BOARD OF TRUSTEES MEETING
Cleveland Neighborhood Progress
Tuesday, March 19, 2019
5:00 – 6:30 pm
AGENDA

1. Welcome from Linda Warren, Senior Vice President of Placemaking, Cleveland Neighborhood Progress

2. Chair’s Report, Anthony Hiti
   A. Approval of the Minutes of the January 15th Meeting (pg. 3-4)
   B. Nominating & Trustees Committee, with Rob Weeks (pg. 5-7)
      1) Committee Description & Members
      2) Trustee Engagement Policy
      3) Send your recommendations!
   C. Advocacy & Public Policy Committee (pg. 8)
      1) 2019 “Resolutions”
      2) Meeting Open to Trustees, April 9, noon, Sarah Benedict House: Review redesign concepts for Shaker Square.
   D. Board Strategic Planning
   E. Audit Forthcoming

3. President’s Report, Kathleen Crowther
   A. Community Luncheon, thank you! (pg. 9)
      1) Maurice Cox Presentation
      2) Financial Recap
   B. Next Up: Celebration of Preservation on May 22nd (pg. 10-13)
      1) Co-hosted with AIA Cleveland
      2) 26 Nominations, Jury Process Underway
      3) Sponsorships now available
C. Winslow Road Update, with Margaret Lann (pg. 14-16)
   1) Work Completed to Date
   2) Scheduled Work
   3) Next Steps

D. Advocacy Day in Washington DC, with Jonathan Sandvick (pg. 17-44)
   1) Overview of national preservation advocacy issues and visits, Kathleen
   2) Comments from Jonathan Sandvick

E. Third Floor Vacancy (pg. 45-46)
   1) See Brochure – Rent: $2,300/month, negotiable for a synergistic tenant
   2) 1,700 sq ft space available; includes use of first floor conference rooms

4. Old And/or New Business

5. Tour of St. Luke Manor by Wayne Mortensen, Trustee and Director of Design & Development for Cleveland Neighborhood Progress

Next Board of Trustees Meetings;
Tuesday, May 14, 2019, 5:00 – 6:30 pm; location at 18520 Winslow Road

Upcoming Events
Friday, April 12th, Sarah Benedict Circle donors’ dinner, Harcourt Manor, by invitation
Saturday, April 13th, SNOOP! Worthington Yards, 725 Johnson Court in Cleveland’s Warehouse District, 10 – 11 am
Wednesday, May 22nd, Celebration of Preservation, Playhouse Square theatre
Saturday, September 21, Annual Benefit Dinner, Harcourt Manor in Cleveland Heights, a private home
Chair's Report – Tony Hiti.

A. Tony Hiti welcomed the board and thanked Scott Holbrook and Baker Hostetler for their hospitality. Tony then asked for approval of the minutes of the last board meeting. Scott Holbrook moved to approve the minutes for the November 8, 2018 meeting. Greg Frost seconded the motion and it was approved unanimously.

II. Approval of 2019 Budget, Mike Cummins Chair, Finance Committee and Tom Jorgenson, Chief Operating Officer

Overview and Preliminary 2018 Results. $27,666 positive net income for 2018. There was an increase in service fees and public grants, including a $25,000 grant from the City, however private grants were down from last year. As for Operating Revenue, the Annual Benefit underperformed in 2018. 25-30% of the budget is driven by the Heritage Home Program. They then presented the 2019 Budget and identified small increases in Direct Costs, Property Related Expense, and Staffing Expense. Joe Denk moved to approve the 2019 Budget. Tom Einhouse seconded the motion and it was approved unanimously.
III. 2018 in Review.

A. Kathleen Crowther introduced the CRS staff, who introduced themselves: Stephanie Allen, Marketing and Event Manager; Jessica Beam, Heritage Home Program Assistant; Liz Cardarelli, Heritage Home Program Team Leader; Michael Fleenor, Director of Preservation Programs & Services; Debra Gulick, Business & Accounting Manager (absent); Emma Kopp, Heritage Home Program Assistant; Margaret Lann, Manager of Development and Publications; Dean Pavlik, Preservation Construction Manager; Sophia Szeles, Development and Marketing Assistant; Audrey Thomas, Heritage Home Program Associate.

B. Margaret Lann provided an overview of Membership and Development. The staff reviewed membership numbers, contacted lapsed members, and conducted a membership survey. That work resulted in a $3,000 increase in membership dues. The Annual Fund saw an increase of $30,000. Margaret also provided an overview of publications, which includes two issues of Façade and twelve issues of Perspectives. Façade received a facelift. Margaret also summarized all the work that has gone into the Winslow Road project.

C. Stephanie Allen reviewed CRS’s three large events in 2018: Community Luncheon, Celebration of Preservation (awards program); and the Annual Benefit. She also discussed the 2019 events, including the 2019 Community Luncheon, which is March 7, Celebration of Preservation, which is May 22, and Annual Benefit will be September 21 at the Harcourt Manor in Cleveland Heights. Events raised over $78,000.

D. Michael Fleenor summarized CRS’s advocacy work, including attending Landmark Commission meetings, commenting on projects, assisting property owners, and conducting Section 106 Review. Michael also reviewed the Preservation Services conducted by CRS over the year, which included the Sacred Landmarks Committee, the Lee-Harvard Cultural Heritage project, and a survey of the Lee-Harvard & Lee-Seville areas. Michael also discussed the work under the Small Deals Task Force.

E. Liz Cardarelli and Dean Pavlik explained the continued success of the Heritage Home Program. They explained the program, mailings to market the program, and the statistics for the program, including signing over 139 loans with a total loan value of $7,796,729. Dean walked the Board through a typical site visit and the ways in which CRS provides technical assistance and Liz walked through a typical home loan project. Liz explained that CRS implemented web-based scheduling program to allow homeowners to schedule site visit themselves through the website. That program has been very successful, resulting in an increase in site visits.

F. The Board was also provided with a written high level summary of accomplishments.

IV. There was no old or new business.

Next Board of Trustees Meeting is March 19, 2019 at Cleveland Neighborhood Progress, located in the east wing of the old St. Luke’s Hospital

Adjourned.

Minutes respectfully submitted by Bill Hubbard, Board Secretary.
Policy on Trustee Engagement

Prologue: Service on the Board of Trustees of the Cleveland Restoration Society requires a significant commitment of an individual’s time, talent and treasure. Each element of board service is essential for the effective operation of the Cleveland Restoration Society. Trustees dedicate their time through steady attendance at meetings and events. Trustees share their talents through engagement on projects where they provide expertise and special abilities not otherwise available to the organization. Trustees contribute meaningful amounts of money in order to ensure a financial base for the organization. All of these responsibilities are inherent in the term “Trustee.” Therefore, the following policy outlines the expectations of all Trustees so that each individual will be secure in understanding the expectations of service.

With regard to treasure:

1. Each Trustee shall be member in good standing through payment of dues.
2. Each Trustee shall make an Annual Fund contribution of at least $1,000.
3. Each Trustee shall support the Community Luncheon by hosting a table or assembling a table.
4. Each Trustee shall support the Celebration of Preservation awards program through attendance and corporate sponsorship, as appropriate.
5. Each Trustee shall support the annual Benefit(s) by hosting a table, assembling a table or providing underwriting, as appropriate.
6. Each Trustee shall consider a planned gift.
7. Each Trustee shall encourage others in his/her friends and associates to become members of the Cleveland Restoration Society.

With regard to talent:

1. Each Trustee shall provide information on their particular abilities to allow the organization to find a place for them in its work.
2. Each Trustee shall offer to deploy their particular talent at every opportunity to support the activities of the organization.
3. Each Trustee shall consider the gift of their talents as a serious commitment that comes ahead of other matters and does not let down the organization in any manner.
4. Each Trustee will be an articulate ambassador for the organization in the community.

