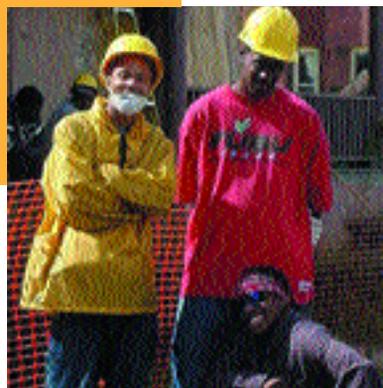
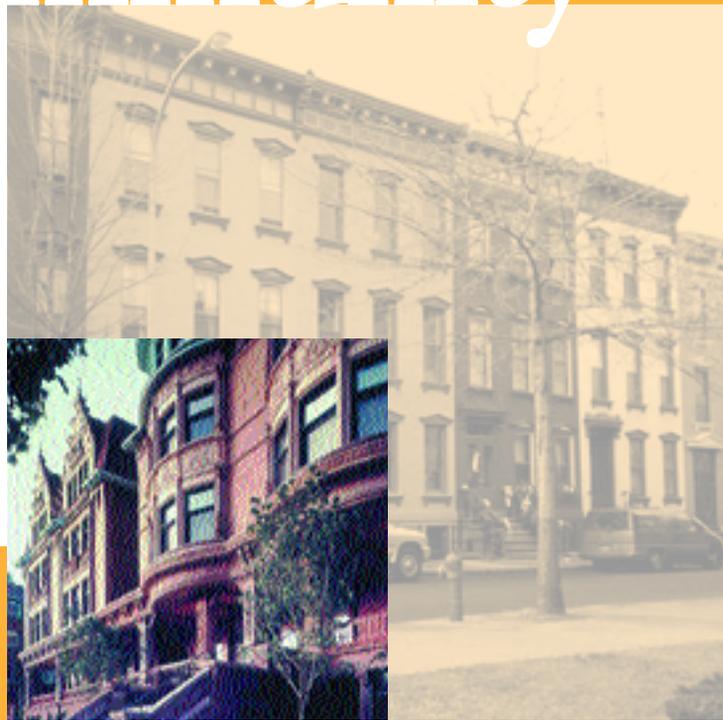


A Best Practices Toolkit
for Historic Preservation
and Redevelopment



Rebuilding

Community



A National Trust Publication



The National Trust for Historic Preservation provides leadership, education and advocacy to save America's diverse historic places and revitalize our communities.

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The National Trust for Historic Preservation and Community Partners Consultants, Inc. are indebted to the initiators of each example listed in *Rebuilding Community: A Best Practices Toolkit for Historic Preservation and Redevelopment* for submitting the descriptions of their work that form the content of the summaries in this book, giving us permission to publish their photographs, and, most importantly, for their leadership, dedication, and creativity in bringing these projects to fruition.

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Dear Friends,

Abandoned buildings can break a neighborhood's heart. Demolished buildings can destroy its soul.

When disinvestment, poor maintenance and abandonment leave a neighborhood pock marked with vacant or dilapidated buildings, public officials and citizens often seek a quick solution to the community's woes by razing the deteriorated structures. Demolition may effect a dramatic change in the neighborhood's appearance, but it's rarely a change for the better. Years of experience, much of it forged in the crucible of misguided programs such as urban renewal, have clearly demonstrated the folly of destroying a place in order to save it.

The National Trust for Historic Preservation believes there is a better way. Having encouraged and assisted neighborhood revitalization efforts in cities and towns all over America, we are convinced that the best way to restore vitality and livability to a community is to build on its strengths, to save and enhance the character and ambience that make each neighborhood unique, to preserve and celebrate the tangible evidence of the community's history instead of smashing it to rubble and carting it off to the landfill.

Rebuilding Community is a book of stories about neighborhoods reborn. Each story is different, offering testimony to the fact that there is no single "silver bullet" that will solve all problems and guarantee revitalization. Some of the cases illustrate relatively simple "why-didn't-I-think-of-that?" ideas, while others describe a patient process involving thoughtful planning and tenacious advocacy. For all their diversity, the stories share a couple of things in common: They recognize the power of historic preservation as an effective tool for sustainable revitalization, and they suggest ways to harness that power in everything from zoning ordinances and reinvestment incentives to preservation-friendly building codes and innovative new uses for old buildings. From Bangor, Maine to Atlanta, Georgia the places in this book have embraced a vision that uses a respect for a community's past as a solid foundation to build a better future.

Winston Churchill said, "We shape our buildings, and then our buildings shape us." The same thought holds true for communities: The way we design and maintain them exerts a powerful influence on the quality of our lives. We hope that the ideas in this book will give people – whether elected officials or neighborhood activists, card-carrying preservationists or "ordinary" citizens – the tools they need to shape communities that are safe, attractive, vibrant and truly livable.

A handwritten signature in gold ink, reading "Richard Moe".

Richard Moe
President



Advisors for *Rebuilding Community: A Best Practices Toolkit for Historic Preservation and Redevelopment*

We would like to thank the volunteer members of the Best Practices Advisory Council, whose invaluable insight was critical during the development stages of this book.

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Introduction

Rebuilding Community: A Best Practices Toolkit for Historic Preservation and Redevelopment

A report released by the Brookings Institution in December 2000 revealed that the Northeast region of the United States had the highest number of abandoned structures, almost three times the national average. In a survey of 70 cities with populations of more than 100,000, northeastern cities had an average of 7.47 abandoned structures per 1,000 inhabitants, compared to 2.63 for the country as a whole. Philadelphia reported the highest per capita vacancy rate for the year 2000, and the mayor has announced plans to demolish 14,000 abandoned buildings citywide. According to the Brookings study, Baltimore had close to 15,000 abandoned structures. Smaller cities proved to be at risk as well. Providence had approximately 800 abandoned buildings and New Haven had 500.

Concerned about this troubling trend and committed to helping community leaders preserve housing stock, the Northeast Office of the National Trust for Historic Preservation has compiled this Best Practices Toolkit. While not every building is a candidate for rehabilitation, generally, communities that remain vital, appealing places to live are those that have preserved their historic structures and streetscapes. They retain their architectural integrity, real estate values, cultural richness, and sense of place.

As historic structures age, the challenges of preserving them and the neighborhoods they anchor multiply. Redevelopment may appear too complicated. Lacking experience, know-how, and even patience, some communities may throw up their hands and simply resort to the bulldozer as a quick fix solution to property abandonment. Our aim is to provide leaders with alternatives to demolition in dealing with vacant and abandoned buildings. Armed with good tools, neighborhoods can rebuild.

Rebuilding Community: A Best Practices Toolkit for Historic Preservation and Redevelopment provides public officials, neighborhood leaders, preservationists, and real estate professionals with a host of tools used successfully in communities to forge revitalization strategies particular to their own circumstances. *Rebuilding Community* offers two dozen examples of public policies, financing programs, marketing strategies, model partnerships, and design and adaptive use approaches that have contributed to community renewal. Together they can comprise a comprehensive city strategy for achieving neighborhood revitalization goals.

The basic foundation for successful community building, however, is a comprehensive preservation plan. Crafted through active participation by neighborhood residents and property owners, a preservation plan is grounded in a commitment to understand an individual neighborhood's unique place in America's diverse history.

An effective planning process begins with a community assessment to identify neighborhood assets, resources, problems, needs, and desires. A survey of historic resources and natural resources, paired with analysis of economic, physical and demographic conditions, make up the key components of a comprehensive assessment. Then, clear community goals and objectives can be articulated and a plan compiled, employing the tools described in this toolkit, as well as others. Good neighborhood revitalization begins with a commitment to understand, validate, and strategize from a sensible community-driven planning process.

Each community must make decisions based on its own unique circumstances and attributes. The National Trust hopes the tools and approaches described in the following chapters will inspire readers to take stock of their older neighborhoods, to view historic buildings as great assets, and to embrace the preservation approach as a key strategy for rebuilding community.

Rebuilding Community PowerPoint

A PowerPoint presentation created from the stories told in this toolkit is available in downloadable form on the National Trust Web site, www.nationaltrust.org.

Public Policy

A policy is a mechanism that encourages or regulates a course of action, representing a statement of values and priorities. The policy tool acts as an impetus for implementation that has public benefit. Policies may also be linked to regulations that require a certain set of actions to accomplish stated goals. Some policies are voluntary and function as incentives, while others are more regulatory in nature and have established procedures and sanctions for lack of enforcement. Building codes, zoning ordinances, special tax districts, and public funding are just some of the ways that public policies and regulations can help prevent demolition of abandoned buildings.

Public Policy





Lowell Artist Overlay District

Lowell, Massachusetts



Many of the nation's older industrial cities have been searching for ways to adapt their abandoned factory buildings to new uses. One approach has been to turn the upper stories of commercial buildings, often difficult to rent, into residences and workspaces for artists. Such an approach was taken in Lowell, where in 1998 the city created a new component of its zoning code called the "Artist Overlay District." The new ordinance allows artists to both live and work in the same space, a multiple use not typically allowed under municipal zoning regulations.

Initiator

City of Lowell Division of Planning and Development and the Lowell Historic Board.

Background

Lowell, the fourth largest city in Massachusetts, is home to historic, cultural, and educational institutions such as the Lowell National Historical Park and the University of Massachusetts. In the 19th century, Lowell was one of the largest planned industrial communities in America, with a thriving textile industry. The decline of that industry left behind many buildings that were vacant and underutilized for years. They are now beginning to be reused for homes, businesses and cultural activity, in part due to the addition of the Artist Overlay District to city zoning codes. The city implemented this policy to encourage artists to both live and work in the historic downtown and National Park areas, thereby stimulating the growth of a concentrated arts, cultural, and entertainment district. This policy has been a catalyst for a vibrant, 24-hour downtown life and stimulated new economic opportunities for the district.

Project Impact

Between 1998 and 2000, the ordinance was pivotal in the rehabilitation of four distressed properties in the heart of the downtown historic district and National Park. All four were owned by the city through tax foreclosure and were transferred to two private developers who converted them into artists' spaces. Two National Register-listed buildings in the National Park were rehabilitated into 51 units at a cost of approximately \$4 million. Two other buildings are currently being rehabilitated into nine units. Several downtown condominium units, owned by the city through tax foreclosure, were similarly transferred with the stipulation that they be used for artist live/work housing. Further spin-offs of the "Artist Overlay District" policy have included new privately developed art galleries and working spaces.



Factors of Success

Primary reasons for the Artist Overlay District's success in Lowell are the existing network of historic, cultural, and artistic entities; the cumulative effect of 20-plus years of preservation; and culturally based economic development, tourism, and marketing efforts. The grassroots and political support for such an effort already existed through the community's public-private partnerships. The ordinance was a natural extension of these activities and was supported by the city's elected officials and administration.

Why is it a Best Practice?

- ▲ It demonstrates that historic preservation and urban economic development can work hand-in-hand towards the betterment of a community.
- ▲ The overlay district presents opportunities to reuse upper floors of buildings that may have previously been underutilized or vacant, and encourages the further rehabilitation of historic structures in the downtown.
- ▲ The greater flexibility in permitted uses creates a wider range of reuse opportunities, making projects more economically viable.
- ▲ Increased housing within the downtown promotes a more vibrant, 24-hour downtown life.
- ▲ The influx of new, arts-oriented residents further supports existing businesses and creates new economic opportunities for the downtown.
- ▲ To help locate artists in the district, the city established technical assistance programs that provide information about topics concerning financing options and real estate.

Tips for Others

- ▲ Don't treat downtowns simply as retail centers. Amend policies and regulations to promote increased and stabilized residential uses of downtowns to complement commercial uses.
- ▲ Research previous existing ordinances from other communities to help craft and review ordinances.
- ▲ Make use of existing cultural and historic institutions and networks, public-private partnerships, and issues that can draw both popular and political support.



New Jersey Rehabilitation Subcode

New Jersey



Most states have building codes designed only for new construction. These regulations can force people who are rehabilitating older buildings into undertaking costly and unnecessary work, especially in mixed-use buildings.

The State of New Jersey has helped alleviate this problem by passing the first subcode in the country dealing specifically with rehabilitation. Called the “Rehab Code” for short, the 1999 New Jersey Rehabilitation Subcode requires structural and safety regulations that work with the existing buildings’ height, area, construction type, fire resistance ratings, zoning, and fixed dimensions, rather than demanding alterations that are costly in older buildings.

Initiator

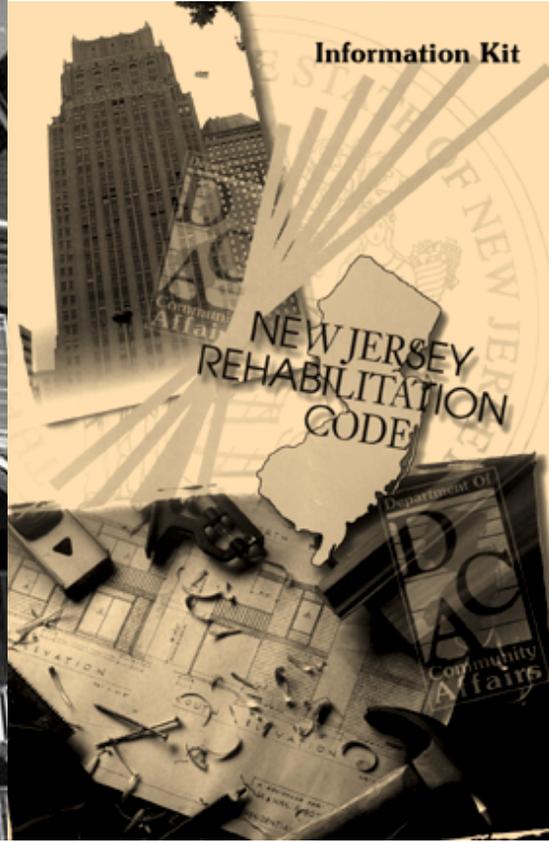
The New Jersey Department of Community Affairs, Division of Codes and Standards.

