Historic Preservation for Museums and Cultural Institutions

Florida Association of Museums

Wednesday, April 25, 2018, 9:00 am - 4:30 pm
Lightner Museum, St. Augustine
Agenda

9:00 am  Welcome
         Carmen Godwin, FAMF Program Manager

         FAM Overview
         Malinda Horton, FAM Executive Director

9:20 am  Preservation Planning
         Jenny Wolfe, Historic Preservation Officer
         City of St. Augustine

         Kathy Fleming, Executive Director
         St. Augustine Lighthouse and Maritime Museum, Inc.

10:20 am BREAK

10:35 am Let’s get Technical: Masonry
         Patricia Davenport-Jacobs, Historic Resources Specialist, Environmental Services, Inc.

11:35 am BREAK

11:45 pm LUNCH
         Rising Waters:
         Emily Jane Murray, Public Archaeology Coordinator, Florida Public Archaeology Network

         Rick Cain, Director Museum Services Division, St. Augustine Lighthouse and Maritime Museum, Inc.

12:45 pm Museum Tour:
         Robert Harper, Executive Director, and
         Barry Myers, Curator, The Lightner Museum

2:00 pm Let’s get Technical: Wood and Windows
         Jodi Rubin, Business Development Manager – Restoration, Specialized Property Services

3:00 am BREAK

3:15 pm DHR Programs and Resources
         Eric Case, DHR Historic Preservation Grants Specialist

         Ruben Acosta, DHR Survey & Registration Supervisor

4:15 pm WRAP UP & Q&A

5:00 pm FAM Member Mixer
         St. Augustine Lighthouse Museum
Partners
Florida Association of Museums Overview
Malinda Horton, Executive Director
Preservation Planning

Jenny Wolfe, Historic Preservation Officer
City of St. Augustine
HISTORIC PRESERVATION PLANNING:

How your local municipality may regulate and promote historic preservation in your community

Presented to Florida Association of Museums
Preservation Training for Museums and Cultural Institutions
April 25, 2018

Jenny Wolfe
Historic Preservation Officer
Historic Preservation Division
City of St. Augustine Planning and Building Department
Our Tangible Heritage

“Maintain and enhance the historic integrity and ambiance within the City of St. Augustine while encouraging economic growth and the identification, preservation, continued use and adaptive reuse of existing historic structures.”

City of St. Augustine Historic Preservation Element
HISTORIC PRESERVATIONISTS

What Developers Think We Do
What Our Parents Think We Do
What Our Supporters Think we CAN Do

What My Friends Think I Do
What I Think I Do
What I Really Do
Overview

Historic Preservation as the City of St. Augustine:

1. Regulatory authority for development activity
2. Promote historic preservation, heritage tourism, economic development
3. Evaluate and update regulations and planning strategies
4. Honor Certified Local Government designation

Tools: National Register of Historic Places, Secretary of the Interior’s Standards, and local guidelines and planning documents

What does a local regulatory entity do?

When communicating with your local government, keep in mind they are here to serve all their constituents. In St. Augustine, the Historic Preservation Division is housed in the Planning and Building Department. The local office for historic preservation cannot represent the state office, National Register, or other regulating authorities but can provide you with recommendations and contacts. (p.s. the local government is not the historical society)

Other agencies of a local government include Public Works, Legal, Finance, Administration, City Clerk, Police, and Fire as well as human resources and facility management. The COSA Planning and Building Department is responsible for reviewing building permits, tree removal permits, archaeological permits, new business applications, sign permits, enforcing related ordinances, administering the Planning and Zoning Board, Historic Architectural Review Board, Code Enforcement and Adjustments Board, and the Technical Review Committee meetings.
1. Regulatory Authority for Development Activity: Archaeological Ordinance
1. Regulatory Authority for Development Activity: Historic Preservation Ordinance

"You’ve got to preserve it and yet you’ve got to have people use it. The two things are always at odds."

Architectural Guidelines for Historic Preservation
Prepared by the Planning and Building Division
City of St. Augustine, Florida
The Local Historic Preservation Commission

“Historic Architectural Review Commission”
“Historic Architectural Review Board”
“Historic Preservation Board”

If you’ve heard of these or heard of them by their affectionate acronyms you need to be prepared for your project to undergo a public review process! Remember that you are a steward of a historic resource and the rule of thumb is first, do no harm 😊

1. Discuss your project with city staff to determine what type of application(s) are necessary and how your project may be affected by other city regulations
2. File an application (typically called a Certificate of Appropriateness)
3. Submit existing and proposed renderings along with material details and specifications
4. Describe a project summary using the local design guidelines as a reference to indicate that your project meets the local/applicable design standards
5. Talk to your neighbors and get their input and support
6. Ask for the staff report prior to the public meeting to prepare your comments
7. Be open to recommendations from the local board and respectful of the public process
8. Invite staff members and board members to visit your project once its complete!
2. Promote historic preservation, heritage tourism, economic development
Lincolnville Community Redevelopment Area includes a Rehabilitation Program:

- Down payment assistance program
- Rehabilitation program: residential properties and historic institutional properties

Community Redevelopment Areas generate funds for the designated area using tax increment financing and fund projects listed in the plan.
3. Evaluate and update regulations and planning strategies

- City-Wide Planning initiatives
- Historic Preservation Inventory
- Historic Preservation, Conservation, and Zoning
- Reducing Historic Building Demolition
- Economics
- Hazard Mitigation
- Archaeology
- Education and Advocacy

Draft plan has been developed following multiple SWOT analyses with citizen boards, individual members of the public, neighborhood workshops, and online surveys.
Grant Projects:

1. Alcazar roof restoration (managed by General Services) ($750k)
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2. Stabilization of Waterworks Building (aka Garden Center) ($400k)
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3. Recorded 75 years of archaeology on state inventory forms ($75k)

Table 1. Sites Included in the St. Augustine Inventory.

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Figure 2. Map of the project area. Township 7 South, Range 30 East, Section 4. USGS St. Augustine 1972.
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A total of seven hundred seventy-five (775) resources were identified during the field survey. Of those resources sixty-five (65) had been previously recorded; and seven hundred ten (710) are newly recorded. Six hundred thirty-two (632) of the resources are considered to be potentially eligible or contributing to a NRHD; and approximately one hundred forty-three (143) are considered to be ineligible or non-contributing structures. An electronic copy of project GIS data layers showing newly surveyed structures at least 50 years of age and a color overlay map depicting the newly surveyed structures and the previously recorded structures are on file with the City of St. Augustine. Furthermore, certain resources were identified as having potential as a Multiple Property listing and are highlighted as well.
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6. Archaeology exhibit in Visitor Information Center ($42.5k)
7. Architectural survey update for the downtown historic district ($50k)
8. Expansion of the wayfinding program ($50k)
9. National Register nomination of sites and buildings significant to the Civil Rights Movement (grant earned #1 ranking by state panel) ($50k)
4. Honor Certified Local Government Designation

Designation established by the National Park Service and managed by the State Historic Preservation Office (SHPO)

a) **Review and comment on all National Register nominations within the jurisdiction**
   - Constitution Obelisk
   - St. Augustine Waterworks
   - St. Augustine Mini-Golf
   - Father Lopez statue at the Mission Nombre de Dios
   - Government House
   - Menendez Encampment Site at FOY
   - National Cemetery
   - Pending: St. Augustine Civil Rights Sites (multiple property designation)

b) **Review and comment on projects with Federal funding/permitting requirements as solicited by the state/federal agency**

c) **Submit annual reports to Florida DHR and National Park Service**

d) **Enforce local preservation regulations, maintain a reviewing authority, provide public participation (HARB and professional staff)**

e) **Maintain and update historic resource inventory**
Communicating the significance of your site and knowing how to identify and preserve the significant aspects of your site are key to maintaining an authentic sense of place (and be eligible for preservation funding!)

