

2016 Morris County Historic Preservation Trust Fund

APPLICATION WORKSHOP

February 4, 2016



2016 Morris County Historic Preservation Trust Fund

Creation of the Trust Fund

- Morris County voters approved a referendum in November 2002 authorizing the Freeholders to permit historic preservation funding under the Open Space Trust Fund, as allowed by state law.
- Between 1/8 and 1/4 cent of the existing tax for Open Space and Farmland Preservation Trust Fund was to be used for the preservation and acquisition of historic properties, structures, facilities, sites, areas or objects.



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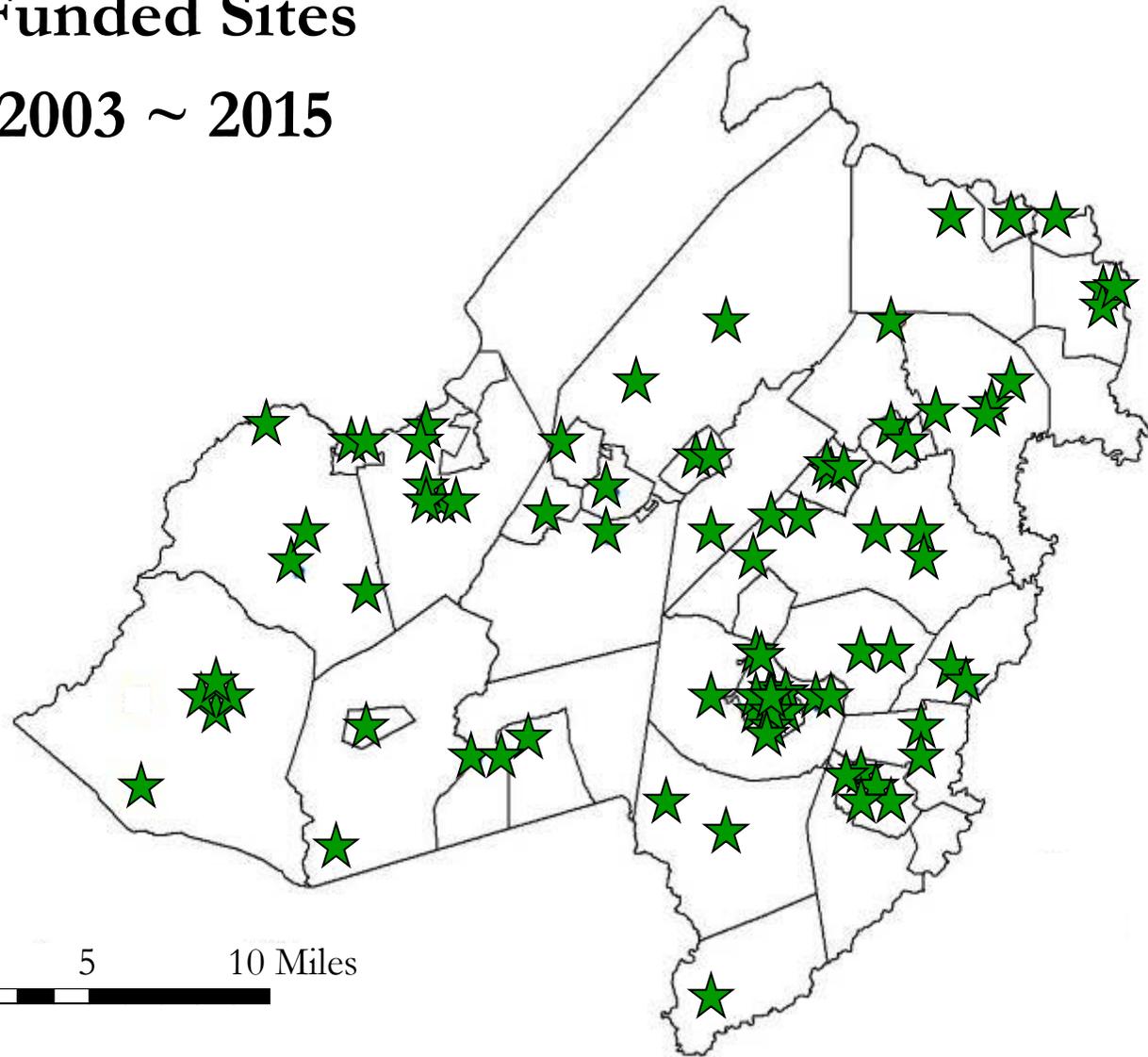
Funding Summary 2003~2015 (13 Rounds)

