

# City of Jacksonville

## 2018

### **HISTORIC PRESERVATION FUND (HPF)**

# Grant Program Manual

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## **HPF INTRODUCTION**

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The Jacksonville Historic Preservation Fund was created through privately-donated financial contributions for the purpose of historic preservation efforts within the City of Jacksonville. While the City utilizes some of the funds for large cultural preservation projects and projects that focus on Jacksonville Landmark-Listed public structures, the City has created HPF Programs designed to provide financial and technical assistance to owners and lessees of privately-owned Jacksonville Landmark-Listed structures.

## **HPF GOALS AND OBJECTIVES**

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### **HPF GOAL**

The goal of the HPF is to form public/private partnerships that protect the historical townscape of Jacksonville and to return individual Jacksonville Landmark-Listed Contributing Historic Resources to their original condition and integrity.

### **HPF OBJECTIVES**

- Enhance and revitalize the historic character of Jacksonville through the preservation, restoration, rehabilitation and/or reconstruction of individually landmark-listed contributing historic resource structures.
- Encourage the enhancement of the condition and integrity of individual landmark-listed contributing historic resource structures by providing financial assistance to eligible projects.
- Encourage stabilization and structural improvements of individual landmark listed contributing historic resource structures by providing financial assistance to eligible projects.

## **GRANT PROGRAM DESCRIPTION**

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The HPF Grant Program is a highly-competitive, 1:1 matching grant program. Although there is no minimum or maximum limit to apply for, the HPF Grant Program will have a total 'cap' of funds. This will be determined annually, based on the availability of HPF funds.

The applicant must pay 100% of the costs of the approved work up front. Upon project completion and submission of paid receipts the Historic Preservation Officer and a member of the HARC will inspect the project. After a successful inspection, the applicant will then be reimbursed for 50% of the cost of the approved work. Please be aware that only parts of your proposal may be awarded funds.

## **MANDATORY REQUIREMENTS**

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1. The subject property must be listed on the Jacksonville Landmark List as a Contributing Historic Resource.
2. If the applicant is the owner of the property, proof of ownership must be provided. Common proof of ownership is a deed of record.
3. If the applicant is a lessee, the applicant must provide a notarized Property Owner License and Agreement form, as provided by the City of Jacksonville.
4. The entirety of the project is for exterior treatments, unless for structural improvements.

5. The entire scope-of-work complies with the Secretary of the Interior's *Standards for the Treatment of Historic properties*, Local, State and Federal laws. This entire document is found online or in the Planning Office. An **excerpt only** is provided in Attachment A. All contractors will be required to perform work in compliance with these standards.
6. The applicant must submit a complete HPF application to include clear, concise and complete project narrative and budget of the proposed project and all required exhibits.
7. If approved for an HPF grant, applicants are required to submit planning applications (e.g., a Certificate of Appropriateness application) and its corresponding fee. (Please contact the Planning Department at 541-899-6873 for more information.)

**\*Please Note: Roof replacement proposals are generally not approved for grant funding, unless the replacement includes significant structural improvements.**

**The Grant is not retroactive. Projects that are already complete or in process are not eligible for a grant award.**

## **ADDITIONAL REQUIREMENTS**-----

- Participants may not have debts in arrears to the City.
- The subject property must be free of any outstanding code violations and/or any outstanding conditions of approval.
- At the time of project completion all projects receiving HPF monies will be required to contact the City for a site inspection and submit contractor invoices. Monies may only be used for approved projects.
- Any deviation of approved projects, including (but not limited to) unapproved use of funds, will be deemed a breach of contract and all funds must be repaid within thirty (30) days of the identified breach; a breach may disqualify the applicant from any/all future HPF Program funds.

## **PRIORITIES**-----

- **First Priority:** Projects that restore structural integrity.
- **Second Priority:** Projects that restore and/or replace deteriorated historic features on the front façade.
- **Third Priority:** Projects that restore missing or deteriorated features on facades and/or roofs not visible from the street view.
- **Fourth Priority:** Projects that remove incompatible features, alterations or additions on the front façade.
- **Fifth Priority:** Projects that remove incompatible features, alterations or additions on facades and/or roofs not visible from the street view.
- **Sixth Priority:** Projects that focus on mechanical/ and/or electrical improvements (to preserve the structural condition and/or integrity).

**\*Please Note: Roof replacement proposals are generally not approved as an HPF grant project, unless the replacement includes significant structural improvements.**

## EVALUATION CRITERIA-----

- (25%) The property receives on-going maintenance, or its present state is not the result of disrepair or neglect by the current owner (*Ownership Dependent*).
- (20%) The project serves as a significant public demonstration of historic preservation and will encourage further preservation efforts in its immediate surroundings.
- (20%) The project has shown that it will improve the integrity and/or condition, as defined in the 1999 Jacksonville Historic Inventory Update.
- (15%) The property has a preservation plan in place.
- (10%) The applicant has worked with a contractor to estimate costs and scope of work.

