



HISTORIC REHABILITATION PROJECT COMPLETION PROCESS AND STEWARDSHIP TERM OVERVIEW

To fulfill the requirements of the LCHIP grant, recipients must complete and submit a series of “follow-up forms” within the LCHIP grant portal. The requirements of each form are described in brief below. LCHIP requires at least 45 days to review each form submission prior to approval. Recipients should familiarize themselves with this overview and the guidance documents indicated below. LCHIP’s Historic Resource Specialists can provide individualized guidance as needed.

PROJECT and GRANT COMPLETION PROCESS

1. Follow-Up Form: Estimated Timeline

The estimated timeline serves as a roadmap, describing the recipient’s anticipated project completion schedule. These dates will be used to schedule reminders to both recipients and LCHIP staff of upcoming deadlines, as well as allowing LCHIP to anticipate upcoming project reviews. Recipients should be realistic in establishing these dates, which can and should be updated regularly as the project progresses.

2. Follow-Up Form: Pre-Construction Documentation Package (PDP) *Submit no less than 45 days prior to start of work*

The PDP must be approved by LCHIP before work begins. LCHIP requires at least 45 days to review the submitted materials. Typically, some revisions to the materials will be required prior to approval. Recipients should allow sufficient time for the LCHIP review and to complete any required revisions before contractors expect to begin work. Recipients can expect to receive the first grant installment approximately four weeks after approval.

The PDP includes the following documentation:

- A. Detailed Plan/Scope of Work – Provide a more detailed description of the scope of work included in the grant proposal. Refer to the “*Detailed Description of LCHIP Scope of Work*” guidance document for more information.
- B. Pre-Construction Budget – Complete the Preconstruction Budget form using current, valid estimates. Refer to Section 1 in the “*Completing the Project Budget Workbook*” document for more information.
- C. Draft Stewardship Plan – Prepare a draft plan in accordance with the “*Stewardship Plan*” guidance document. Recipients are advised to carefully review the Stewardship Plan and Current Condition Report (see step 3 below) guidance documents carefully, and to avoid restating information provided in the Qualified Preservation Plan (if applicable).
- D. Archeological Survey (*indicated in grant portal if required by LCHIP*) – Projects involving digging or ground disturbance may require a completed archaeological survey be submitted as part of the PDP. Refer to the “*Special Rehabilitation Concerns*” document for more information.

3. Follow-Up Form: Midpoint Documentation Package (MDP)

Recipients can expect to receive the second grant installment approximately four weeks after approval. At that time LCHIP will also provide the draft Grant Agreement for review, which must be executed following project completion. See #4 Final Documentation Package below.

- A. Site Visit or Photo Documentation – LCHIP requires either a midpoint site visit or photo documentation of project progress as part of the MDP. The specific requirement for each project will be indicated within the grant portal.
- B. Midpoint Progress Update – Provide a summary of progress made in completing the project.

- C. Midpoint Project Budget – Recipients must update the Preconstruction Budget to reflect work completed to date, as well as updates to expenses or funding. Refer to “*Completing the Project Budget Workbook*” Section #2 for more information.
- Updated Estimates – If the *Estimated Total Project Cost shown on the midpoint budget* has changed by more than 10% from the *Preliminary Total Project Cost* shown on the Preconstruction Budget, updated estimates must be provided documenting the budget change.
- E. Draft Current Conditions Report – Prepare a draft Current Conditions Report. Recipients are advised to carefully review the Stewardship Plan (see step 2 above) and Current Condition Report guidance documents carefully, and to avoid restating information provided in the Qualified Preservation Plan (if applicable). Contact LCHIP with questions
- D. Historic Resource Plaque Request

4. Follow-Up: Final Documentation Package (FDP)

Final Site Visit – To avoid delay in closing out the LCHIP grant, a final site visit should be scheduled as soon as possible following completion of the LCHIP-funded scope of work. Recipients must contact LCHIP in advance to allow sufficient time to schedule the visit.

Final Documentation Package - The final documentation package should be submitted within 30 days of the completion of work; therefore recipients should begin finalizing the required documentation as early in the process as possible.

- A. Accepted Grant Agreement
- B. Final Project Budget – Provide final income and expense data in accordance with section 2 of the “*Completing the Project Budget Workbook*” document
- C. Final Current Conditions Report – Finalize the CCR based on feedback received from LCHIP, and in accordance with the “*Current Conditions Report*” guidance document
- D. Final Stewardship Plan – Finalize the Stewardship Plan based on feedback received from LCHIP, and in accordance with the “*Stewardship Plan*” guidance document
- E. Press Release/Publicity – Provide a press release announcing the project’s completion for LCHIP distribution

5. Execute and Record Grant Agreement

Following approval of the FDP, LCHIP will send the required LCHIP Grant Agreement to recipient’s authorized representative via DocuSign for signature and will record the executed Agreement at the county registry of deeds, uploading a copy of the recorded Agreement to the project’s "Documents" tab within the grant portal. Recipients can expect to receive the final grant installment approximately four weeks after the Agreement has been recorded.

STEWARDSHIP TERM

When the Grant Agreement has been executed and recorded, Recipients begin a stewardship term of five or more years, based on the amount of the grant award. During the stewardship term, the Recipient and/or property owner must ensure that:

- the architectural, historical, and cultural features of the resource are retained and maintained in the current or better condition as existed on the date of the agreement, as documented by the Current Conditions Report,
- all future work undertaken complies with LCHIP approval requirements as described in the Grant Agreement, and complies with the Secretary of the Interior’s Standards for the Treatment of Historic Properties, and
- the resource is inspected annually, and an Annual Monitoring Report (AMR) submitted to LCHIP on or before the prescribed deadline.

Recipients completing the required inspection and submitting the required AMR will be eligible to receive a small Stewardship Grant annually. Contact LCHIP for additional information on the Grant Agreement and stewardship requirements.