**National Register of Historic Places Criteria of Significance:**
The quality of significance in American history, architecture, archeology, engineering, and culture is present in districts, sites, buildings, structures, and objects that possess integrity of location, design, setting, materials, workmanship, feeling, and association, and:

**A.** That are associated with events that have made a significant contribution to the broad patterns of our history; or

**B.** That are associated with the lives of significant persons in our past; or

**C.** That embody the distinctive characteristics of a type, period, or method of construction, or that represent the work of a master, or that possess high artistic values, or that represent a significant and distinguishable entity whose components may lack individual distinction; or

**D.** That have yielded or may be likely to yield, information important in history or prehistory.

Generally properties must be 50 years of age or older to qualify. Reconstructed or relocated properties are generally not eligible, as well as cemeteries, graves, religious properties, and commemorative properties unless they meet established “Criteria Considerations.”
Tools

National Register of Historic Places 7 Aspects of Integrity:

1. **Location** is the place where the historic property was constructed or the place where the historic event occurred.
2. **Design** is the combination of elements that create the form, plan, space, structure, and style of a property.
3. **Setting** is the physical environment of a historic property.
4. **Materials** are the physical elements that were combined or deposited during a particular period of time and in a particular pattern or configuration to form a historic property.
5. **Workmanship** is the physical evidence of the crafts of a particular culture or people during any given period in history or prehistory.
6. **Feeling** is a property's expression of the aesthetic or historic sense of a particular period of time.
7. **Association** is the direct link between an important historic event or person and a historic property.

Does the property look similar to the way it did during the height of its historic time period?
Choosing an appropriate treatment for a historic building or landscape is critical:

**Preservation** focuses on the maintenance and repair of existing historic materials and retention of a property's form as it has evolved over time. *See Drayton Hall.*

**Rehabilitation** acknowledges the need to alter or add to a historic property to meet continuing or changing uses while retaining the property's historic character. *See St. Augustine Lighthouse Keepers Quarters.*

**Restoration** depicts a property at a particular period of time in its history, while removing evidence of other periods. *See Kingsley Plantation site.*

**Reconstruction** re-creates vanished or non-surviving portions of a property for interpretive purposes. *Few properties are entirely reconstructed, refers most often to individual features.*
Standards for Rehabilitation

1. A property will be used as it was historically or be given a new use that requires minimal change to its distinctive materials, features, spaces and spatial relationships.

2. The historic character of a property will be retained and preserved. The removal of distinctive materials or alteration of features, spaces and spatial relationships that characterize a property will be avoided.

3. Each property will be recognized as a physical record of its time, place and use. Changes that create a false sense of historical development, such as adding conjectural features or elements from other historic properties, will not be undertaken.

4. Changes to a property that have acquired historic significance in their own right will be retained and preserved.

5. Distinctive materials, features, finishes and construction techniques or examples of craftsmanship that characterize a property will be preserved.

6. Deteriorated historic features will be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature will match the old in design, color, texture and, where possible, materials. Replacement of missing features will be substantiated by documentary and physical evidence.

7. Chemical or physical treatments, if appropriate, will be undertaken using the gentlest means possible. Treatments that cause damage to historic materials will not be used.

8. Archeological resources will be protected and preserved in place. If such resources must be disturbed, mitigation measures will be undertaken.

9. New additions, exterior alterations or related new construction will not destroy historic materials, features and spatial relationships that characterize the property. The new work will be differentiated from the old and will be compatible with the historic materials, features, size, scale and proportion, and massing to protect the integrity of the property and its environment.

10. New additions and adjacent or related new construction will be undertaken in such a manner that, if removed in the future, the essential form and integrity of the historic property and its environment would be unimpaired.
Local Design Regulations

- Design guidelines and standards may apply to your project
- Overlay zoning regulations may apply to your project

Application deadlines and permit expirations may apply

These are separate and distinct from any state or federal requirements if your project is grant funded or federally permitted
Incentives to participate in your community’s preservation efforts:

• Federal Historic Preservation Tax Credits
• State Grants
• Heritage Tourism
• Stable/increasing property values
• Local economic incentives (CRAs, property tax exemption, façade grants)
• Conservation easements
• Florida Main Streets
• Honorary designations
• Community Pride

*Some incentives do not directly benefit or are not applicable to non-profit institutions, however; preservation of a site contributes to the overall historic landscape of the community and viability of economic benefits to private investors
Preservation Planning

Kathy Fleming, Executive Director
St. Augustine Lighthouse and Maritime Museum, Inc.
HISTORIC PRESERVATION: THE FUNDRAISING AND ORGANIZATION SIDE

The past has been there all along, reminding us: This time--maybe, hopefully, against all odds, we will get it right.”
— Leslie T. Chang
National Park Service Definition of Historic Preservation

Historic preservation is a conversation with our past about our future. It provides us with opportunities to ask, "What is important in our history?" and "What parts of our past can we preserve for the future?"

When we ask these questions, we answer them not alone but in a community. In any community stakeholders have different ideas. And some in the community will support us. But some won’t.

The techniques of historic preservation both support and are supported by building friendships, raising funds and
The Path you Take toward a Preservation Project will be unique to your historic site, structure, and resources.

Expect some curves and surprises along the way. That is normal during a preservation project of any type.
The Real World of Planning
Different aspects of Preservation

- **Designation** of historic sites (includes federally, state, and privately owned properties).
- **Documentation** (includes written, photographic, and technical documentation, as well as oral histories)
- **Physical preservation** (includes stabilization, rehabilitation, restoration, and reconstruction)

- [https://www.nps.gov/subjects/historicpreservation/what-is-historic-preservation.htm](https://www.nps.gov/subjects/historicpreservation/what-is-historic-preservation.htm)
A Preservation Plan

1. Is a community project: Involves Stakeholders and the Public, your community, volunteers, governments and others
2. Assists with raising friends, awareness and money.
3. Helps determine best practices in ongoing preservation
4. Helps you document historic context, existing conditions and important features
5. Identifies the expert help you need.
6. Considers worse case and best case scenarios
7. Helps to provide economic and other community benefits
8. Helps you budget and phase the work.
9. A living breathing document that can be changed…
START WITH A “A BIG” VISION

Why are you doing it?
- To create places for small business
- To preserve a sense of place
- To preserve the significant story of a person or movement.
- To attract tourism
- To provide green spaces for local business.
- To create local jobs
- Other Adaptive uses – museum, hotel, housing...

What are you doing?
- Save a building
- Save an historic district
- Preserve a cultural or historic landscape
- Stimulate the economy.
There are many ways to share. You can share outcomes and pieces of your vision. Give talks, gather like minded groups.
Your Vision Needs to be Tested

Get Bids, Run the Numbers, find someone to craft a business plan for you.
Thinking about Planning

Typical Plan Process

Gather Facts
- From all Stakeholders
- Customer analysis
- Competitor analysis
- Industry analysis
- Environmental
- Company performance
- Company strategies

SWOT Analysis
- External Analysis
- Opportunities
- Threats
- Internal Analysis
- Strengths
- Weaknesses
- Strategic Questions
- Strategic Issues

Review Inputs
- All Stakeholders
- Review Inputs
- Review SWOT Analysis
- Define 3-4 key statements

Strategic Matrix
- All Stakeholders
- Define Strategies to address SWOT combinations:
  - Opportunities vs Strengths
  - Opportunities vs Weaknesses
  - Threats vs Strengths
  - Threats vs Weaknesses

Define Strategies
- Objectives
- Key Strategies
- Short and Long Term Goals
- Operational Plans

Final Reviews
- All Stakeholders
- Review Strategies
- Review Goals
- Adjust as necessary
Gather Facts  (Decide who will do this work best…it will inform your stakeholders, volunteer support requests.)