- 405 applications requested \$41.1 million.
- \$26.1 million were awarded through 322 grants to 93 historic sites located in 32 municipalities.
- 171 Construction grants were awarded with a median amount of \$109,840
- 151 Non-Construction grants were awarded with a median amount of \$19,720



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Funded Sites 2003 ~ 2015



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ELIGIBLE APPLICANTS

- Municipal governments within Morris County
- Morris County Government
- Charitable Conservancies (a corporation or trust exempt from federal income taxation under Section 501(c)(3) of the Federal Internal Revenue Code of 1986) whose purpose includes historic preservation of historic properties, structures, facilities, sites, areas or objects, or the acquisition of such properties, structures, facilities, sites, areas or objects for historic preservation purposes.



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Religious Institutions

- Must qualify for tax-exempt status under IRC section 501(c)(3).
- Must operate for a public rather than a private interest.
- No part of its net earnings inures for the benefit of any private shareholder or individual.



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ELIGIBLE PROPERTIES

- Located in Morris County
- Listing on the National or New Jersey Register of Historic Places, individually or as part of a historic district listed on the National/State Register.
- If not listed on either Register, property must be certified as eligible for listing by the State Historic Preservation Office, either as an individually listed site or as part of a historic district.



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- If property/district is not listed on the Registers, a Certification of Eligibility (COE) letter or a State Historic Preservation Officer Opinion (SHPO Opinion) must be included with the application.

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ELIGIBLE ACTIVITIES

- Stabilization, Rehabilitation, Restoration and Preservation
- Acquisition
- Plans and reports associated with the implementation of a historic preservation project
- Register Nominations



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Religious Institutions

Eligible activities include:

- Historic Structure Reports, Preservation Plans, and Assessment Reports;
- The preparation of construction documents and completion of construction activities for the exterior building elements, and the building's structural and MEP systems (mechanical, electrical and plumbing)



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Cemeteries

- Must be individually listed on or eligible for the New Jersey or National Register of Historic Places.
- Eligible activities include the preparation of reports, assessments and studies that document the conditions of tombstones or other elements of the cemetery; and the preparation of construction documents and completion of construction activities for all historic cemetery elements.



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All proposed activities must be in
conformance with

*The Secretary of the Interior's Standards for
the Treatment of Historic Properties 1995*

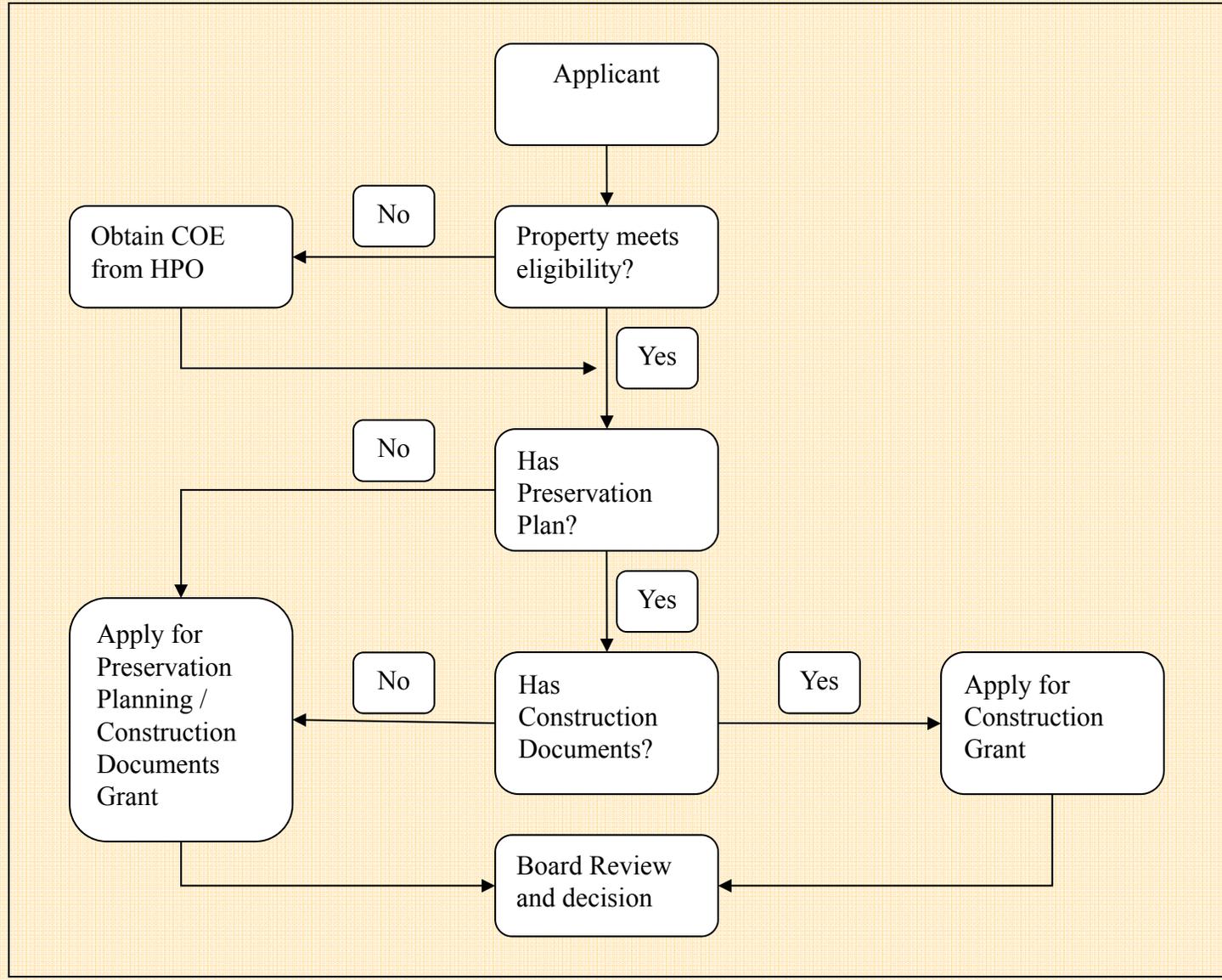
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Long-Term Facilities Planning