**For assistance:** Please contact the Planning Department at (541)899-6873

## APPLICATION PROCESS / TIMELINE-----

### **Application Submittal Deadline: 2:00 pm on Friday, Aug 10, 2018**

All applications must be submitted to the City of Jacksonville Planning Department no later than 2:00pm Friday, **Aug 10<sup>th</sup>, 2018**. Applications via mail must be postmarked by this same day.

#### In-Person Submittal:

City of Jacksonville Planning Department  
206 N. Fifth Street  
Jacksonville, OR

#### Office Hours:

Monday, Tuesday, Thursday, Friday:  
8:30 am – 2:00 pm  
CLOSED WEDNESDAYS

#### Submittal by Mail:

City of Jacksonville  
Attn: Planning Department  
P.O. Box 7  
Jacksonville, OR 97530

### **Application Review/Acceptance: Wednesday, Aug 29, 2018**

The Historical and Architectural Review Commission (HARC) will review recommendations on all applications for approval or denial during a public hearing on **Aug 29, 2018**.

### **Notification of Acceptance or Rejection: Friday, Aug 31, 2018**

Staff will notify all applicants, in writing, of project acceptance or rejection, by **Aug 31, 2018**.

### **Award Finalization:**

Staff will work with award recipients to complete the Award Finalization process of signing the Program Agreement and obtaining applicable planning permits for review. After the relevant review, award recipients are permitted to **submit their building permits** for review and approval, if applicable.

### **Project Completion:**

All projects will have 120 days, as of Award Finalization date, to complete their project. Upon completion of construction the applicant shall submit documentation that the contractor(s) has been paid in full and request a date and time for city staff and a HARC Representative to conduct a Project Completion site visit, to check project

compliance and to take photographs. Only after a successful Project Completion visit, will the City issue a check for the award amount.

# ATTACHMENT A

## SECRETARY OF THE INTERIOR'S STANDARDS FOR THE TREATMENT OF HISTORIC PROPERTIES (1992)

For more information, visit <http://www.cr.nps.gov/hps/tps/standguide/>

### TREATMENTS

There are Standards for four distinct, but interrelated, approaches to the treatment of historic properties – Preservation, Rehabilitation, Restoration, and Reconstruction. Preservation focuses on the maintenance and repair of existing historic materials and retention of a property's form as it has evolved over time. (Protection and Stabilization have now been consolidated under this treatment.) Rehabilitation acknowledges the need to alter or add to a historic property to meet continuing or changing uses while retaining the property's historic character. Restoration is undertaken to depict a property at a particular period of time in its history, while removing evidence of other periods. Reconstruction re-creates vanished or non-surviving portions of a property for interpretive purposes.

The simplification and sharpened focus of these revised sets of treatment standards as provided below is intended to assist users in making sound historic preservation decisions. Choosing the appropriate treatment for a historic property, whether preservation; rehabilitation; restoration; or reconstruction; is critical. This choice always depends on a variety of factors, including the property's historical significance, physical condition, and proposed use.

### PRESERVATION AS A TREATMENT

When the property's distinctive materials, features, and spaces are essentially intact and thus convey the historic significance without extensive repair or replacement; when depiction at a particular period of time is not appropriate; and when a continuing or new use does not require additions or extensive alterations, Preservation may be considered as a treatment. Prior to undertaking work, a documentation plan should be developed.

**Preservation** is defined as the act or process of applying measures necessary to sustain the existing form, integrity, and materials of a historic property. Work, including preliminary measures to protect and stabilize the property, generally focuses upon the ongoing maintenance and repair of historic materials and features rather than extensive replacement and new construction. New exterior additions are not within the scope of this treatment; however, the limited and sensitive upgrading of mechanical, electrical, and plumbing systems and other code-required work to make properties functional is appropriate within a preservation project.