- Historic Photographs
- Oral Histories
- Survey’s
- Land records
- Histories of the area, associated industry, state
- Associated people
- Influences
- Archaeological or Architectural drawings.
Review Inputs, Facts, SWOT

- Define Three Key Statements
  - 1. This place is significant in the following way.
  - 2. We need to raise $ and # Support because
  - 3. We have identified the following resources.
    - For immediate action.
    - For future action.
CRAFT STRATEGIES

1. **Strategies:** Very Broad Goals/ Big Picture Thinking.

   Phases That divide your Plan into manageable parts.
   
   1. Strategies may help shape your time line.
   2. Involving Stakeholders and the public is important early in the process

1. **Objectives:** The specific results or desired outcomes that one intends to achieve under each Strategy

2. **Action Steps or Tactics:** What you will do to get there?
Resources to learn From

https://www.nps.gov/preservation-planning/guidance.html

Your Plan will have three Action levels:

- Broad Strategies
- Specific Objectives
- Very Specific Action Steps

Outputs/Evaluation

Outcomes and Impact – Loftier Benefits
Real Life Hierarchy

Demanding your Attention
Stop the Fires from Burning

- What’s on fire?
  - Is the building envelope water tight?
    - Water intrusion?
    - Pests?
  - Is there Vandalism?
  - Are Stakeholders Concerned?

If yes? Respond accordingly. Discuss, Envision, Ask for help. Partner, Fundraise...establish a time line.

- Low Cost. Volunteers make a difference.
- Reversible.
- Public problems may take a long time.
- Public Education requires patience, trust and credibility.

Fire Fighting is an Act of the Leadership and Will
Fire Fighting Techniques: Mothballing

- Mothballing: The temporary closing of a structure to preserve it from the weather, reduce deterioration and secure it from vandalism.
Community Involvement and if needed, Conflict Resolution

NO SURPRISES.

- Identify Stakeholders early.
- Reach out to them first.
- Craft mutual benefit
  - Economic
  - Green
  - Adaptive Reuse
- Surprise is deadly.

First Do no Harm…

- Involving
- **Listening**
- Understanding
- **Communicating Mutual Benefit**
- Brainstorming Solutions
- **Agreement/ Compromise**
Strategy Examples and Key Points
Objectives:
1. Build Friends, Expertise, Volunteers
2. Set a Timeline – Fundraising may be a marathon
3. Find Expert Help when it’s needed.
4. Diversify your options.
5. Develop a Case for Support

STRATEGY A: No $$$ Margin; No Mission.
Objective A. 1. Build Friends and Support

A. 1. A. Build your Team:

Identify Key Stakeholders – Partners, Owners, Municipalities.

Gather volunteers, be very formal about it. Reach out specifically to people you want.

1. B. Put them to Work

A. Assign a specific volunteer to coordinate social media, do grant writing, maybe even help with documenting. etc.

B. Meet individually with key stakeholders and invite participation.

C. Other Strategies…such as writing press releases.

D. Develop Job Descriptions for volunteers.
Objective A. 2. Set an Objective Timeline

- Your timeline will depend on the scale of your project
- On how readily money is available, and what resources you have to start.
- Upon available expertise
  - Architects
  - Builders
  - The economy
- You May need to Phase your project.

Campaign Fundraising can take 5-10 years. Federal Government Projects can take longer.

Don’t Give UP.
Protect the envelope first. Stop Water intrusion, Vandals, etc.
Use Documents provided by Experts for Grant and Foundation Requests. But leave a year for the process.
State grants can fund planning and preservation
  - **Small Matching** – 1 year up to $50K
  - **Development Projects in Special Categories.** Up to $500K over two years.
Objective A. 3. Find Expert Help

A. 3. 1. Find Expert Help

Historic Preservation Experience is needed to document condition and craft appropriate actions.

- Architects
- Bids
- Historians
- Contractors and Craftspeople
- Elected officials
- Community Support
- Even the act of getting an estimate gives you information and documentation you can use
Objective A. 4. Create a Diverse Fundraising Plan

A. 4. 1. Identify all possible Funding Streams

- **Earned Income**
  - Community events – Kiss the Pig, Race for the Cure.
    - T-Shirts, Programs, Events.

- **Other Income**
  - Research and Apply for Grants: State, Local, Foundation
    - Pay Attention to FIT
    - Corporate gifts
      - Foundations
      - Marketing
  - Donations: Most Money still comes from Individuals.
    - Friend building, partnerships, etc.
    - **Create naming opportunities at all levels.**
      - Windows, Doors, Rooms, Bricks.
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<td>Under 2,500.00</td>
<td>78</td>
<td>314</td>
<td>98,400.00</td>
<td>1,000,000.00</td>
<td>100%</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>132</strong></td>
<td><strong>528</strong></td>
<td><strong>1,000,000.00</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Objective A. 5. Develop a Case for Support

- 1. Gather The Right Information – See Strategy B.
- 2. Write down your case, then have someone else read it who will tell you the truth. Be ruthless.
  - A Good case is about emotional appeal AND logic.
  - A fancy printed version with pictures can work but it can also backfire. Keep it simple.
  - Develop an Elevator Case. – You have five minutes in the elevator with a Senator who can support your case.
  - What will you say?
  - Video, Social Media, etc. makes a great case sharing opportunity.
- Practice.
Case for Support Example.

- This Place Matters, started 2008.
  - https://nextcity.org/daily/entry/this-place-matters-national-trust-historic-preservation-tweets
This mom raised $1,629 to get her daughter to the national championship.

The Detroit community raised $2,155 to get this peanut vendor back on his feet.

Neighbors raised $50,877 to help the Cobles after fire destroyed their house.
Case For Support Should Convey

- Significance
- Competence
- Benefit to the Public
- Authentic Truth

- Emotional Tug – Need or Excellence, Fear of Loss, Love for Place or Community.
  - Use powerful images.
  - Be real.
There's a lot worth saving in this country.

Today more Americans who value the best of yesterday are working to extend the life of a special legacy.

Saving and using old ships, docks and urban waterfront areas is more than just a sentimental gesture. Economically it makes good sense to restore and revitalize them. Preservation conserves energy and materials at a time when our resources are limited.

We can also appreciate the artistry and design of our historic maritime resources, which are as much a part of our unique culture as the art and music we have given the world.

The National Trust for Historic Preservation—in cities, towns, and neighborhoods—is helping to keep our architectural and maritime heritage alive for us and for our children.

Help preserve what's worth saving in your community. Contact the National Trust, P.O. Box 2800, Washington, D.C. 20013.
I feel invisible. No one notices me. Why do I always feel guilty? How am I going to pay the rent? I wish I had more time. I need to get out of this town. I wish I could have done better in school. I'm not as active anymore. What happened to the old me? My goodness. A green grass floor for this ancient abbey—it looks like the skeleton of an angel sprouting from the ground.
Consider Fit for Fundraising

- Marketing departments offer dollars in return for press
- Philanthropic Organizations pick a subject to give to.
  - If they care about historic preservation or history then you have fit.
  - If they care about animals or health care, then they are less likely to give to your cause, even if you think they should.
- Knowing the economic benefits of your program or project can help.

- If donors see the need and know where their funding is going, it makes a difference.
- If they know you are utilizing expertise and doing it right, it makes a difference.

Mid-Term Propose a Designation of a property or group of Properties to the National Register of Historic Places.

Mid-Term Use your Reports and Designations for Fundraising or Grant Documentation and Support.
B. 1. **Determine the Historic Context and Historic Features**

B. 1. A. Evaluate the Structure(s) inside it’s historic context based on NPS Criteria.

B. 1. B. Have a scholar or architect Develop a Condition Assessment Report and/or a Historic Structures Report listing context, features and proposed...
Objective B. 1 Determine the Property’s **Historic Context** and Important **Features**

- Major decisions about identifying, evaluating, registering and treating historic properties are most reliably made in the context of other related properties. – NPS

- A single historic context describes one or more aspects of the historic development of an area, considering history, architecture, archaeology, engineering and culture and identifies the **significant patterns** that individual historic properties represent...

