger community-wide planning goals, such as affordable housing, retail amenities, and strong social capital.

The City of Erie launched a Historic Review Commission with the mission of stimulating the revitalization of business districts, enhancing local historic attractions, and helping promote the preservation key historic assets. Local commissions like this help ensure historic preservation effectively meets the needs of residents.



Data Insight: Leveraging Existing Data from Local Organizations

Many communities feature place-based nonprofit organizations, such as Main Street programs or Chambers of Commerce, that can provide quality on-the-ground data that may be difficult to obtain from other data sources. These organizations can often provide data on typical commercial rents, the number and attendance figures of community events, new retail business counts, and other key trends within historic districts.

Environmental

The environmental impacts, or reduction thereof, of historic preservation can improve the energy efficiency of buildings, reduce construction and demolition debris, and bolster local walkability and green infrastructure.

Energy Efficiency

Per square foot, historic commercial properties often have highly efficient energy consumption rates, as many older buildings were constructed prior to the invention of mechanical heating and cooling systems and therefore feature energy-conserving systems in their original design⁽¹⁾. Buildings' energy efficiency is typically assessed by measuring the energy consumption per unit conditioned floor area, typically expressed in BTU per square foot.

Embodied Energy

Adaptive reuse and rehabilitation efforts are key components of energy efficiency. Embodied energy refers to the preserved energy already represented by an existing structure.⁽²⁾ Comparatively, new construction generates additional energy, adding to the life cycle of energy and emissions. The EPA determined that it takes nearly 65 years to replace the energy lost during the construction of a new building.⁽²⁾

Landfill Diversion: Construction and Demolition Debris

New building construction, existing structure renovation, and demolitions efforts produce construction and demolition debris, commonly referred to as C&D debris. Demolition represents over 90% of the US's C&D debris with construction constituting less than 10%.⁽¹⁾ As preservation efforts work to retain existing structures, the contribution of the industry on landfill diversion can be quite significant.

Carbon Emissions

Comparing emissions across building ages and different neighborhoods can help quantify the environmental impact of historic properties. The standard metric for measuring buildings' carbon emissions is CO₂e (Carbon Dioxide equivalent).

(1) National Park Service, Technical Preservation Services, 2021

(2) EPA, Smart Growth and Preservation of Existing and Historical Buildings, 2021

To study the impact of a specific property or project, property owners can provide estimates of energy usage. If this data is unavailable, various online calculators help estimate buildings' energy uses. The EPA provides Greenhouse Gases Equivalencies calculators further to quantify the environmental impact of buildings or new construction.

Walkability

Historic districts often lend themselves to walkable environments, rooted in the experience of the pedestrian rather than the vehicle. Walkable environments can spark additional spending, support business activity, and contribute to the health and wellbeing of residents and visitors. WalkScore, an online tool, measures the walkability of communities across the country and includes insights on the availability of alternative transportation and bikeability. A historic district's WalkScore is an easy and free metric to track.

Green Infrastructure

Cities and towns often rely on infrastructure systems of pipes, tunnels, and drains, that direct stormwater to treatment plants or nearby bodies of water. This stormwater moves pollutants through engineered systems into waterways and natural resources. Green infrastructure efforts mitigate this through landscaping and permeable surfaces to collect and filter stormwater. Historic districts and building preservation efforts can track green infrastructure incorporation in recent rehabilitation projects.

Natural Assets

Identifying natural assets protected and retained through preservation efforts can demonstrate the relationship between historic preservation and environmental considerations. Common metrics include an inventory of natural assets and acreage calculations.



Questions to Spark Research

How do my city's historic preservation policies help make our community a more sustainable place to live?

What are the environmental and sustainability implications of a proposed historic preservation rehabilitation project?



URBAN CITY SPOTLIGHT

Pittsburgh's Green Building Alliance

Pittsburgh's Green Building Alliance is a nonprofit dedicated to ensuring the environmental sustainability of Pittsburgh's built environment.

The organization has helped bridge the worlds of preservation and sustainability by educating property owners about how preservation can reduce construction waste and other adverse environmental effects, as well as how LEED certification credits can encourage investment in historic districts. By helping Pittsburgh's development community better understand how to effectively utilize available tax credits, grants, and certifications, the organization is helping push through projects that reduce waste and preserve the local historic and environmental resources.



