



Historic Preservation & Education Grants

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Overview

Historic Preservation Grants support projects aimed at preserving, restoring, or rehabilitating properties on the City's Landmark Designation List. The new **Historic Education Grant** structure will serve to elevate community awareness of the forces, events, and stories that shaped Lake Oswego through the creation of educational materials and programs.

FY 2024-25 Allocation: \$20,000

Eligibility

Historic Preservation Grants. Grants to preserve, restore, or rehabilitate historic structures will only be awarded to the owners of property on the City's Landmark Designation List or the National Register. Please contact Paul Espe in Planning and Building Services at 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.

Historic Education Grants. Historic Education Grants may be awarded to any individual, group, or entity that applies for funding to execute a local history project or program. Preference will be given to entities with strong community ties (residents, Neighborhood Associations, Lake Oswego-based non-profits, local businesses).

Funding Priorities

The Historic Resources Advisory Board strives to balance funding awards between **Historic Preservation** projects and **Historic Education** projects. Historic Preservation grant awards are generally capped at \$5,000 per project and Historic Education grant awards are generally capped at \$2,000 per project. Exceptions will be considered.

Within the **Historic Preservation Grant** category, requests will be prioritized as follows:

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.

Historic Preservation Grant - Project Details

*Potential 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. **Soft Cap: \$5,000.***

Historic Preservation Grant Criteria

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. 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 (see below) for Rehabilitation and must be consistent with Lake Oswego Code, Chapter 58 (Historic Preservation).
4. 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.
5. Grants are not awarded for materials already purchased or for work that is already in progress or completed.
6. 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.
7. Before and after photographs must be submitted in electronic format (PDF or JPEG) to document the project.
8. 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.
9. The applicant must also obtain any necessary building permits (if required).

10. Any contractor performing work on the project must be licensed and bonded for that type of work.
11. All receipts and documentation of expenditures must be submitted with photographs of the completed project for reimbursement prior to **July 5, 2025**.

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.

Historic Education Grant - Project Details

*Potential projects include, but are not limited to the following: developing wayfinding signs, reader boards, information kiosks, site markers, street sign toppers, oral history programs, neighborhood tours, or other projects that would help to identify broad patterns of the events that helped to shape Lake Oswego. Information could be drawn from various resources from the mid-century modern period, Iron Industry agricultural heritage or other historic trends that characterizes the city's historic context. **Soft Cap: \$2,000.***

Historic Education Grant Criteria

1. Projects must provide a public benefit to the Lake Oswego community. Projects providing neighborhood benefit and applied for by City-recognized Neighborhood Associations will receive funding priority over homeowner associations and other groups.
2. For physical installations, projects should be located on public land within the boundaries of a City-recognized Neighborhood Association. Physical improvements located on private land in a publicly-prominent location may be eligible on a case-by-case basis.
3. For physical installations, applicants must have the support of the Neighborhood Association in which the project will take place.
4. Applicants must identify and provide detail on who will be responsible for completing the work. This should include the project coordinator(s) and the role of any consultants or vendors, for each element of the proposal.
5. Groups interested in applying for a grant are required to review their project with the grant program coordinator prior to application submittal, and are strongly encouraged to contact the coordinator early in the process to discuss initial ideas. All grant applicants must include email correspondence in their application materials to confirm that they have reviewed their project with the grant program coordinator. Applicants must also include email correspondence to confirm that they have coordinated with other relevant contacts based on project type (i.e. the Parks Department if an installation will take place in a park).
6. Qualifying projects in neighborhoods that have not previously received a grant may receive priority over neighborhoods that have received recent awards. Projects that leverage matching funds or in-kind contributions may also be prioritized.
7. **Be aware**, in order to ensure accountability for public funds granted through the grant process, **grant recipients are expected to have the capacity (capital or credit) to make their own purchases**, follow the grant requirements, and request reimbursement from the City. Projects must be completed before reimbursements are processed. Partial reimbursement requests will not be considered.

Application & Reimbursement Process

1. Determine if design review is necessary per the Community Development Code. Contact Planning staff if necessary.
→ **If your project does not involve construction, skip to step three!**
2. If design review is necessary, schedule a Pre-Application conference and submit the grant application at the same time as the application for Design Review.
3. If Design Review is not necessary, submit the Historic Preservation and Education Grants application (<https://www.ci.oswego.or.us/forms/HEPG>).
4. Planning staff will review your application for completeness and inform you if additional information is needed.
5. We recommend that you attend the Historic Resources Advisory Board 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. If necessary, 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 (pdf format) and photos by email to Paul Espe, at pespe@lakeoswego.city.

To be eligible for reimbursement, expenses must be incurred between July 1, 2024 and June 30, 2025. All reimbursement requests for this funding cycle must be submitted by **July 5, 2025**.

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