With regard to time:

1. Each Trustee shall attend all or a majority of Board of Trustees meetings.
2. Each Trustee shall serve on one or more Committees and attend each or a majority of Committee meetings.
3. Each Trustee shall attend the majority of CRS events, large and small.
4. Each Trustee shall engage his/her friends and associates in the organizations events.
Nominating & Trustees Committee

Chair: Rob Weeks  Scott Holbrook
Anthony Hiti        William Hubbard
Michael T. Cummins  Joseph Marinucci
Joe Denk           Bill Saltzman
Tom Einhouse       Rosemary Reymann

Summary of Duties: The Nominating & Trustees Committee is responsible for nominating new Trustees and for evaluating the effectiveness of current Trustees according to CRS’s Trustee Engagement Policy.

The first step of the Nominating & Trustees Committee is to evaluate current Trustees to assess whether they are performing satisfactorily and should be considered for re-election. Evaluations may be performed by a subset of the nominating committee or an independent third party to ensure fairness.

The second step of the Nominating & Trustees Committee is to receive recommendations for new Trustees from management and current Trustees. The committee should review the resumes of potential candidates, assessing their skills and experience to determine if they meet qualifications for the position. In reviewing candidate profiles, the committee should consider criteria that includes:

- Proven leadership
- Previous board experience
- Knowledge and experience
- Diversity-including age, gender, ethnicity, race, disabilities, geography
- Experience with large and complex organizations
- Current or prior CEO, COO, or CFO level experience
- Skillset-including finance, legal, auditing, government affairs, public relations, community experience, and knowledge of the organization

The third step for the Nominating & Trustees Committee is to make contact with candidates to assess the candidate’s personal and professional integrity, their level of commitment to the organization if nominated and availability to serve. This is often done by assigning one member of the Nominating & Trustees Committee to one candidate, who will bring a candidate summary with recommendations back to the full committee. Additional interviews by the nominating committee and the CEO may be necessary to ensure due diligence. Additional interviews may be conducted with the assistance of a third party.

The Nominating & Trustees Committee forms a final slate of recommended candidates for formal approval by the Membership at the Annual Meeting. The slate includes honorary life trustees and officers.
**CRS Advocacy & Public Policy Committee Resolutions for the New Year**

We will explore working with Cleveland Metropolitan School District (CMSD) to rehabilitate historic school buildings. CRS was successful working with CMSD to find a developer for Longfellow School, avoiding demolition of a Cleveland Landmark.

We will strongly encourage the MetroHealth System to continue to work with the Cleveland Landmarks Commission and Cleveland Planning Department to preserve the two existing sacred landmarks adjoining their campus.

We will work with the City of Cleveland to find an appropriate reuse of the Warner & Swasey Building.

We will encourage Cuyahoga County to look at existing historic buildings as they consider the relocation of the Justice Center and County Jail. Summit County reused the Firestone Tire and Rubber Company’s Warehouse and Shipping Facility to house combined County services. This expansive industrial building (a quarter million square feet) had been vacant for approximately 25 years in an under populated area of the city.

We will advocate for increased staffing for the Cleveland Landmarks Commission.

We will determine the status of the Warner & Swasey Observatory and identify opportunities for preservation.

We will work with Cleveland Landmarks and Council representatives to strengthen threatened historic districts.

We will support the work of the Dall-Mays Houses Taskforce (2225 & 2229 E. 46th Street) to help position the houses for an appropriate reuse.

We will support the work of the Luther Moses House Taskforce (5611 Lexington Avenue) to develop a preservation plan for the house.
Westin Downtown Cleveland
Thursday, March 7, 2019

Speaker: Maurice Cox
Director of Planning and Development, City of Detroit
Individual Tickets Purchased: 100
Total Tickets Purchased: 330 - SOLD OUT
Attendance: 315

SPONSORSHIPS

Presenting Sponsor 1 @ $6,500
Sandvick Architects, Inc.

Platinum Sponsor 1 @ $5,000
NTCIC

Sponsor Table Host 6 @ $2,500
APA Cleveland*
Bedrock Detroit*
Cleveland History Center (Lin Emmons)*
Cleveland Neighborhood Progress
University School (Dick Parke)
Walter|Haverfield LLP

Patron Table Hosts 16 @ $1,500
Benson Law Firm*
Downtown Cleveland Alliance
Frost Architectural Preservation
Geis Companies
Hiti DiFrancesco + Siebold
Jack Joseph & Morton Mandel Center for Humanities at Tri-C*
LDA Architects*
Mansour Gavin LPA
Marous Brothers Construction
Maxine Goodman Levin College of Urban Affairs*
Novogradac & Company LLP
Ohio Capital Corporation for Housing
Playhouse Square Foundation
RSM US LLP
Third Federal Savings and Loan
Thompson Hine LLP

Income: $61,675
Expenses: $19,879
Revenue: $41,796
Budget Goal: $45,000

*Denotes new sponsors
2019 Celebration of Preservation Awards Jury

Cleveland Restoration Society
Hannah Belsito
Jane Busch
Michael Cummins, Chair
Cynthia Druckenbrod
Denise Huck
Elizabeth Murphy

AIA
Mr. Brian Carter Broadus, AIA
Perspectus Architecture, LLC

Mr. Christopher W. Loeser, AIA
DLR Group | Westlake Reed Leskosky

Ms. Lauren Pinney Burge, AIA
Perspectus Architecture, LLC

Ms. Crystal Montgomery, Associate AIA
Vantage Partners LLC

Alternates:
Mr. David Ellison, AIA
The D.H. Ellison Co.

Mr. Christopher Allen Toddy, AIA
Christopher @ Architects LLC
2019 Celebration of Preservation
Wednesday, May 22, 2019
5:30-8:00 pm
The Ohio Theatre at Playhouse Square
1511 Euclid Avenue, Cleveland

The Cleveland Restoration Society (CRS) and the American Institute of Architects (AIA) Cleveland join together again to recognize outstanding historic preservation projects from the region.

Over 26 applications were received for consideration this year. Award winners are selected by a jury of historic preservation experts and certified architects coordinated by both CRS and AIA.

During the Celebration of Preservation, individuals, businesses, organizations and the projects they complete are recognized for demonstrated excellence and their outstanding commitment to historic preservation. The event is co-hosted by CRS and AIA Cleveland in commemoration of National Preservation Month and honors exemplary projects and the individuals, businesses and organizations that make them possible.

Tickets for this year’s Celebration go on sale in April. Individual tickets for members of either CRS or AIA Cleveland are $20; tickets for nonmembers are $30. Advertising and sponsorship opportunities are also available. Contact Stephanie Allen at 216.426.3106 or sallen@clevelandrestoration.org or Sophia Szeles at sszeles@clevelandrestoration.org or 216.426.3117 for more information.
2019 Celebration of Preservation
Wednesday, May 22, 2019
5:30-8:00 pm
The Ohio Theatre at Playhouse Square
1511 Euclid Avenue, Cleveland

Sponsorship Levels
The Cleveland Restoration Society and AIA Cleveland recognize outstanding preservation projects and the individuals who complete them each year during the Celebration of Preservation. Your sponsorship allows our organizations to highlight the award-winning projects which revitalize our diverse communities, strengthen our regional economy and enhance the quality of life in Northeast Ohio.

Sponsorship Packages Include:
• Tickets to the Celebration of Preservation awards and reception
• Opportunity to display your company or organization advertising in the Reception Hall
• Recognition throughout the event on presentation screens and signage
• Advertisement in the event program
• Mention in the post-event articles in CRS’ magazine Façade and in AIA Cleveland's newsletter

<table>
<thead>
<tr>
<th>Capitol Sponsor</th>
<th>$5,000</th>
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<tbody>
<tr>
<td>• Eight tickets to the awards and reception</td>
<td></td>
</tr>
<tr>
<td>• Two page ad (spread) in program</td>
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<tr>
<td>• Stand alone company profile e-blast to 3,500 OR</td>
<td></td>
</tr>
<tr>
<td>• Table in Ohio Theatre lobby during reception</td>
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<table>
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<tr>
<th>Pillar Sponsor</th>
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<tr>
<td>• Six tickets to the awards and reception</td>
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<td>• Full page ad in program</td>
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<th>Cornice Sponsor</th>
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<td>• Four tickets to the awards and reception</td>
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<td>• Half page ad in program</td>
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The Cleveland Restoration Society uses the powerful tool of historic preservation to revitalize our diverse communities, strengthen the regional economy, and enhance the quality of life in Northeast Ohio. The Cleveland Restoration Society is a non-profit 501(c)3 organization. All contributions are tax deductible to the extent allowable by law.

