2023 Morris County Historic Preservation Trust Fund

APPLICATION WORKSHOP

January 25, 2023

Creation of the Trust Fund

- Morris County voters approved a referendum in November 2002 authorizing the County Commissioners to permit historic preservation funding under the Open Space Trust Fund, as allowed by state law.

- Between 1/8 and ¼ cent of the existing tax for Open Space and Farmland Preservation Trust Fund was to be used for the preservation and acquisition of historic properties, structures, facilities, sites, areas or objects.

Funding Summary
2003~2022 (20 Rounds)

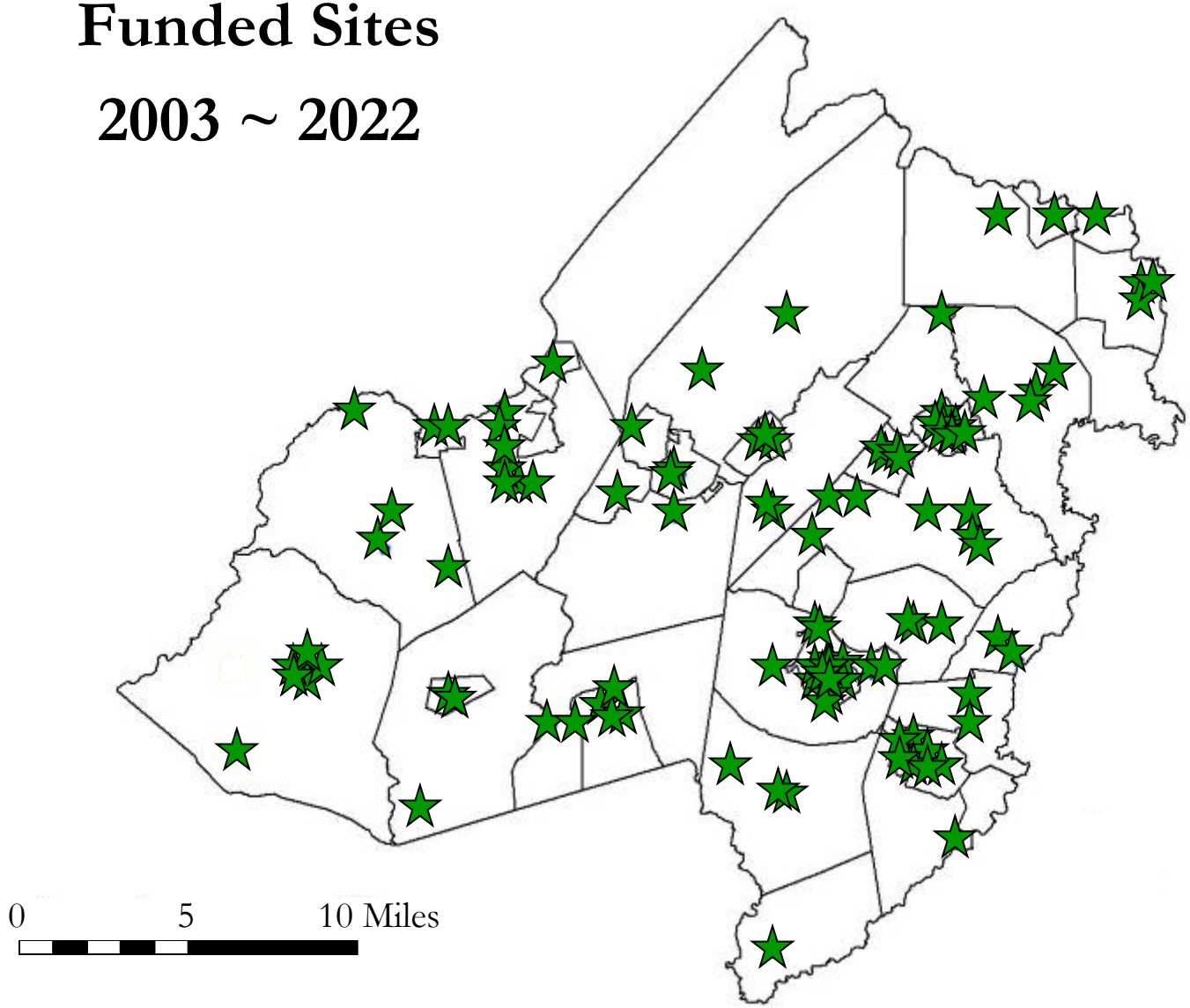
- 626 applications requested $69 million.
- $45 million were awarded through 512 grants to 122 historic sites located in 34 municipalities.
- 273 Construction grants were awarded with a median amount of $129,128
- 239 Non-Construction grants were awarded with a median amount of $22,360

For 2023, about $3 million will be available for the Historic Preservation Trust Fund.

2023 Morris County Historic Preservation Trust Fund

Funded Sites

2003 ~ 2022



ELIGIBLE APPLICANTS

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

ELIGIBLE PROPERTIES

- Located in Morris County
- Listing on the National or New Jersey Register of Historic Places, individually or as part of a historic district listed on the National/State Register.
- If not listed on either Register, property must be certified as eligible for listing by the State Historic Preservation Office, either as an individually listed site or as part of a historic district.
- Any property that is currently used for religious purposes or functions is ineligible for Historic Preservation grant funding.