Data Insight: Finding Resources

Local planning departments, municipal offices of sustainability, and the Pennsylvania Department of Natural Protection can be valuable sources for collecting local environment data, including the size of green infrastructure within historic districts and specific examples of landfill diversion or green building initiatives.

Quality of Life

Pennsylvania's beloved historic places and districts help share the legacy and retain the unique character of communities while helping create attractive places for residents to live, work, shop, and play.

Historic Legacy and Story

Historic preservation extends beyond the built environment – playing a significant role in honoring the specific people, events, and places that are important to the community.

Shared lives and identity unite communities, and a city's landmarks, memories, and stories contribute to nurturing a collective community.⁽¹⁾ Preserving the stories of communities through buildings, districts, and placemaking can celebrate and retain a collective community legacy.

Various vehicles exist to communicate and share the stories of places. Physical historic signage, educated advocates, walking tours, event programming, marketing collateral, digital collections, and social media channels provide opportunities to document and broadcast the stories of past people, events, and places.

Community Character

A community's character reflects the distinct and unique identity of the place.⁽²⁾ This critical component of placemaking offers first and lasting impressions of the community and plays a significant role in the decision to visit a place, the experience, and desirability to live in a community. Oftentimes, key metrics for community character can be expressed through descriptive narrative and imagery as well as conceptual maps of cultural assets.

Branding

In many Pennsylvania communities, historic preservation and place-based branding are intrinsically linked, as historic districts and landmarks are often central to personal experiences of a place. While a brand can be challenging to quantify, surveying community members can provide measurable insights on how architecture and other historic assets contribute to perceptions of a place.

(1) <https://forum.savingplaces.org/blogs/forum-online/2015/03/10/why-do-old-places-matter-community>

(2) American Planning Association. PSA QuickNotes 72.

Livability Index

National livability indexes measure a variety of factors and metrics to quantify and assess the livability of neighborhoods and cities. Contributing factors often include affordability, safety, real estate, transportation, community amenities, education, and more.

Leading resources include the AARP Livability Index⁽¹⁾ conducted by AARP's Public Policy Institute as well as various third-party platforms, including AreaVibes⁽²⁾ and Livability.⁽³⁾ These resources are publicly available, easy to use, free online, and offer insights into communities of all sizes.

The value of knowing a community's livability index score is two-fold. First, reflecting and relating scores to historic preservation initiatives can help justify the value preservation brings to communities. Second, these insights can provide justification for future preservation efforts that work to improve the livelihood of community residents.

Live Work Play

Resilient, livable communities provide robust opportunities to live, work, and play. This trifecta fosters opportunities for strong local economies, balanced lifestyles, and prosperous futures.

Historic preservation enthusiasts and stakeholders can conduct inventories of opportunities to assess the balance of live, work, play options in historic districts and work to advocate for enhanced amenities and third places outside of home and work. Regulatory and policy audits can be a helpful tool for preservationists to explore the intersection of how various policies and programs can support increasing the volume and quality of live, work, and play options in a community.

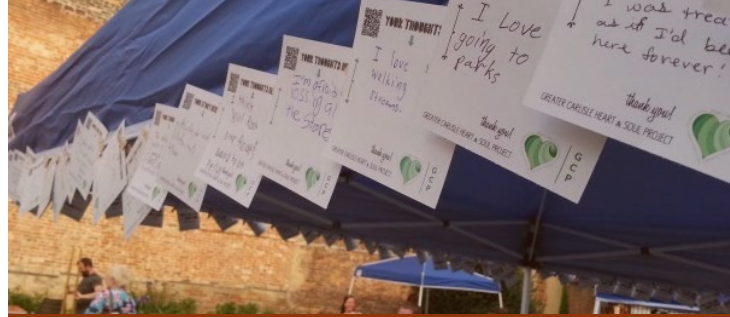
- (1) <https://livabilityindex.aarp.org/>
- (2) <https://livability.com/>
- (3) www.areavibes.com



Questions to Spark Research

How do local historic preservation initiatives and/or policies highlight and share the unique character and history of my community?

Does historic districting impact the livability of my city or town? Are historic districts more 'livable' than other parts of my community?