Questions?
Please contact the Cleveland Restoration Society at 216.426.3106 or 216.426.3117 or email us at sallen@clevelandrestoration.org or sszeles@clevelandrestoration.org
2019 Celebration of Preservation
Wednesday, May 22, 2019
5:30-8:00 pm
The Ohio Theatre at Playhouse Square
1511 Euclid Avenue, Cleveland

Sponsorship Form

Return this form with your check to: Cleveland Restoration Society
3751 Prospect Avenue E
Cleveland, OH 44115

Or pay online at: www.clevelandrestoration.org

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<tr>
<th>Sponsorship Level</th>
<th>Amount</th>
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<td>Capitol Sponsor</td>
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<td>Pillar Sponsor</td>
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<td>Cornice Sponsor</td>
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<td>Full Page Ad</td>
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<td>Half Page Ad</td>
<td>$275</td>
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Event Tickets

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<tr>
<th>Type</th>
<th>Number of Tickets</th>
<th>Total Amount</th>
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<tr>
<td>Individual tickets ($30)</td>
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<tr>
<td>Member tickets ($20)</td>
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Contact Name

Company Name, if applicable

Billing Address

City

State

Zip Code

Phone Number

Email Address

Credit Card Number

Expiration Date // Security Code

For event program advertising, please provide camera ready art to Stephanie Allen and Sophia Szeles at sallen@clevelandrestoration.org and sszeles@clevelandrestoration.org. Ads will be printed in grayscale and will have no bleeds. Files should be submitted as high resolution PDF or JPG.

For more information about sponsorship benefits or to reserve a sponsorship, please contact Stephanie Allen or Sophia Szeles at the emails provided above.
Rehabilitation of 18520 Winslow Road
Shaker Heights Double House
Winslow Road National Register Historic District

Completed to Date:

<table>
<thead>
<tr>
<th>Work Description</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tear-off, New Roof, Gutters &amp; Downspouts</td>
<td>$12,500</td>
</tr>
<tr>
<td>Rebuilding of Chimneys</td>
<td>$7,252</td>
</tr>
<tr>
<td>Rebuilding of Front Porch</td>
<td>$14,450</td>
</tr>
<tr>
<td>Rebuilding of Back Porch</td>
<td>$4,200</td>
</tr>
<tr>
<td>Exterior Carpentry</td>
<td>$12,450</td>
</tr>
<tr>
<td>Full House Painting</td>
<td>$7,000</td>
</tr>
<tr>
<td>Window Glazing</td>
<td>$1,800</td>
</tr>
<tr>
<td>Replace Windows(4)</td>
<td>$2,570</td>
</tr>
<tr>
<td>Replace Doors (1)</td>
<td>$1,235</td>
</tr>
<tr>
<td>Installation of New Exterior Storm Windows</td>
<td>$7,634</td>
</tr>
<tr>
<td>Masonry</td>
<td>$295</td>
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<tr>
<td>Drainage</td>
<td>$1,100</td>
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<tr>
<td>Electric</td>
<td>$2,625</td>
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<tr>
<td>Total</td>
<td>$75,111</td>
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Grant from Ohio Historic Preservation Office $(14,255)$

Net Expense to CRS Historic Properties Fund $60,856

Work Approved by Executive Committee 2/19/19:

<table>
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<tr>
<th>Work Description</th>
<th>Bids</th>
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<tbody>
<tr>
<td>Two Furnaces (Installed)</td>
<td>$6,950</td>
</tr>
<tr>
<td>Debris Removal, Interior Clean Up (Completed)</td>
<td>$1,200</td>
</tr>
<tr>
<td>Investigation of Plumbing, repair frozen lines in basement</td>
<td>$1,345</td>
</tr>
<tr>
<td>New Asphalt Driveway</td>
<td>$6,400</td>
</tr>
<tr>
<td>Garage (w/electric service)</td>
<td>$20,436</td>
</tr>
<tr>
<td>Subtotal</td>
<td>$36,331</td>
</tr>
<tr>
<td>Requested 2nd grant from OHPO</td>
<td>$(13,167)</td>
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Estimate of Remaining Work:

<table>
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<th>Work Description</th>
<th>Cost</th>
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<tbody>
<tr>
<td>Minimal Kitchen updates</td>
<td>$5,600</td>
</tr>
<tr>
<td>Minimal Scrape, patch, repair, paint all interior walls</td>
<td>$13,600</td>
</tr>
<tr>
<td>Repair damage floor</td>
<td>$1,800</td>
</tr>
<tr>
<td>Vinyl flooring hallway and stairs</td>
<td>$3,000</td>
</tr>
<tr>
<td>Misc (smoke detectors etc)</td>
<td>$2,000</td>
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<tr>
<td>Basement scrape and paint</td>
<td>$2,000</td>
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<tr>
<td>Plumbing and Bathrooms Placeholder Amount</td>
<td>$10,000</td>
</tr>
<tr>
<td></td>
<td>$38,000</td>
</tr>
<tr>
<td>Name</td>
<td>Affiliation</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>----------------------------------------------------------</td>
</tr>
<tr>
<td>Kathleen Crowther</td>
<td>Cleveland Restoration Society, President</td>
</tr>
<tr>
<td>Steve Coon</td>
<td>Cleveland Restoration Society, Board of Trustees Heritage</td>
</tr>
<tr>
<td>Jonathan Sandvick</td>
<td>Cleveland Restoration Society, Board of Trustees Heritage</td>
</tr>
<tr>
<td>Amanda Terrell</td>
<td>SHPO</td>
</tr>
<tr>
<td>Barb Powers</td>
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</tr>
<tr>
<td>Mariangela Pfister</td>
<td>SHPO</td>
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<tr>
<td>Diana Welling</td>
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<tr>
<td>Todd Kleismit</td>
<td>OHC</td>
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<tr>
<td>Kevin Pape</td>
<td>Heritage Ohio, Board Chair</td>
</tr>
<tr>
<td>Craig Gossman</td>
<td>Heritage Ohio, Board</td>
</tr>
<tr>
<td>Joyce Barrett</td>
<td>Heritage Ohio, Director</td>
</tr>
<tr>
<td>Chick McBrien</td>
<td>Marvin Windows</td>
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</tbody>
</table>

| Group 1                     | Kathleen Crowther, Jonathan Sandvick, Chick McBrien,     |
|                            | Mariangela Pfister                                      |
| Member                     | Legislative Assistant                                   |
| David Joyce                | Chris Cooper                                            |
| Troy Balderson             | Brittany Madni                                          |
| Bob Latta                  | Mike Davin                                              |
| Rob Portman                | Charlie Bolton                                          |
| Marcia Fudge               | Jonathan Briggs                                         |

| Group 2                     | Steve Coon, Barb Powers, Kevin Pape                      |
| Member                     | Legislative Assistant                                   |
| Marcy Kaptur               | Stacy Barton                                            |
| Steve Chabot               | Brian Bates                                              |
| Michael Turner             | Luke Graeter                                             |

| Group 3                     | Joyce Barrett, Amanda Terrell                            |
| Member                     | Legislative Assistant                                   |
| Jim Jordan                 | Emily Greene                                             |
| Sherrod Brown              | Chanty Gbaye                                            |
| Warren Davidson            | Connor White                                             |

| Group 4                     | Diana Welling, Todd Kleismit, Craig Gossman              |
| Member                     | Legislative Assistant                                   |
| Anthony Gonzalez           | Stephen Hostelley                                        |
| Tim Ryan                   | Samantha Fay                                             |
| Joyce Beatty               | Chonya Davis                                             |
| Steve Stivers              | Mimi Bair                                                |
| Bill Johnson               | Dave Rardin                                              |
HISTORIC PRESERVATION FUND

Established in 1976, the Historic Preservation Fund (HPF) has helped to recognize, save, revitalize, and protect America’s historic places. For more than forty years it has empowered states and local communities to preserve the buildings and sites that tell their communities’ stories. The HPF has been used to educate people of all ages, build community pride, and rescue and rehabilitate significant historic sites. It has also aided in the creation of jobs and strengthened state and local economies.