Background

According to Robert Thomas, Historic Preservation Officer in Camden, New Jersey, abandoned row houses “adversely affect neighboring properties, thus causing further abandonment. This also leads to demolition as a solution. The effect is broken rows, or missing teeth, in what was once a continuous line of houses. Where the problem has accelerated in the extreme, entire city blocks are missing. The tattered look discourages development in these areas.” He adds that revised building codes have brought “...an impressive surge in reinvestment in New Jersey. Historic preservation has been embraced as a rehabilitation practice...public and private partnerships have been formed to further the restoration of buildings, National Register nominations were submitted for the downtown commercial districts, and local historic commissions guided exterior design.”

Project Impacts

During the first year of the Rehab Code’s implementation, the total amount of money dedicated to renovation increased in New Jersey’s 16 largest cities from \$363 million in 1997 to \$511 million in 1998, a 41 percent increase. In 1999, renovation work in New Jersey’s 16 largest cities reached \$590 million. Renovation continues to be a strong part of New Jersey’s construction economy, accounting for about 43 cents of every dollar of construction authorized by building permits.



Factors of Success

The Rehab Code is successful because it works with the existing characteristics of a building. The code does not require that work done to an existing building meet the same codes as a newly constructed building, thus making adaptive use more feasible and encouraging urban reinvestment.

Why is it a Best Practice?

- ▲ The cost of meeting building code standards is increased when rehabilitating an existing building. Application of the Rehab Code has trimmed more than 25% off the construction budget of some urban projects, therefore extending the limited funding available to revitalize cities.
- ▲ Rehabilitation can be more affordable and predictable while simultaneously ensuring building safety.
- ▲ Greater preservation of historic characteristics is possible.

Tips for Others

- ▲ A successful policy can create positive attention to a state historic preservation program, and promote the economic feasibility of preservation as a revitalization tool.
- ▲ Codes for existing buildings are different from those inspectors are accustomed to using for new construction. Communities that decide to follow this example should remember to incorporate training sessions on the Rehab Code as part of the licensing process for code officials.

“The new Rehab Code has been a great boon for restoration. First, the owners are being saved money; next, none of the changes in the code compromises safety; and, finally, we are able to save much more historic material. It allows us to do a much better job.”

Anne Weber, architect
Ford, Farewell, Mills & Gatsch



Policy Position on Funding for Affordable Housing Projects



To encourage affordable downtown housing and a reinvestment in city centers, Vermont has created a statewide policy that combines incentives for affordable housing development with an emphasis on projects that involve the rehabilitation of existing downtown buildings. This emphasis has had an enormous impact on the location and type of affordable housing development that has taken place in Vermont during the past thirteen years, focusing development on existing downtown buildings, existing residential neighborhoods, and village centers.

Initiator

The Vermont Housing & Conservation Board (VHCB), a Vermont state agency.

Background

Preserving the character of downtowns, maintaining affordable housing for city residents, and protecting against urban sprawl are some of the varied problems which American cities face. The state of Vermont created a statewide incentive policy that combines its affordable housing development incentives with a priority on projects that involve the rehabilitation of existing downtown buildings, encouraging the development of affordable housing, a reinvestment in city centers, and protection of countryside.

Project Impacts

Focusing on existing downtown buildings, the policy has had an enormous impact on the location and type of housing development in Vermont's residential neighborhoods and village centers. Of the 6,200 units that have received VHCB funding, more than 80 percent have involved the rehabilitation of existing properties. Furthermore, many affordable housing units have been created through the adaptation of historic buildings, including schools, municipal buildings, commercial and industrial buildings, and single-family residential structures.



Factors of Success

Because VHCB decides where public funding is spent, it is able to initiate broad changes throughout the state. Coordinating the policy with other state funding agencies, including the Community Development Block Grant and low-income housing tax credit programs, resulted in those programs subsequently focusing funds on downtown rehabilitation.

Why is it a Best Practice?

- ▲ Affordable housing developers who receive state or federal funds from VHCB must look first to preservation and rehabilitation when considering development.
- ▲ Financial resources are focused towards rehabilitation as opposed to demolition and/or new construction.
- ▲ The *Guidelines for New Construction Housing Projects* reinforce the housing policies by steering developers toward rehabilitation as opposed to new construction.
- ▲ Affordable housing rehabilitation projects serve as catalysts, creating a “spin-off effect” that spurs owners of neighboring properties to invest in their properties as well.

Tips for Others

- ▲ Receive and consider advice from the community.
- ▲ Develop palatable proposals that address various constituencies.
- ▲ Exhibit the project’s value to policy makers by showing how the community will benefit.

“I delivered milk there when I was 8 to 10 years old. In those days, they weren’t bad apartments; they weren’t the best. But it went from bad to worse.... When our group saw that the housing was on the market for office space, meaning it would be torn down and 125 low-income people would be out on the street, we said, ‘This is for us.’ We called the Central Vermont Community Land Trust and we went to the churches for help, both physical and financial. We wrote to our congressional delegates. The whole project took four to five years to complete. When we drive by now and see decent housing, a pocket park, and beautiful landscaping, it’s just short of a miracle.”

Glen Goodall, resident of Montpelier and founding member of Catalyst for Community



Proposal System for Sale of Tax-Foreclosed Properties

Troy, New York



Many cities find themselves owning deteriorating or abandoned buildings because the property taxes have not been paid. These buildings often lie dormant, continuing to decline until the city 'seizes' the property through a tax foreclosure process. It is common practice to auction the property to the highest bidder with no regard for the building or its future. In Troy, New York, the city developed a system for the sale of tax-foreclosed properties that requires the review of a 'purchase proposal.' The intended use is considered more important than the proposed purchase price. This process ensures that buyers put the properties to new uses that contribute to neighborhood revitalization.

Initiators

The city of Troy and the Troy Architectural Program (TAP, Inc).

Background

By a local ordinance, the city is required to offer foreclosed properties for sale by the proposal method. To promote the proposal process, the city hired Troy Architectural Program (TAP), a private, nonprofit community design center, and assigned city staff to work specifically on promotion. The city and TAP photograph all of the available tax-foreclosed properties and prepare information sheets for each one. Foreclosure signs are displayed prominently on all properties, local news coverage is generated, and applicants are directed to TAP for assistance in completing the proposal application. The city also posts detailed property descriptions on its Web site. When proposals are reviewed, the intended use is considered more important than the bid price, and only after a property has failed to sell by the proposal method will it be offered at auction.

Project Impacts

In 2000, the city took the initiative to aggressively promote the proposal process, and the results were tangible. All together, 110 parcels have been sold to buyers in the community and as far away as San Francisco. Following Troy's near bankruptcy in recent years, the city is experiencing a renaissance, which this program has helped to make possible. It has inspired a renewed interest in Troy's rich architectural heritage and has encouraged a preservation ethic in a new generation of city residents.



Factors of Success

Success in this case is primarily the result of the concept's soundness. Selling buildings to the highest bidder can be a destructive way to liquidate surplus property, and experience shows that within the three-year period, many properties are returned for resale. The initiators recognized these failures, devised a policy to specifically address them, and involved neighborhood groups in the process to encourage qualified bidders. In addition, they had the benefit of existing ordinances which were applicable and useful in the new policy.

Why is it a Best Practice?

- ▲ Tax foreclosure auctions are one of the mechanisms by which cities can deteriorate. Soliciting proposals is a better method of ensuring that foreclosed properties are put to beneficial and desirable uses. Troy's proposal system ensures a productive use that will not only prevent the demolition of the property, but also contributes to the revitalization of the neighborhood.
- ▲ TAP worked to involve neighborhood groups in the decision-making process as a means of strengthening the social fabric of the neighborhood.

Tips for Others

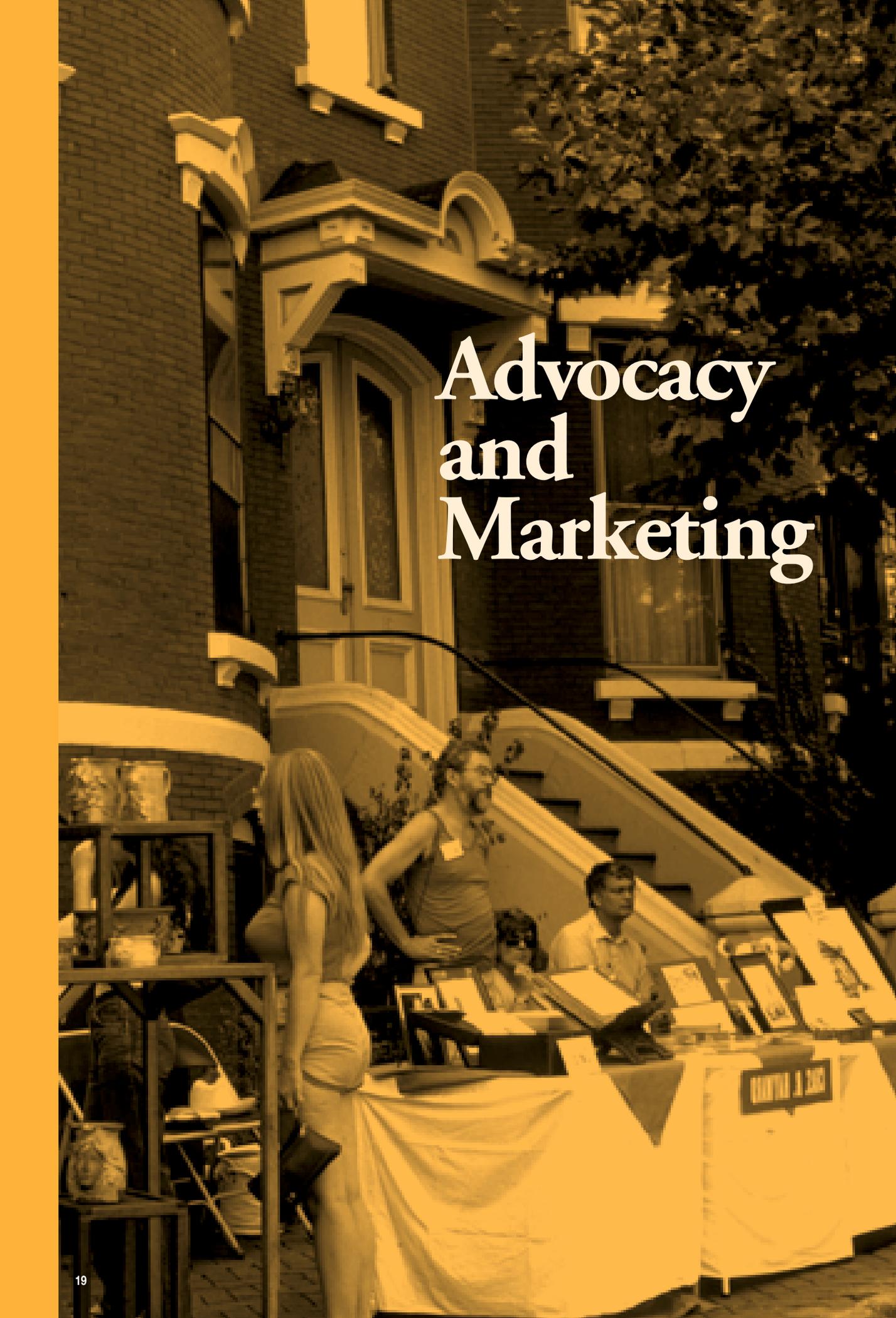
- ▲ Put new initiative behind existing programs. Through the years, the proposal process enabled many buildings to be sold to buyers who rehabbed them with care. However, it was not until the program was changed to an initiative that the real benefit was realized.
- ▲ Make sure that the state government has the proper enabling legislation to support the city government's liquidation of property.

"We have realized that the process of foreclosing on delinquent properties is much more than a way to raise revenue. We now see it as an opportunity for community-building by making properties available to homeowners, adjacent property owners, and neighborhood groups. This year, in partnership with TAP and other community partners, we have seen that opportunity become a reality."

Mark Pattison, Mayor of Troy

Advocacy and Marketing

Information is the key to success. People need to understand the significance of historic buildings, how they can be adapted to new and viable uses, and how to utilize the resources and technical assistance available to accomplish the reuse of these valuable properties. And they need to know that with the right tools, preservation is indeed feasible. Each of the best practices in the following section highlights tangible, practical examples of getting this helpful information to the right audiences.



Advocacy and Marketing



Catalogue of Historic Homeownership Opportunities

Hartford, Connecticut

Encouraging the rehabilitation of historic buildings for residential use can be as straightforward as compiling a directory of available properties. In Hartford, Connecticut, the Local Initiatives Support Corporation created a catalogue of buildings available for development in order to inform developers and encourage them to invest in city housing.

Initiatives

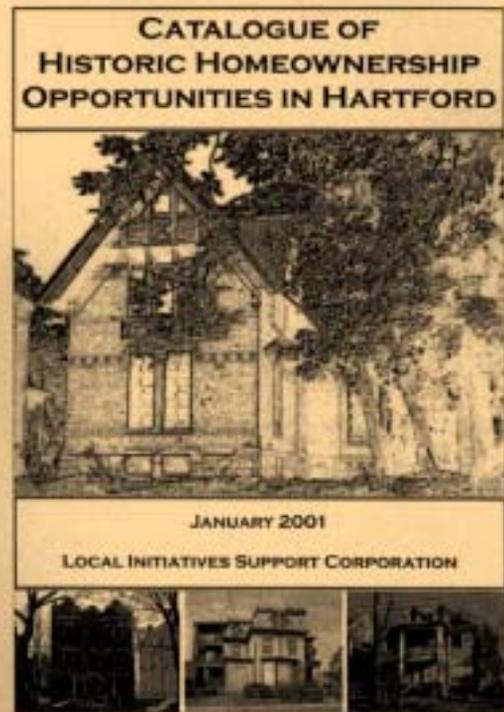
The Local Initiatives Support Corporation (LISC), the nation's largest nonprofit community development intermediary, was founded in 1979 to provide financial and technical assistance to neighborhood-based organizations working to revitalize their communities. LISC operates in more than 40 cities across the country. The Hartford Office has been in operation since 1984.