RURAL TOWNSHIP SPOTLIGHT

Heart and Soul and Cumberland County Historical Society Carlisle, Pennsylvania

Historic preservation can help create the foundation for local residents to celebrate and honor the unique history, character, and values of their town or city. The Cumberland County Historical Society has been a leader in using local history as a launching point to bring residents together to learn, share, and connect with each other about what they value and want to see in their communities. Through their Heart & Soul program, the organization gathered over 1,000 stories from residents, many of which expressed a desire to maintain the aesthetic beauty of their small towns and agricultural heritage.

The historical society also organizes several speaker series, tours, and classroom workshops, to learn about the county's history and celebrate its existing historic assets.

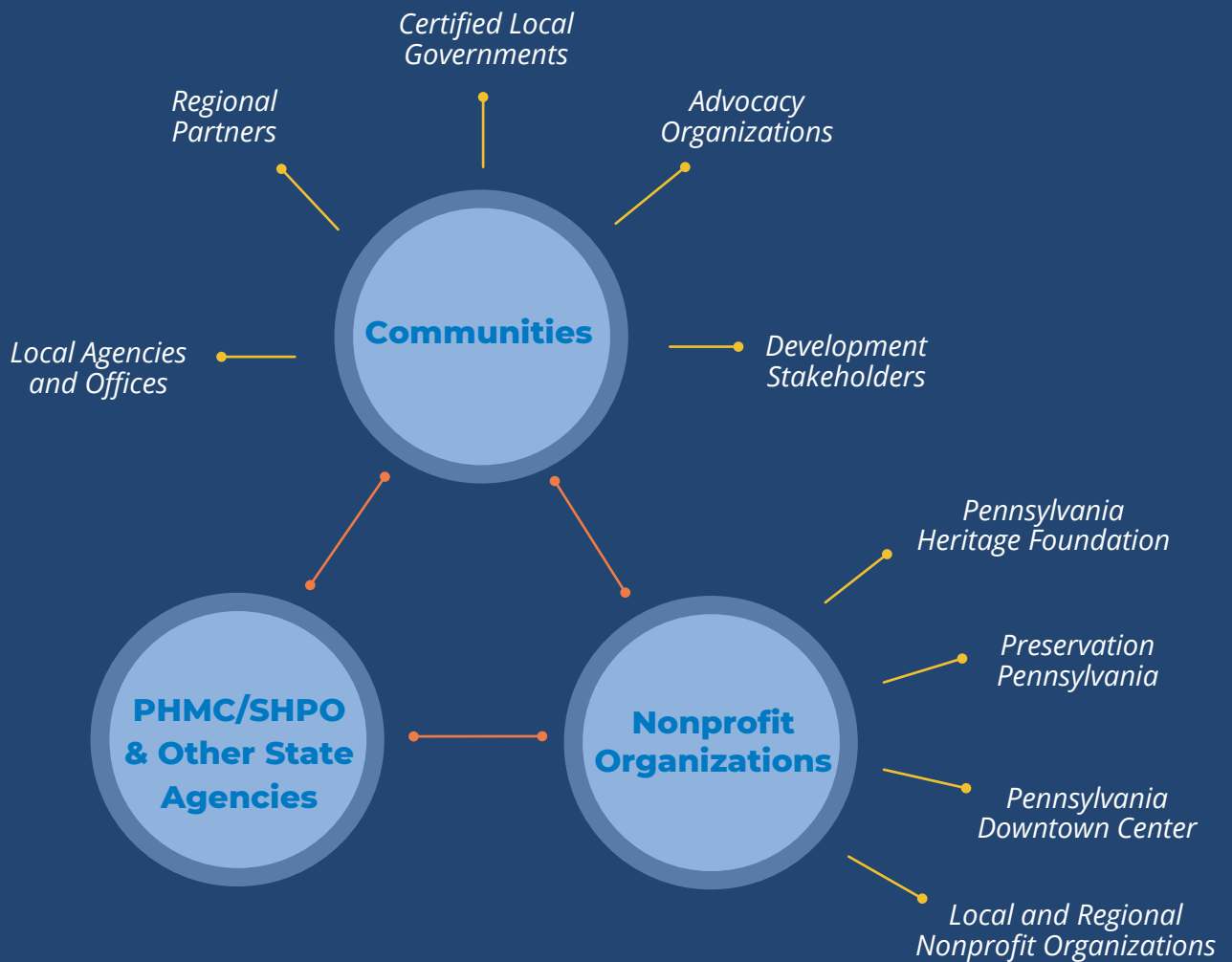


Data Insight: Measuring Your Community's Livability

The AARP Livability Index is a widely used resource for measuring the overall quality of life in a neighborhood, town, or city. This index measures a wide range of community metrics, including access to amenities and social engagement. Scores from this index can be incorporated into local historic preservation impact assessments.