**HPF does not use tax-payer dollars** - The HPF is uniquely structured, allocating a tiny percentage of revenue from federal offshore drilling (non-tax dollars) towards locating, protecting, and utilizing historic resources. States are required to match at least 40 percent of the funding that they receive from the HPF. The combined funds allow states and tribes to carry out their federally mandated duty of identifying and protecting our historic places as well as evaluating the impact of federal projects upon them. With America’s history disappearing all around us, it is vital to invest in the HPF so state and local entities will have the resources and tools they need to save America’s historic places.

![HPF Appropriations History](image)

*Excludes $126 million in supplemental funding that was appropriated over the years for natural disaster relief and job creation.

The HPF is not used for land acquisition but instead provides state and local entities with the resources they need to enable both public and private preservation efforts.

In addition to facilitating the preservation of our historic places, since 1976, the HPF has facilitated more than 93,000 listings on the National Register, the survey of millions of acres for cultural resources, and **$144 billion in private investment through the Historic Tax Credit**.

The HPF uses non-tax payer dollars to partner with States and Tribes to help save important places in your community and brings local voices to federal decision-making. Adequate funding for the HPF is essential for recognizing, preserving and utilizing our Nation’s historic resources for all Americans.
HISTORIC PRESERVATION FUND

"The preservation of this irreplaceable heritage is in the public interest so that its vital legacy of cultural, educational, esthetic, inspirational, economic, and energy benefits will be maintained and enriched for future generations of Americans."

-1966 National Historic Preservation Act

HISTORIC PRESERVATION FUND FY20 REQUEST:

- **$60 million for State Historic Preservation Officers (SHPOs) for heritage preservation and protection programs that create jobs, economic development, and community revitalization. (FY 2019 funding - $49.675 million)**
  In partnership with the federal government, SHPOs carry out the primary functions of the National Historic Preservation Act including finding and documenting America's historic places, making nominations to the National Register, providing assistance on rehabilitation tax credit projects, reviewing impacts of federal projects, working with local governments, and conducting preservation education and planning.

- **$20 million for Tribal Historic Preservation Officers (THPOs) (FY 2019 funding - $11.735 million)**
  THPOs are designated by federally recognized tribal governments that have entered into an agreement with the Department of the Interior to assume the federal compliance role of the SHPO on their respective Tribal lands. Tribal historic preservation plans are based on traditional knowledge and cultural values, and may involve projects to improve Indian schools, roads, health clinics and housing.

- **$5 million for competitive grants for SHPOs and THPOs to invest in geographic information systems-based mapping for historic resources (New program)**
  21st century digital maps would allow project planners to know where cultural resources have already been located and where they are likely to be identified. It would encourage early participation in project planning, enabling SHPOs and THPOs to work with project sponsors to plan, design, and develop projects that avoid harm to historic resources, lessen conflict, and expedite project delivery.

- **$30 million for Civil Rights Initiative Competitive Grants (FY 2019 funding - $14.5 million)**
  A competitive grant program to preserve the sites and stories of Civil Rights in America. $20 million of these funds would have to be used to preserve the sites and stories of the African American Civil Rights movement.

- **$10 million for Historically Black Colleges and Universities (FY 2019 funding - $8 million)**
  Funding would provide grants to Historically Black Colleges and Universities (HBCUs) to preserve and repair historic buildings on the campuses of HBCUs.

- **$15 million for Save America's Treasures Program (FY 2019 Funding - $13 million)**
  Save America's Treasures grants program help preserve nationally significant historic properties and collections that convey our nation's rich heritage to future generations of Americans.

- **$1 million for Survey & Nomination** For competitive grants for the survey and nomination of properties to the National Register of Historic Places and as National Historic Landmarks associated with communities currently under-represented.

Total Historic Preservation Fund Request: FY 2020 $141 million (FY 2019 $102.66 million)
The Federal Historic Tax Credit

- The Historic Tax Credit (HTC) encourages private investment in the rehabilitation of historic buildings. The credit attracts private capital—$144 billion since inception—to revitalize often abandoned and underperforming properties that have a financing gap between what banks will lend and the total development cost of the transaction.

- The credit in turn generates new economic activity by leveraging private dollars to preserve historic buildings and create jobs; through 2017, the rehabilitation of more than 43,000 historic buildings has created more than 2.5 million jobs.

- The HTC program also is an important tool for revitalizing older, economically-depressed communities. In Fiscal Year 2017, 1,035 completed historic rehabilitation projects were certified by the National Park Service, representing $5.82 billion in estimated rehabilitation costs that qualify for a 20% Federal tax credit. Many of these projects involved buildings that were abandoned or underutilized, and in need of substantial rehabilitation in order for them to contribute to a community’s economy. Based on National Park Service data, it has determined that over 50% of the certified rehabilitation projects in FY 2016 were located in low and moderate income census tracks and more than 75% were located in economically distressed areas.

- Historic rehabilitation greatly outperforms new construction in job creation. Rehabilitation project costs are on average 60 percent labor and 40 percent materials compared to new construction, which is about 40 percent labor and 60 percent materials.

- In addition to revitalizing communities and spurring economic growth, the HTC returns more to the Treasury than it costs. In fact, Treasury receives $1.25 in tax revenue for every dollar invested. According to a study commissioned by the National Park Service, since inception, $27.5 billion in federal tax credits have generated more than $32.4 billion in federal tax revenue from historic rehabilitation projects.

- The HTC was initially enacted in 1978 and made permanent in the tax code in 1986.

- Thirty-five states across the country, including Louisiana, Wisconsin, Texas, Ohio, Missouri, North Carolina, and Virginia, recognize the economic development potential of historic rehabilitation and have enacted individual state Historic Tax Credit programs that work in tandem with the federal program.

- Tax reform legislation preserved the 20 percent Historic Tax Credit, but changed it so that it is spread over five years at 4 percent per year. The tax credit applies only to certified historic structures. A certified historic building is one that is listed individually on the National Register of Historic Places, or contributes to the character of a National Register-listed Historic District. The tax credit is available for any income producing property, including residential rental projects.
STATE HISTORIC PRESERVATION OFFICES

FY 2020 REQUEST:
- $60 million for State Historic Preservation Officers (SHPOs) for heritage preservation and protection programs that create jobs, generate economic development, and spur community revitalization.
- Current funding level is $48.925 million.

SHPOs were established in 1966 by the National Historic Preservation Act to administer federal historic preservation programs at the state and local levels. These programs help communities identify, evaluate, preserve, and revitalize their historic, archeological, and cultural resources. This encourages heritage tourism, increases economic development, and brings state and local input into the federal decision-making process.

QUICK FACTS

- The Historic Preservation Fund (HPF), created in 1976, provides federal funding to State Historic Preservation Offices.

- States are required to match 40% of the money they receive from the HPF.

- In FY17, the Rehabilitation Tax Credit Program, administered primarily by SHPOs, leveraged $6.5 billion in private investment and created about 107,000 jobs.

- Working under 30 day deadlines, in 2017 SHPOs reviewed and commented on 101,500 Federal undertakings and provided 81,900 National Register eligibility opinions.

- Through the work of SHPOs and the National Park Service, in 2017, 968 new listings were added to the National Register of Historic Places.

- More than 1 million Americans live in National Register homes or districts in virtually every county.

- There are more than 2,000 Certified Local Governments (CLGs). Ten percent of SHPO HPF funding is passed through to CLGs.

- In 2017, SHPOs and consultants surveyed more than 5.63 million acres for cultural resources.

- Nearly half of the nation’s historic resource records are solely available in paper/map formats and current funding levels are insufficient to resolve this backlog.

- 95% of States report that lack of digital records impacts their project review efficiency.
Tribal Historic Preservation Funding

Our Request

$20 million to carry out the requirements of the National Historic Preservation Act. This would provide the nearly 200 federally recognized Tribal Historic Preservation Officers (THPOs) an average of $100,000 to run their programs, which create jobs, generate economic development, and spur community revitalization.

What are Tribal Historic Preservation Officers?

