

## LCHIP Historic Resource Project Checklist

Grant payments for LCHIP Historic Resource projects are made in three disbursements. Certain elements of the work must be completed before each payment is made. Once the work elements have been approved, it typically takes one to two weeks to process a request for disbursement.

### 1. First Disbursement Requirements (50% of grant award)

To receive your first grant payment, all seven of the following items must be submitted, reviewed and approved by LCHIP (and the Division of Historical Resources "DHR") before the work begins. LCHIP and our partner DHR require up to 45 days to conduct the review of plans and scope of work. Both LCHIP and the DHR make every effort to turn this review around as quickly as possible. You may be asked to revise your plan or scope of work in order to comply with the Secretary's Standards.

- a. Project Agreement: The Project Agreement is the contract between LCHIP and your organization. It explains, among other things, the scope of work and the grant disbursement schedule. LCHIP will send the Project Agreement to you. It should be signed, notarized and returned to LCHIP.
- b. Plans and/or Detailed Scope of Work : These are the documents that describe in detail the work that will be performed. The more detail and description you provide, the easier and quicker the approval process will be. Full size plans, if available, are preferred. Please contact the office if you have questions about these requirements. YOUR PLANS MUST BE APPROVED BY LCHIP BEFORE YOU BEGIN THE WORK!
- c. Estimated Timeline: This should be a realistic schedule of all work from beginning through completion. Projects must be completed within 24 months of the grant award date. If your timeline extends beyond this period, please include an explanation of why it does. We understand that this is an early estimate of the schedule. Changes in the project timeline (including extensions of the 24 month period) may be accepted, when necessary.
- d. Proof of Match Funds: You must show LCHIP that you have an amount equal to your grant award secured before your first disbursement of funds. At least half of that amount must be in cash. Depending on the source of funds, the proof of match may be bank statements, treasurer's reports, award letters from other grants, or statements from in-kind donors of the approximate value of their donation.
- e. List of Contractors to be Used on the Project: List the names of the individuals or firms that will work on the project. If the contractors have not been identified yet, please indicate when your decision will be made.
- f. Stewardship Plan: The Stewardship Plan explains how you will insure that the property will be maintained in good condition over time. This plan will also be reviewed and approved by the Division of Historical Resources. General information about stewardship plans can be found at <http://www.lchip.org/pdf/Stewardship%20Guidance.pdf> or you may contact the LCHIP office for sample Stewardship Plans.
- g. Land Trust Alliance Standards: If you have not yet adopted the applicable Land Trust Alliance Standards, you must adopt them prior to the disbursement of the first grant payment. General information about the Land Trust Alliance Standards and how they apply to Historic Resource projects can be found at <http://lchip.org/pdf/LTAHP.pdf>

## 2. **Second Disbursement Requirements (30% of grant award)**

To receive the second disbursement, you must complete half of the work and:

- a. Midpoint Site Visit: Contact LCHIP staff to arrange a site visit.
- b. 50% Complete Letter: Have your contractor/consultant send a letter stating that the project is 50% complete.

## 3. **Final Disbursement Requirements (20% of grant award)**

The final disbursement of your award is made when LCHIP is satisfied that all project requirements are finalized, including all six of the items below.

- a. Final Site Visit : LCHIP staff will conduct a final site visit upon completion of the project.
- b. Baseline Documentation Report: The purpose of Baseline Documentation is to provide a clear record of the physical condition and historic character of your resource at the time of project completion. This documents the work that was accomplished by your LCHIP grant. The baseline documentation is an integral part of the stewardship of your resource. Thorough and accurate Baseline Documentation will make review and approval of future alterations to the building easier. Find instructions for completing the Baseline Documentation Report at: <http://lchip.org/pdf/HRBaselineDocumentation0308.pdf>
- c. Final Project Budget: You must provide LCHIP with a final budget showing all project costs and sources of funding. This serves as final documentation of all matching sources, including cash and non-cash. Find a final budget worksheet at: <http://www.lchip.org/pdf/final-budget-worksheet.xls>
- d. Inform Local Officials: LCHIP requires the grant recipient to inform their state legislators when the project is completed, via press release, invitation to a celebration, etc.
- e. Return LCHIP Sign: LCHIP provides temporary metal signs to some projects while they are underway. The sign promotes both the LCHIP program and the project. This sign must be returned to LCHIP before the project is considered complete. LCHIP reserves the right to withhold \$100 from the final grant payment or invoice the grantee \$100 if the sign is not returned.
- f. Stewardship Agreement Recorded: A Stewardship Agreement between LCHIP and the grant recipients is required for every restoration or rehabilitation project. The Stewardship Agreement will be recorded with the property deed, and will include the stipulation that the building can only be sold if the new owner agrees to sign a new Stewardship Agreement with LCHIP. Length of terms of agreement between LCHIP and grant recipient will be linked to amount of grant received and may be adjusted to incorporate the expected lifetime of the restoration/rehabilitation project, and size and scope of the activities for which LCHIP funds are utilized. LCHIP will provide the language for the Stewardship Agreement required for your project. The agreement must be signed by LCHIP and your organization and must be recorded at your county's Registry of Deeds before the final disbursement can be made and the project is considered complete.

If you have any questions, please contact the LCHIP office at (603) 224-4113