Background

Hartford is Connecticut's capital and largest city, with a population of about 125,000. Like many other cities of similar size, it has a rich building stock that is underutilized and ripe for reinvestment. LISC's Hartford Office sought a means to visually showcase and market to investors and community development corporations properties that were available for redevelopment. To that end, LISC, with the help of a consultant and an intern from a local college, developed a catalogue of 125 vacant buildings available for renovation into homes. The 2001 catalogue features pictures of the vacant buildings and provides critical information about each one, including lot size, name and address of the current owner, and tax delinquency status to help the nonprofit developer plan its acquisition and redevelopment.

Project Impacts

By marketing the redevelopment potential of these properties, LISC expects to galvanize nonprofit developers and the funding community to work together to revitalize the structures and eliminate blight in their neighborhoods. In addition, a local funding group has pledged financial support in the form of a \$10,000 incentive fee per unit to any nonprofit developer who will renovate buildings listed in the catalogue. Already, nonprofit developers have identified approximately 50 properties from the most recent catalogue that they intend to acquire and renovate.



Factors of Success

This compiled data has provided an important one-stop source of information for developers interested in renovating historic homes. The catalogue saves the developer significant up-front research time and highlights opportunities for renovating a block of contiguous properties, thereby increasing the scale and impact of redevelopment in the neighborhoods. Furthermore, the catalogue encourages nonprofit groups not engaged in renovating to become involved in rebuilding Hartford's historic homes. It serves as an effective preservation device because it addresses three of Hartford's most important housing objectives: to encourage the creation of more homeownership units; to eliminate blight in neighborhoods; and to preserve Hartford's historic housing stock. The restoration of the vacant buildings listed in this catalogue will create distinctive homes to attract families back to Hartford's neighborhoods and encourage other people to remain.

Why is it a Best Practice?

- ▲ The catalogue identifies the many opportunities that currently exist to renovate blighted historic structures.
- ▲ It encourages nonprofit groups not engaged in renovating to become involved in rebuilding Hartford's historic homes.
- ▲ Without the catalogue, nonprofit organizations remain unaware of the number and locations of vacant buildings in Hartford that may be acquired and renovated for homeownership.

Tips for Others

- ▲ Take advantage of potential pro bono assistance from local colleges and preservation societies to compile catalogue data.
- ▲ Hold meetings and conduct workshops to explain the information contained in the catalogue and follow up with nonprofit developers who have expressed an interest in getting involved in the renovation of the vacant buildings.

"This catalogue is a useful tool for community development groups engaged in homeownership development in Hartford that we hope will serve as a catalyst to other groups to get involved in rebuilding Hartford's historic homes."

Linda Spencer, Connecticut Historical Commission



Guide to Historic Housing Rehabilitation

Pioneer Valley, Massachusetts



Many people are hesitant to rehabilitate old buildings because they view it as a complicated process with unique requirements. Some regulations can appear intimidating at first and a user-friendly guide to rehabilitation of historic housing can be a valuable tool. The Pioneer Valley Planning Commission in Western Massachusetts has published a guide to help property owners understand what it means to own a historic building.

Initiator

Community Development Section of the Pioneer Valley Planning Commission (PVPC) in West Springfield, Massachusetts. The PVPC is the regional planning organization for the 43 communities of Hampshire and Hampden counties in the Connecticut River Valley of Western Massachusetts. The Commission's housing rehabilitation program is most active in the small, rural towns of the region whose populations range from 500 to 10,000 people.

Background

PVPC's Community Development Department works to help homeowners adhere to the Secretary of the Interior's Standards for Rehabilitation of historic buildings. Because the housing rehab program is most active in rural towns with populations of 10,000 or less, hiring technical staff to work with owners individually was not feasible. Instead, the Commission and the Massachusetts Department of Housing and Community Development funded the preparation of a Guide to Historic Housing Rehabilitation to provide this information to homeowners through local historical commissions, building inspectors, and town select-boards.

Project Impacts

The 14-page booklet answers 10 of the most important questions owners ask when their houses are designated as historic. From vinyl siding and replacement windows to de-leading of interior trim and choosing exterior paint colors, the text explains how the Secretary of the Interior's Standards may apply to their homes. Included are illustrations of quality examples as well as unacceptable practices. This successful guide is generating awareness among the region that vernacular housing is equally deserving of preservation and can have as much historic value as the grandest properties in town. The guide has triggered new pride for individual homeowners and enabled interested owners to become advocates for their properties while rehabilitation work occurs.



Factors of Success

The guide is brief and jargon-free, and offers thorough technical explanations and the rationale behind the Secretary's Standards. This clear and direct communication with owners about the historic value of their homes uses a positive, reassuring tone, avoiding edicts that sound too official and bureaucratic. In addition, the illustrations are familiar, and though not directly identifiable, evoke a connection to the built environment.

Why is it a Best Practice?

- ▲ The guide is an early and direct communication with homeowners about the historic value of their houses.
- ▲ The guide explains the determination of historic properties and its implications in very understandable, clear language and with a reassuring tone.

Tips for Others

- ▲ Clarify for concerned property owners the implications of being eligible for the National Register at the time of their initial inspections.
- ▲ Distribute the guide widely -- to the local historical commissions, building inspectors, town boards and the general public.
- ▲ Consider the guide an opportunity to present the reasoning behind the Secretary of the Interior's Standards.



The Home Room A City Living Resource Center

Rochester, New York



Some prospective homeowners are hesitant about moving downtown if the housing stock is old and the neighborhoods appear unsafe. These reluctant homebuyers need education and encouragement to live in the city and to renovate historic homes. Likewise, realtors often need training to highlight the unique characteristics of historic homes and city living. In Rochester, New York these issues loomed large and concerned not just city leaders, but activists at the Landmark Society of Western New York as well. The Landmark Society established a creative new approach in 1998 to encourage homeownership in the city by starting a marketing initiative: the Home Room City Living Resource Center.

Initiators

The Landmark Society of Western New York, the Greater Rochester Association of Realtors, and the city of Rochester.

Background

Rochester, a city of 220,000 located on Lake Ontario, is an ideal place for this type of program. Featuring a Web site and resource center with extensive listings of houses currently for sale in Rochester and detailed information on many city neighborhoods, the center educates the public as well as realtors about the benefits of city living through classes, tours, a weekly newspaper column, advertising campaigns, and an annual housing fair. The Home Room also offers a course specifically for realtors called "Marketing Historic Homes Successfully." Since so many parties stood to benefit from this initiative, it became a collaborative effort. The city provides the largest amount of financial support for the Home Room along with the Greater Rochester Association of Realtors, which provides management and maintenance of the Web site. The Landmark Society offers office space and administrative support.

Project Impacts

The Home Room has greatly strengthened the relationship between the Landmark Society, the Greater Rochester Association of Realtors, and local real estate agents. The Home Room programs have been popular: 37,000 hits to the Web site in April 2000, 500 visitors to the Resource Center in a two-year period, and a positive response among realtors for the "Marketing Historic Homes Successfully" course. Local realtors and potential homebuyers are better informed about the potential of historic residential properties, and home sales within the city have increased.



Factors of Success

Key to the success of this program is the collaboration between the city, the Landmark Society and the Realtors Association. Recognizing the importance of a more holistic approach to encouraging reinvestment in downtown housing, the proponents of the Home Room have been able to create energy and momentum for preservation as a revitalization tool.

Why is it a Best Practice?

- ▲ Realtors are trained in how to sell homes in the city, involved in urban revitalization, and introduced to historic preservation.
- ▲ Partnerships among homeowners, realtors and the city government are strengthened.
- ▲ Home-buying in the city is encouraged by making the benefits better understood by both realtors and potential homeowners.

Tips for Others

- ▲ Take the time to work with neighborhood leaders to brainstorm ways to promote city neighborhoods and determine how to get neighborhood information into the mainstream news.
- ▲ Develop a well-rounded program with complementary components.
- ▲ Be aware of what other organizations provide in related services, such as lending resources for homeowners, so as not to duplicate services.

Design

Redeveloping historic buildings requires a special appreciation of the design implications of such work. The prospect of rehabilitating a historic structure can initially feel overwhelming due to the uncertainty of the building's condition and the necessity to comply with modern building codes. Experts in the trenches offer practical guides to ease this process. Well-crafted design guidelines or manuals can establish a framework for historic rehabilitation that respects the integrity of these structures while offering flexibility and creativity in the design process.

A photograph of two men in a workshop or office setting, looking at architectural blueprints on a table. The man on the left is leaning over the table, pointing at a drawing. The man on the right is sitting and looking at the same drawing. The scene is lit with a warm, golden light. The word "Design" is overlaid in white serif font in the center-right of the image.

Design



Martin Luther King, Jr. Historic District Guidelines

Atlanta, Georgia



Historic preservation is often viewed as being too costly and difficult to achieve in a low-income neighborhood. In Atlanta's Martin Luther King, Jr. National Historic Site and Preservation District, flexible design guidelines ensure preservation of the historic character of buildings while enabling owners to contain the costs of rehabilitation.

Initiators

The Historic District Development Corporation (HDDC) and the Atlanta Urban Design Commission. The Historic District Development Corporation is a local community development corporation that develops affordable housing in the district. The Atlanta Urban Design Commission is a governmental body which reviews proposed rehabilitation plans.

Background

The Martin Luther King, Jr. National Historic Site and Preservation District in Atlanta are listed on the National Register of Historic Places and the area is also designated as a local historic district. The guidelines were established specifically for this historically significant African-American neighborhood located immediately east of downtown Atlanta. The HDDC created the local rehabilitation guidelines in response to a policy on Affordable Housing and Historic Preservation adopted in 1995. That policy stresses flexibility, encourages community involvement, and concentrates on the treatment of building exteriors. The local guidelines established for the MLK Historic District emphasize the preservation of architectural features as important to the historic character of that neighborhood.

Project Impacts

The neighborhood-specific guidelines provide clear images and descriptions of preferred preservation practices, detail options for rehabilitation of individual structures, and describe their visual impact on the historic character of the buildings and the streetscape. Included is a clear glossary that helps individuals understand the complex language of historic rehabilitation. There has been a resounding positive impact on the neighborhood as a result.



Factors of Success

These design guidelines encourage the preservation of historic houses by describing rehabilitation approaches that are economical for the affordable housing market, yet do not sacrifice the overall historic character of the district or the individual buildings in it. The advantage of this preservation tool lies in the flexible design parameters that ensure maintenance of the historic character of buildings while enabling owners to contain the costs of rehabilitation. Important also is the collaborative review process; the Atlanta Urban Design Commission assists HDDC by reviewing proposed rehabilitation plans.

Why is it a Best Practice?

- ▲ The guidelines encourage the preservation of historic houses by describing rehabilitation approaches that are economical for the affordable housing market, yet do not sacrifice the overall historic character of the district or the individual buildings.
- ▲ Preservation of architectural features integral to the historic character of the neighborhood is emphasized.
- ▲ Clear images and descriptions of preferred preservation practices are presented.
- ▲ The guidelines offer various options for the rehabilitation of individual structures and describe their visual impact on the historic character of the building and the streetscape.
- ▲ A clear glossary is included that helps individuals understand the language of historic rehabilitation.

Tips for Others

- ▲ Encourage collaboration with other organizations in the community.
- ▲ Stress the economic benefits of rehabilitation and that preservation can be affordable.



Lewiston Historic Preservation Design Manual

Lewiston, Maine



Many cities set up review boards and commissions to ensure that building rehabilitation follows historic preservation codes. Due to unfamiliar terms or bureaucratic regulations, such codes can be difficult to interpret for both board members and property owners. Accordingly, the city of Lewiston created the Lewiston Historic Preservation Design Manual, an illustrated guide of preservation codes and ordinances to assist in design deliberations and to provide the information needed for owners of historic properties to retain the historic integrity of their properties.

Initiator

The Lewiston Historic Preservation Review Board, a seven-member, mayoral-appointed regulatory board that is responsible for safeguarding the city's architectural, historic and cultural heritage.

Background

Using a Community Development Block Grant and National Park Service funds to produce the manual, the city hired an experienced consultant who used local examples, and kept the design and production simple to save costs. The city then widely distributed the publication to members of the Planning Board, City Council, Historic Preservation Review Board, Lewiston Historic Commission and Maine Historic Preservation Commission, to city staff, owners of historically-designated properties within the city of Lewiston, and participants at a government workshop. Copies were placed in locations around the city such as libraries, schools, the chamber of commerce and the historic society. Some of the copies were also sold at cost to interested buyers, making preservation accessible and understandable to lay people.

Project Impacts

The Lewiston Historic Preservation Design Manual has helped the city administer its historic preservation ordinances and has made the process much more user friendly. It helped educate both public and private citizens in historic preservation principles, and encouraged a preservation ethic.



Factors of Success

The manual is successful because of its accessibility. It is user friendly and understandable to the community at large, and not just those involved in the process. In addition, costs were kept low in order to print more copies, thus allowing a wider distribution.

Why is it a Best Practice?

- ▲ The design manual contains over 200 figures and photographs, using examples found within the city to help explain and resolve issues related to historic preservation.
- ▲ Tax credits and other benefits of historic designation are explained.
- ▲ The Secretary of the Interior’s Standards for Rehabilitation are explained in simple terms, using photos and diagrams.

Tips for Others

- ▲ Hire a good consultant, and keep it simple.
- ▲ Use local examples and aim for wide distribution.