THPOs are designated by federally recognized tribal governments that have an agreement with the Department of the Interior to assume the role of the State Historic Preservation Officer on Tribal lands.

Tribal historic preservation plans are grounded in self-determination, traditional knowledge and cultural values, and may involve projects to improve Indian schools, roads, health clinics and housing.

What do THPOs do?

- Work with law enforcement to apprehend and prosecute looters of Indian remains and sacred objects;
- First responders when a sacred site is threatened or Native ancestors are disturbed by development;
- Create their tribe’s oral history programs and operate tribal museums and cultural centers;
- Provide assistance and funding for historic preservation projects and activities;
- Locate, survey, record and maintain inventories of tribal historic resources;
- Review federal projects for their impact on tribal historic resources;
- Nominate properties to the National Register of Historic Places; and
- Lead revitalization of cultural traditions and native languages.

What is at stake?

As the number of Indian tribes with THPO programs increases, the amount of HPF funding appropriated and apportioned to THPOs must keep pace:
in 1996, 12 tribes received an average of $80,000;
in 2018, 179 tribes received an average of $64,000.

Reconnecting Native peoples to their cultural heritage has the power to help heal deep generational wounds. To continue historic preservation in Indian country, it is essential that THPO programs receive increased funding to meet the increasing need.

National Association of Tribal Historic Preservation Officers | 202.628.8476 | nathpo.org
National Conference of State Historic Preservation Officers | 202.624.5465 | www.ncshpo.org
National Trust for Historic Preservation | 202.588.6000 | www.preservationnation.org
National Alliance of Preservation Commissions | 706.542.0169 | napcommissions.org
Preservation Action | 202.637.7873 | www.preservationaction.org
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JOIN THE HISTORIC PRESERVATION CAUCUS

The Congressional Historic Preservation Caucus was established in 2003 as a bipartisan effort to support and encourage historic preservation.

Co-chaired by Representatives Earl Blumenauer (D-OR) and Mike Turner (R-OH), the Historic Preservation Caucus serves as a forum for members to discuss ways to protect and revitalize America’s historic places and structures. The Historic Preservation Caucus is a great place for new and seasoned Representatives to work together to support preservation and thoughtful economic development by advocating for sensible historic preservation legislation and funding.

Every community across America has history - from Williamsburg and Philadelphia to Seneca Falls and Selma, from rural Main Streets to modest row homes. Through programs such as the Federal Rehabilitation Tax Credit, historic buildings serve as valuable economic development tools. Heritage tourism, the commercial revitalization of downtowns, and the re-use of historic properties for housing, are only a few of the ways that history comes alive. The Caucus supports these important initiatives by championing legislation that advances historic preservation throughout the country.

To sign on as a member of the Caucus or for more information contact:

Alabama
Bradley Byrne (R)

Arkansas
French Hill (R)

Arizona
Raul Grijalva (D)
Ruben Gallego (D)

California
Susan Davis (D)
Barbara Lee (D)
Doris Matsui (D)

Colorado
Diana DeGette (D)
Scott Tipton (R)

Connecticut
Joe Courtney (D)
Rosie DeLauro (D)
John Larson (D)
Jim Himes (D)

D.C.
E. Holmes-Norton (D)

Delaware
Lisa Blunt-Rochester (D)

Florida
Bill Posey (R)

Georgia
John Lewis (D)
David Scott (D)

Iowa
Dave Loebsack (D)

Illinois
Danny Davis (D)
Janice Schakowsky (D)

Indiana
Andre Carson (D)

Kentucky
Andy Barr (R)
James Comer (R)
Brett Guthrie (R)
Hal Rogers (R)
John Yarmuth (D)

Louisiana
Ralph Abraham (R)
Cedric Richmond (D)

Massachusetts
Katherine Clark (D)
Stephen Lynch (D)
Jim McGovern (D)
Richard Neal (D)
Joseph Kennedy III (D)

Maryland
Anthony Brown (D)
Elijah Cummings (D)
Jamie Raskin (D)
John Sarbanes (D)

Maine
Chellie Pingree (D)

Michigan
Daniel Kildee (D)
Fred Upton (R)

Minnesota
Betty McCollum (D)

Missouri
Emanuel Cleaver (D)

Nebraska
Nebraska
Jeff Fortenberry (R)

New Hampshire
Ann Kuster (D)

New Jersey
Frank Pallone (D)
Bill Pascrell (D)
Albio Sires (D)

New Mexico
Ben Ray Lujan (D)

New York
Brian Higgins (D)
Nita Lowey (D)
Carolyn Maloney (D)
Sean Maloney (D)
Jarrod Nadler (D)
Jose Serrano (D)
Paul Tonko (D)

North Carolina
Aima Adams (D)
G.K. Butterfield (D)
David Price (D)

Ohio
Marcy Kaptur (D)
Tim Ryan (D)
Steve Stivers (R)
Michael Turner (R)

Oklahoma
Tom Cole (R)

Oregon
Earl Blumenauer (D)
Peter DeFazio (D)

Pennsylvania
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E. Bernie Johnson (D)

Utah
Rob Bishop (R)

Virginia
Bobby Scott (D)
Rob Wittman (R)

Virgin Islands
Stacey Plaskett (D)

Vermont
Peter Welch (D)

Washington
Adam Smith (D)

Wisconsin
Gwen Moore (D)
Mark Pocan (D)
ADVOCACY GUIDE & BRIEFING PACKET

PRESENTED BY:

PRESERVATION

Action

Preservation Action
202-463-0970
mail@preservationaction.org

NCSHPO

National Conference of State Historic Preservation Officers
202-624-5465

IN COOPERATION WITH:

National Trust for Historic Preservation • National Trust Community Investment Corporation
National Association of Tribal Historic Preservation Officers • Historic Tax Credit Coalition
National Alliance of Preservation Commissions • Coalition for American Heritage
Welcome to
HISTORIC PRESERVATION ADVOCACY WEEK
2019

This Briefing Packet provides information on the key issues historic preservationists will be taking to their Members of Congress. This year's issues focus on the Historic Preservation Fund, the Historic Tax Credit, and the Historic Preservation Caucus. While all of them are important, we encourage you to carefully consider which issues are most appropriate to bring before your legislators.

For Each Issue You Will Find:
- Who to Talk To
- Lists of Relevant Committee Members
- Talking Points
- What to Ask For
- References to Relevant One-Pagers

Additional Resources:
- Where to Go for More Information
- A Sample Hill Report Form

The 2018 midterm elections brought significant changes to Washington. After 2 years of unified Republican control of the House, Senate and Presidency, Democrats picked up 40 seats in the House of Representatives, taking control of the lower chamber. Meanwhile Republicans picked up 2 seats in the Senate extending their majority. Additionally, the Midterm elections brought nearly 100 new members to Congress to Washington. This record level of new lawmakers means educating new members on preservation priorities will be critical. The good news for preservationists is that our message is one that enjoys good bi-partisan support: Protect and preserve our American heritage, while generating economic development, leveraging private investment, and creating jobs.

The 2018 and 2019 Trump Administration's budget requests called for dramatic cuts to the Historic Preservation Fund (HPF). Despite these challenging budgets, members of Congress on both sides of the aisle have demonstrated strong support for the HPF. For the last two years, we've been successful in advocating for significant increases to the HPF, including a record level of $102.66 million for FY19. As Congress begins work on FY20 appropriations, we need to remind legislators of the important work the HPF makes possible; recognizing, saving, and protecting America's shared heritage. Despite chronic underfunding the HPF continues to have a huge impact, including facilitating over $144 billion (adjusted for inflation) in private investment through the Historic Tax Credit.

In 2017 Preservationists, developers, and others successfully mobilized across the country to advocate for the protection of the Historic Tax Credit during efforts to reform the tax code. Thanks to this incredible advocacy effort and the efforts of numerous members of Congress who vocalized their support, the 20% Historic Tax Credit was retained. As we enter a new Congress, we need to educate members, especially new members, about the amazing economic development and community revitalization power of the Historic Tax Credit. This is critical, as there could be additional opportunities to pass legislation that enhances the Historic Tax Credit and restores some of the value lost during tax reform.

