Agenda

- Who We Are and What We Do
- GIS Data and Your Planning
- Tax Credits
- Working Locally
State Historic Preservation Office

• Consults on federally-assisted projects for effects on architectural and archaeological resources

• Administers statewide survey of historic resources

• Reviews properties for listing on the National Register of Historic Places

• Reviews historic rehabilitation tax credits

• Planning, community outreach, technical assistance
Planning & Technical Assistance

- State Historic Preservation Plan
- Technical assistance
  - Fast Facts
  - Preservation Briefs
  - Webinars and trainings
- GIS and I-Form survey program
  - Access current data
  - Add data for projects
Ohio Revised Code §149.53

• “All departments, agencies, units, instrumentalities, and political subdivisions of the state shall cooperate with the Ohio Historical Society and the Ohio Historic Site Preservation Advisory Board in the preservation of archaeological and historic sites and ... shall, whenever practical, by contract or otherwise provide for archaeological and historic survey and salvage work during the planning phases, before work on a public improvement begins or at other appropriate times...”
Information Needs for Planning

• What baseline data do you need for specific neighborhoods?
  • Do targeted surveys help plan program activities? Yes!

• Surveys can help avoid targeting scarce financial resources to intact clusters of historic buildings
  • Areas with historic district potential usually have more redevelopment potential

• Detroit, Columbus, Cincinnati, and Cleveland have all done parcel-level surveys including historic resources
Basic Historic Property Research

- Review SHPO information
  - Historic and archaeology inventory forms
  - National Register listing
  - Records Search Service

- Historic maps, city guides, and photographs

- Local historical societies and history experts
National Register of Historic Places

- Official list of historic properties recognized as worthy of preservation
  - Local, state, or national significance
  - Listed for history, architecture, archaeology, engineering, or culture

- Includes buildings, sites, structures, objects, and historic districts

- NIP program rules do not allow for demolition of listed properties with NIP funds
Finding info about known historic properties

- More than 40,000 archeological sites (green)
- Over 100,000 historic structures (blue)
Identifying Historic Properties: Surveys

- NPS and SHPO have guidelines for professional level surveys
- Use SHPO Fact Sheets for advice about hiring consultants, check references
- Consultant lists are available from SHPO if you want to circulate an RFP or contact consultants directly
- Talk to SHPO first! There’s flexibility in the effort necessary to get the data you need for decisions
- Consider using staff & volunteers
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
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<tbody>
<tr>
<td>No.</td>
<td>STA-1044-10</td>
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<tr>
<td>County</td>
<td>Stark</td>
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<tr>
<td>Location of Negatives</td>
<td>City of Massillon</td>
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<tr>
<td>Roll No</td>
<td>54</td>
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<tr>
<td>Specific Address or Location</td>
<td>14 Federal Ave, NE</td>
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<td>City or Village</td>
<td>Massillon</td>
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<tr>
<td>Site Plan with North Arrow</td>
<td>FEDERAL AVE</td>
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<td>U.T.M. Reference</td>
<td>453210</td>
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<td>Present Use</td>
<td>School Offices</td>
</tr>
<tr>
<td>Building Use</td>
<td>Office</td>
</tr>
<tr>
<td>On National Register</td>
<td>Yes</td>
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<tr>
<td>Prior to 1934</td>
<td>Yes</td>
</tr>
<tr>
<td>Prior to 1950</td>
<td>No</td>
</tr>
<tr>
<td>Prior to 1961</td>
<td>Yes</td>
</tr>
<tr>
<td>Name of Established District (N.R. or Local)</td>
<td>None</td>
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<td>Further Description of Important Interior and Exterior Features</td>
<td>Features of the Neo-Classical style include round-arched windows separated by Doric pilasters, a central entry on both west and south facades, and a classical entablature corona with triglyph frieze, modillions, and parapet balustrade. The entries are embellished with decorative copper metalwork and light fixtures. Only the doors themselves have been altered with metal replacements.</td>
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<tr>
<td>History and Significance</td>
<td>This building is significant as Massillon's early 20th century post office, built in 1913. The post office was first established in Massillon in 1877. In 1870 the post office was located in the Opera Block on Eire St. S., and was located at 59 Eire St., S. prior to the opening of this building. Occupies prominent corner location on northern edge of downtown.</td>
</tr>
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</table>
Free online access to survey data