Strong preference is given to those projects for which a preservation planning document, such as a Preservation Plan, Historic Structures Report, Historic Landscape Report, Conservation Assessment is completed prior to requesting funding for the preparation of Construction Document or for Construction.



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Typical Timeline

July 2016: Grant award (Preservation Plan)

July 2017: Grant award (Construction Documents)

July 2018: Grant award (Construction)



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Review Schedule

For projects with HP funding for the preparation of Preservation Planning or Construction Documents, the following deadlines must be met to be considered for additional funds for the funding request year:

- By Jan. 7th : 75% Documents must be delivered to Morris County for review.
- By Feb. 28th: 100% Documents must be delivered to Morris County for review.

Projects failing to meet the submittal dates will not be considered for additional funding during that grant year.

Grant work may not start prior to the execution of Grant Agreement.



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Professional Services Checklist

All applicants seeking funding for

- a) Professional Services and/or
- b) Construction activities requiring Professional Services

must complete and submit the Professional Services Checklist (available on the website).



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Preservation Plan and Construction Documents – Review

Draft Preservation Planning Documents and Construction Documents must be at least **50%** complete before submission for County review and funding reimbursement.



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Construction Document Review Schedule

- Those projects for which Construction Documents were prepared without HP funding could submit Construction Documents for preliminary review prior to the grant application deadline.
- Completed Construction Documents could also be submitted with a Construction Grant application.



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Construction Documents

- Full Construction Documents must be submitted for all projects with an anticipated construction cost of over \$50,000.
- A complete set of Construction Documents provides a comprehensive, fully coordinated set of detailed plans, elevations, sections and details sufficient to accurately and completely describe the proposed scope of construction work; in addition to detailed Construction Specifications Institute standard 16-part or 50-part specifications.
- The coordinated drawings and specifications should allow the Contractor to determine a guaranteed maximum price and obtain necessary permits to construct the project.