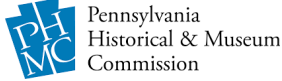
RESOURCES AND PROGRAMS

The Commonwealth of Pennsylvania includes advocates, agencies, and organizations that support communities with local historic preservation efforts.



From state organizations and agencies to offices and initiatives in local municipalities, Pennsylvania offers a comprehensive range of stakeholders and players that can support local communities in understanding the ways in which historic preservation generates impacts and further preservation efforts.

This network of players offers an abundance of valuable resources, programs, and initiatives for communities of all types, from rural townships to our dense cities. Scaling from local impacts to collaborative regional studies offers unique ways of measuring and communicating the various effects of historic preservation efforts in our communities. Collaboration amongst stakeholders deepens these stories.



Pennsylvania Historical & Museum Commission (PHMC) is the official history agency of the Commonwealth of Pennsylvania and is responsible for the collection, conservation, and interpretation of Pennsylvania's historic heritage.

The **Pennsylvania State Historic Preservation Office (SHPO)** is a bureau within PHMC and conducts cultural resource surveys, prepares statewide preservation plans, nominates properties to the National Register of Historic Places, reviews federal undertakings for effects on landmarks, and assists in federal tax applications. SHPO's **Certified Local Government (CLG) Program** is a partnership between local, state, and national governments focused on promoting historic preservation at the grassroots level. CLG-certified municipalities have access to CLG grants to support local preservation efforts.



Pennsylvania Heritage Foundation is the nonprofit partner of the Pennsylvania Historical and Museum Commission and helps preserve the Commonwealth's rich heritage through charitable funding, membership, grant management, and community engagement.



Preservation PA assists Pennsylvania communities in protecting and utilizing historic resources through creative partnerships, targeted educational and advocacy programs, and various fee-based services, including rehabilitation plans, historic resource inventories, national register nominations, and tax credit applications.



The **Pennsylvania Downtown Center (PDC)** is the Commonwealth's statewide nonprofit dedicated to the vitality, management, and economic development of Pennsylvania's downtowns and business districts. PDC administers the Commonwealth of Pennsylvania's Main Street and Elm Street Programs. PDC's **Main Street Program** provides funding and technical assistance for downtown and commercial district revitalization, while the **Elm Street Program** provides funding and technical assistance to support the revitalization of older residential areas bordering Main Streets and central business districts.



Pennsylvania's **Department of Community and Economic Development (DCED)** encourages shared prosperity by supporting good stewardship and sustainable development initiatives. DCED provides strategic technical assistance, training, and financial resources to help the Commonwealth's communities and industries. DCED's **Keystone Communities Program** provides funding and technical assistance for disadvantaged industrial/manufacturing and business sites (Keystone Enterprise Zones) and residential/commercial districts (Keystone Communities).

Looking for more information about the future of historic preservation efforts in Pennsylvania?

Check out Pennsylvania's Statewide Historic Preservation Plan 2018-2023 for SHPO's five-year strategic action plan and collaboration to reframe the historic preservation conversation in Pennsylvania. Easily find the plan on the Pennsylvania Historical and Museum Commission's website. #PreservationHappensHere



IMPLEMENTATION

Conducting a Historic Preservation Impact Study

The following steps can help initiate an impact assessment for your historic preservation efforts, initiatives, programs, and policies.



Identifying Your Research Questions and Deciding the Best Metrics to Measure

Exploring the themes and specific metrics detailed in this guidebook may spark a wide range of ideas around the structure of impact studies appropriate for your historic preservation initiatives. Impact studies can range from comprehensive assessments to targeted analyses of project-specific redevelopment implications. While studies can include a comprehensive range of impact types, communities should be deliberate about choosing metrics that align with local efforts and priorities.



Funding Your Impact Study

Pennsylvania offers a variety of grants and funding support to help make your impact assessments a reality. The following page details some available resources. Importantly, assessing the impact of historic preservation efforts can range in costs and capacity requirements. Consider the available funding resources when determining the scope of work and consider if research questions can be answered efficiently and cost-effectively.



