

# LCHIP

## Land & Community Heritage Investment Program



### Guidance Document: Stewardship Plans for Historic Rehabilitation Grants

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#### OVERVIEW

LCHIP is tasked with preservation of cultural and historic resources and ensuring their long-term care. Consequently, a comprehensive Stewardship Plan is required for each historic rehabilitation grant.

LCHIP defines “Stewardship” as *planning for and taking the necessary actions over the long term to successfully preserve and protect the natural, cultural, or historic value of a resource*. An acceptable Stewardship Plan must address routine maintenance and nonroutine projects to be undertaken during the LCHIP Grant Agreement term.

- *Routine maintenance* consists of day-to-day and periodic activities necessary to prolong the life of the historic resource. These activities include both regular cleaning and housekeeping activities, as well as periodic activities such as minor repairs, painting, and the like.
- *Nonroutine projects*, sometime called capital improvements, are larger, less frequent, but equally important tasks that require more planning – to raise the necessary funds and to organize and implement the work. Examples include replacing the roof or carrying out a comprehensive rehabilitation project involving multiple contractors. Costs for this kind of work may have to be amortized (spread out) over a number of years.

The Stewardship Plan serves as a road map for long-term maintenance of the historic resource. The work involved in preparing this document is valuable because it aides those responsible for maintaining a property in making a careful examination of the resource and in thinking about and planning ahead for each upcoming task.

Often, the Stewardship Plan works in concert with, and refers to, the Qualified Preservation Plan and Current Conditions Report (CCR) for the resource (see separate guidance documents). Recipients may find it helpful to refer to the Qualified Preservation Plan, and to work on the CCR and Stewardship Plan simultaneously.

The Stewardship Plan can be completed by the Recipient or by a paid (or volunteer) consultant. Assistance in developing the plan, and periodic review by a knowledgeable consultant, is desirable. Any costs associated with completing the initial Plan may be included in your project budget.

The Stewardship Plan must be submitted in draft form to LCHIP for comment as part of the pre-construction review and prior to beginning work on the funded scope of work. Approval of final Stewardship Plan is required prior to final disbursement of grant funds.

#### STEWARDSHIP PLAN CONTENTS

1. Contact Information – Emergency contact information (plumber, electrician, building manager) as well as special contractors with skills that may be useful in properly responding to maintenance needs.
2. Document Inventory – Include a list of all drawings and plans describing the resource, with storage location.
3. Safety Considerations – List, for example, any floor load limits, hazardous materials known to be present, etc.

4. Legal considerations – for example, restrictions on use or approval obligations. This could include agreements/restrictions following prior grants from LCHIP or other funders; permitting requirements based upon the property’s location in a locally designated historic district; restrictions binding upon leased properties by the owner; etc.
5. Maintenance Survey – A detailed inventory, made room by room, and exterior wall by exterior wall, constituting a physical inventory of the structure and materials. Examine and record each material to be maintained, as their character will inform treatment.
6. Monitoring and Inspection Program – A description of when and how the resource will be inspected and by whom, with an explanation of the extent of the inspection required. List all individuals or entities to whom this information should be submitted, and the responsibilities of each for responding to it. Develop and include a template inspection form to ensure a consistent and thorough inspection. As each inspection is completed and reviewed, add approved reports to the appendix (below) to inform subsequent inspection or maintenance activities.
7. Cyclical Maintenance Plan (CMP) – A schedule of planned maintenance activities that, if followed, will maintain the building in good condition. The CMP should list, in chronological order, each anticipated maintenance activity, including a description of the work to be done, the related Preservation Briefs, and a rough estimate of cost. The CMP should also include non-routine, but planned, improvements (e.g., additions, rehabilitation, etc.) and should cover, at minimum, the period of the anticipated LCHIP Grant Agreement. Estimates of cost should reflect appropriate increases for inflation. These estimates will allow the stewards to allocate financial and other organizational resources at the appropriate time.

## Appendices

- A. Historical Information: This may be found in the Qualified Preservation Plan or the Current Conditions Report. If so, refer to page numbers for each item below; if not, include them here.
  - 1) A statement of significance of the property (If need be, consult the NH Individual Inventory Form, the NH Determination of Eligibility, or the nomination to the National Register of Historic Places.)
  - 2) A description, or timeline, of the physical evolution of the property, noting major additions and/or alterations (If need be, consult the NH Individual Inventory Form, the NH Determination of Eligibility, or the nomination to the National Register of Historic Places.)
  - 3) A bulleted list of Character-Defining Historic Features (If need be, consult the National Park Service’s “Preservation Brief 17: Architectural Character: Identifying the Visual Aspects of Historic Buildings as an Aid to Preserving Their Character.”)
- B. Use Guidelines: Recommendations/requirements to educate and inform those who might negatively impact the resource about the need to protect and preserve it. Create and distribute use guidelines to protect the resource. Provide them to, and enforce them for, all users, both internal and external. Examples of use guidelines may include requiring that a mat be placed at all points of egress; prohibiting the attachment of decorations or other items to walls or trim; or requiring that all lights be turned off, and windows closed when a room is not in use.
- C. Maintenance Log: Describes all completed maintenance. If appropriate, recommend revisions to the Maintenance Survey or Cyclical Maintenance Plan may be made, to be implemented in the next periodic update.
- D. Inspection Reports