- [https://www.nps.gov/nr/publications/bulletins/nrb15/nrb15_5.htm](https://www.nps.gov/nr/publications/bulletins/nrb15/nrb15_5.htm) - To help the Beginning Understand Historic Context.
Five Points of Historic Context

1. What **facet of** prehistory or history (Local, State, Nation?) does the property represent?
2. Is that **facet significant**?
3. Does the property have **relevance and importance** in illustrating that facet of history or prehistory?
4. If yes, how does it do so?
5. Whether the property possesses the physical **features** necessary to convey the aspect of prehistory or history with which it is associated?
What is a Feature?

**What is a Feature?** A feature is a distinct element or a separately identifiable part of the structure such as windows, roof structure, mullions, decks, cornices…

Preserve and identify original historic features.

Windows are critical features of most buildings and must be treated properly.
Evaluate Historic Context re: NPS Criteria (Important to grantors or the NPS, Community and Donors)

1. An event, a series of events or activities, or patterns of an area's development (Criterion A);
2. Association with the life of an important person (Criterion B);
3. A building form, architectural style, engineering technique, or artistic values, based on a stage of physical development, or the use of a material or method of construction that shaped the historic identity of an area (Criterion C); or
4. A research topic (Criterion D). **Contributes information important to history or pre-history.**
Document Your findings: Two Different Written Reports:

I. Historic Structures Report

- The NPS primary guide to treatment and use of an historic structure and may also be used in managing a prehistoric structure…groups of similar structures may be addressed in one report.

- 1. Management Summery
- 2. Scholarly Development History
- 3. Treatment and Use – Emphasis on preserving extant historical materials and resolving conflicts
- 4. Concludes by recommending Specific Treatments.
2. Condition Assessment Report

- **Major Assessments** are a special type of condition assessment that are usually conducted by experienced professionals with a focus on identifying and documenting long range repair, restoration, major modifications, and improvement requirements for historic structures and their features.

- Knowledge of the Secretary’s Standards for Historic Preservation
- Knowledge of local life safety or fire codes and ADA requirements for historic buildings is a must
- Experience in historic preservation.
And a Third Operational Report

3. Scheduled Assessment

- Conducted by staff and volunteers at the local level. Staff and volunteers should be well trained and the intent is to develop an annual maintenance plan for the structure.
- Do this monthly after your restoration is “finished.”
- Hint: it’s never finished.
Resources.

- Guidelines for treatment of Wood, Brick, Metal, and choosing an appropriate method of rehabilitation, restoration or preservation
Helpful Hints

- It can be very helpful to involve a local historian, or architectural historian in Documentation.

- Documentation can be used to
  - Secure a National Register Nomination
  - Begin to tell your story to the press
  - Build Credibility for your project.
  - Support grants, or other funding streams.

- Working with a recognized historian or architect will help you.
Strategy: Do the Work

1. Do the Design Work
2. Don’t pay too much. But don’t pay too little.
3. Use an architect experienced in historic preservation.

A. Hiring the right contractor, building codes, Historic Preservation experience.
B. Safety Considerations doing the work, for visitors or users.
C. Change Orders
Let’s Get Technical: Restoration of Masonry

Patricia Davenport-Jacobs, Historic Resources Specialist, Environmental Services, Inc.
MASONRY: PRESERVATION AND RESTORATION

PRESENTED BY:

PATRICIA DAVENPORT-JACOBS
HISTORIC RESOURCES SPECIALIST
ENVIRONMENTAL SERVICES, INC.
JACKSONVILLE, FLORIDA
TYPES OF MASONRY
WHAT IS IT AND HOW IS IT MADE?

• Brick
• Concrete
• Cast Stone
• Limestone
• Sandstone
• Granite
• Terra cotta
• Marble
• Coquina
• Tabby
• Slate
• Adobe
• Sod
• Architectural / glazed tile
WHAT IS THE PROBLEM?
ENVIRONMENTAL EFFECTS ON MASONRY

- Water/water pressure – Humidity Levels
- Wind and Air circulation/pressure
- Sun and heat levels
- Carbonation and carbon deposits
- Flora and Fauna
- Etc. How to identify the problem/cause?
SIMPLE CLEANING? IS IT REALLY THAT EASY?

- Understand your material
  - Identify prior treatments
  - Plan an approach
  - Choose the appropriate cleaning method
- Cleaning methods
  - Water
    - Soaking
    - Low pressure washing
    - Steam and pressurized cleaning (drip system)
  - Chemical cleaning
    - Acidic and alkaline Cleaners
    - Organic solvents
  - Abrasives
  - Laser cleaning
  - Biocides
PROTECTION?

- Water-Repellent Coatings
- Waterproof Coatings
- Air circulation
- De-humidifier
- Solid masonry joints
- Routine assessments and maintenance
RESOURCES AND REFERENCE MATERIAL

National Park Service – Technical Preservation Services
   Preservation Brief 1: Assessing Cleaning and Water-Repellent Treatments for Historic Masonry Buildings
   Preservation Brief 2: Repointing Mortar Joints in Historic Brick Buildings
   Tech Notes: Masonry 1-4

USACE
   Unified Facilities Guide Specifications: Division 4 – Masonry: Restoration and Cleaning of Masonry in Historic Structures

American Institute for Conservation of Historic & Artistic Works (AIC)

Association for Preservation Technology International

National Center for Preservation Technology and Training

*Various trades groups
Rising Waters: Disaster Mitigation in the Sunshine State

Rick Cain, Director Museum Services Division, St. Augustine Lighthouse and Maritime Museum, Inc.
Identify Threats to Life & Property

- Fire
- Flood
- Wind
- Power grid malfunction
- Drinking water supply compromise
- Sewer system compromise
- Civil unrest
- Active shooter
- Bombing or Bomb threat
Identify What You Can Control

- Disaster Plan
- Determine chain of command
- Assess for safe space on property
- Identify routes of emergency egress
- Develop a code system
- Assembly of supplies
- Staff & volunteer education
- Continual monitoring of conditions
- Budget considerations
- Film your site/collections
2004 Record Breaking Year

- Fifteen named storms
- Six major hurricanes
One of the most devastating seasons for Florida on record

Hurricane Charley
August 9 – 15

Hurricane Frances
August 23 – September 6

Hurricane Ivan
September 2 – 17

Hurricane Jeanne
September 13 – 27
Matthew 2016

2 Billion dollars in property and infrastructure damage

7 – Foot storm surge on Anastasia Island
Irma 2017

Hurricane Irma

Empty!

St. Augustine Flooding

ABC Action News
What Have We Learned
Write a Usable Disaster Plan
Staff Training is Key

- Clearly communicate to staff and volunteers your expectations.
- Start before hurricane season with review of procedures.
- Teach packing principles for collection.
- Review safety procedures for using drills, tractors, etc.
Clear Communication of Expectations
Review Procedures Frequently
Take your important stuff with you

- Film your property & collections
- Get hand-carry back-ups of your server and IT files
- Get copies of your insurance polices
- Add your company call list
- Take everything with you or multiple copies with you with different individuals
Teach Packing Principles
Collections Protection
Inventory & Prep Equipment
Determine Areas with High Potential for Damage
Where is it Safe?
When to initiate the plan is inherently difficult and usually leaves little time to secure the site.
- Staff contact list with phone numbers and evacuation location.
- County emergency management numbers.
- Insurance companies and policy list.
- Media contacts list to update public on status.
Appoint one person to be PR Coordinator.
Post clear signage at your site.
Post periodic PSA’s as to your status.
Maintain current status information on your website.
Utilize social media.
Those people want to know what it is like to prepare a lighthouse for a storm. They could be stuck in a cubicle in East Wakeeney, Kansas.

They want honest dialogue.

They don’t want mission statements and three-color, tri-fold brochures.