“The Lewiston Historic Preservation Design Manual serves us on the Historic Preservation Review Board as a reference work relating architectural styles to our own buildings here in Lewiston. It is both an educational tool for owners of historic properties and a guide for change consistent with historic preservation principles.”

Marilyn Hirshler, Lewiston Historic Preservation Review Board

Partnerships

The process of historic preservation is quite complex. To be most successful, it must involve a multitude of partners representing the community, developers, designers, neighbors, public officials, and various financing sources. The projects described in this section represent a variety of creative partnerships demonstrating the maxim that the whole can definitely be more than the sum of individual parts.

A group of people in business attire are gathered around a ribbon-cutting ceremony. The scene is captured in a warm, golden-yellow monochrome. In the foreground, a man in a dark suit and patterned tie is using scissors to cut a dark ribbon. To his left, another man in a dark suit is also reaching towards the ribbon. Behind them, a woman with glasses and a light-colored jacket is smiling. In the background, other people are visible, including a man in a light-colored shirt. The word "Partnerships" is overlaid in a large, white, serif font across the middle of the image.

Partnerships



**Brentwood Apartments,
4130-4140 Parkside Avenue**
Philadelphia, Pennsylvania



Like many east coast cities, Philadelphia lost a vast percentage of population over the last four decades, resulting in a large number of abandoned buildings and vacant lots. These years of neighborhood decline and housing abandonment require a critical mass of building renovation to spur significant change. Renovation projects require diverse sources of funding, and can benefit from partnerships, such as the nonprofit/for-profit approach that was taken in a rehabilitation project in Philadelphia's Parkside neighborhood.

Initiators

Partnership of Pennrose Properties, Inc., a for-profit development corporation, and the Parkside Historic Preservation Commission (PHPC), a nonprofit organization. These two groups, both National Trust Honor Award winners, formed a unique nonprofit/for-profit partnership known as Brentwood/Parkside Associates, Ltd., which undertook the rehabilitation of the Brentwood Apartments.

Background

The Brentwood Apartments are located in a late 19th century neighborhood developed by local brewers. Initially an entirely burnt out building with only its shell remaining, the Brentwood was brought back to its splendor when the project was completed successfully in 1996. The rehabilitation cost \$6.5 million, a figure 20-25% higher than typical restoration projects in Philadelphia due to the expensive materials and high degree of care required; yet this project was considered a project worth the extra cost because of its landmark quality and importance for the future development of the Parkside neighborhood. As a contributing structure in the Parkside National Register Historic District, the project was able to utilize low-income historic tax credits and historic rehabilitation tax credits.

Project Impacts

With the addition of 43 dwelling units to the neighborhood, this project contributes to the ongoing revitalization in the Parkside neighborhood. The Brentwood represents a collaboration between an active neighborhood-based, nonprofit corporation and an experienced affordable housing developer, and effectively combines the assets of each to gain local support, attract the necessary financing, and obtain and provide the expertise in managing this most challenging development.



Factors of Success

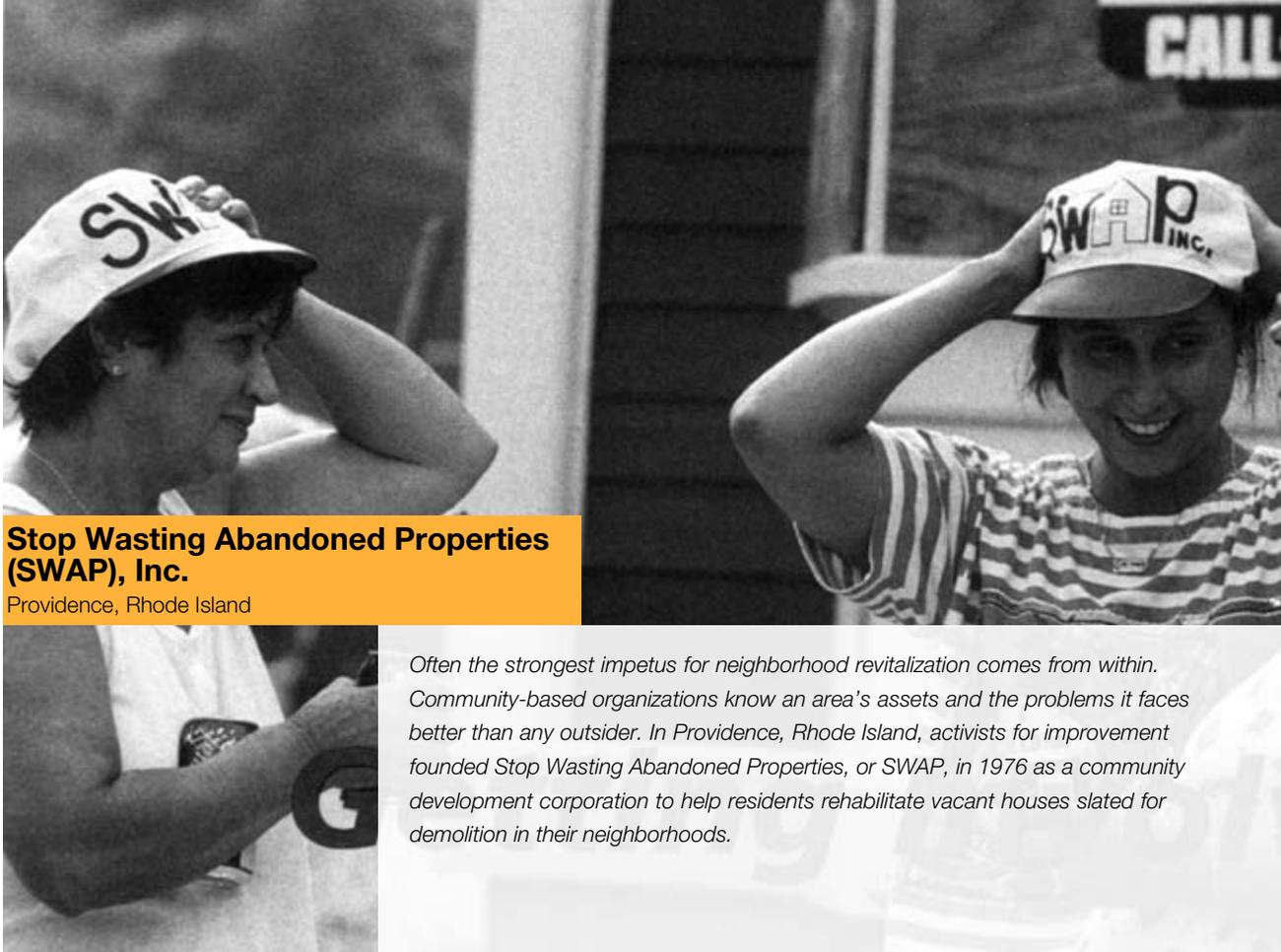
The development of the Brentwood Apartments eliminated blight and hazardous conditions in a neighborhood struggling to reverse decades of disinvestment and deterioration. This project provided the necessary critical mass of livable space to support a more viable project. The restoration proved successful in reconfiguring the interiors to meet contemporary housing needs while also preserving the historic integrity of the facades. The hundreds of rehabilitated dwelling units in the neighborhood offer support for the need to develop commercial amenities for these new residents.

Why is it a Best Practice?

- ▲ Through a creative partnership, the entities combined the assets of each organization to obtain local support, attract the necessary financing, and provide the required project management and operations experience.
- ▲ The excellence of the design and construction of the neighborhood units in this project provided high-quality affordable housing.
- ▲ The proximity of the area to local landmarks warranted special efforts and provided an incentive for others to invest in redeveloping the neighborhood.

Tips for Others

- ▲ Communicate to the prospective sources of development financing the benefits of preserving historic buildings.
- ▲ Emphasize the multiple shared objectives of participants in the development process to help secure the required financing.



Stop Wasting Abandoned Properties (SWAP), Inc.
 Providence, Rhode Island

Often the strongest impetus for neighborhood revitalization comes from within. Community-based organizations know an area's assets and the problems it faces better than any outsider. In Providence, Rhode Island, activists for improvement founded Stop Wasting Abandoned Properties, or SWAP, in 1976 as a community development corporation to help residents rehabilitate vacant houses slated for demolition in their neighborhoods.

Initiator

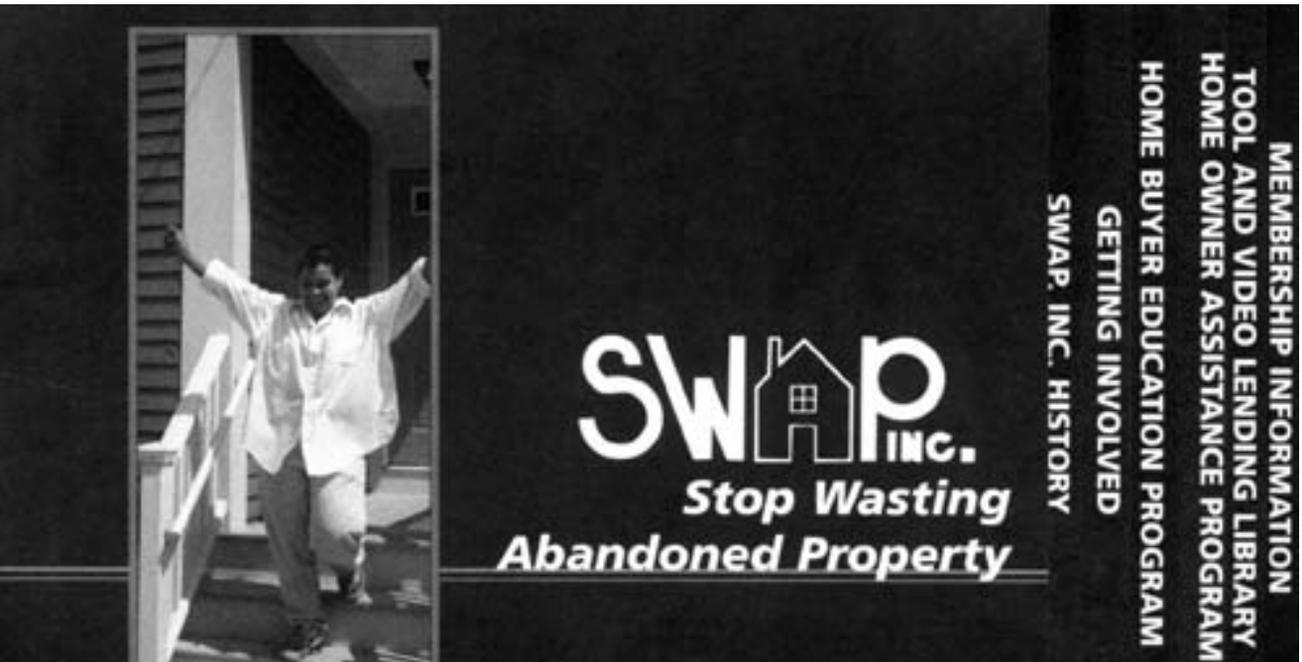
Stop Wasting Abandoned Properties (SWAP), Inc.

Background

SWAP's mission is to provide affordable housing opportunities for low- and moderate-income families. The group began by selling houses for a dollar and helping families renovate them for owner-occupancy. In addition to rehabilitating homes and building new ones on vacant lots, SWAP also develops rental and cooperative-living opportunities. Today SWAP provides a variety of housing-related services through its Home Buyer Education Program. Assistance in maintaining, repairing, and improving their homes is available to owners through SWAP's Homeowner Assistance Program and the Tool and Instructional Video Lending Library.

Project Impacts

With in-house staff, SWAP has established systems and procedures for all aspects of the development process. Over the course of its existence, SWAP has facilitated the rehabilitation or construction of 73 units of affordable rental housing and 43 home ownership units. Providing impetus for major investment in both public and private funds, the effect on the community has been dramatic.



Factors of Success

SWAP utilizes both the low-income housing tax credit financing program and the HOME program of the U.S. Department of Housing and Urban Development as its major funding sources for both home ownership and rental development. Community Development Block Grant funds provide one-third of its operating budget.

Why is it a Best Practice?

- ▲ With experienced staff, SWAP has established systems and procedures for all aspects of the development process.
- ▲ SWAP offers a good model of neighborhood grassroots activism backed up by development experience for affordable housing.
- ▲ SWAP has overcome the daunting task of developing low-income housing in a blighted urban neighborhood by concentrating efforts and resources in a small area to gain the greatest impact.

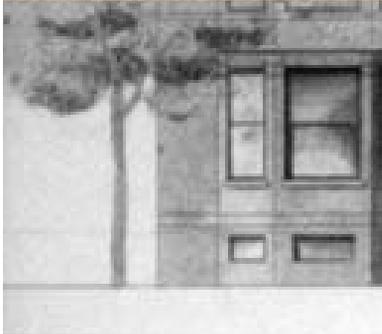
Tips for Others

- ▲ Focusing on housing development in a blighted neighborhood can seem daunting. Concentrate efforts and resources in a smaller area and work from there to gain momentum.
- ▲ Know all the details and do not always depend on someone you think knows more than you do.
- ▲ Ask questions and require accountability from contractors.
- ▲ Be involved and learn from every success and failure.



Denny Row Housing Development

Pittsburgh, Pennsylvania



Many urban neighborhoods face the dilemma of concentrated areas of deteriorated and abandoned houses but have few resources for renovation. Potential homebuyers often lack money or expertise to attempt large-scale renovations on their own. Neighborhood groups in Pittsburgh have found an innovative solution by sharing the renovation challenge with new homebuyers, providing a much-needed impetus for neighborhood revitalization.

Initiators

The Allegheny West Civic Council, Inc. (AWCC) and the North Side Leadership Conference (NSLC). The AWCC is an all-volunteer community organization dedicated to the preservation and revitalization of the historic neighborhood of Allegheny West on Pittsburgh's North Side. The NSLC is a coalition of 14 North Side neighborhood organizations, including AWCC, providing technical expertise to its member organizations with professional staff.