Engaging Consultants

External consultants can provide both additional capacity and technical expertise needed for the collection and analysis of certain impact metrics. Consultants can be hired through a variety of mechanisms, including competitive bids, sole-sourcing, or strategic partnerships with nonprofits or municipal agencies.



Partnering for Support

Pennsylvania's historic preservation network, including the agencies and nonprofits identified in this guidebook, can provide technical guidance, funding, and administrative support to communities looking to undertake a preservation impact assessment. These partnerships can also help ensure impact assessments align with similar studies conducted throughout Pennsylvania.



Methodological Considerations for Pennsylvania's Communities

Determining the best approach for measuring historic preservation impacts can vary due to many factors and considerations, and importantly, based on the size of the community.



Rural Townships

Many of Pennsylvania's historically-rooted small towns incorporate preservation efforts within the community and along primary routes to and from the townships. With less available data than larger municipal areas, methodologies may require primary source and locally collected data. The expansive nature of preservation activity and landmarks in rural areas lends towards methodologies oriented around the measurable impacts of specific historic sites and buildings on incorporated township tax bases and visitor attraction.



Small and Medium-Sized Boroughs

Sharing similar attributes to both rural and urban areas, small and medium-sized boroughs, towns, and cities allow for opportunities to construct a wide range of impact methodologies. Enhanced data may be more readily available as city and population size increases, while the intimate nature of these communities encourages in-person conversation and data collection. Many impact assessments in small and medium-sized communities are oriented around historic downtowns districts, assessing how they serve as key commercial, cultural, and social hubs.



Large Cities and Urban Areas

The diversity of the urban fabric in our cities allows for comparative assessments between historic districts and areas of cities that are not designated as historic districts. This comparative assessment methodology can help articulate analytical answers to questions such as the impact of preservation efforts on residential and commercial affordability, how historic districts contribute to citywide sustainability goals, and if the built environment of the districts supports higher levels of business activity. This methodology helps articulate and decipher the specific attributable impacts of historic preservation.



Grant Resources to Help You Measure Impact

There are many grant resources available to assist communities in securing funding to conduct historic preservation impact studies.

The following grants, including both Pennsylvania-specific and nationally available grants, provide financial support for local government municipalities and nonprofit organizations. Additional up-to-date eligibility and application information can be found online.



Cultural and Historical Support Grant Program

Pennsylvania Historical and Museum Commission

Pennsylvania's Cultural and Historical Support Grant program offers grant funding assistance for museums and historical societies to support the general operations of the organizations. Museums may apply for up to \$65,000, and historical societies are eligible for grants up to \$4,000.

Eligible Recipients: Museums and Official County Historical Societies



Keystone Historic Preservation Planning Grant

Pennsylvania Historical and Museum Commission

This grant offers financial support for planning and development for publicly accessible historic resources that are listed in or eligible for listing in the National Register of Historic Places. Grant awards range from \$5,000 to \$25,000.

Eligible Recipients: Local Governments and Nonprofit Organizations



Certified Local Government Grant Program

Pennsylvania Historical and Museum Commission

Certified Local Governments are eligible for grant support for tools, products, programs, and services to administer local preservation programs effectively and in accordance with the CLG Guidelines and Procedures. Grant awards range from \$3,000 to \$25,000.

Eligible Recipients: Certified Local Governments



Keystone Fund

WeConservePA

The Keystone Fund provides support for the identification, preservation, promotion, and protection of historic resources. Eligible projects include rehabilitation projects, municipal planning initiatives, and feasibility assessments. Grant awards range from \$5,000 to \$25,000.

Eligible Recipients: Local Governments and Nonprofit Organizations

Note: Grant amounts, eligible uses, and eligible recipients are as of December 2021. Grant specifications are subject to change.
Measuring Impact Guidebook



Johanna Favrot Fund for Historic Preservation

National Trust for Historic Preservation

Central Pennsylvania municipalities in designated counties and nonprofit organizations may apply for grant funding for professional advice, conferences, workshops, and education programs that contribute to the preservation or recapture of an authentic sense of place. Awards range from \$2,500 to \$10,000 in grant funding

Eligible Recipients: Local Governments and Nonprofit Organizations Located in one of 21 Counties in Central Pennsylvania



Cynthia Woods Mitchell Fund for Historic Interiors

National Trust for Historic Preservation

Nonprofit organizations are eligible to apply for this grant support for professional expertise, print and video communications materials, and educational programs that support the preservation, restoration, and interpretation of historic interiors. Grant awards range from \$2,500 to \$10,000.

