



LCHIP Historic Resource Checklist

After funding decisions are made all grantees will be sent a **Project Agreement**, which should be signed/notarized and returned to LCHIP. The Project Agreement is the contract between LCHIP and your organization and explains (among other things) the scope of work and the grant disbursement schedule. Once all of the due diligence items listed below have been received, reviewed and approved, the first disbursement of your grant award (50% of the award) can be made. The remaining payments are issued as follows: 30% of the grant award once the project is 50% completed (contractor/consultant must send a letter stating that the project is 50% complete); 20% of the grant award (final payment) once the entire project is completed and a final budget and proof of matching funds is received; final site visit is completed; and all required baseline documentation is received.

1. First Disbursement Requirements

In order to receive your first disbursement (up to 50% of the grant award), you must submit the following five (5) documents for review and approval by LCHIP:

Plans and/or Detailed Scope of Work

These are the documents describing in detail, the work to be performed. These will be reviewed by the Division of Historical Resources for adherence to the Secretary of the Interior's Standards. The more detail and description you can provide, the easier and quicker the approval process will be. **YOUR PLANS MUST BE APPROVED BEFORE YOU BEGIN THE WORK!**

Estimated Timeline

A realistic schedule of all work through completion. LCHIP's current policy requires projects to be complete within 24 months of the award date. If your schedule extends beyond this period, please include an explanation of why it does. We understand, however, that this is an estimated timeline, and changes in the project schedule (including extensions of the 24 month period) are accepted, when necessary.

Proof of Match Funds

You must provide proof for the matching funds detailed in your application and/or supplemental materials. You must have an amount equal to your grant award secured before your first disbursement of funds, and half of that amount must be Cash Match. Depending on the source of funds these 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.

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 that, and indicate when you hope to decide.

Draft Stewardship Plan

This plan will also be reviewed (and must be approved) by the Division of Historical Resources. A sample Draft Stewardship plan is contained in this document.

2. Second Disbursement Requirements

In order to receive your second disbursement (up to 30% of the grant award), you must contact LCHIP staff to arrange a mid-point site visit and have your contractor/consultant send a letter stating that the project is 50% complete.

3. Final Disbursement Requirements

Final disbursements will be made upon receipt and approval of the following three (3) documents and a site visit:

Final Site Visit

LCHIP staff will conduct a final site visit upon completion of the project.

Baseline Documentation Report

The purpose of Baseline Documentation is to provide documentation of the physical condition and historic character of your resource once the project is completed, to provide a permanent record of the work that was accomplished by your LCHIP grant. The baseline documentation is an integral part of the stewardship of your resource; and good, thorough Baseline Documentation will make review and approval of future alterations to the building easier.

Final Budget Worksheet

This Excel spreadsheet provided by LCHIP will list all project costs and sources of funding and will serve as final documentation of all matching sources, including cash and non-cash.

Stewardship Agreement

LCHIP will provide the language for the Stewardship Agreement required for your project. The SA must be signed by LCHIP and your organization and recorded at your county's Registry of Deeds before the final disbursement can be made and the project is considered complete.

An Important Note about Grant Disbursements

LCHIP attempts to be as prompt as possible in sending out disbursements after they have been requested (and the required documentation has been provided). Our checks are provided by the New Hampshire Department of the Treasury, so there may be a delay of 1-2 weeks before you receive a requested payment. In addition, the final disbursement of your award **will not** be made

until LCHIP is satisfied that all project requirements are finalized. This includes recording of the Preservation Easement/Stewardship Agreement, completion of Baseline Documentation for monitoring the Preservation Easement or Stewardship Agreement, completion of the final budget worksheet, and a site visit from LCHIP staff.

If you have any questions, please do not hesitate to contact the office at 603.224.4113.

Sample Historic Resource Stewardship Plan

Historic Harrisville, Inc. – Cheshire Mill # 1 - Stewardship Plan - April 22, 2002

Historic Harrisville, Inc. believes that routine maintenance is the best means of preserving historic buildings. It works to bring the buildings in its care up to a high level of maintenance and then keep them there. A program that includes annual building assessments identifies failures and building needs early on, addresses them, and thereby reduces the need for large-scale repair projects. Such a program makes long range planning for major improvement items, such as roof replacements, possible.

Annual building assessments gather information on the existing condition of the structure and note possible causes. They are used to establish prioritized work plans, design repair strategies, and establish budget requirements for the next building season. A building assessment for Mill #1 includes the following elements:

- a. Foundation and site (dam, retaining wall, grade levels, drainage, parking area, signage.)
- b. Masonry walls (open mortar joints, displacement.)
- c. Metals (historic iron fire escape, ties)
- d. Wood trim (failing paint, rotting wood)
- e. Roof Flashings (missing slate, displaced flashings, roof run off)
- f. Doors & Windows (failing paint, failing glazing, hardware)
- g. Finishes (paint, paint on metal roofs of bell tower& cupola)
- h. Mechanical (plumbing, fire protection, heating)
- i. Electrical (service & distribution, lighting)

Areas that require repair or further investigation are photographed. Photographs are labeled with the date, building name, compass orientation, photographer's name, and a brief description of the condition that is being documented. A full set of photographs documenting existing conditions is taken every 5 years.

A written report is prepared and used to create a prioritized work plan. The work plan is used to establish a budget for annual maintenance and major improvements for the building. A repair approach is established and specifications for the repairs are developed. An annual work report documents the work that was carried out during the year. Work reports are arranged, like the building assessment, according to construction categories derived from the uniform construction index, as is the order of the building survey. Work reports include a description of existing conditions, the scope of the work that was included, the materials used, the name of the contractor or staff person who did the work, the name of the person preparing the report, notes that document any unusual conditions met with during the work, and recommendations for further work. Building assessments, specifications, and work reports are kept in property files

and become part of the maintenance history.

* Model used with permission from Historic Harrisville, Inc.

Preservation Easement/Agreement Terms

Stewardship Agreements (SA) and deed restrictions are required for all restoration or rehabilitation projects. The Stewardship Agreement will be made between the grant recipient and LCHIP, and will impose the same restrictions that are in our Easements (runs with the land). It 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 Preservation Contract with LCHIP. Length of terms 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. Term lengths will be as follows:

Grant Award (Cumulative)	Document and Term
\$400,000 and above	Perpetual Easement
\$250,001 – \$399,999	20 year Stewardship Agreement
\$150,001 – \$250,000	15 year Stewardship Agreement
\$50,001 – \$150,000	10 year Stewardship Agreement
\$50,000 and below	5 year Stewardship Agreement

For reference, model documents can be found on the LCHIP website at:

<http://www.lchip.org/historic-cultural-resource-pages/lchip-publications-and-documents.asp>