Site: Museum of Early Trades & Crafts, Madison
Applicant: Museum of Early Trades & Crafts
Funding: \$613,758 (Lighting, Preservation Plan, Construction Documents, Moisture Mitigation)



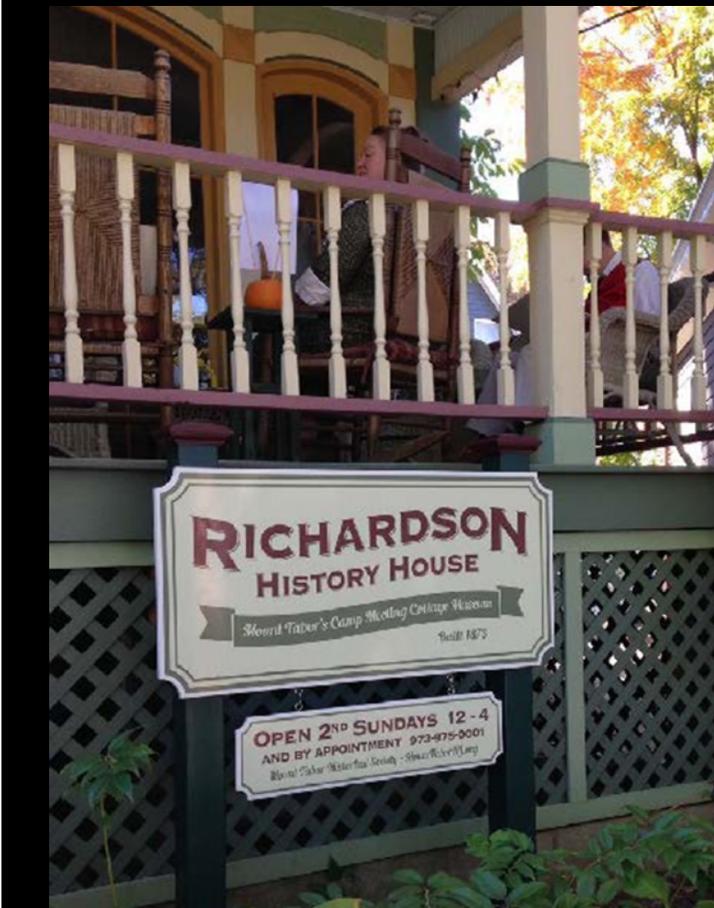


Site: Ford-Faesch House, Rockaway Township
Applicant: Historical Society of Rockaway Township
Funding: \$628,088 (East Wing Restoration, Exterior Restoration & Structural Repairs, HSR Update,)





Site: J. Smith Richardson History House, Parsippany-Troy Hills
Applicant: Mt. Tabor Historical Society
Funding: \$191,497 (Preservation Plan, Construction Documents, Exterior & Interior, Electrical)



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Ownership

- Owner consent is required for all applications, except for an acquisition.
- For Construction grants, if applicant is not the owner, applicant must have lease with 20 year unexpired lease term from the date of application.
- For Preservation Planning / Construction Documents grants, if applicant is not the owner or lessee with a 20-year unexpired lease term, applicant must prove significant involvement with the property's preservation.
- All properties to be acquired must be purchased in fee simple and purchasing entity must have full control of the land.



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Ineligible Activities

- Reconstruction
- Administrative or operational costs of the agency
- Routine or ongoing maintenance work such as grounds maintenance, painting or cleaning that is not part of a comprehensive project
- Interpretive activities such as displays, signs, etc.



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Matching Requirement

Grant Type	Trust Fund will pay:	Applicant will pay:
Construction	80%	20%
Acquisition	50%	50%
Preservation Planning / Construction Doc.		
If \leq \$5,000	100%	0%
If $>$ \$5,000	80%	20%



Easement Requirement

- An easement agreement with a 30-year term with the County of Morris is required for:
 - a) All acquisition projects and
 - b) Construction grants over \$50,000, applied cumulatively over any number of funding cycles.
- Easements are not required for non-construction projects resulting in plan development.



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2016 Review Schedule

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|-----------|--|
| Feb. 29 | Declaration of Intent due |
| Mar. 31 | Application deadline. 2 paper copies of each application due with one disc of photos, application file and supporting documentation. |
| May~June | Review Board site visits/Final Presentations |
| Late June | Review Board makes 2016 funding recommendations to Freeholders |



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Application Submission

Two paper copies and one electronic copy for:

- Application Forms
- Proposals from Professionals, Consultants, Contractors, Sub-Consultants > \$5,000

All electronic files on one disc, including:

- All photos as JPEG images, minimum 200 dpi at 4"x6" (500 KB)
- Preservation Plans and other large documentation (with prior County approval)
- All other supporting documentation



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Application Submission

- Double-sided printing is encouraged.
- Paper submittals shall be bound by staple, paper clip or binder clip only.
- The use of binders, plastic separators, non-recyclable materials, etc. are strongly discouraged. Submittals will not be evaluated on the basis of the aesthetic of the package.
- If submitting more than one application, please prioritize each project.