Your people already like you. Tell them what is going on in your life. If you don’t they will quickly find new friends who will.
Perform a site assessment upon return prior to calling in staff.
Debris clean up and organize repairs.
Open for business.
Wrap Up

- Identify threats.
- Identify what you can control.
- Write a usable plan.
- Educate your staff and volunteers.
- Pack and prepare your site.
- Maintain excellent safety practices.
- Maintain open lines of communication.
- Keep everyone safe.
Thank you
Rising Waters: Disaster Mitigation in the Sunshine State

Emily Jane Murray, Public Archaeology Coordinator, Florida Public Archaeology Network
Rising Waters: Disaster Mitigation in the Sunshine State

April 25, 2018
Preservation Training for Museums and Cultural Institutes
Florida Associations of Museums

Emily Jane Murray
FPAN.us/HMSFlorida
#HMSFlorida
FPAN MISSION

“To promote and facilitate the stewardship, public appreciation, and value of Florida's archaeological heritage through regional centers, partnerships, and community engagement.”
Climate Change Impacts: Sea Level Rise

1 Meter Sea-Level Rise
- 16,015 Resources Affected
  - 214 National Register Listed
  - 12,810 Structures
  - 2,908 Archaeological Sites
  - 297 Other Resources

2 Meter Sea-Level Rise
- 34,786 Resources Affected
  - 496 National Register Listed
  - 29,964 Structures
  - 3,985 Archaeological Sites
  - 837 Other Resources

Image courtesy of Florida Master Site File

6 foot rise (light and dark blue shaded areas)
NOAA Sea Level Rise Viewer: https://coast.noaa.gov/slr/
Flooding and Storm Surge

A1A wash out after Matthew

Ft. Lauderdale during a King Tide

Image courtesy Ed Gonzalez-Tennant
Threats Level for Cemeteries

- Major Road Expansion: 465
- Inland Rising Waters: 55
- Urban Expansion: 736
- Sea Level Rise: up to 207
- Storm Surge: 457
Sea Level Rise and Cultural Resources

Join the Florida Public Archaeology Network, the Florida Trust for Historic Preservation and the City of Fernandina Beach to learn how sea level rise could affect historic structures, archaeological sites and other cultural resources. Learn about ongoing research and modeling efforts, discuss options for mitigation and try your hand at planning for rising waters in our area.


For more information, contact Emily Jane Murray at EMurray@flagler.edu or 904-382-7874 or Adrienne Burke at aburke@flm.org or 904-310-3162.

Friday, November 6
9am - 3pm
Fort Clinch State Park
What is HMS Florida?

- Statewide citizen science program for monitoring heritage at risk

- Confirming basic site information in FMSF

- Assessing impacts and threats
  - Natural: climate change, sea level rise, erosion
  - Human: development, vandalism

- Add to knowledge on sites

- Collect data
  - Prioritize sites and threats
    - Inform management and planning
Basics of Monitoring
Florida Master Site File
How to Monitor a Site

- FPAN.us/HMSFlorida
- Apply to become a Scout (general info and ethics statement)
- Use the online form to enter site information!
  - Can enter using a mobile device or print and enter later
  - Asks simple questions about the state of the site and any threats you see, like visitor traffic, erosion, etc.
- Take photos and submit to HMSflorida@fpante
Site Monitoring Form

Site Monitoring Form

Master Scout ID:

Site Name:

Site Number (if known, i.e. BSJ405):

Time:

Date:

Site Location
Mission location verified
Site found but in different location (note corrected location in comment field below)
Site could not be found

Visit
Initial
Follow up

Overall Site Condition
Good – Stable (structural stability, no obvious or predicted deterioration)
Fair – Declining (discernible decline, wholeness or physical integrity threatened by normal wear)
Poor – Unstable (palpable, accelerating decline, physical integrity is being compromised quickly)

Threats Observed (check all that apply: link to illustrative examples forthcoming)
Active erosion
Storm surge
Wind
Flooding
Wave action
Vegetation growth
Animal disturbance
Visitor traffic
Vehicle damage
Development
Other:

Priority - include justification in comments section below
High - threats pose immediate risk, recommend urgent follow up
Medium - threats pose a moderate risk, continue to monitor after storm events or on annual basis
Low - site at minimal risk, monitor after storm events or every 5 years

Comments on site impacts:

Artifacts visible (photograph in place, do not move)
Prehistoric pottery
Lithics
Shell tool
Historic ceramics
Glass
Architectural (nails, wire, bricks)
Other:

Recommendation (repeat visit, defense, FMSF update, other comments):

Supplementary reporting
Please enter the information on this form into the online reporting system found at FPAN.us/HMISFlorida and then send select/representative pictures of site conditions and any other documentation or questions to HMSFlorida@fpan.us.
ARCHES – Coming August 2018
HMS Florida in Action

Hurricanes and Pilot Programs
St. Johns County Cemeteries
GTM Research Reserve Pilot Program

- 4 public workshops, training 30 individuals
- Hand-on classroom portion with artifact identification
- Afternoon in field monitoring
- Documented impacts of 2 hurricanes in less than 1 year
Pilot Program in Fernandina Beach
HMS Florida at a Glance

• From 2016-2017 Annual Report

• 233 Scout Reports registered
  • 76 Active (monitored a site)
  • 7 scouts monitored 10+ site

• 312 Site Locations
  • 180 Archaeological sites
  • 104 Cemeteries
  • 18 Historic Structures
Questions?
Facility Tour

Robert Harper, Executive Director
Barry Myers, Curator
The Lightner Museum
Let’s Get Technical: Restoration of Wood and Wood Windows

Jodi Rubin
Business Development Manager - Restoration Specialized Property Services
State of Florida, DHR
Preservation Programs & Resources

Eric Case, DHR
Historic Preservation Grants Specialist

Ruben Acosta, DHR
Survey & Registration Supervisor
Programs of the Florida Division of Historical Resources

Florida Association of Museums
Historic Preservation for Cultural Institutions Workshop
Ruben A. Acosta

- Survey and Registration Supervisor, Bureau of Historic Preservation
- Formerly National Register and Certified Local Governments Coordinator, Nebraska State Historical Society

Ruben.Acosta@DOS.MyFlorida.com
850.245.6364 (direct)
850.245.6333 (main)
Chapter 267, Florida Statutes, directs the Division of Historical Resources (DHR) to identify, document, protect, preserve, interpret and promote Florida's historical, archaeological, and folklife resources.

Division programs are designed to nurture an understanding of Florida's diverse cultural fabric; and promote Florida's role in regional, national, and international history.
• Division of Historical Resources is the State Historic Preservation Office

• Director of the Division of Historical Resources is the State Historic Preservation Officer (SHPO), Dr. Timothy Parsons

• Each state is federal mandated by the Historic Preservation Act of 1966 to have a State Historic Preservation Office
Bureau of Archaeological Research

Bureau of Historic Preservation
Division of Historical Resources Programs

• Florida Master Site File
• National Register of Historic Places (NRHP)
• Compliance & Review
• Federal Historic Preservation Tax Incentives
• Certified Local Government (CLG) Program
• Historic Preservation Grants
• Main Street Program
• State Historical Marker Program
• Heritage Trail Series
• Florida Folklife Program

Norman Film Studios, Jacksonville National Historic Landmark
Site File Resource Counts

Cultural Resources – 210,083*
  169,056 Historic Structures
  35,770 Archaeological Sites
  1,316 Historic Cemeteries
  1,313 Historic Bridges
  2,628 Resource Groups

Manuscripts – 24,745
  • Field Survey Reports from Archaeologists or Historians
  • Excavation Reports
  • Other Unpublished Preservation Documents

1996 – 100,895 cultural resources recorded
*Compiled April 10, 2018
Who Uses the Site File?