- Direct access to digital info
- Annual subscription gets multiple users access
- Data available by request
Quick Case Study - Sandusky

• 221 W. Washington
  • Not a concentration of historic buildings
  • Survey data does not support historic district
Quick Case Study - Sandusky

• 304 E. Washington
  • OHI for property
  • Concentrated area of historic buildings
  • Survey data supports historic district
Quick Case Study - Sandusky

• 334 E. Washington
  • OHI for property
  • Listed on the National Register
  • Currently serves as Firelands Symphony School of the Arts
We Want to Be Part of the Discussion

- Historic properties are a building block of redevelopment and revitalization

- Tremont, Short North, Over-the-Rhine all used the draw of existing historic buildings as the basis for their redevelopment plans

- Data on historic properties is important to making decisions about land bank actions

- Selling the community to prospective residents and investors is easier with unique properties
Cleveland Trust Bank
Euclid Avenue in Cleveland- ca. 1916

Heinen’s Supermarket
Euclid Avenue- ca. 2016
Historic Preservation Tax Credits
Historic Preservation Tax Credits

- Federal and Ohio program
- Tax credits on value of Qualified Rehabilitation Expenditures (QREs)
- Building must be designated as a ‘historic building’
- Rehabilitation work must meet U.S. Secretary of Interior’s Standards for Rehabilitation
- Tax credits received upon certification of completion
Federal Historic Preservation Tax Credit

- 20 percent tax credit
- Non-competitive
- Property must be income-producing
  - Excludes condos and single-family homes
- No annual program or project cap
- Administered by State Historic Preservation Office, in coordination with the National Park Service and Internal Revenue Service
Ohio Historic Preservation Tax Credit

- Up to 25 percent tax credit
- Competitive
- Bi-annual application process
- Projects are scored based on economic impact, developer readiness, local support, and location
- $60 M annual allocation and $5 M project cap
- Administered by Ohio Development Services Agency, in partnership with the State Historic Preservation Office
## Program Awards

<table>
<thead>
<tr>
<th>Category</th>
<th>APPROVED</th>
<th>COMPLETED</th>
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<tbody>
<tr>
<td>Projects</td>
<td>353</td>
<td>199</td>
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<tr>
<td>Historic Buildings</td>
<td>494</td>
<td>267</td>
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<tr>
<td>Total Investment</td>
<td>$5.6 billion</td>
<td>$2.4 billion</td>
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<td>Total Tax Credit</td>
<td>$694 million</td>
<td>$348 million</td>
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<td>Residential Units</td>
<td>12,654</td>
<td>5,908</td>
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*Updated 9/7/2017*
Ownership or Leaseholder Interest

- Fee Simple Owner
  - Purchase agreement insufficient
- Qualified Lessee
  - Long-term (usually 27.5-39 years)
- Political subdivisions ineligible

Major Factor

- “But-for” requirement
- Tax credit must be a major factor in decision to undertake OR increase investment in the project
Application Process

Intent to Apply Form
• Request Pre-Application Meeting(s)

Pre-Application Meetings
• SHPO (required)
• Development (encouraged)

Historic Documentation
• Part 1 & Part 2

Application
• Eligibility & Financial Component
• Competitive Scoring
## Upcoming Application Rounds

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<tr>
<th>Round</th>
<th>20 (Spring 2018)</th>
<th>19 (Fall 2017)</th>
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<tbody>
<tr>
<td>SHPO Mtg Request</td>
<td>Feb. 1</td>
<td>Aug. 1</td>
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<tr>
<td>Intent to Apply/SHPPO Mtg</td>
<td>Feb. 15</td>
<td>Aug. 15</td>
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<tr>
<td>Part 1/Part 2 Due</td>
<td>Feb. 28</td>
<td>Aug. 31</td>
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<tr>
<td>Applications Due</td>
<td>Mar. 31</td>
<td>Sept. 29</td>
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<tr>
<td>Awards On/Before</td>
<td>June 30</td>
<td>Dec. 31</td>
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Application Selection