#### Preservation Standards

1. A property shall be used as it was historically, or be given a new use that maximizes the retention of distinctive materials, features, spaces, and spatial relationships. Where a treatment and use have not been identified, a property shall be protected and, if necessary, stabilized until additional work may be undertaken.
2. The historic character of the property shall be retained and preserved. The replacement of intact or repairable historical materials or alteration of features, spaces, and spatial relationships that characterize a property shall be avoided.
3. Each property shall be recognized as a physical record of its time, place, and use. Work needed to stabilize, consolidate, and conserve existing historic materials and features shall be physically and visually compatible, identifiable upon close inspection, and properly documented for future research.
4. Changes to a property that have acquired historic significance in their own right shall be retained and preserved.
5. Distinctive materials, features, finishes, and construction techniques or examples of craftsmanship that characterize a property shall be preserved.
6. The existing condition of historic features shall be evaluated to determine the appropriate level of intervention needed. Where the severity of deterioration requires repair or limited replacement of a distinctive feature, the new material shall match the old in composition, design, color, and texture.
7. Chemical or physical treatments, if appropriate, shall be undertaken using the gentlest means possible. Treatments that cause damage to historic materials shall not be used.
8. Archeological resources shall be protected and preserved in place. If such resources must be disturbed, mitigation measures shall be undertaken.

## REHABILITATION AS A TREATMENT

When repair and replacement of deteriorated features are necessary; when alterations or additions to the property are planned for a new or continued use; and when its depiction at a particular period of time is not appropriate, Rehabilitation may be considered as a treatment. Prior to undertaking work, a documentation plan for Rehabilitation should be developed.

**Rehabilitation** is defined as the act or process of making possible a compatible use for a property through repair, alterations, and additions while preserving those portions or features which convey its historical, cultural, or architectural values.

### Rehabilitation Standards

1. A property shall be used as it was historically or be given a new use that requires minimal change to its distinctive materials, features, spaces, and spatial relationships.
2. The historic character of a property shall be retained and preserved. The removal of distinctive materials or alteration of features, spaces, and spatial relationships that characterize a property shall be avoided.
3. Each property shall be recognized as a physical record of its time, place, and use. Changes that create a false sense of historical development, such as adding conjectural features or elements from other historic properties, shall not be undertaken.
4. Changes to a property that have acquired historic significance in their own right shall be retained and preserved.
5. Distinctive materials, features, finishes, and construction techniques or examples of craftsmanship that characterize a property shall be preserved.
6. Deteriorated historic features shall be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature shall match the old in design, color, texture, and, where possible, materials. Replacement of missing features shall be substantiated by documentary and physical evidence.
7. Chemical or physical treatments, if appropriate, shall be undertaken using the gentlest means possible. Treatments that cause damage to historic materials shall not be used.
8. Archeological resources shall be protected and preserved in place. If such resources must be disturbed, mitigation measures shall be undertaken.
9. New additions, exterior alterations, or related new construction shall not destroy historic materials, features, and spatial relationships that characterize the property. The new work shall be differentiated from the old and shall be compatible with the historical materials, features, size, scale, and proportion, and massing to protect the integrity of the property and its environment.
10. New additions and adjacent or related new construction shall be undertaken in such a manner that, if removed in the future, the essential form and integrity of the historic property and its environment would be unimpaired.

## RESTORATION AS A TREATMENT

When the property's design, architectural, or historical significance during a particular period of time outweighs the potential loss of extant materials, features, spaces, and finishes that characterize other historical periods; when there is substantial physical and documentary evidence for the work; and when contemporary alterations and additions are not planned, Restoration may be considered as a treatment. Prior to undertaking work, a particular period of time, i.e., the restoration period, should be selected and justified, and a documentation plan for Restoration developed.

**Restoration** is defined as the act or process of accurately depicting the form, features, and character of a property as it appeared at a particular period of time by means of the removal of features from other periods in its history and reconstruction of missing features from the restoration period. The limited and sensitive upgrading of mechanical, electrical, and plumbing systems and other code-required work to make properties functional is appropriate within a restoration project.

### Restoration Standards

1. A property shall be used as it was historically or be given a new use which reflects the property's restoration period.
2. Materials and features from the restoration period shall be retained and preserved. The removal of materials or alteration of features, spaces, and spatial relationships that characterize the period shall not be undertaken.

3. Each property shall be recognized as a physical record of its time, place, and use. Work needed to stabilize, consolidate, and conserve materials and features from the restoration period shall be physically and visually compatible, identifiable upon close inspection, and properly documented for future research.
4. Materials, features, spaces, and finishes that characterize other historical periods shall be documented prior to their alteration or removal.
5. Distinctive materials, features, finishes, and construction techniques or examples of craftsmanship that characterize the restoration period shall be preserved.
6. Deteriorated features from the restoration period shall be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature shall match the old in design, color, texture, and where possible, materials.
7. Replacement of missing features from the restoration period shall be substantiated by documentary and physical evidence. A false sense of history shall not be created by adding conjectural features, features from other properties, or by combining features that never existed together historically.
8. Chemical or physical treatments, if appropriate, shall be undertaken using the gentlest means possible. Treatments that cause damage to historic materials shall not be used.
9. Archeological resources affected by a project shall be protected and preserved in place. If such resources must be disturbed, mitigation measures shall be undertaken.
10. Designs that were never executed historically shall not be constructed.