Background

The AWCC faced a conundrum with Denny Row, a collection of imposing three-story row houses that were in poor condition after 15 years of vacancy and vandalism. Despite this neglect, the houses still contained original interior architectural elements such as plaster crown moldings, oak staircases, and wood details. AWCC devised a unique approach, fully restoring only the exteriors of the houses (porches, brickwork, windows, roofs), as well as sidewalks and street trees. After the renovation, the shells had considerable curb appeal and sold for \$30,000 to \$40,000. The homebuyers then rehabilitated the interiors themselves or hired private contractors.

Project Impacts

Prior to the Denny Row project, the only sale in 15 years in the 900 block of West North Avenue had been for tax delinquency, and 14 of 19 houses were vacant. Today there remain only two vacant houses. Homeownership has increased from 2 houses to 11 houses, and sale prices have increased from \$10,000 at tax sale to \$160,000 on the open market. City real estate tax revenue has increased by \$50,000 annually, street traffic is slower, and litter is reduced. In addition, two of the new residents have served on the AWCC board of directors.



Factors of Success

AWCC has established a reputation for working on rehabilitation projects, thus attracting homebuyers looking for historic structures. With its sound understanding of the local real estate market, AWCC was able to be creative and unique in developing housing. Moreover, because it is a strong community organization supported by quality professional staff, it was able to foster productive relationships with local lenders.



Why is it a Best Practice?

- ▲ The exteriors of six contiguous 19th-century Italianate row houses were restored, increasing curb appeal. The shells were sold to homebuyers, partly because of their interest in restoring the interior features.
- ▲ The project proponents successfully convinced a bank and the Urban Redevelopment Authority to lend \$500,000 to renovate the exteriors.

Tips for Others

- ▲ Understand the micro-real estate market.
- ▲ Know what buyers are seeking and focus on the bigger picture.
- ▲ When dealing with lenders, convince them to visit your project and negotiate the deal on-site. It is easier for them to turn you down in an office than standing in front of a project.
- ▲ Make a convincing argument for lenders by emphasizing that your project is a viable option for your real estate market.

Adaptive Use

The following examples offer the most tangible illustrations of the potential for preservation of historic properties for housing and other mixed uses. Each project also employs several tools presented in this toolkit, particularly the importance of quality partnerships, design, advocacy, and financing techniques.

Adaptive Use



Freese Building Rehabilitation Project

Bangor, Maine



Reuse of large abandoned commercial or industrial buildings in a downtown poses a particular challenge to urban revitalization. Combining a mix of uses not only helps fill space, but also can enliven a downtown beyond the normal 9-to-5 workday. A public/private rehabilitation project in Bangor, Maine involved a creative reuse plan that has sparked a new interest in downtown.

Initiators

The city of Bangor, the Community Development Block Grant Program, Realty Resources Chartered, the Maine State Housing Authority, and the Maine Discovery Museum.

Background

The Freese Building was home to the city's leading department store for nearly 70 years. The store closed in 1985, and ownership of the six-story, 140,000-square-foot building passed to a real estate developer who failed to put together a plan to reuse the structure. By 1995, the building was in severe disrepair, the city took possession and began exploring redevelopment options. The building's renovation is a result of a public/private effort involving the City Council of Bangor, who embraced this project's goal of saving a historic downtown department store. The city considered the Freese Building to be a cornerstone in downtown revitalization, and worked with developers, assisted in obtaining financing, and provided substantial city funding to make the project a reality.

Project Impact

The former department store is now home to diverse tenants. Half of the building includes 34 units of elderly housing, and the top three floors on Main Street feature 39 assisted-living units, all of which are currently occupied. The bottom three floors facing Main Street house the Maine Discovery Museum for Children and the Meals for Maine commissary kitchen. Since the Freese Building's successful re-opening, a renewed vitality exists in the downtown. In addition, four major redevelopment projects are underway on formerly deteriorated buildings.





Factors of Success

This project creatively addresses the growing demand for elderly housing and offers a unique and positive opportunity for interaction between children and seniors. It reinforces the tourism component of rehabilitation, attracting 75,000 additional visitors to Bangor's downtown each year. In addition, the Maine Discovery Museum takes advantage of the building's unique mix of uses by recruiting volunteers from the building's residents.

The vision and imagination on the part of the city's elected officials and staff were paired with realistic planning to achieve this excellent adaptive-use project. The needs of the community and the downtown neighborhood were incorporated in the objectives and strong financial commitments on the part of the developer and the governmental entities involved provided the necessary resources.

Why is it a Best Practice?

- ▲ The city of Bangor, Maine recognized the need to make a substantial investment in itself. The private market often can not solely support a project's redevelopment, but requires a city to invest significantly as well.
- ▲ This project creatively addresses the growing demand for elderly housing and offers a unique opportunity for interaction between children and seniors.
- ▲ It reinforces the tourism component of rehabilitation, attracting 75,000 additional visitors to Bangor's downtown each year.
- ▲ The Maine Discovery Museum takes advantage of the building's unique mix of uses by recruiting volunteers from the residents of Freese.

Tips for Others

- ▲ Assess community's needs and agree upon goals for the downtown.
- ▲ Create partnerships with different interest groups and recruit direct involvement of the city.
- ▲ Locate public and private partners to help move ahead.

"This was by far one of the most challenging and most satisfying projects our Division has ever worked on. In future years this project will be cited as a key in the revitalization of our downtown and its historic structures."

Dan Wellington, Code Enforcement Officer, city of Bangor



The Broad Street Historic District Preservation Project

Newark, New Jersey



Churches in urban neighborhoods across the country are playing a leading role in community revitalization efforts. The rehabilitation of a series of limestone row houses in Newark, New Jersey is an example of a religious organization taking the lead on a significant historic preservation project.

Initiators

St. James Community Development Corporation (CDC), a nonprofit organization working in northern New Jersey.

Background

St. James CDC was established in 1992 as part of the Newark Episcopal Diocese's effort to contribute to institutional change in urban communities of northern New Jersey. The diocese has been present in the historic North Broad Street neighborhood for several decades, witnessing the cycle of decay. In 1995 the group oversaw the rehabilitation of a group of abandoned, three-story, limestone row houses plus the construction of one new building.

Project Impact

The rehabilitation of the row houses has been an integral part of the stabilization of a historic neighborhood on North Broad Street as well as countering urban blight in the North Ward of Newark. It has proven to be a catalyst in attracting private investment to the area which has resulted in a neighborhood of mixed incomes. Reuse of properties with historic significance, where economically feasible, proved to be an effective strategy to preserve the architectural character of a neighborhood, offering residents a profound sense of positive change, and created renewed economic interest in other buildings in the neighborhood.



Factors of Success

The city of Newark provided the funding necessary to attract additional capital to the project. Through its HOME and CDBG programs, the city leveraged \$1.8 million in loans and \$1.8 million in equity, with the addition of a nominal grant from the Episcopal Church Center. Assistance was also provided through federal historic and low income housing tax credits. An important early step was securing development funding for preliminary work necessary to obtain project approvals and permanent funding. As the St. James CDC Broad Street project demonstrates, successful urban redevelopment involves rehabilitating key historic properties.

Why is it a Best Practice?

- ▲ The St. James CDC successfully preserved a historic streetscape through the restoration of the front facades and entrance stoops, within the context of rehabilitation of the buildings into safe, efficient and code-compliant family housing.
- ▲ The project stimulated support and interest in the development of adjacent properties and neighborhoods, and helped to attract people back to the area.
- ▲ The rehabilitated row houses have played an integral role in stabilizing a historic neighborhood and countering urban blight by attracting investors to the area and enticing families of various incomes.

Tips for Others

- ▲ Consider rehabilitating key historic properties where it is structurally and financially feasible.
- ▲ Assemble a good project team, including the sponsor, funding agencies, historic preservation consultants, architects and contractors.
- ▲ Secure the predevelopment funding that is essential in enabling the sponsor to accomplish preliminary work necessary to obtain project approval and permanent funding.

“Because the St. James CDC was able to build this project, they assisted me with my struggle of being a single parent. Because of the affordable rent, I have been able to provide my daughter with a safe, clean environment and a more comfortable living. Living in a historic project to me gives a sense of being a part of history. It also reminds me of how wealthy and rich the neighborhood used to be. All in all, living at St. James has enriched my life and that of my daughter.”

Mrs. Myriam Mejia-Garcia, tenant



Globe Mill Housing Rehabilitation Project

Woonsocket, Rhode Island

Abandoned mill buildings remain in many cities as vestiges of a former industrial economy, particularly in the Northeast. Many of these buildings were created as workers' quarters and serve as a unique opportunity to meet the current need for affordable housing. The Woonsocket, Rhode Island, Department of Planning and Development made use of this historic link in creating new affordable housing in the city.

Initiator

Department of Planning and Development, city of Woonsocket, Rhode Island.

Background

Woonsocket, a former mill town with a population of approximately 45,000 people, now contains a large stock of abandoned buildings. The Globe Mill Housing Rehabilitation Project focuses on 11 houses built around 1865 to house textile workers of Globe Mill. A century later, the abandoned, boarded-up buildings became an eyesore to the residents of Woonsocket. The rehabilitation project transformed these buildings into a desirable community comprising 22 units of affordable housing for first-time homeowners. To maintain the historical integrity of the buildings, the rehabilitation was done in cooperation with the Rhode Island Historical Preservation and Heritage Commission, the State Historic Preservation Office.

Project Impacts

The project was funded with over \$640,000 in HOME grant funds. Three weeks after completion, all units were under purchase and sales agreements with an affordable housing subsidy program administered by the U.S. Department of Housing and Urban Development. This financing was critical to the first-time income qualified home buyer. Each buyer was given \$5,000 in HOME grant closing costs and down payment assistance. The renovated houses were each sold as two-unit homes at a cost of approximately \$94,000 or \$47,000 per unit. In all cases, one of the two units is owner-occupied and the other unit provides rental income to the owner.



Factors of Success

Valuable federal funds, financial leveraging of funds, and the cooperation and assistance of the Historical Preservation and Heritage Commission led to the project's success. A strong consumer need for the product and the involvement of a reliable contractor also contributed to the project's success.

Why is it a Best Practice?

- ▲ The development restored one of the most blighted areas of Woonsocket.
- ▲ It provided homeownership opportunities in a city with a high percentage of renters (about 60% of the housing stock is rental units).
- ▲ The project provided rental income to the low-income owners to help cover monthly carrying costs.
- ▲ Mill housing from an important historic period was preserved in an appropriate use.

Tips for Others

- ▲ Be familiar with grants and resources for leveraging funds.
- ▲ Know the federal regulations covering various programs.
- ▲ Whenever historic buildings are involved, work closely with the State Historic Preservation Office.



School House Place and West End Apartments

Warwick and Providence, Rhode Island

The costs and complexities of preserving historically significant buildings can make their adaptation to affordable housing difficult. This goal can, however, be achieved using a variety of funding programs, historic tax credits, grants, and determined expertise. The partnership between the Women's Development Corporation and the city of Warwick, Rhode Island created an opportunity for combining the resources of both entities.

Initiators

Women's Development Corporation (WDC) and the city of Warwick.

The Women's Development Corporation (WDC) is a nonprofit organization founded in 1979 to design, develop, and manage affordable housing for low-income families, primarily female-headed households with children. WDC has established itself as a leader in the development and rehabilitation of historic buildings to house low-income families and persons with special needs.

Background

WDC projects include School House Place, Warwick and the West End Apartments, Providence. The School House Place project in Warwick was an adaptive reuse of a school built in 1886, while the West End projects involved the reuse of eighteen 19th century buildings. WDC brought to the table the expertise to leverage the necessary additional funds and experienced staff to see the projects through the construction phase.

Project Impacts

In its School House Place project, WDC converted a landmark public school of Warwick, built in 1886, into seven low income units. The significance of this project is most notable in how it has profoundly affected the lives of the people who now have a home. The West End apartments were the first and second phases of a project that reclaimed 20 buildings, transforming them into 47 units of affordable rental housing. These projects should convincingly dispel the fiction that historic preservation and affordable housing for families are incompatible. These projects prove that it is possible and feasible to preserve historic buildings in order to create affordable housing.



Factors of Success

Three principles have remained constant in WDC's development process: to provide safe, decent, affordable housing; to use participatory design to create housing that meets the clients' needs; and to develop properties that blend with and strengthen surrounding neighborhoods.



Why is it a Best Practice?

- ▲ The projects used innovative combinations of multiple financing sources and succeeded in promoting home ownership.
- ▲ The planning, design and development process engaged local residents and officials.
- ▲ Outdated spaces were creatively redesigned.

Tips for Others

- ▲ Historic rehabilitation for low-income residents is possible and desirable.
- ▲ Any developer interested in historic rehabilitation should consult with state housing finance agencies, historic consultants, the state historic preservation office, and other developers who have successfully completed similar projects.

“While the families who moved into School House Place could not have been more enthusiastic about their beautiful new homes, they were not the only beneficiaries of the planning and development that culminated in the creation of School House Place. The community gained a positive attitude toward the affordable housing after seeing that it could be both attractive and serviceable, the city gained experience in developing family-based housing and a dilapidated, nineteenth century historic building was converted into an attractive twenty-first century residence.”

Scott Avedisian, Mayor of Warwick

Financing

There's no getting around the obvious: historic preservation costs money and often requires creative financing. Most projects mentioned in this toolkit use a variety of public, private, and nonprofit funding, not to mention a vast amount of persistence and patience. Some of the most typical financing tools include public financing programs, tax incentives, low-interest revolving loan funds, grants, and "sweat equity." These programs can be quite complex, but the following examples demonstrate ways in which to successfully finance a preservation project.