As you prepare to make your way to the Hill, we encourage you to talk with your colleagues, ask questions, and exchange ideas. There are many different perspectives to advocacy, and we become more effective when we become aware of the various positions articulated on an issue.

After your Hill visits, please fill out a "Hill Report Form" for each visit and return it to Preservation Action. One is included in this packet and an electronic version is available online at https://www.surveymonkey.com/r/PAHillForm19.
HISTORIC PRESERVATION FUND

WHO TO TALK TO:

Your Senator and Representative and members of the Appropriations Committees, especially the House and Senate Interior Appropriations Subcommittees.

WHAT TO REQUEST:

Appropriators: Ask appropriators to adequately fund core programs of the Historic Preservation Fund (HPF).

FY20 Request: $60 million for State Historic Preservation Officers, $20 million for Tribal Historic Preservation Officers, $5 million in competitive grants for SHPOs and THPOs to invest for GIS and Data systems mapping of historic resources, $30 million for Civil Rights Initiative Competitive Grants, $10 million for Historically Black Colleges and Universities, $15 million for Save America's Treasures, and $1 million for underrepresented communities.

Non-Authorizers: If your member is not on the Appropriations Committee, ask them to voice support for the HPF request listed above to the Chairman and Ranking Member of the Interior Appropriations subcommittee. (see side bar.)

Tell all House offices to request that they sign onto the Dear Colleague HPF appropriations letter. The House letter is being circulated by Representatives Elenor Frommeran (D-OR) and Turner (R-OH).

TALKING POINTS:

1. Inadequate funding to SHPOs and THPOs impacts preservation activities in your state or district. Examples may include: little to no bricks and mortar rehabilitation grants; inadequate or piecemeal inventory/survey work; and increased turn-around time for Section 106 reviews (at the same time Congress is trying to speed up project delivery); For SHPOs, delayed tax credit certifications; the inability to be a proactive force for community revitalization, and economic investment.

2. State Historic Preservation Offices jointly administer with the NPS the Federal Rehabilitation Tax Credit program which in 2017 alone leveraged $5.32 billion in private investment and created over 108,000 jobs.

3. Identify programs and programs of interest to your member that will languish without proper funding. Also, reference the Certified Local Government (CLG) program which assists local communities and preservation commissions with training and survey grants funded in part by the HPF.

4. Acknowledge that you understand domestic spending is down because of the budget deficit and the economy. Point out that historic preservation supports job creation and economic development. It is a way for direct local positive impacts.

5. Mention that the source of SHPO and THPO funding is not tax revenue but rather from the Historic Preservation Fund (HPF), funded by Outer Continental Shelf Oil Lease revenues. Every year $150 million in lease revenue is deposited into the HPF. Ask that these revenues be used for their intended purpose and not sacrificed as a budget-balancing tool.

6. Funding for THPOs has not kept pace with the number of new THPOs added each year, therefore the average award is reduced each year.

HOUSE APPROPRIATIONS
Subcommittee on Interior, Environment and Related Agencies

Chair, Betty McCollum (D-MN)
Chellie Pingree (D-ME)
Derek Kilmer (D-WA)
Jose Serrano (D-NY)
Mark Mequley (D-IL)
Bonnie Watson Coleman (D-NJ)
Branka Lawrence (D-MI)

Ranking, David Joyce (R-OH)
Mike Simpson (R-ID)
Chris Stewart (R-UT)
Mark Amodei (R-NV)

SENATE APPROPRIATIONS
Subcommittee on Interior, Environment, and Related Agencies

Chair, Lisa Murkowski (R-AK)
Lamar Alexander (R-TN)
Roy Blunt (R-MO)
Mitch McConnell (R-KY)
Steve Daines (R-MT)
Shelly Moore Capito (R-WV)
Cindy Hyde-Smith (R-MS)
Marco Rubio (R-FL)

Ranking, Tom Udall (D-NM)
Brian Schatz (D-HI)
Patrick Leahy (D-VT)
Jack Reed (D-RI)
Jon Tester (D-MT)
Jeff Merkley (D-OR)
Chris Van Hollen (D-MD)

SUGGESTION:

Identify an HPF supported activity or project (i.e. preservation training, grant, tax credit project) in your district that has had a positive economic impact on your community.
FEDERAL TAX INCENTIVES FOR HISTORIC PRESERVATION

WHO TO TALK TO:

Your member of Congress but importantly members of the House Ways and Means Committee and its Subcommittee on Select Revenue Measures, and the Senate Finance Committee.

WHAT TO REQUEST:

Continue to educate legislators about the amazing economic development and community revitalization power of the Historic Tax Credit. Encourage members to support future legislation to enhance and improve the Historic Tax Credit.

TALKING POINTS:

1. Since inception, the HTC has rehabilitated more than 43,000 buildings, created more than 2.5 million jobs and leveraged $144 billion in private investment nationwide.

2. On average, the credit leverages $5 dollars of private investment for every $1 dollar in federal funding creating highly effective public-private partnerships.

3. Historic rehabilitation greatly outperforms new construction in job creation. Rehabilitation project costs are on average 50 percent lower and 40 percent materials compared to new construction.

4. The tax credit currently generates more revenue than it costs. The cumulative $27.5 billion cost of this program has been more than offset by the $32.4 billion in federal tax receipts generated by these rehabilitation projects.

5. The HTC has revitalized the historic corners of cities and towns across America, enhancing property values, encouraging additional reinvestment by adjacent owners and augmenting tax revenue for federal, state and local governments.

6. The tax credit is a reliable investment with a recapture rate of only 3/4 of one percent. In other words, more than 99% of tax credit projects are successful, and do not result in the “recapture” of the tax credit for the investor’s inability to hold the project for at least five years.

7. Thirty-five states across the country, including Louisiana, Wisconsin, Texas, Ohio, Missouri, North Carolina, and Virginia, recognize the economic development potential of historic rehabilitation and have enacted individual state Historic Tax Credit programs that work in tandem with the federal program.

8. Tax reform legislation preserved the 20 percent Historic Tax Credit but changed it so that it is spread over five years at 4 percent per year. The tax credit applies only to certified historic structures and is available for any income producing property, including residential rental projects.

If your member express interest in the tax credit, let us know on your Hill Report Form and we will follow up with more detailed information.

Visit the National Park Service information table for the 2018 Annual and Statistical Reports on the Historic Tax Credit. It includes breakdowns by state.

HOUSE WAYS AND MEANS

Chair, Richard Neal (D-MA)
John Lewis (D-GA)*
Mike Thompson (D-CA)*
Lloyd Doggett (D-TX)*
John B. Larson (D-CT)*
Earl Blumenauer (D-OR)*
Ron Kind (D-WI)
Bill Pascrell Jr. (D-NJ)
Denny Edwards (D-KY)*
Linda Sanchez (D-CA)*
Brian Higgins (D-NY)*
Terri Sewell (D-AL)
Suzan DelBene (D-WA)*
Judy Chu (D-CA)
Gwen Moore (D-WI)*
Den Nolte (D-NE)*
Brendan Boyle (D-PA)*
Don Beyer (D-VA)*
Dwight Evans (D-PA)
Brad Schneider (D-IL)
Tom Suozzi (D-NY)*
Jimmy Panetta (D-CA)
Stephanie Murphy (D-FL)
Jimmy Gomez (D-CA)
Steven Horsford (D-NV)
Ranking Member, Kevin Brady (R-TX)
Devlin Nunes (R-CA)
Vern Buchanan (R-FL)*
Adrian M. Smith (R-KS)*
Kenney Merchant (R-TX)
Tom Reed (R-NY)
Mike Kelly (R-PA)
George Holding (R-NC)
Jason Smith (R-MO)
Tor: Rice (R-SC)*
David Schweikert (R-AZ)*
Jackie Walorski (R-IN)
Darin LaHood (R-IL)*
Brad Wenstrup (R-OH)
Jody Hice (R-GA)*
Drew Ferguson (R-GA)*
Ron Estes (R-KS)

* Members of Subcommittee on Select Revenue Measures

SENATE FINANCE COMMITTEE

Chair, Chuck Grassley (R-IA)
Mike Crapo (R-ID)*
Pat Roberts (R-KS)*
Mike Enzi (R-WY)*
John Cornyn (R-TX)*
John Thune (R-SD)*
Richard Burr (R-NC)*
Johnny Isakson (R-GA)*
Rob Portman (R-OH)*
Patrick Toomey (R-PA)*
Tim Scott (R-SC)
Bill Cassidy (R-LA)
James Lankford (R-OK)
Steve Daines (R-MT)
Todd Young (R-IN)
Ranking, Ron Wyden (D-OR)
Debbie Stabenow (D-MI)
Mara Cantwell (D-WA)
Robert Menendez (D-NJ)*
Thomas Carper (D-DE)*
Ben Cardin (D-MD)*
Sheldon Brown (D-OH)
Michael Bennet (D-CO)*
Robert P. Casey, Jr. (D-PA)
Mark Warner (D-VA)*
Sheldon Whitehouse (D-RI)*
Maggie Hassan (D-NH)
Catherine Cortez Masto (D-NV)

* Members of Subcommittee on Taxation
JOIN THE HISTORIC PRESERVATION CAUCUS

WHO TO TALK TO:

Your member of the U.S. House of Representatives and Senate.