- Fully objective scoring process
- 100 point scoring criteria
- Scoring focused on two areas:
  A. Regional Distributive Balance
  B. Potential Economic Impact
- Applicants must score 50 points to be eligible
Allocation Set-Asides

Small Projects
• Less than $1.25 million in QREs
• Maximum tax credit of $250,000
• 8% reserved (at least $2.4 million)

Intermediate Projects
• $1-10 million in QREs
• Maximum tax credit $2,000,000
• 25% reserved (at least $7.5 million)
Qualified Rehabilitation Expenditures

- Same for Federal and Ohio programs
- Includes all hard and soft costs of permanent improvements within the building envelope
- Examples of QREs:
  - structure, walls, roofs, systems, elevators inside building, design, permitting, insurance, labor
- Examples of non-QREs:
  - additions, enlargements, landscaping, site work, appliances, furniture, marketing
Using a Tax Credit

- Tax credits offset tax liability (not a deduction)
- Multiple approaches
  - Individual(s) with tax liability use credit
  - Partner with an investor(s) with tax liability (e.g. bank, insurance company, individual, etc.)
  - Ohio program provides for refunds if sufficient liability does not exist
- Non-profits may be able to participate
Definition of ‘Historic Building’

- ‘Historic building’ definition for Ohio program means the property meets any of these:
  - Individually listed on National Register
  - Contributes to National Register Historic District
  - Contributes to NPS Certified Historic District
  
  OR

- Local landmark in Certified Local Government (CLG)

- Properties with only CLG designation are not eligible for federal program
Pipeline Initiative

- Technical assistance and small grants to plan and prepare historic properties for rehabilitation
- Nominating buildings and districts targeted for redevelopment is a good first step toward advancing rehabilitation projects

A. National Register Nomination for Individual Building
   - Grant up to $4,000 for third-party research and consulting to nominate a building

B. National Register Nomination for a Historic District
   - Grant up to $12,000 for third-party research and consulting to nominate OR amend a district
C. NR Integrity Investigation of an Individual Building

- Grant of $12,000 or more for brick and mortar activities to the exterior of a building to reveal intact historic materials (e.g. remove a non-historic façade)
We’re Here to Help

Lisa Brownell
OHPTC Program Manager

(614) 752-2345
lisa.brownell@development.ohio.gov
Working Locally
Rehabilitation

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

• Ten common sense principles
  • Preservation of historic character
  • Repair vs. replacement
  • Compatibility

• Apply to all types of buildings

• Pertains to both interiors and exteriors
Kent Hotel, Kent
Kent Hotel, Kent
Steele Mansion, Painesville
Steele Mansion, Painesville
Merriman Block, Kenton
Merriman Block, Kenton
What does a Local Commission Do?

• *Guide* design through the ordinance and guidelines

• Protect historic buildings and sites from demolition

• Offer assistance to historic property owners

• Work with local governments on preservation planning and design
Working with Local Commissions

- Proactive meetings with Historic Preservation Commissions for planning
- Avoid challenges to demolition

- Access local survey and designation data

- Identify areas of collaboration between your organization and local government
Working with Local Partners

• Find organizations with capacity to take on rehabs
  • Financial resources
  • Staff resources

• Find locals to assist in planning efforts
  • Local congregations
  • Local activists
  • Neighborhood groups
Moving Beyond Demolition

• Mothballing key buildings as planned investment for future of your target area
  • Stabilize roof, store critical historic features off-site
• Property maintenance assistance for owners
  • Building Doctor Program
  • All Preservation Briefs online and free to print
• Property rehabilitation programs
  • Tax Credits
  • Heritage Home program
NIP Case Study- Yondata Historic District

• Corner lot within listed historic district
• Asked for reassessment of rehab potential
• Lucas County Land Bank found renovation partner for the property
NIP Case Study- Commercial building

- Potentially eligible historic district
- Corner Building at key intersection leading into commercial area- major water damage
Finding the next upcoming neighborhood

Redevelopment built on preservation-
Mt. Adams Street Fair, 1969
Mt. Adams today-
Save those key buildings
Questions?

Contact us anytime to set up site visits or meet with us to talk about preservation planning!

State Historic Preservation Office
Ohio History Connection
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Columbus, OH 43211-2475
614-298-2000
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