Financing



Historic HomeWorks Program

Boston, Massachusetts



Boston Mayor Thomas Menino initiated a program that helps Boston homeowners make affordable and historically appropriate exterior repairs/improvements. Called Historic HomeWorks, this program provides grants and technical assistance to help homeowners in making repairs that maintain the architectural integrity of their homes, and contribute to the overall historic character of their neighborhood.

Initiator

City of Boston, Department of Neighborhood Development (DND).

Background

Historic HomeWorks is a city-sponsored program in Boston that offers matching grants of up to half of the cost of common home improvements. Through various funding sources, grants of up to \$7,500 are available for historically appropriate exterior repairs and improvements. The amount of rehabilitation can be between \$2,000 and \$35,000. To qualify for a HomeWorks grant, an applicant must be the owner occupant of a one to five unit house or condominium. Annual income may not exceed \$55,000 for a household of one, or \$85,000 for a household of two or more, and the house must be more than 50 years old. Grantees must guarantee that they will use the house as their primary residence for 10 years.

Project Impact

The Historic HomeWorks Program has helped many Boston homeowners maintain their housing. In a market with high housing costs, homeowners are not only at risk of declining conditions, but also bank foreclosure since so much of their income goes to maintaining their property. In addition, these at-risk homeowners are often elderly homeowners living on small, fixed incomes, so basic maintenance costs are even harder to cover. This program was designed specifically to address these issues, and give much needed assistance to homeowners to make historically appropriate improvements.



Factors of Success

The Department of Neighborhood Development has a number of programs designed to help residents realize their dream of owning their own homes, and to help homeowners maintain and improve their property. The Historic HomeWorks program offers much needed support to owners of historic properties and gives a much needed boost to help neighborhoods maintain their sense of history and character. Offering one-to-one matching grants of up \$7,500 means that major projects are possible for people who might otherwise not have the means. For technical assistance, the program works closely with the city's appointed preservation commission, the Boston Landmarks Commission.

Why is it a Best Practice?

- ▲ The program gives homeowners the ability to maintain their historic homes, thereby anchoring and strengthening their neighborhoods.
- ▲ Grants do not need to be paid back unless the house is sold in less than 10 years.
- ▲ The program ensures that the historic integrity of entire neighborhoods is protected and fosters a sense of pride as well as a preservation ethic for future generations.

Tips for Others

- ▲ Require a Terms and Conditions Agreement to ensure that the home is used as the primary residence for 10 years.
- ▲ The requirement that the homeowner matches the grant helps ensure that the project will be carried out, and demonstrates a commitment on behalf of the homeowner.



Corky Row Housing, East Main, and Niagara Housing

Fall River, Massachusetts



When a neighborhood is perceived as blighted, rehabilitating buildings one at a time may seem to have little effect. A critical mass of buildings is necessary to make rehabilitation viable. A private developer in Fall River, Massachusetts, an industrial community of 92,000 people located on the banks of the Taunton River, has initiated such a broad-scoped redevelopment project by combining 25 scattered sites into single feasible projects.

Initiators

The Cushing Companies, a private developer/contractor, with support from the city of Fall River Community Development Department, Fall River Affordable Housing Corporation, Commonwealth of Massachusetts Department of Housing and Community Development, Massachusetts Housing Investment Corporation, BankBoston Development Company, and Niagara Neighborhood Association.

Background

The Cushing Companies led a comprehensive neighborhood revitalization effort involving the creation of 90 units of affordable housing through gut rehabilitation of 25 vacant and blighted buildings along Corky Row, East Main, and Niagara streets. Knowing they needed substantial financial resources, the developers assembled a diverse portfolio of buildings to attract investors. They also secured historic tax credits for several of the properties and made low-income rental housing development feasible with funds from the Low Income Housing Tax Credit and HOME programs. As a result, the contractor leveraged \$3.8 million in low-interest loans from city and state agencies by attracting almost \$10 million in private equity from tax credits. The project was structured in phases over several years, each corresponding to a separate round of annual tax credit applications. Completed units were marketed to working families already living in the neighborhood.

Project Impacts

The Historic Rehabilitation Tax Credit Program is one of the most effective programs communities can use to bring private investment to distressed neighborhoods. The program's benefits can be maximized where redevelopment reinforces the inherent strengths of the community. By focusing efforts on pockets of blight amid stable properties, the positive effects spill over to the adjacent properties. Scattered-site redevelopment is costly, but the returns are felt throughout the community.



Factors of Success

Addressing a critical need, this project removes blight, creating in its place high quality housing units large enough to accommodate families. The success of the project rests in the city's long-term commitment to its scattered-site model of development, in having secured the services of an experienced private developer, and in the healthy partnerships between the city and all the other entities.

Additionally, a unique feature of the program is that construction work is carefully separated into bid packages that allow the participation of small, local subcontractors and in turn provide a boost to the local economy.

Why is it a Best Practice?

- ▲ The developer assembled a diverse portfolio of buildings in order to attract investment.
- ▲ The low income rental housing development was made feasible with funds from the Low Income Housing Tax Credit and the HOME program and historic tax credits.
- ▲ The redevelopment project leveraged \$3.82 million in low-interest loans from city and state agencies by attracting almost \$10 million in private equity from tax credits.
- ▲ The project represents the successful partnership between the city of Fall River, the Massachusetts Department of Housing and Community Development, and other state, local and private entities.

Tips for Others

- ▲ Maintain good relationships with your city and work towards establishing successful collaborations.
- ▲ Recognize the necessity of attracting private developers to accomplish your goals, and be aware of his/her needs and pressures as well as your own.

“The workmanship in this home where I live is superb. I tip my hat to you.”

Steve Elderkin, resident addressing a gathering that included then Massachusetts Governor Paul Cellucci and Fall River Mayor Edward Lampert.



Portsmouth Community Development Block Grant Program

Portsmouth, New Hampshire



The U.S. Department of Housing and Urban Development's Community Development Block Grant (CDBG) Program can be a key source of funding for development and revitalization projects. CDBG-funded activities typically support the preservation of neighborhoods and ensure the availability of a safe and decent housing stock through loans for housing. A community can use CDBG funds as an effective tool in historic preservation to bridge the gap between the cost and value of such projects to assist low and moderate income homeowners in renovation projects. In Portsmouth, N.H., the city operates a program using CDBG funds to assist low and moderate income homeowners in renovation projects.

Initiator

Community Development Department, city of Portsmouth.

Background

The Portsmouth Community Development Block Grant Program is an example of a financing tool as well as a policy framework. Financing for the housing and infrastructure activities conducted in Portsmouth is provided primarily by the Community Development Block Grant Program administered by the U.S. Department of Housing and Urban Development. This financing source can be used for a wide range of programs. Portsmouth, through its Consolidated Planning process, identified the need for a diverse array of programs that independently address distinct community needs and that together support the ongoing development of a strong vibrant community with opportunity for all residents.

Project Impacts

Administered by a Housing Rehabilitation Specialist, Portsmouth's CDBG program offers a diverse array of tools that independently address individual needs and together support the ongoing development of a vibrant community. A first-time homebuyer's program helps reinvigorate neighborhoods by increasing the level of homeownership. The local CDBG program also helps low and moderate income homeowners by financing home improvements through low-interest or deferred loans, developing bid specifications, and overseeing the rehabilitation work. From 1995 through 2000, 61 units of single and multifamily housing were rehabilitated in Portsmouth for a total cost of \$409,775. In addition, lead-based paint abatement grants totaling \$60,060, were provided for an additional six residential units.



Factors of Success

This program's success can be attributed to its responsiveness to the community's needs. To keep the program on track, a Citizens' Advisory Committee holds two public hearings each year. The close working relationship between the city manager, the Community Development Department, and other city departments facilitates communication regarding community issues. Finally, the ability of the Housing Rehabilitation Specialist to assist homeowners with all components of rehabilitation from funding to developing the bid specifications to overseeing the work is critical to owners who might otherwise be deterred from making these necessary improvements.

Why is it a Best Practice?

- ▲ Portsmouth's Community Development Program offers a diverse array of programs to address the local community's needs.
- ▲ A first-time homebuyer's program helps to reinvigorate neighborhoods by increasing the level of homeownership. This concerted effort ensures that the entire neighborhood becomes a safe community for its residents.
- ▲ Administered by the Housing Rehabilitation Specialist, the program helps low and moderate homeowners by financing the improvements through low interest or deferred loans, developing bid specifications and overseeing the rehabilitation work.

Tips for Others

- ▲ Remain current with both the CDBG regulations and the community needs.
- ▲ Conduct training sessions to increase the number of lead-safe certified remodelers and apply for additional funds to help finance lead-based paint abatement.
- ▲ Enter a partnership with the state finance agency, like the New Hampshire Housing Finance Authority, and other banks to develop solid financing packages for potential homebuyers.



Lease-to-Purchase Program

Pittsburgh, Pennsylvania



When Pittsburgh steel mills were closed in the 1960's and 70's, the city suffered a massive loss of employment, population base, and economic opportunity. Many homes were abandoned and deteriorated. However, in the last 15 years a strong downtown revitalization effort has taken place. One of the signs of that effort is the Lease-to-Purchase Program, which was born out of the weak housing market in the Garfield neighborhood of Pittsburgh's East End.

Initiators

Bloomfield-Garfield Corporation, which began in 1975 as a grass-roots advocacy organization, has grown into both economic development and service delivery roles since then. Today, it works to rehabilitate and renovate vacant historic housing by providing homeownership opportunities for low-income families with difficult credit histories who have no possibility of acquiring mortgages through banks.

Background

Under the Lease-to-Purchase Program, the customer, selected by the corporation, deposits \$1,000 at the time of the lease and agrees to purchase the house by payment of monthly fees that are collected as rent and deposited as mortgage payments until the renter is able to secure the mortgage loan. The rental deposit becomes the down payment on the mortgage and demonstrates the buyer's intent and commitment. Rent is set at a figure approximating the actual mortgage payment, and renters can move into the property and use the next 12 to 24 months to secure a mortgage loan.

Project Impacts

The Lease-to-Purchase Program has demonstrated the potential for people with poor credit histories to become homeowners. The program also conserves historic building stock and provides high-value housing for low income residents in older neighborhoods. For example, the Corporation is moving forward with a 50-unit for-sale housing development in the Garfield neighborhood, which combines new and renovated housing.



Factors of Success

Throughout the life of the agreement the Bloomfield-Garfield Corporation maintains a strong relationship with the residents. Only those who comply with the agreement and plan to stay in the house and become homeowners are accepted. The corporation develops and manages the building on its own, ensuring stable, reliable management and a successful Lease-to-Purchase program. Also, buyers are assisted by the corporation to clear their credit histories through the programs of the Neighborhood Housing Agency. Lastly, the corporation is strongly backed by the City of Pittsburgh Urban Redevelopment Authority, which offers financial support to make the houses affordable through its Community Development Block Grant program.

Why is it a Best Practice?

- ▲ The program demonstrates the market for homeownership in a tenant-based neighborhood.
- ▲ Restoring historic buildings provides high value housing for low-income residents.
- ▲ Families with bad credit histories are able to increase their assets through their homes, creating an incentive for them to strengthen their financial capability.

Tips for Others

- ▲ Set the limit for renovation costs to \$60 per square foot so that the project is feasible, and limit the total development costs on new construction to no more than \$150,000 per unit of new construction and to \$130,000 per renovated unit.
- ▲ Sale prices should equal 65% to 70% of total development costs for a market that is between 70% and 100% of median income.
- ▲ Work with the municipal or county redevelopment authority to create a second mortgage loan instrument out of CDBG funds or some other source, to cover the inevitable gaps between real costs and appraised values in communities affected by economic decline.
- ▲ The \$1,000 down payment is a critical step in the process--it is a demonstration of the buyer's intent and shows a commitment.

“Thanks for everything you have done for me and my family. We will never forget it.”

Loretta Bray, a 1999 homebuyer who bought one of the renovated homes in Garfield. Ms. Bray is a former resident of the Garfield Heights public housing complex and operates a day-care service out of her home.



The Garden State Historic Preservation Trust Fund

New Jersey



Financial grants are increasingly needed as rehabilitation costs expand and other sources of funding for historic preservation projects become difficult to obtain. Many states have found that public initiatives expand the availability of such funds. In New Jersey, the Garden State Historic Preservation Trust Fund has served as a stable source of funding for preservation projects.

Initiators

The New Jersey Historic Trust, whose mission is to advance the preservation of the state's historic properties through financial, educational, and stewardship programs.

Background

The Garden State Historic Preservation Trust Fund is part of the Garden State Preservation Trust, a voter-approved initiative to preserve open space, farmland, and historic sites, with funding from state revenues guaranteed to 2008. This program follows the Trust's first grant program, the Historic Preservation Bond Program, which was funded by a series of bond initiatives from 1987 to 1997. The Trust Fund provides matching grants for planning and "bricks-and-mortar" preservation projects to historic sites throughout the state. Planning grants range from \$5,000 to \$50,000, and capital/bricks and mortar grants range from \$5,000 to \$750,000. Eligible applicants are nonprofit organizations and entities of municipal or county government and eligible properties must be listed in or be eligible for listing in the State or National Registers of Historic Places.

Project Impacts

The Historic Preservation Bond Program awarded \$52.3 million in six years. A June 1997 study of the economic impact of historic preservation in New Jersey by the Center for Urban Policy Research at Rutgers University found that the Trust's grants and loans awarded by the end of 1997, together with private and other funds used to match the grants, will leverage approximately \$403 million in total historic rehabilitation efforts, 6,200 jobs, \$222 million in income and \$307 million in gross domestic product for New Jersey residents. The first round of the Garden State Historic Preservation Trust Fund awarded \$12.3 million to 50 planning and capital preservation projects that represent an \$84 million investment in the preservation of historic properties in New Jersey.



Factors of Success

“Visually and physically the United States could be very different if other states followed the lead of the New Jersey Historic Trust. What the Trust has accomplished in the last 10 years through its grants program is testimony to the initiative and commitment of its members. Its initiatives range from historic tourism to the development of a history vision for the state, and most important of all are the buildings, parks, and objects the trust has helped save and restore.”