WHAT TO REQUEST:

Ask House members to join the Congressional Historic Preservation Caucus by contacting Jon Bosworth in Rep. Earl Blumenauer’s (D-OR) office at 202-225-4811 or Jeff Wilson in Rep. Michael Turner’s (R-OH) Office (202-225-6465). If they already are a member, thank them! Encourage the member to note on their website that they are member of the Congressional Historic Preservation Caucus and encourage them to share stories on preservation issues, and historic sites in their district on their websites.

Ask your Senator to lead an effort to create a Senate Historic Preservation Caucus. There is currently no Caucus in the Senate.

TALKING POINTS:

1. The Congressional Historic Preservation Caucus brings together Members of Congress who understand the under-appreciated potential of America’s historic places. They know that the value of these places is not solely in what they teach us about our history. It is also in what they promise for our future. Heritage tourism, the commercial revitalization of forgotten downtowns, the economically viable rehabilitation and the re-use of historic properties as housing stock are only a few of the ways that history is coming alive in communities across the country.

2. Members of the Congressional Historic Preservation Caucus join together to support and encourage the preservation and thoughtful development of historic places in their districts, states, and as a matter of national policy. The Caucus allows Members to share information and ideas and support legislative and budget matters as they pertain to national, state, and local issues and opportunities in historic preservation.

CURRENT LIST OF CONGRESSIONAL HISTORIC PRESERVATION CAUCUS MEMBERS

Alabama
Bradley Byrne (R)

Arkansas
French Hill (R)

Arizona
Raul Grijalva (D)
Ruben Gallego (D)

California
Susan Davis (D)
Barbara Lee (D)
Doris Matsui (D)

Colorado
Diana DeGette (D)
Scott Tipton (R)

Connecticut
Joe Courtney (D)
Rosa DeLauro (D)
John Larson (D)
Jim Himes (D)

D.C.
E. Holmes-Norton (D)

Delaware
Lisa Blunt-Rochester (D)

Florida
Bill Posey (R)

Georgia
John Lewis (D)
David Scott (D)

Iowa
Dave Loebsack (D)

Illinois
Danny Davis (D)
Janice Schakowsky (D)

Indiana
Andre Carson (D)

Kentucky
Brett Guthrie (R)
Andy Barr (R)
James Comer (R)
Hal Rogers (R)
John Yarmuth (D)

Louisiana
Ralph Abraham (R)
Cedric Richmond (D)

Massachusetts
Katherine Clark (D)
Stephen Lynch (D)
Jim McGovern (D)
Richard Neal (D)
Joseph P. Kennedy III (D)

Maryland
Elijah Cummings (D)
Anthony Brown (D)
Jamie Raskin (D)
John Sarbanes (D)

Maine
Chellie Pingree (D)

Michigan
Daniel Kildee (D)
Fred Upton (R)

Minnesota
Betty McCollum (D)

Missouri
Emanuel Cleaver (D)

Nevada
Jeff Fortenberry (R)

New Hampshire
Ann Kuster (D)

New Jersey
Frank Pallone (D)
Bill Pascrell (D)
Albio Sires (D)

New Mexico
Ben Ray Lujan (D)

New York
Brian Higgins (D)
Nita Lowey (D)
Carolyn Maloney (D)
Sean Maloney (D)
Jerrold Nadler (D)
Jose Serrano (D)
Paul Tonko (D)

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Ama Adams (D)
David Price (D)

Ohio
Marcy Kaptur (D)
Tim Ryan (D)
Steve Stivers (R)
Michael Turner (R)

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James Langevin (D)

South Carolina
James Clyburn (D)
Joe Wilson (R)

Tennessee
Steve Cohen (D)
Jim Cooper (D)
Phil Roe (R)

Texas
Lloyd Doggett (D)
Kay Granger (R)
E. Bemie Johnson (D)

Utah
Rob Bishop (R)

Virginia
Bobby Scott (D)
Rob Wittman (R)

Virgin Islands
Stacey Plaskett (D)

Vermont
Peter Welch (D)

Washington
Adam Smith (D)

Wisconsin
Gwen Moore (D)
Mark Pocan (D)
ADDITIONAL RESOURCES

KNOW YOUR MEMBER

Doing a bit of homework before meeting a legislator or their staff can help with the conversation and build a relationship. You can do this by visiting the legislator’s website at www.house.gov or www.senate.gov. Basic information includes biography, committee assignments, top policy priorities, and their track record with preservation and other legislative issues that impact your state and community.

You may find that someone helped establish a National Historic Landmark or provided assistance with a local tax credit project. In some cases, you’ll be talking to someone (or more likely their staff) who has no track record with historic preservation at all. Preservation programs may not fall within their immediate subcommittee jurisdiction. Find a way to connect. Share your knowledge of preservation and the district. Share how what you do relates to a given program and what insights and help you can offer.

It is also helpful to see how your legislator gets recognized in local press. If you haven’t actually met them, you can at least meet their public persona in media and online.

Knowing your legislator is very similar to knowing a colleague. As you know, in a non-lobbying context, you get to know someone over time based on common interests and goals. Trust is key. Communication with your legislator should be about building a two-way dialogue for information sharing and problem solving. There is always common ground. And, never jump to conclusions based on background or political party. You may miss critical information.

Create an opportunity for more dialogue. If there’s an upcoming event in the district, invite the member and/or staff to attend.

HELPFUL ONLINE RESOURCES

Advocacy Week Schedule & One-Pagers
preservationaction.org/advocacyweek

Preservation-Related Congressional Committee List
preservationaction.org/congressional-committees/

Historic Preservation Caucus List
preservationaction.org/caucus/

Preservation Action Legislative Updates
preservationaction.org/category/legislative-update

Bill Information
congress.gov

DIRECTIONS AND LOCATIONS

The Kimpton Hotel Palomar is closest to the Dupont Circle metro station (red line).

The Union Station metro station (red line) is located on the “Senate side” not far from the Russell Senate Office Building.

The Capitol South metro station (orange, blue, and silver lines) is located on the “House side” very close to the Cannon House Office Building and is about a 10 minute walk to the “Senate side”.

If the weather is bad, or you’re short on time and want to avoid going through security more than once, you can access the Cannon Building on its southeast corner, then go downstairs to a tunnel that connects with the other two House office buildings.

Suites within the House office buildings are numbered as follows:

Cannon – 3 digits
Longworth – 4 digits starting with 1
Rayburn – 4 digits starting with a 2

Be sure to leave enough time between Hill meetings for delays.

The best place to wait for more than 15 minutes is the closest cafeteria. These are in the Rayburn and Longworth House buildings and the Dirksen Senate Office Building.