## **RECONSTRUCTION AS A TREATMENT**

When a contemporary depiction is required to understand and interpret a property's historic value (including the re-creation of missing components in a historic district or site); when no other property with the same associative value has survived; and when sufficient historical documentation exists to ensure an accurate reproduction, Reconstruction may be considered as a treatment. Prior to undertaking work, a documentation plan for Reconstruction should be developed.

**Reconstruction** is defined as the act or process of depicting, by means of new construction, the form, features, and detailing of a non-surviving site, landscape, building, structure, or object for the purpose of replicating its appearance at a specific period of time and in its historic location.

### **Reconstruction Standards**

1. Reconstruction shall be used to depict vanished or non-surviving portions of a property when documentary and physical evidence is available to permit accurate reconstruction with minimal conjecture, and such reconstruction is essential to the public understanding of the property.
2. Reconstruction of a landscape, building, structure, or object in its historic location shall be preceded by a thorough archeological investigation to identify and evaluate those features and artifacts which are essential to an accurate reconstruction. If such resources must be disturbed, mitigation measures shall be undertaken.
3. Reconstruction shall include measures to preserve any remaining historic materials, features, and spatial relationships.
4. Reconstruction shall be based on the accurate duplication of historic features and elements substantiated by documentary or physical evidence rather than on conjectural designs or the availability of different features from other historic properties. A reconstructed property shall re-create the appearance of a non-surviving historic property in materials, design, color, and texture.
5. A reconstruction shall be clearly identified as a contemporary re-creation.
6. Designs that were never executed historically shall not be constructed.



# ATTACHMENT B

## JACKSONVILLE HISTORIC PRESERVATION FUND GRANT PROGRAM PROPERTY OWNER LICENSE AND AGREEMENT

I \_\_\_\_\_ owner(s) of the property located at \_\_\_\_\_, Jacksonville, Oregon, 97530 and legally described in Exhibit "A" attached hereto and made a part hereof, hereby acknowledge that the lessee(s) of this property is applying for funding assistance to the Jacksonville Historic Preservation Fund (HPF) Grant Program. I declare that the lessee has been granted my authorization to use the approved acquired funds for use of the Preservation, Rehabilitation, Restoration and/ or Reconstruction of my property, as well as has been granted my authorization to follow-through with the attached application project proposal.

For and in consideration of the City of Jacksonville's Historic Preservation Fund monies, I hereby agree to the following:

For the purposes of enhancing, preserving and protecting the historical features, significance, and characteristics of the property that made it eligible for listing as a Contributing Historic Resource located on the City of Jacksonville's Historic Landmark List, I declare that the property, and every part thereof, shall be held, sold and conveyed subject to the following covenants running with the land for a period of five years after successful project completion, and that the covenants shall be binding on all parties having any right, title, or interest in the property and every part thereof, their heirs successors, and assigns.

1. I agree, at my own expense, to maintain and repair said property so as to preserve the architectural, historical and archeological integrity of the same in order to protect and enhance those qualities that made the property eligible for listing as a Contributing Historic Property located within the City of Jacksonville's National Historic Landmark District.
2. I agree to the provisions of the HPF Grant Program Agreement.
3. I agree that no visual or structural alterations will be made to the property without prior written permission of the City of Jacksonville Planning Department.
4. I agree that the City of Jacksonville, its agents and designees shall have the right to inspect the property at all reasonable times in order to ascertain whether or not the conditions of this agreement are being observed.
5. I agree to comply with Title VI of the Civil Rights Act of 1964 (42 U.S.C. 200(d)), the American Disabilities Act, and with Section 504 of the Rehabilitation Act of 1975 (29 U.S.C. 794). These laws prohibit discrimination on the basis of race, religion, national origin, or handicap. In implementing public access, reasonable accommodations to qualified handicapped persons shall be made in consultation with the City of Jacksonville.

I have attached a copy of the Lease Agreement between the lessee and myself to complement this HPF Application.

Property Owner Print Name:

Property Owner Signature:

Date:

On this \_\_\_\_\_ day of \_\_\_\_\_, 20 \_\_\_\_\_, personally appeared \_\_\_\_\_, who is personally known to me, or whose identity was proved to me on the basis of satisfactory evidence to be the person whose name is subscribed to this instrument, and acknowledged that he or she executed the same.

Notary Public: \_\_\_\_\_

My Commission Expires: \_\_\_\_\_