Richard Guy Wilson, Professor of Historic Preservation at the University of Virginia



Why is it a Best Practice?

- ▲ More than one-third of funded projects involved rescuing buildings that were either closed or uninhabitable.
- ▲ The flexibility of the grant program offers financial opportunities at different stages of development.
- ▲ Capital grants are given at two levels, from \$5,000 to \$50,000 and \$50,001 to \$750,000, allowing a wide range of project types and sizes to qualify for funding.
- ▲ Matching grants ensure that the grantee is prepared to undertake and carry out the proposed project.

Tips for Others

- ▲ Be flexible in amount and timing of grant making.
- ▲ Maintain a list of approved consultants who have successfully completed funded projects.



Providence Preservation Society Revolving Fund

Providence, Rhode Island



Providence, Rhode Island's capital and largest city, has undergone an award winning urban revitalization in recent years, due in large part to the attention paid to the city's heritage and historic building stock. Combining expertise in historic preservation, financing, community planning, and community development can have profound effects on neighborhood revitalization. A nonprofit organization in Providence works to effectively integrate these essential elements and is making a remarkable impact on this city.

Initiator

Providence Preservation Society Revolving Fund (PPSRF), Inc. Since 1980, the nonprofit PPSRF has worked to preserve Providence's architectural heritage and stimulate community revitalization through advocacy, low-interest loans, technical assistance, and development. To that end, the PPSRF manages a capital pool that is used for rehabilitation loans to homeowners and to acquire abandoned property for development and resale in targeted low and moderate income historic neighborhoods.

Background

The capital pool was raised from public and private sources and includes loan funds from the Rhode Island Historical Preservation and Heritage Commission and Bank Rhode Island. Operating income is obtained from interest, development fees, and other fees for services, memberships, and grants from public and private sources. The organizational structure of the Revolving Fund places policy decisions in the hands of a small, highly skilled, nine-member board of directors who represent expertise in real estate development, law, banking, architecture, and social services. To maximize its impact, PPSRF targets its resources to specific historic neighborhoods that are in need of revitalization and partners with neighborhood steering committees and community-based organizations to tailor strategies to meet the needs of the area. PPSRF provides extensive financial counseling, technical expertise, and construction monitoring to loan recipients.

Project Impacts

In its 20-year history, PPSRF has loaned in excess of \$2.5 million for 146 restoration projects, including the renovation of 39 previously abandoned buildings. The Revolving Fund has taken a long-range view on neighborhood revitalization issues, still working with its first target neighborhood after 20 years. During this time, the organization has evolved and adapted to meet continuing challenges in each of its subsequent target areas, and has been a successful advocate for the union of affordable housing and preservation.



Factors of Success

A revolving fund can be a highly effective element of a preservation toolkit. In PPSRF's case, success is assured by a staff experienced in the use of historic and low income tax credits and in the National Trust for Historic Preservation's Main Street approach to revitalization. PPSRF treats housing as a component of a comprehensive neighborhood revitalization strategy that includes neighborhood organizing, infrastructure improvements, promotional activities, overall design enhancement, and economic development initiatives.

Why is it a Best Practice?

- ▲ PPSRF targets its resources to low and moderate income historic neighborhoods, using preservation as a key to neighborhood revitalization.
- ▲ The organization forms partnerships with neighborhoods and community-based organizations, retains and develops affordable housing, collaborates with others to preserve and develop real estate, and serves as a catalyst for public and private investment.
- ▲ Goals are clearly defined and opportunities are seized as they arise.
- ▲ The mutual goals of historic preservation and affordable housing are achieved.

Tips for Others

- ▲ Community housing development organizations can work toward increasing the supply of affordable housing units of historic importance in low and moderate income neighborhoods.
- ▲ Treat housing as a component of a comprehensive neighborhood revitalization strategy, including neighborhood organizing, political activism, infrastructure improvements, and economic and community development initiatives.

“As a nonprofit developer, the PPS Revolving Fund is an effective and active public advocate for the union of historic preservation and affordable housing.”

Edward F. Sanderson, Deputy State Historic Preservation Officer and Executive Director of the Rhode Island Historical Preservation and Heritage Commission



State Tax Incentives for Historic Preservation



In addition to the preceding examples of good financing tools, it is important to highlight several states whose tax credit programs are exemplary models for the rest of the country. According to research by the National Trust for Historic Preservation, 45 states around the country provide financial incentives for historic preservation. The state programs have different characteristics but they mainly fall under the category of real property tax relief and state income taxes. Their success depends on various factors such as the nature of the tax legislation, the support given to the legislation by the state, the resources available to provide the incentives, such as the assets of the State Historic Preservation Offices (SHPO), and the general attitude toward preservation in the state. An efficient combination of these factors leads to results that promote the preservation of historic properties.

Real Property Tax Relief

This method is more effective in providing incentives for the rehabilitation of historic commercial buildings. It works effectively in jurisdictions where the real property taxes and the rehabilitation expenses are relatively high in proportion to the general expenditure for the building. Several jurisdictions have incorporated property tax relief in their homeownership programs.

State Income Tax Credits

These programs provide a grant against state income taxes to the owner or the developer of a historic building equal to a percentage of the expenditure necessary for the rehabilitation of the property.

Most of the northeastern states have passed or are in the process of passing new legislation for more effective tax incentive programs. The new programs for Maine, Rhode Island, and New York are anticipated to be very effective. The National Trust report deemed the financial incentive programs in Georgia, Missouri, Illinois, Maryland, and North Carolina some of the best in the nation.

Georgia

Georgia's Historic Preservation State Tax Incentive Program was authorized by the voters through a constitutional amendment and created by the Georgia General Assembly in 1989. The program provides owners with an eight-year freeze and a two-year phase-out period on property tax assessments on certified historic properties that have undergone substantial rehabilitation. The state tax incentive program benefits owners of both income-producing and residential property. In fiscal years 1992 through 1996, approximately \$16 million of private monies were invested in projects qualifying only for this incentive. For Further Information: *Georgia Historic Preservation Division* <http://www.ganet.org/dnr/histpres/>

****FOOTNOTE:** The information in this summary is drawn from a report prepared by Elizabeth G. Pianca and Harry K. Schwartz published in the Forum News (A newsletter of the National Trust for Historic Preservation), January/February 2001 edition (Volume VII, No. 3) and interviews with Ms. Pianca and Mr. Schwartz.



Illinois

The Property Tax Assessment Freeze Program in Illinois provides tax incentives to owner-occupants of certified historic residences who rehabilitate their homes. The buildings include owner-occupied condos, co-ops, multiunit properties (up to six units), and single-family residential units. Through this program, the assessed valuation of the historic property is frozen for eight years at its level in the year rehabilitation began. The valuation then is brought back to market level over a period of four years.

For Further Information:

Illinois Historic Preservation Agency
<http://www.state.il.us/HPA/ps/financialassistance.htm>

Maryland

The Heritage Preservation Tax Credit Program, administered by the Maryland Historical Trust, provides state income tax credits equal to 25 percent of the qualified capital costs expended in the rehabilitation of a certified heritage structure. The program also includes a mortgage credit certificate option. Under this plan, a property owner may elect to transfer the credit to his or her mortgage lending institution in exchange for a reduction in the principal amount or interest rate of the loan. The lending institution may then use the credits to offset its own state income tax liability. The lender may discount the credit by the

amount its federal tax liability increases. In addition, Maryland has a local property tax abatement option that allows for a 10-year freeze. Local governments can also provide a property tax credit equal to 10 percent of rehabilitation expenditures. It is possible for local governments to offer both the credit and the 10-year freeze.

For Further Information:

Maryland Historical Trust
<http://www.marylandhistoricaltrust.net/index.html>

Missouri

Missouri provides an investment tax credit equal to 25 percent of approved costs associated with qualified rehabilitation made after January 1, 1998. Homeowners and commercial developers can qualify for the state credits, which are administered by the Community Development Division of the Missouri Department of Economic Development. The Historic Preservation Program is responsible for reviewing and approving rehabilitation work for the state credits. Missouri law does not allow for phasing. Tax credits will be issued at the completion of the entire project when the building is put back in service. One building cannot be split into more than one project. Any person, firm, partnership, trust, estate, or corporation is eligible to participate in this program except nonprofit and government entities.

For Further Information:

Missouri Historic Preservation Program
<http://www.ecodev.state.mo.us/communities4.html>

North Carolina

North Carolina provides a 20 percent state tax credit for rehabilitation of income-producing historic properties that also qualify for the 20 percent federal investment tax credit. In effect, the combined federal-state credits reduce the cost of a certified rehabilitation of an income-producing historic structure by 40 percent. A new state tax credit of 30 percent is available for qualifying rehabilitation of non-income-producing historic structures, including owner-occupied personal residences. There is no equivalent federal credit for such rehabilitation.

For Further Information:

North Carolina Historic Preservation Office
<http://www.hpo.dcr.state.nc.us/>

Lowell Artist Overlay District*City of Lowell*

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 J.F.K. Civic Center
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 Lowell, MA 01852

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P (978) 970-4252

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W <http://web.ci.lowell.ma.us/dpd/>

Lowell Historic Board

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 Administrator

E Sstowell@ci.lowell.ma.us

P (978) 970-4270

F (978) 970-4262

W <http://www.historiclowell.net>

**New Jersey Rehabilitation
 Subcode**
*New Jersey Department of
 Community Affairs*

Division of Codes and Standards

P.O. Box 802

Trenton, NJ 08625

Contact: John Terry, Supervisor, Code
 Enforcement

P (609) 984-7609

W <http://www.state.nj.us/dca/index.html>

**Policy Position on Funding for
 Affordable Housing Projects**
*Vermont Housing and Conservation
 Board*

149 State Street

Montpelier, VT 05602

Contact: Polly Nichol, Director of
 Housing Programs

P (802) 828-3250

F (802) 828-3203

W <http://www.vhcb.org>

**Proposal System for Sale of Tax-
 Foreclosed Properties**
Troy Architectural Program, Inc.

210 River Street,

Troy, NY 12180

Contact: Joe Fama, Executive Director

E famajoe@aol.com

P (518) 274-3050 Ext. 11

F (518) 274-3165

W <http://www.tapinc.org>

**Catalogue of Historic
 Homeownership Opportunities**
*Local Initiatives Support Corporation
 (LISC)*

Hartford Program Office

81 Wethersfield Avenue

Hartford, CT 06114

Contact: Ken Johnson

E kjohnson@liscnet.org

P (860) 525-4821

F (860) 525-4822

W <http://www.liscnet.org>

**Guide to Historic Housing
 Rehabilitation**
Pioneer Valley Planning Commission

26 Central Street

West Springfield, MA 01089

Contact: Bonnie Parsons, Principal
 Planner, Historic Preservation

E bparsons@pvpc.org

P (413) 781-6045

F (413) 732-2953

W <http://www.pvpc.org>

**Rochester Home Room City Living
 Resource Center**
Rochester Home Room

133 South Fitzhugh Street

Rochester, NY 14608

Contact: Lawrence Jones

E ljones@landmarksociety.org

P (716) 546-7029 Ext. 25

F (716) 546-4788

W <http://www.thehomeroom.net>

**Martin Luther King, Jr. Historic
 District Guidelines**
*Historic District Development
 Corporation*

107 Howell Street, N.E.

Atlanta, GA 30312

Contact: Mtamanika Youngblood

E mtamanika@hddc.net

P (404) 215-9095

F (404) 523-4747

**Lewiston Historic Preservation
 Design Manual**
City of Lewiston

27 Pine Street

Lewiston, ME 04240

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 Director

E jlysen@ci.lewiston.me.us

P (207) 784-2951 Ext. 304

F (207) 795-5071

W <http://www.lewiston.me.us>

**Brentwood Apartments, 4130-4140
 Parkside Avenue**
Pennrose Properties, Inc.

One Liberty Place, Suite 3810

Philadelphia, PA 19103

Contact: Robert Totaro, Project
 Manager

E pennrose@msn.com

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W <http://www.pennrose.com>

Parkside Preservation

P.O. Box 15527

Philadelphia, PA 19131

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**Stop Wasting Abandoned
 Properties (SWAP), Inc.**
SWAP Inc.

439 Pine St.

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E ginka100@aol.com**P** (412) 231-2822*North Side Leadership Conference*

Contact: Ernie Hogan, Housing Director

E ernie@NSLConf.org**P** (412) 231-4714**Freese Building Rehabilitation****Project***City of Bangor*

73 Harlow Street

Bangor, ME 04401

Contact: Dan M. Wellington, Code Enforcement Officer

E dan.wellington@bgrme.org**P** (207) 945-4400**F** (207) 945-4449**The Broad Street Historic District****Preservation Project***St. James Community Development Corporation*

260 Broadway, Suite 300

Newark, NJ 07104

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E jamesstcdc@aol.com**P** (973) 482-5700**F** (973) 482-0176**W** <http://www.dioceseofnewark.org/cdc/98annrpt/sjcdc.html>**Historic Lafayette Apartments***Historic Lafayette Apartments;**Property Development Association, Ltd.*

550 Washington Avenue

Carnegie, PA 15106

Contact: James W. McCarthy

P (412) 279-5200**F** (412) 279-5204**Globe Mill Housing Rehabilitation****Project***City of Woonsocket, RI*

169 Main Street,

Woonsocket, RI 02892

Contact: Joel D. Mathews, Director of Planning and Development

P (401) 762-6400**F** (401) 766-9312**W** <http://www.ci.Woonsocket.ri.us>**School House Place and West End****Apartments***Women's Development Corporation*

861A Broad Street

Providence, RI 02907

W <http://www.homestead.com/womens-development>**Historic HomeWorks Program***Boston Historic HomeWorks*

Department of Neighborhood

Development

26 Court Street, 9th floor

Boston, MA 02108

P (617) 635-0600**W** <http://www.ci.boston.ma.us/dnd>**Corky Row Housing, East Main, and Niagara Housing***City of Fall River Community**Development*

162 Main Street

Fall River, MA 02722

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E gmhovorka@aol.com**P** (508) 679-0131*Cushing Companies*

Contact: Caleb C. Clapp

E caleb@cushingco.net**P** (617) 227-0003 Ext. 15**Portsmouth Community****Development Block Grant Program***Community Development Department*

1 Junkins Avenue

Portsmouth, NH 03801

Contact: Cindy Hayden, Community Development Director

E CLHayden@ch.cityofportsmouth.com**P** (603) 431-2006, Ext. 218**F** (603) 427-1593**W** <http://www.cityofportsmouth.com/CommunityDev/>**Lease-to-Purchase-Program***Bloomfield-Garfield Corporation*

5149 Penn Avenue

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Contact: Richard Swartz, President

E rickswartz11@aol.com**P** (412) 441-6950**The Garden State Historic****Preservation Trust Fund***New Jersey Historic Trust*

PO Box 457

Trenton, NJ 08625

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E njht@dep.state.nj.us**P** (609) 984-0473**W** <http://www.njht.org>**Providence Preservation Society****Revolving Fund, Inc.***Providence Preservation Society**Revolving Fund*

24 Meeting Street

Providence, RI 02903

Contact: Clark Schoettle, Executive Director

E ppsr@msn.com**P** (401) 272-2760



Bibliographic and Online Resources

Examples and Tools that Work

Beaumont, Constance Epton.

