

Stewardship Plans

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.*

Such actions include

- managing the resource in accordance with all legal obligations,
- performing regular maintenance and upkeep,
- providing for necessary monitoring,
- educating or informing those who might negatively impact the resource about the need to protect and preserve it,
- paying tax or in-lieu-of tax obligations, if any,
- obtaining insurance, and
- securing sufficient levels of financial resources to carry out all necessary actions.

A Stewardship Plan is a document that states and explains how these goals will be achieved.

A Stewardship Plan should answer the following questions:

- *Who* is preparing the plan, and who is responsible for the different aspects of stewardship?
- *Why* is the resource significant?
- *What* are its historic features of the resource that are to be preserved?
- *When* and *how* will various activities, such as regular maintenance, monitoring, budgeting, etc. take place?

Suggestions for a Stewardship Plan follow:

I. The Resource:

- A. Explain the history and significance of the resource,
- B. describe when it was built and when it was modified, and
- C. name the features that help define its historic character.

You may find useful information about this in the documentation that you submitted to document that the property is listed, or eligible for listing, on the State or National Register of Historic Places.

II. Stewarding organization(s):

- A. Who owns the Resource? Who is responsible for maintaining it?
- B. If stewardship duties are shared among different organizations, how are those duties divided up?
- C. How long has/have the organization(s) been the steward(s) of the Resource?
- D. How does the Resource fit in with the operations of the organization(s)?

III. Legal obligations:

- A. What are the legal constraints governing the stewardship of the Resource?
 - 1. Are there any existing preservation easements or LCHIP stewardship agreements (from previous grants) that are in effect?
 - 2. Are there any local boards or commissions that have jurisdiction over the Resource (such as the planning board or heritage commission)?
 - 3. If the stewarding organization leases the Resource, what legal obligations bind the organization to stay in compliance with the lease?

IV. Regular monitoring and inspecting:

- A. How often is the condition of the property evaluated?
- B. Who does monitoring and inspecting?
- C. What sort of documents are used and/or generated (checklists of features to be examined, photographs showing current conditions)?
- D. How are the findings of regular inspections recorded? Where are records kept?
- E. How do regular inspections help inform planning for the future?

V. Regular maintenance and upkeep:

- A. How is regular maintenance and upkeep planned for, executed, and paid for?
- B. Who supervises, executes, and inspects the work? To what extent does the stewarding organization use in-house staff, external contractors, and/or volunteers to get work done?
- C. To what extent are people who do this work briefed about, and familiar with, best practices in historic preservation?

VI. Educating users about the need to preserve the Resource:

- A. Who uses the Resource?
- B. Is it used by outside groups for events?
- C. How are users made aware of the significance of the Resource and the need to preserve it?
- D. Are there written agreements between the stewarding organization and outside users that include policies concerning the responsible use of the historic resource?

VII. Taxes or in-lieu-of-taxes payments (if any):

- A. Does the stewarding organization need to pay any taxes or make any in-lieu-of-taxes payments? (Even nonprofit organizations may have to pay some taxes or other assessments, especially if their property produces income from rents.)

VIII. Insurance:

- A. Indicate what kind of insurance you have and what the levels of coverage are.
 - 1. Liability insurance protects the stewarding organization.
 - 2. Property insurance may be for actual cash value or replacement cost value.
- B. Who in the stewarding organization reviews insurance? How often does that review take place?

IX. Funding:

- A. How is money allocated for the stewardship of the resource? How are funds budgeted toward needed expenses?
- B. Are there dedicated streams of funding that may be used for its stewardship?
- C. Does the stewarding organization have a way of dealing with unexpected expenses?