



# Historic Resources Advisory Board

## Historic Resources Preservation Grant Guidelines

### 2019-2020

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The City of Lake Oswego is now accepting applications for historic resource rehabilitation grants for preservation and repair of historic buildings listed on the City's Landmark Designation List. Qualifying projects can receive a grant that provides partial reimbursement of the cost to do the work. Grant applications are available in Planning and Building Services or on line at <https://www.ci.oswego.or.us/planning/historic-resources-preservation-incentive-grant-program>. Applications must be submitted by 4:00 p.m. on or before **Friday, May 31, 2019** and will be reviewed by the Historic Resources Advisory Board **June 12, 2019**. Funding is limited and grant awards will be based on the priorities below. Grants are considered taxable income and must be reported on your income tax return. The project must be completed with all paperwork submitted by **June 1, 2020**.

#### Eligibility Requirements

The following standards must be met to be eligible for the matching grant:

1. The building must be on the City's Landmark Designation List. Please contact Paul Espe in Planning and Building Services at [pespe@lakeoswego.city](mailto:pespe@lakeoswego.city) or (503) 697-6577 to determine if your house or building is on the Landmark Designation List (LDL). Structures that are not on the LDL are not eligible.
2. All work must be performed on the exterior of the structure, and cannot be new construction or an addition.
3. Projects must meet the Secretary of Interior Standards for Rehabilitation and must be consistent with Lake Oswego Code, Chapter 58 (Historic Preservation).
4. Grants are not awarded for materials already purchased or for work that is already in progress or completed.
5. Grants are not awarded for projects that solely involve repainting or change in paint color. Painting may be a part of the repair and preparation.

#### Eligible Projects and Funding Priority

**First Priority – Preservation:** focuses on the maintenance and repair of existing historic materials and retention of a property's form as it has evolved over time. Appropriate expenditures include: sash repair, roof and gutter repair, removing artificial or inappropriate siding from the house and restoring with appropriate siding. Preference will be given to projects that do not require Historic Design Review.

**Second Priority – Restoration:** involves removing past alterations to restore a property to its appearance at a particular period of time in its history. Restoration includes projects that repair, or replace in-kind, deteriorated historic features. Funding is also available for projects that preserve the integrity, safety, and stability of the building elevations. Examples of projects include, but are not limited to: decorative features, porch parts, columns, stairs, balusters/handrails, newel posts, porch flooring and porch roofs, windows, doors, siding, foundations and chimneys. Restoration in this category would generally not require Historic Design Review.

**Third Priority – Rehabilitation:** acknowledges the need to alter or add features to a historic building to meet changing needs while retaining the property's historic character. Rehabilitation includes projects that remove incompatible features, alterations or additions and/or restoring missing or altered historic features on facades. Example projects include, but are not limited to the following: removing larger incompatible features and

replacing documented missing features such as gables, porches, porch newel posts, balusters or eave brackets with features compatible with the style. Replacing inappropriate windows or doors (aluminum, vinyl, non-wood) with wood windows or doors compatible with the architectural style. Rehabilitation projects usually involve the replacement of larger historic elements based on interpretation of the historic record and would likely be considered minor alterations that require Historic Design Review.

### **Grant Conditions**

1. Grants must have a minimum match of 50%. Personal labor or “sweat equity” may count towards your match and will be credited at the current minimum wage (unless you are a licensed contractor). The cost of tools may not count toward your project budget. Two itemized contractor’s estimates must be included with your application. **Grant funds will be reimbursed to the owner only when the project is complete and receipts documenting all expenses are provided.**
2. Projects must meet the Secretary of Interior Standards for rehabilitation for the treatment of historic properties (see attached).
3. The repair and/or restoration of missing or altered historic features requires accurate replication of composition, design, texture and other visual qualities substantiated by original plans, photographs or other physical evidence.
4. Before and after photographs must be submitted in electronic format (PDF or JPEG) to document the project.
5. The site is subject to inspection during the rehabilitation by Historic Resources Advisory Board (HRAB) members and/or staff to determine compliance with required design standards.
6. The applicant must also obtain any necessary building permits (if required).
7. Any contractor performing work on the project must be licensed and bonded for that type of work.
8. All receipts and documentation of expenditures must be submitted with photographs of the completed project for reimbursement prior to **June 1, 2020.**

### **Process**

1. Determine if design review is necessary per the Community Development Code. Contact Planning staff if necessary.
2. If design review is necessary, schedule a Pre-Application conference and submit the Historic Resources Rehabilitation Grant application at the same time as the application for Design Review.
3. If Design Review is not necessary, complete the Historic Rehabilitation Grant application and submit it to Planning and Building Services.
4. Planning staff will review for completeness and inform you if additional information is needed.
5. We recommend that you attend the HRAB meeting where projects are reviewed and awarded. Attending the meeting gives you an opportunity to explain your project and how this grant would assist you.
6. Apply for and obtain required building or other permits.
7. Complete the project.
8. Let Planning staff know when the project is complete for an inspection.
9. Submit receipts and/or invoices for reimbursement.
10. Receive the reimbursement.

**Secretary of the Interior's Standards for Rehabilitation** (additional guidelines and other information available at <http://www.nps.gov/tps/>):

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

**Please direct any questions to Paul Espe, Associate Planner at [pespe@lakeoswego.city](mailto:pespe@lakeoswego.city) or (503) 697-6577.**