Smart States, Better Communities: How State Governments Can Help Citizens Preserve Their Communities.

Washington, DC: National Trust for Historic Preservation, 1996.

Analyzes historic preservation as it pertains to economic aspects in the United States. Gives an overview of current laws, legislation, and cultural policy. Useful case studies provide information for communities and cities that want to tap into historic preservation resources at the state level.

Garvin, Alexander.

American City: What Works, What Doesn't.

New York, NY: McGraw-Hill, 1996.

Analyzes more than 250 programs and projects, describing why some projects succeed in achieving revitalization, why others fail, and what lessons may be learned from both successes and failures. This book suggests that the key to regenerating our cities lies in combining private-sector efforts, community-level action, and broad-based government policy.

Grogan, Paul S. and Tony Proscio.

Comeback Cities: A Blueprint for Urban Neighborhood Revival.

Boulder, CO: Westview Press, 2000.

Analyzes some of America's most distressed urban neighborhoods which have turned around as a result of innovative community-based efforts. Discusses many CDC-based best practice cases within a conceptual framework. Shows how innovative, pragmatic tactics for easing the nation's urban ills have produced sound results.

Listokin, David.

Living Cities: Report of the Twentieth Century Fund Task Force on Urban Preservation Policies.

New York, NY: Priority Press Publications, 1985.

A critical look at the American preservation movement and processes. Includes what has been done and what should be done with regard to historic preservation, as well as what tools are available and who should set policy. Addresses the evolution, themes, and meanings of the movement along with government regulations and controls at the local, state, and national levels.

Morris, Marya.

Innovative Tools for Historic Preservation. (Planning Advisory Service); Report no. 438.

Chicago, IL: American Planning Association, 1992.

Addressing the American Federal Preservation tax credit cuts of 1986, this report looks at options for state and local governments to encourage or enforce historic preservation.

The book proposes a variety of approaches (state and local tax relief, conservation districts, down-zoning, and comprehensive plans) with examples from numerous American cities.

Paseltiner, Ellen Kettler and Deborah Tyler.

Zoning and Historic Preservation: A Survey of Current Zoning Techniques in U.S. Cities to Encourage Historic Preservation.

Chicago, IL: *The Council*, 1983.

A comprehensive survey regarding zoning techniques designed to encourage historic preservation.

Robinson, Susan and John E. Petersen.

Fiscal Incentives for Historic Preservation.

Washington, DC: *Government Finance Research Center of the Government Finance Officers Association*, 1988.

In the late 1980s, the city of Atlanta undertook a project to integrate historic preservation into its existing planning program. This report examines the implications of tax incentives to the city budget and property owners. Includes an economic explanation of tax incentives with informative graphs showing the effects of different incentive programs on property taxes.

Schuster, J. Mark, John de Monchaux, and Charles A. Riley II, eds.

Preserving the Built Heritage: Tools for Implementation.

Hanover, NH: *University Press of New England*, 1997.

Outlines tools of government action in preserving the built heritage and presents critical essays regarding each tool. Discusses how to create partnerships and provides an extensive list of international resources in preservation.

National Trust for Historic Preservation

Preservation Revolving Funds.

Washington, DC: *National Trust for Historic Preservation*, 1993.

Explains process of establishing a preservation revolving fund. Examines organizational issues, project eligibility, acquisition tools, rehabilitation options, marketing and resale, protective measures, publicity, and funding. Includes bibliography for other revolving fund resources.

US Department of Housing and Urban Development

The State of the Cities 2000.

Broad overview and numerous examples of successful best practices. Available online at www.huduser.org.

Urban Land Institute

New Uses for Obsolete Buildings.

Washington, DC: *ULI*, 1996.

Eight case studies and 75 shorter descriptions of successful adaptive use projects. Explores the advantages and challenges presented by adaptive use, including zoning, building codes, environmental concerns, economic feasibility, and marketing.

Wagner, Richard.

Local Government and Historic Preservation.

National Park Service and the National Trust for Historic Preservation, 1991.

A broad guide for city-level preservation. Explains tax incentives, the Secretary's Standards, and the National Register while exploring approaches to educating the community and neighborhood revitalization strategies.

Planning and Design

Belmont, Steve.

Cities in Full.

APA Planner's Press, Chicago, 2002.

Explores the potential of the American city and outlines an agenda for recentralization.

Gratz, Roberta with Norman Mintz.

Cities Back from the Edge.

Washington, DC: *Preservation Press*; New York: *John Wiley*, 1998.

Case studies of cities that have successfully reversed the effects of sprawl, big-box retailing, and other urban crises.

Herr, Philip B. and Sarah James.

Place-Notes: Resources for Protecting Community Character.

Boston, MA: *National Trust for Historic Preservation*, 1993.

This workbook, in the span of two pages for each topic, describes how numerous planning tools are implemented, addressing the advantages and challenges of each. Tools as diverse as downtown development programs, historic preservation plans, building codes, agricultural preservation, parking regulations, protective easements, sign control, and numerous others are summarized. A useful definition of terms and a list of resources and organizations are also included.

Hylton, Thomas.

Save Our Land Save Our Towns: A Plan for Pennsylvania.

Harrisburg, PA: *Rb Books*, 1995.

Hylton examines 10 states that have used comprehensive state plans to preserve farmland, revive urban areas, protect the environment, and reclaim a sense of community. He outlines a plan that contains valuable advice for any community looking to combat the effects of suburban sprawl.

Hirschhorn, Joel S. and Paul Souza.

New Community Design to the Rescue.

Washington, DC: *National Governors Association*, 2001.

Provides overall guidance to approaching new community design, including new development and reuse of historic structures.

Jacobs, Jane.

The Death and Life of Great American Cities.

New York, NY: Vintage Books, 1992.

A classic since its publication in 1961, this book is the definitive statement on American cities: what makes them safe, how they function, and why all too many official attempts at saving them have failed.

Moe, Richard and Carter Wilkie.

Changing Places: Rebuilding Community in the Age of Sprawl.

New York, NY: Henry Holt and Co., 1997.

Analyzes methods used by America's historic communities to confront sprawl. Focusing on ways to ways to harness community activism, this book examines ways to build pride in distressed neighborhoods.

National Trust for Historic Preservation, Northeast Office.

Preservation Plan for Lawrence, Massachusetts.

Boston, MA: National Trust for Historic Preservation, 2001.

A model preservation plan for the Arlington neighborhood of Lawrence, Massachusetts is posted on the National Trust Web site to serve as an introduction to the planning process as well as a valuable reference tool.

Sustaining Urban Excellence: Learning from the Rudy Bruner Award for Urban Excellence 1987-1993.

Cambridge, MA: The Rudy Bruner Foundation 1998.

An anthology of past Rudy Bruner Award recipients. These awards are based on excellence in urban design, how projects have withstood the test of time, and how they have evolved in the face of changing circumstances. Although not all case studies are historic preservation projects, there are various examples that provide models for preserving urban areas.

Economic Benefits of Historic Preservation

Listokin, David and Michael Lahr.

Economic Impacts of Historic Preservation.

New Brunswick NJ: Center for Urban Policy Research, May 1997.

Widely cited study on the economic benefits of Historic Preservation in the northeast.

Rypkema, Donovan.

The Economics of Historic Preservation: A Community Leader's Guide.

Washington, DC: National Trust for Historic Preservation, 1994.

Outlines 100 economic reasons why older and historic buildings should be saved.

Downtown Revitalization

Dane, Suzanne G.

Main Street Success Stories.

Washington, DC: National Main Street Center, National Trust for Historic Preservation, 1997.

Case studies of 44 downtown revitalization success stories are highlighted. Each example summarizes the downtown revitalization approach, major accomplishments, economic impacts, changes in vacancy rate and rent revenues, and the number of jobs created for each community.

Law and Legislation

Costonis, John.

Space Adrift: Landmark Preservation and the Marketplace.

Urbana, IL: Published for the National Trust for Historic Preservation by the University of Illinois Press, 1974.

A seminal work that discusses the transfer of development rights as a tool for preservation planning. Focuses on the Chicago plan and its economic, design, and legal impacts.

Costonis, John J.

Icons and Aliens: Law, Aesthetics, and Environmental Change.

Urbana, IL: University of Illinois Press, 1989.

Explores the relationship between aesthetics and the law by presenting and interpreting the judicial system as it pertains to the preservation of historic and otherwise significant buildings.

Medler-Montgomery, Marilyn.

Preservation Easements: A Legal Mechanism for Protecting Cultural Resources.

Denver, CO: Colorado Historical Society, State Museum, Colorado Heritage Center, 1984.

A guide to the development concerns, uses, and consequences of preservation easements.

Creating Housing

Van Vliet, Willem ed.

Affordable Housing and Urban Redevelopment in the United States.

Thousand Oaks, CA: Sage Publications, 1997.

Analyzes nine case studies of how large cities such as Chicago, New York, Boston, Cleveland, Baltimore, and Los Angeles have met the challenges of providing affordable housing while redeveloping urban areas in the face of reduced federal involvement.

Online Resources

The Enterprise Foundation

<http://enterprisefoundation.org>

A national, nonprofit housing and community development organization working through a network of more than 1,600 community-based nonprofit organizations. The site has information and links on the foundation's major initiatives, including grants for housing, neighborhood development, and revitalization as well as community facilities and technology for community development.

Heritage Preservation Services

<http://www2.cr.nps.gov>

Sponsored by the National Park Service, this Web site offers a connection to links about preserving historic buildings, landscapes, landmarks, and American battlefields. Among the list of programs offered is Technical Preservation Services, the nation's leading provider of information and guidance on the care of historic buildings.

Housing Partnership Network

<http://www.nahp.net>

A membership network of regionally based, nonprofit housing organizations, bringing together the resources, relationships, and entrepreneurial efforts of sophisticated housing organizations that are responsive to local communities. Has links to network programs on homeownership counseling and housing partnership development funds, along with discussions on housing and a resource section that includes a document library, public policy material, and links to other Internet resources.

Local Initiatives Support Corporation

<http://www.liscnet.org>

LISC provides grants, loans, and equity investments to CDCs for neighborhood redevelopment. When LISC begins a new program, national LISC matches locally raised funds which provide more to the community for renovation. The CDC then designates the funds to a variety of projects that will best suit the neighborhood, and the renovation begins.

National Center for Preservation Technology and Training

<http://www.ncptt.nps.gov/pir/>

An interdisciplinary effort by the National Park Service to enhance the art, craft, and science of preservation and conservation. Serves as a clearinghouse of online resources for the preservation community, including information about research, educational opportunities, and other online information.

National Housing Institute

<http://www.nhi.org>

Examines the key issues affecting affordable housing and

community development practitioners and their supporters, such as housing, jobs, safety, education, poverty, and racism. The site includes Shelterforce Online, the nation's oldest continually published housing and community development magazine.

National Trust for Historic Preservation

<http://www.nthp.org>

Provides a wealth of information from the latest news in preservation to the laws and policies regarding historic preservation. There are links to the preservation magazine, travel programs, historic homeownership information, history of the organization, books in preservation, and valuable information about the National Trust's historic sites.

National Trust for Historic Preservation Library

<http://www.itd.umd.edu/UMS/UMCP/NTL/ntl.html>

Provides links to catalogues and databases regarding preservation. The Website also provides links to the entire library collection, international historic preservation Web sites, and state and local Web sites related to preservation organizations and programs.

U.S. Department of Housing and Urban Development

<http://www.hud.gov>

This Web site highlights a variety of services and policies regarding housing and urban development. This is an especially useful site for research on policies that have been enacted, projects that work, and initiatives that effected housing rehabilitation and preservation.

U.S. National Park Service

<http://www.cr.nps.gov>

Provides a user-friendly database of cultural resource subjects and programs along with an extensive list of links to grants and tax credits, national parks, tools for learning, partners and contacts, and publications.

Virginia Commonwealth University Urban Studies & Planning Homepage

<http://www.has.vcu.edu/usp/>

Provides links to community resources on the web in the following categories: census information, citizen participation, computer applications, economic development, environmental planning, general planning, geographic information systems, historic preservation, housing, maps and graphics, new urbanism, organizations and journals, planning history, rural planning, social equity, sustainability, transportation planning, and zoning and land-use law.

Preservation Books

<http://www.preservationbooks.org>

Online catalogue of publications available from the National Trust for Historic Preservation.



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