Eligible Recipients: Nonprofit Organizations

While not directly applicable for impact assessments, the following grants offer financial support for historic preservation initiatives and advocacy efforts.



Keystone Historic Preservation Construction Grants

Pennsylvania Historical and Museum Commission

This grant offers support to governments and nonprofits to support small-scale construction projects for publicly accessible historic resources. Grant awards range from \$5,000 to \$100,000.

Eligible Recipients: Local Governments and Nonprofit Organizations



Louis J. Appell, Jr., Preservation Fund for Central Pennsylvania

National Trust for Historic Preservation

The Louis J. Appell, Jr., Preservation Fund for Central Pennsylvania offers \$1,000 to \$2,000 grant awards for historic preservation planning and education efforts. Importantly, this grant may not be used for building and construction activities, historic resource surveys to create inventories or list resources in the National Register, academic research, or real estate acquisition.

Eligible Recipients: Local Governments, Historical and Heritage Organizations, and Museums



Henry A. Jordan, M.D., Preservation Excellence Fund

National Trust for Historic Preservation

This grant provides financial support for facilitating positive dialogues between the diverse interests of historic preservation, land conservation, business development, transportation, and government. Grant awards range from \$1,000 to \$2,000.

Eligible Recipients: Local Governments, Historical and Heritage Organizations, and Museums

Applicability Index

The following index summarizes the metrics discussed in this guidebook and shares insights on how to measure historic preservation efforts effectively.

Applicability Legend

T Y P O L O G Y



Building

Applies to preservation or restoration of specific buildings, developments, or other physical assets in a community.



District

Applies to preservation and restoration of historic districts, downtowns, or other physical geographies.

R E S E A R C H



Qualitative

Case studies, testimonials, and other narrative or visual-based content to assess the impact of preservation.



Quantitative

Numerical metrics, such as total dollars invested in a district, to assess the impact of preservation.

I N I T I A T I V E



Construction & Rehabilitation

Applies to the assessment of physical improvements made in historic buildings or other structures, such as renovations or property acquisition.



Program

Applies to the assessment of preservation-oriented initiatives or grants, typically managed by public or nonprofit entities.



Policy

Applies to the assessment of public policy, such as design guidelines, historic district designations, or tax incentives.

E A S E & E X P E R T I S E



Light

Metrics are free, readily available, or require minimal cost and expertise to collect and analyze.



Moderate

Metrics may require some technical expertise or could be moderately time-intensive to collect. These metrics may require additional partnerships or external consultation.



Extensive

Metrics require extensive time capacity or technical expertise to collect and analyze. These are typically assessed by external consultants.

Impact Metrics



Economic Development

Preservation Industry Sector	●	●	●	●	●	●	★★★★
Development Square Footage	●	●	●	●	●	●	★★★
Industry Employment	●	●	●	●	●	●	★★★
Business Growth, Attraction, and Retention	●		●	●	●	●	★★★
Economic Impact	●	●	●	●	●	●	★★★★
Tourism	●	●	●	●	●	●	★★★★



Fiscal and Financial

Tax Credits	●	●	●	●	●	●	★★★
Grants	●	●	●	●	●	●	★★★
Property Value Change	●	●	●	●	●	●	★★★★
Fiscal Impact	●	●	●	●	●	●	★★★★



Community Development

Population and Demographics	●		●	●		●	★★★
Housing Units	●	●	●	●	●	●	★★★
Affordability	●		●	●	●	●	★★★★
Community Retention	●		●	●	●	●	★★★★
Events, Programming, and Amenities	●		●	●	●	●	★★★
Retail Businesses	●	●	●	●	●	●	★★★



Environmental

Energy Efficiency	●		●		●	●	★★★
Embodied Energy	●		●		●	●	★★★★
Landfill Diversion	●		●		●	●	★★★★
Carbon Emissions	●		●		●	●	★★★★
Walkability		●		●	●	●	★★★
Green Infrastructure	●	●	●	●	●	●	★★★
Natural Assets		●	●	●	●	●	★★★



Quality of Life

Historic Legacy and Story	●	●	●	●	●	●	★★★
Community Character	●		●	●	●	●	★★★
Branding	●			●		●	★★★
Livability Index	●			●	●	●	★★★
Live Work Play	●		●	●	●	●	★★★