• Division of Historical Resources
• Other Government Agencies, Federal, State and Local
• Cultural Resource Management Consultants
• Academic Researchers
• Real Estate Agents
• Homeowners and Private Citizens
• The Site File responds to about 5,000 requests for information annually

Archaeological Site locations and Building Plans are Exempt from Sunshine Law
Site File Eligibility Requirements

50 Years Old

• There is no historical significance requirement.
• Inclusion in the Site File inventory does not convey any protections or restrictions.
• Resource management tool that raises awareness of a potential historic resource.

Completed Site File Forms

• A complete form includes a map and a photo.
• Anyone may submit a form, not just for historic preservation professionals.
• We rely on user submissions.
• Updates are encouraged.
Vincent “Chip” Birdsong
Supervisor, Florida Master Site File

Duty Staff
FMSFile@DOS.MyFlorida.com
850.245.6440
National Register of Historic Places

• Nation’s list of historically significant places

• Provides a standardized framework for evaluating and designating historic properties

• Identifies properties significant in local, state, or national history

• Established in 1966 by the National Historic Preservation Act

• Maintained by the Keeper of the National Register at the National Park Service (NPS)
Historic Building

- Freedom Tower
  Miami
Historic Structure

• Old Bahia Honda Bridge
Florida Keys
Archaeological Site

- Hernando de Soto 1539-1540 Winter Encampment – Tallahassee
Historic Object

- Mizner Fountain, Palm Beach
Historic Landscape

- Commer Gardens
  Jacksonville, NR listed 2010
Historic District

• Los Robles Historic District - Tallahassee
National Register Criteria

Three broad categories: AGE, SIGNIFICANCE and INTEGRITY

• Age: At least 50 years old

• Significance falls into one or more categories:
  A: Events
  B: Person
  C: Design/Construction
  D: Information Potential
Criterion A: Events
Recreation & Culture

Monument of the States
Kissimmee, Osceola County
NR Listed 2015
Criterion B: People

John G. Riley House
Tallahassee, Leon County
NR Listed 1978
Criterion C:
Design/Construction

Sunrise Theatre
Fort Pierce, St. Lucie County
NR Listed 2001
Criterion D: Information Potential

African Cemetery at Higgs Beach
Key West, Monroe County
NR Listed 2012
The Importance of Integrity – 7 aspects

1) Location
2) Setting
3) Design
4) Materials
5) Workmanship
6) Feeling
7) Association

Examples from Lincolnville Historic District, St. Augustine
National Register Nomination Process

• Collaborative process between author and SHPO staff

• All nominations in Florida are reviewed by the National Register Review Board

• Verifies the nomination meets the NR criteria and is adequately documented

• Votes to forward nominations to National Park Service
North Florida Projects

Andrew Waber
Historic Preservationist
Andrew.Waber@DOS.MyFlorida.com
850.245.6430

Ruben Acosta
Supervisor, Survey & Registration
Ruben.Acosta@DOS.MyFlorida.com
850.245.6364

South Florida Projects

Max Imberman
Historic Preservationist
Max.Imberman@DOS.MyFlorida.com
850.245.6341
Benefits of National Register Designation

• Production of a written history

• Public awareness of a property

• Access to historic preservation tax incentives & grants

• Review of federal and state projects that may impact the property

I-4 and 1-75 Interchange, Tampa 1965
Before October 15, 1966, historic properties had few protections from federal actions.

The 1963 demolition of New York’s Penn Station - designed in 1910 by the noted architectural firm of McKim, Mead, & White - propelled the preservation movement to the forefront of the nation’s consciousness.
National Historic Preservation Act

• Establishes
  • ACHP – Advisory Council on Historic Preservation
  • SHPO – State Historic Preservation Officers
  • THPO – Tribal Historic Preservation Officers

• Section 106 of the Act
  ...seeks to accommodate historic preservation concerns with the needs of Federal undertakings through consultation... commencing at the early stages of project planning. - 36 CFR 800.1(a)
Compliance & Review

Reviews federal and state projects that may impact historic and archaeological resources under:

• **Section 106, National Historic Preservation Act (NHPA)**

• **Chapter 267, Florida Statutes**
Section 106 of the National Historic Preservation Act

• "The head of any Federal agency having direct or indirect jurisdiction over a proposed federal or federally assisted undertaking in any State and the head of any Federal department or independent agency having authority to license any undertaking, prior to the approval of the expenditure of any Federal funds on the undertaking or prior to the issuance of any license, shall take into account the effect of the undertaking on any historic property. The head of the Federal agency shall afford the Council a reasonable opportunity to comment with regard to the undertaking."
36 CFR Part 800 – *Protection of Historic Properties*

• 36 CFR (Code of Federal Regulations) Part 800 governs the Section 106 process and outlines how Federal agencies:

1. Consult with SHPOs, THPOs, and other interested parties
2. Identify historic properties
3. Determine whether and how historic properties may be affected
4. Resolve adverse effects to historic properties
Section 106 – Who Completes the Process?

- The **federal agency** that is funding or permitting the project is responsible for initiating and completing the process, but may delegate some responsibilities to others:
  - Federal Agencies
  - State Agencies
  - Local Government
  - Permit Applicants
  - Grant Applicants

Central Avenue, Tampa
Chapter 267, Florida Statutes

- Based on the National Historic Preservation Act

- Known at the Florida Historical Resources Act

- Establishes responsibilities of state agencies regarding the treatment of historic properties.

- “Each state agency of the executive branch having direct or indirect jurisdiction over a proposed state or state-assisted undertaking shall, in accordance with state policy and prior to the approval of expenditure of any state funds on the undertaking, consider the effect of the undertaking on any historic property that is included in, or eligible for inclusion in, the National Register of Historic Places. Each such agency shall afford the division a reasonable opportunity to comment with regard to such an undertaking.”
  - 267.061(2)(a), Florida Statutes
Examples of Projects/Permitting Reviews

**Federal**
- FHWA
- USDA
- FDIC
- EPA
- FRA
- FERC (pipelines)
- US Forrest Service
- Corp of Engineers Permits

**State**
- Florida Department of Transportation
- State Lands (including Florida Parks)
- Water Management District Permits
- Department of Environment Protection Permits

**Local**
- Local Ordinance Reviews
- Upon Request by Local Governments
What to Submit for Compliance Review

• Name of federal, state, or local authority requiring review
• Project address/ Location
• Color location map of project area
• History and dates of construction, if applicable
• Photographs
• Records Search
  • County and City historical societies or preservation office
  • Florida Master Site File, 850-245-6440 or sitefile@dos.myflorida.com

*Note: Review time is approximately 30 days from the time we receive sufficient information to complete our review.
Compliance and Review Staff

Supervisor
• Jason Aldridge

DOT Project Review
• Ginny Jones
• Alyssa McManus

DEP, WMD, and Corps Review
• Robin Jackson
• Rachel Thompson

State Lands Review
• Deena Woodward

Architectural Review
• Scott Edwards

Survey Review
• Lindsay Smith
Compliance Review

Compliance Permits@DOS.MyFlorida.com
850.245.6333

State Historic Preservation Officer
Compliance & Review Section
500 South Bronough Street – 4th Floor
R. A. Gray Building – MS #8
Tallahassee, Florida 32399-0250
Federal Historic Preservation Tax Credit Program

- An **income tax deduction** lowers the amount of income subject to taxation
- A **tax credit** lowers the amount of tax owed
- In general, a dollar of tax credit reduces the amount of income tax owed from an income-producing rehabilitated property by one dollar
- One of the federal government’s most successful and cost-effective community revitalization programs
Federal Historic Preservation Tax Credit Program

• 20% tax credit for the certified rehabilitation of income generating certified historic structures

Kosich Apartments, Daytona Beach

Fontainebleau, Miami Beach
Federal Historic Preservation Tax Credit Program

Athens Theatre, Deland – ca. 1970s
Tax credit project to restore the historic appearance covered over

Athens Theatre, Deland - current
The mid-century ‘modernized’ front was removed to reveal historic brickwork
Architectural Preservation Services

Richard Hilburn, R.A.
Historic Preservation Architect
Richard.Hilburn@DOS.MyFlorida.com
850.245.6363
The CLG program links **federal**, **state**, and **local** governments into a preservation partnership. The program is administered by the National Park Service.