Share your experiences during National Historic Preservation Advocacy Week on social media by using:

#PresAdvocacy19

Historic Tax Credits
nps.gov/gp/tax-incentives.htm
saversglimpse.org/historic-tax-credits
historiccredit.com/

State Historic Preservation Offices
nps.gov/shipo
nchpso.org

Tribal Historic Preservation Offices
nps.gov/history/tribal/tribal_historic_preservation_offices_program.html
nchpso.org
Completed Federal Tax Credit Projects
1977 - Present

$5.54 Billion
Total Investment
2,108 Historic
Buildings Rehabilitated

Investment in Completed Projects
- $1 - $1,000,000
- $1,000,001 - $5,000,000
- $5,000,001 - $10,000,000
- $10,000,001 - $25,000,000
- $25,000,001 - $50,000,000
- $50,000,001 - $2,244,962,603

Map produced by:
State Historic Preservation Office
800 East 17th Ave., Columbus, OH 43211
614-298-2000
www.ohiohistory.org
February, 2019
Representative Marcia Fudge - District 11

In District 11
Two hundred seventy four Federal Historic Rehabilitation Tax Credit Projects were completed and received final certification, totaling $1,491,412,673 invested in historic buildings.

Thirty four Ohio Historic Preservation Tax Credit Projects were completed and received final certification, totaling $465,377,342 invested in historic buildings.

Four Certified Local Governments (Akron, Cleveland, Euclid and Shaker Heights) received 50 historic preservation grants, totaling $404,361 and contributed $448,797 in local match.

There is 1 Main Street Community (Cleveland).
LaSalle Theater Building, Cleveland

PRESERVATION
Works for Ohio!

819–829 East 185th Street
Total Project Costs: $2,500,000

A centerpiece in the East 185th Street Business District bordering the cities of Cleveland and Euclid, the LaSalle Theatre opened in 1927 with a single screen, storefronts, and three apartments. Now the LaSalle Arts and Media Center, the theater space will be used for community and private events and the storefront and residential spaces will be used for their original purposes.
PRESERVATION
Works for Ohio!

526 Superior Avenue
Total Project Costs: $54,800,000

Built in 1913, the fifteen-story property has always been maintained as an office building but demand for new rental housing in downtown encouraged the building’s conversion into 234 market-rate apartments. The bottom three floors continue to function as commercial space, with retail and office on the second and third floors.
Federal Tax Incentives for Rehabilitating Historic Buildings

Annual Report for Fiscal Year 2018

National Park Service
U.S. Department of the Interior
Technical Preservation Services
FISCAL YEAR 2018
AT A GLANCE

1,805 Certifications of significance for rehabilitation (Part 1)

1,479 Preliminary certifications of rehabilitation (Part 2)
Estimated rehabilitation costs .................. $7.48 billion
Median project QRE ................................. $895,385
Average project QRE .............................. $5.06 million

1,013 Certifications of completed work (Part 3)
Estimated rehabilitation costs .................. $6.90 billion
Median project QRE ................................. $1.36 million
Average project QRE .............................. $6.80 million
Rehabilitated housing units ...................... 6,994
New housing units .................................. 12,527
Low and moderate income housing units ...... 6,152
QRE=Qualified rehabilitation expenditures

Over $6.9 billion in private investment in historic preservation and community revitalization.

Program activity remains high—9% increase in certifications of significance (Part 1), and approved rehabilitation projects (Part 2 and Part 3) remain at prior-year highs.

Projects both big and small—almost half (46%) of all completed projects (Part 3) were under $1 million QRE and 18% were under $250,000 QRE.

Under $250,000 (18%)
$250,000—999,999 (28%)
$1,000,000—4,999,999 (28%)
$5,000,000—24,999,999 (20%)
Over $25,000,000 (6%)

New National Register nominations—about 20% of projects involved properties not yet listed in the National Register of Historic Places.

Thirty-five states have state historic tax credits that can be used in tandem with the Federal historic tax credit.

FY 1977–FY 2018
PROGRAM ACCOMPLISHMENTS

285,264
Rehabilitated Housing Units

302,460
New Housing Units

166,210
Low- and Moderate-Income Housing Units

$96.87 billion
Estimated Rehabilitation Investment

44,341
Historic Rehabilitation Projects Certified

Source: Technical Preservation Services, National Park Service
## FY 2018 STATE-BY-STATE PROJECT ACTIVITY

Estimated Qualified Rehabilitation Expenditures (QRE) and Five-Year Cumulative Totals

<table>
<thead>
<tr>
<th>State</th>
<th>Applications Received</th>
<th>Applications Approved</th>
<th>Estimated QRE at Part 2</th>
<th>Estimated QRE at Project Completion (Part 3)</th>
<th>Cumulative Totals FY 2014-FY 2018</th>
</tr>
</thead>
</table>

Source: Technical Preservation Services, National Park Service
Federal Tax Incentives for Rehabilitating Historic Buildings

A Successful Federal/State Partnership Since 1976

The Federal Historic Preservation Tax Incentives Program, administered by the National Park Service in partnership with the State Historic Preservation Offices, is the nation's most effective program to promote historic preservation and community revitalization through historic rehabilitation. With over 44,000 completed projects since its enactment in 1976, the program has leveraged over $96.87 billion in private investment in the rehabilitation of historic properties—spurring the rehabilitation of historic structures of every period, size, style, and type in all 50 states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands.

Commonly known as the Historic Tax Credit, the program provides a 20-percent Federal tax credit to property owners who undertake a substantial rehabilitation of a historic building in a business or income-producing use, while maintaining its historic character. In a three-part application process, the National Park Service certifies that a building is historic, and therefore eligible for the program, and that its rehabilitation meets preservation standards.

The Historic Tax Credit is the largest Federal program specifically supporting historic preservation. It generates much needed jobs and economic activity, enhances property values in older communities, creates affordable housing, and augments revenue for Federal, state, and local governments, leveraging many times its cost in private expenditures on historic preservation. This widely-recognized program has been instrumental in preserving the historic buildings and places that give our cities, towns, Main Streets, and rural areas their special character and has attracted new private investment to communities small and large throughout the nation.

Technical Preservation Services, National Park Service
March 2019

The Federal Historic Preservation Tax Incentives Program is administered by the National Park Service in partnership with the State Historic Preservation Offices.

The State Historic Preservation Offices (SHPOs) are the first point of contact for property owners wishing to use the historic rehabilitation tax credit. The SHPOs can help determine whether a historic building is eligible for Federal or State tax credits, provide guidance before beginning a project, and advise on the application requirements and what constitutes appropriate preservation work. For the phone number or website of your SHPO, contact the National Conference of State Historic Preservation Officers at (202) 624-5465 or visit their website at www.nchpo.org.

The Technical Preservation Services (TPS) office administers the tax incentives program on behalf of the National Park Service. Information about the program and application requirements as well technical guidance and publications on preserving and rehabilitating historic buildings is available from TPS at (202) 513-7270 or www.nps.gov/tps.

Vacant for fifteen years, the rehabilitation of the Federal Reserve Bank of Atlanta, Birmingham Branch, returned the 1925 building and its 1955 contributing addition back to life as a multi-tenant office building. One of the highlights of the project was the restoration of the bank’s two-story entrance, including the flanking columns, based on historic documentation.

Cover photo: Chris Luker
Listed in the National Register of Historic Places, the Sarah Benedict House in Cleveland's Midtown neighborhood offers a central location, meticulously restored and rehabilitated office and meeting spaces, and beautifully landscaped grounds.

The Third Floor Level of the house offers approximately 1,700+ usable SF of fully improved office space: five+ rooms, restroom, and storage facilities. The first floor meeting rooms of the Sarah Benedict House are also available for use by Third Floor tenants, as is the adjacent garden. A kitchen is provided for catering and tenant use.

For more information contact Debra Gulick
dgulick@clevelandrestoration.org
(216) 426-3104
ADDED BENEFITS

- Fully accessible by an elevator
- Restroom and storage available
- Wide open space for activities
- The main floor features an approximately 1,700 SF of flexible office space
- Immediate and easy access to downtown
- The Zen exterior design evokes a sense of excellence

LOCATION

- Excellent location
- For lease the third floor suite of it's head quarter
- The Celeste restaurant society is making available
- 1,700 SF FOR LEASE
- Close to downtown
- Easy access to innerbelt
- Established neighborhood
- Centrally located

3751 PROSPECT AVENUE

THE HISTORIC SAWAH BENEFIT HOUSE