Requirements for CLG certification include:

1. Historic preservation ordinance and a qualified local review commission.
2. A system for historic property survey and inventory.
3. Provisions for public participation in local historic preservation programs, including a process to accept recommendations for nomination to the National Register.
4. Submit a yearly progress report to the SHPO.
Florida’s Certified Local Government Program – 74 strong

Certified Local Governments

1. CITY OF FORT WALTON BEACH
2. CITY OF GAINESVILLE
3. WARWICK COUNTY
4. CITY OF TALLAHASSEE/LEON COUNTY
5. CITY OF MONTICELLO
6. CITY OF FERNANDINA BEACH
7. CITY OF JACKSONVILLE
8. ST. JOHNS COUNTY
9. CLAY COUNTY
10. CITY OF ST. AUGUSTINE
11. CITY OF PALATKA
12. CITY OF KEYSTONE HEIGHTS
13. CITY OF GAINESVILLE
14. CITY OF NEWBERRY
15. TOWN OF MACONOPHY
16. CITY OF CEDAR KEY
17. CITY OF OCALA
18. TOWN OF WELAKA
19. CITY OF DAYTONA BEACH
20. CITY OF NEW SMYRNA BEACH
21. VOLUSIA COUNTY
22. CITY OF DELAND
23. CITY OF SAVANNAH
24. CITY OF MOUNT DORA
25. CITY OF EURISPIDE
26. CITY OF LEXINGTON
27. TOWN OF KNOTTSVILLE
28. CITY OF PT. INDIAN
29. CITY OF ERIAL
30. TOWN OF WINDERMERE
31. CITY OF KISSIMMEE
32. CITY OF AURORA
33. CITY OF LAKEWOOD
34. CITY OF PLANT CITY
35. HILLSBOROUGH COUNTY
36. CITY OF TAMPA
37. CITY OF TARPOON SPRINGS
38. TOWN OF BELLEAIR
39. PINELLAS COUNTY
40. CITY OF ST. PETERSBURG
41. CITY OF GREENWOOD
42. CITY OF ST. PETERSBURG
43. MANATEE COUNTY
44. CITY OF SARASOTA
45. SARASOTA COUNTY
46. HIGHLANDS COUNTY
47. CITY OF MIAMI
48. CITY OF vero BEACH
49. CITY OF TROY"
CLG Inquiries should be directed to:

Ruben Acosta
Supervisor, Survey & Registration
Ruben.Acosta@DOS.MyFlorida.com
850.245.6364
Florida Main Street

- Technical assistance program for historic downtowns
- Encourages revitalization of commercial districts
- Community focused
- Based on Main Street Four Point Approach
  - Design
  - Organization
  - Promotion
  - Economic Vitality
What is the Florida Department of State’s Relationship to Florida Main Street?

- Florida Department of State
  - Division of Historical Resources (SHPO)
    - Bureau of Historic Preservation
    - Florida Main Street Program
Florida Historical Markers

- Approved by the Florida Historical Marker Council
- Structures and sites at least 30 years old
- Events took place at least 30 years ago
- Maintained by the Department of State
Florida Historical Markers

• $1,900 (single-sided)
• $2,200 (double-sided)
• Small Matching Grants available for ½ marker cost
• Marker text must be approved by the Historical Marker Council before submitting a grant application.
• Can be sponsored by an organization, individual, or business

FloridaHistoricalMarkers.com
Florida Heritage Trail Publications

FLheritage.com/preservation/publications
Florida Folklife Program

Florida Folklife is...

...traditional expressive culture shared within the various groups in Florida: familial, ethnic, occupational, religious, and regional. Expressive culture includes a wide range of creative and symbolic forms such as custom, belief, technical skill, language, literature, art, architecture, music, play, dance, drama, ritual, pageantry, and handicraft, which forms are generally learned orally, by imitation, or in performance, and are maintained or perpetuated without formal instruction or institutional direction.

— Section 267.021(6), Florida Statutes

(right) 2017 Master Artist, Quilting, “Miss Sue” Dennis, Sebring
The Florida Folklife Program:

• Documents and presents the folklife, folklore, and folk arts of Florida

• Coordinates activities and projects to increase awareness of traditional culture

• Performs a regional or thematic survey each year to document folklife

• Hosts artists in residency

• Holds folklife forums
• Coordinates a stage at the annual **Florida Folk Festival** in White Springs each year during Memorial Day Weekend

• For the first time in 2016, Florida Folklife artists were featured on the main stage at the festival

Papaloko & Loray Mistik, Florida Folk Festival 2016
Florida Folklife Apprenticeships

- Fosters preservation of the state’s folk and traditional arts
- These arts are usually learned informally
- Supports Masters who pass their knowledge, stills, stories and techniques to apprentices
- Master is known in their community as an expert
- Apprentice must demonstrate aptitude for the art
- Master works with apprentice(s) up to 8 months
- Program includes a small honoraria for masters and apprentices to cover lessons and supplies
Amanda Hardeman
State Folklorist
Amanda.Hardeman@DOS.MyFlorida.com
850.245.6427
Florida Main Street
Community & Government - Shopping & Retail

Timeline
About Photos Reviews More

Florida Main Street added 2 new photos.
February 17th, 2018, Tallahassee, FL

Happy February, Main Streeters!! Check out the beautiful images Charlie Johnson from Wood & Partners took while on the resource team for Crystal River Main Street.

Facebook.com/FloridaDivisionofHistoricalResources
Facebook.com/FloridaMainStreet
Facebook.com/FloridaFolklifeProgram
Facebook.com/FloridaHistoricGolfTrail
Instagram.com/FloridaMainStreet
Instagram.com/FLheritage
CONTACT:

1.800.847.7278 or 850.245.6364

Ruben.Acosta@DOS.MyFlorida.com
DIVISION OF HISTORICAL RESOURCES

GRANTS OVERVIEW
The Division of Historical Resources Grants Program is governed by

Chapter 267.0617, *Florida Statutes*
Chapter 1A-39, *Florida Administrative Code*
Small Matching Grant Guidelines
Special Category Grant Guidelines

The guidelines can be found at their respective pages on our website
http://dos.myflorida.com/historical/
Grant Application Cycle

Submission Period Opens: April 1, 2018

Submission Period Closes: June 1, 2018, 5:00 P.M. Eastern

Funding Availability:
Applications will be evaluated on a competitive basis and the selected projects will be awarded funds for the following fiscal year (July 1, 2019).

Funding for state Small Matching and Special Category grants is contingent upon an annual appropriation by the Florida Legislature.

Application Website:
The DOS Grants online system can be accessed at www.DOSgrants.com.
Online Grants Portal – DOSgrants.com

Florida Department of State Grants System

Welcome to DOS Grants, the Florida Department of State’s online Grants system

DOS Grants allows Floridians to apply for and manage grants offered by the Department of State through the Divisions of Cultural Affairs, Elections, Historical Resources and Library and Information Services. These grants support Florida's position as the recognized national leader in arts and culture, information management and history and heritage while creating opportunities for every Floridian to participate in Florida's culture, history, information, business and electoral process.

Select “Grants” in the menu above to see the available applications or create an account and add your organization to get started.
Who we fund

- Public entities such as
  - counties or municipalities
  - school districts
  - state colleges or universities
  - agencies of state government
- Non-profit organizations (active at sunbiz.org)

Not only must the Applicant Organization be eligible but when the proposed project relates to a site, building or structures, the project site has to be open and accessible to the general public. In addition, the proposed project must be one the Division can fund.
Grant Categories

• **Small Matching**
  One-year grant (July 1 to June 30)
  Provides assistance depending on project type
  Grant amount and required match must be spent and project completed within the fiscal year.

• **Special Category**
  Two-year grant (July 1 to June 30 of the second fiscal year)
  Provides assistance **to a maximum of $500,000**
  Grant amount and required match must be spent and project completed within the two fiscal years.
What we fund

Small Matching Grants

- **Survey** (of historical or archaeological resources, including re-surveying)
- **Planning** (such as design guidelines or preservation guides)
- **Nominations to the National Register of Historic Places** of eligible resources
- **Education and Publication** (such as brochures, web site updates, exhibits)
- **Main Street Start-up Grants** ($25,000)  **Main Street Re-Start up Grants** ($20,000)
- **Historical Markers** (pre-approved text, $1,900 or $2,200, with half of the amount covered by DHR)

Special Category Grants

- **Acquisition** of a Historical Property or Archaeological Site
- **Development** (such as Restoration, Stabilization, Assessments)
- **Archaeological Research** (terrestrial or underwater)
- **Museum Exhibits** (major permanent exhibits for established history museums)
## Recent Legislative Appropriations

<table>
<thead>
<tr>
<th></th>
<th>Small Matching Grants</th>
<th>Special Category Grants</th>
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</thead>
<tbody>
<tr>
<td>FY2019</td>
<td>$2.5 Million</td>
<td>FY2019</td>
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<tr>
<td>FY2018</td>
<td>$3.1 Million</td>
<td>FY2018</td>
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<tr>
<td>FY2017</td>
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<td>FY2016</td>
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<td>FY2015</td>
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<tr>
<td>FY2014</td>
<td>$1.6 Million</td>
<td>FY2014</td>
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What are the match requirements?

**Small Matching Grants**
- One-to-one match required and 25% of this match must be cash-on-hand
- Exceptions:
  - Main Street Start-up and Re-Start-up Grants do not require a match
  - Certified Local Government Applicant Organizations do not require a match
  - Established Main Street local programs do not require a match
  - Projects located in Rural Economic Development Initiative counties or communities do not require a match

**Special Category Grants**
- One-to-one match required and 25% of this match must be cash-on-hand
- Exception:
  - Projects located in Rural Economic Development Initiative counties require a 25% of the grant award as match. Of this, 25% must be cash-on-hand
Sample Projects

Mizner Fountain, Palm Beach

Mel Fisher Pop-up Museums

Norman Film Studios

Cape San Blas Lighthouse Relocation
Sample Projects

Daytona Bandshell

Colonial Archaeology Trail

The History of Matanzas Pass

Estero Island is a barrier island surrounded by San Carlos Bay to the northwest and Estero Bay to the southeast. Matanzas Pass connects the two bays along the island's eastern shore.

The Naming of Matanzas Pass

Arriving on the historic site of Matanzas Pass, the Spanish explorers found the Calusa nation living here. The Calusa nation, also known as the Arawak, were a powerful and advanced people. They lived in large, multi-story, thatched-roof buildings and were known for their trade and barter. The name Matanzas Pass is derived from the Spanish word “matanza,” which means “slaughter” or “slaughterhouse.”

Travel on the Pass

There are different types of watercraft used to navigate Matanzas Pass, including paddleboard, kayak, canoe, and motorized boats. The pass is a popular destination for nature enthusiasts and water sports enthusiasts. In the early 20th century, Matanzas Pass was a strategic point for the city of Fort Myers and access to the Estero Inlet.
Sample Projects

Fort Clinch

Cuscaden Pool

St. Marks Lighthouse Lamproom

Cuscaden Pool

Stanley Mound

Phase 1 Archaeological Survey Report and Preservation Plan,
Stanley Mound Site (BMA127),
Wingate Creek State Park, Manatee County, Florida

By
Kendal Jackson, Thomas J. Pluchhahn, and Jeffrey T. Moates
with an Appendix by: Bill William Burger

University of South Florida
For more information on how to apply for the DHR grants and the information and documents that must be submitted, please download the pdf versions of webinars “How to Apply for a Small Matching Grant” and “How to Apply for a Special Category Grant” accessible at: FL heritage.com or http://dos.myflorida.com/historical/grants.
Scoring Criteria

All applications will be judged by 10 criteria, on a 10 point scale each 80 points for funding.

A. **Criteria relating to Project site/area**
   - Historic significance
   - Endangerment (threat to the site, property, artifacts, or other)
   - Appropriateness of project proposal

B. **Criteria relative to the Applicant Organization**
   - Administrative capabilities
   - Adequate financial resources
   - Availability of professional and technical resources

C. **Criteria related to Public Benefit**
   - Compatibility with statewide historic preservation priorities (as per our solicitation notice)
   - Educational potential
   - Economic benefit
   - Public use or benefit

Cape San Blas Lighthouse
Submitting the Application

• The system will allow the user to stop and save at any time.

• Once the application is complete, and the user is satisfied, the button marked “Submit” will allow for the actual submission of the application.

• The online system will identify errors or issues and prompt the user to address them prior to a successful submission.

• An Applicant Organization may submit only one (1) Small Matching and Special Category application in a single application submission period (exceptions exist for different budgetary units of universities and local governments and for CLGs).

• CLGs may submit two (2) Small Matching applications. Federal funds can only be applied toward Survey, Planning, or National Register Nomination projects and State funds can only be applied toward Education & Publication and Historical Marker projects.
Division Staff Review

• Determines eligibility of the applicant and the proposed project, as well as compliance with the Historic Preservation Program and the Small Matching Guidelines.

• Reviews Scope of Work and determines conformity to the standards such as the Secretary of the Interior’s Standards and Guidelines for Archaeology and Historic Preservation

• Reviews Budget to confirm eligibility / appropriateness of expenses and Budget correlation to the Scope of Work.

• Reviews appropriateness of the Tentative Project Timeline.

• Prepares an assessment of each eligible application and provides these to the Review Panel or the Florida Historical Commission for their consideration.

Note: If clarification is needed, Division staff will contact the Project Contact via the online system. If the Project Contact does not reply within the specified time frame, the assessment will include a note to that effect.
Review and Scoring

• The Review Panel for Small Matching applications, or the Florida Historical Commission for Special Category Applications, is provided access to all eligible applications via the online system.

• Panelists are able to review remotely all eligible applications and staff assessments. Each panelist completes preliminary scoring remotely.

• The Panel and Commission meet at the public Scoring and Ranking Meetings. Panelists can change their evaluations after discussing each application during the meeting, and finalize scores after all application discussions are complete.

• The scores are averaged per application and those that receive 80 or above move forward for funding consideration.

• Applications are then ranked and ties broken by submission order. The final ranked list is read for record at the public meetings and posted in the Grants Program’s website.

• The final ranked list will be submitted to the Secretary of State for approval and then to the Legislature for funding consideration.
APPLICATION SUBMISSION AND REVIEW
Staff review applications for eligibility and conducts technical reviews.

PUBLIC MEETINGS REVIEW AND RANKING
Public meetings are held for specific Review Panels to review and ranking of applicant projects; the recommended list is then submitted to the Secretary of State.

SECRETARY OF STATE
The Secretary of State approves the recommended projects list and submits the total recommended award amount to the Legislature as part of the budget request for the upcoming fiscal year.

LEGISLATURE
The Legislature negotiates a final budget and submits it to the Governor for signature.

APPROPRIATION
Governor either approves or vetoes line items and then signs the budget. Grantees are notified and Grant Award Agreements are prepared for review.

JULY 1
If funded, grant funds become available.
Contact Information

**Division Contact:**
1.800.847.7278 or 850.245.6333

**Grants Staff Contact:**
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Tallahassee, Florida 32399

**Historic Preservation Grants Program Email:**
DHRgrants@dos.myflorida.com

**Department of State**
**Online Application**
**and Grants System:**
DOSgrants.com
Thank You!