2023 Morris County Historic Preservation Trust Fund

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

ELIGIBLE ACTIVITIES

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

Cemeteries

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

2023 Morris County Historic Preservation Trust Fund

All proposed activities must be in conformance with

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

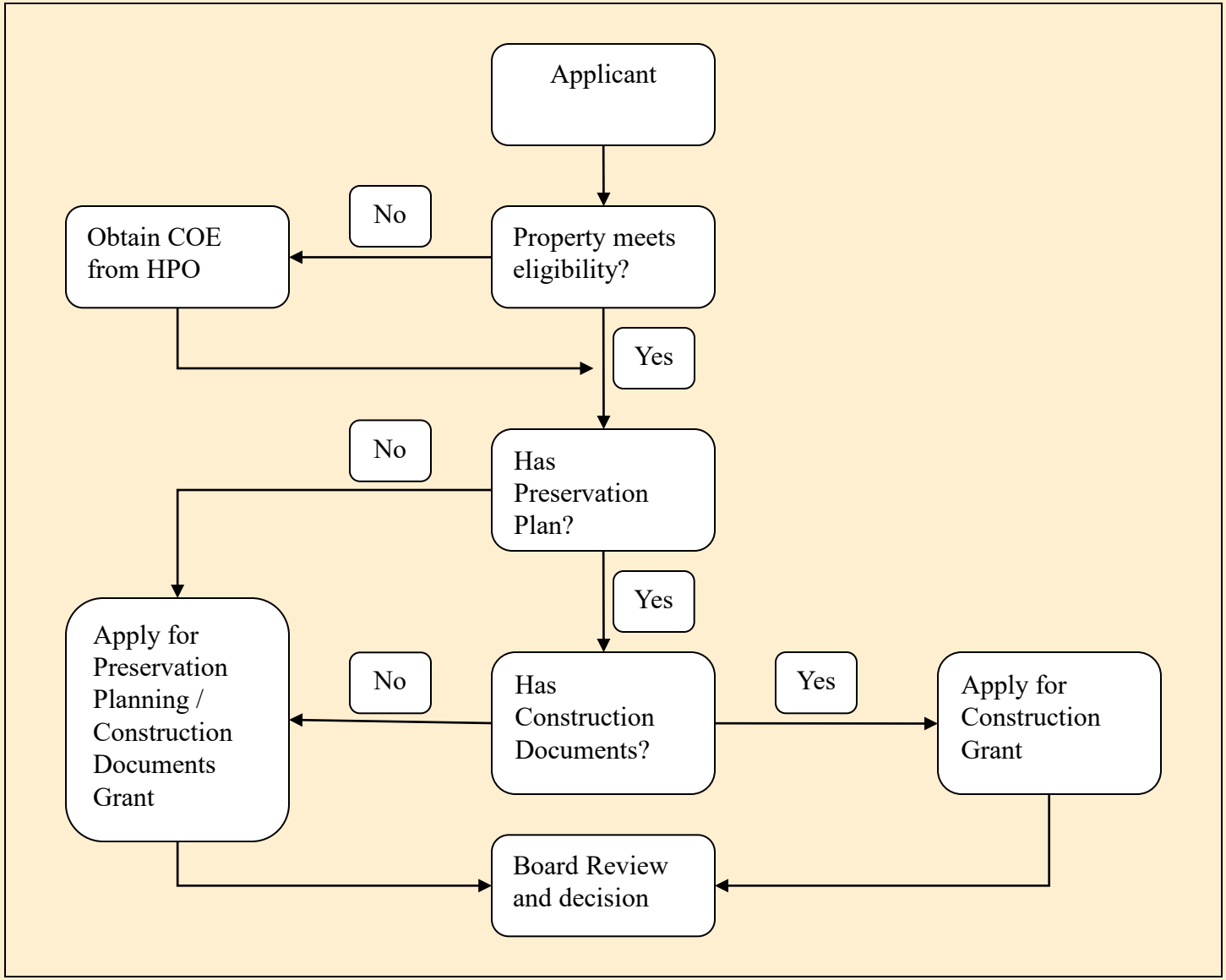
Conformance review by County Consultant approved by NJ HPO

Long-Term Facilities Planning

A preservation planning document, such as a Preservation Plan, Historic Structures Report, Historic Landscape Report, Conservation Assessment must be completed prior to requesting funding for the preparation of Construction Document or for Construction.

All preservation planning documents for County-funded sites can be accessed at Preservation Planning Documents

2023 Morris County Historic Preservation Trust Fund



Typical Timeline (New Project)

July 2023: Grant award (Preservation Plan)

July 2024: Grant award (Construction Documents)

July 2025: Grant award (Construction)

Review Schedule

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

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

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

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

Professional Services Checklist

All applicants seeking funding for

a) Professional Services and/or

b) Construction activities requiring Professional Services

must complete and submit the Professional Services Checklist (available on the website: https://planning.morriscountynj.gov/forms/).

Preservation Plan and Construction Documents – Review

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

Construction Document Review Schedule

- Those projects for which Construction Documents were prepared without HP funding could submit Construction Documents for preliminary review prior to the grant application deadline.

- Completed Construction Documents could also be submitted with a Construction Grant application.

Construction Documents

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

Site: Growing Stage, Borough of Netcong
Applicant: The Children's Theatre of New Jersey, Inc.
Scope: Preservation Plan, Façade Restoration, Exterior Restoration, Structural Upgrades, Fly System

Netcong Auto Body

Site: Acorn Hall Carriage House, Town of Morristown
Applicant: Morris County Historical Society
Scope: Preservation Plan, Phase 1 Restoration, Phase II Rehabilitation, Phase III Interior Rehabilitation

StructurePRO LVL

Site: Former Baptist Church, Township of Mt. Olive
Applicant: Township of Mt. Olive
Scope: Existing Conditions Study, Roof Replacement, Steeple Base, Windows, Exterior / Interior Restoration

EXIT

Site: Morris Canal Lock 2 East, Borough of Wharton
Applicant: Borough of Wharton
Scope: Master Plan, Wall and Gates, Construction Administration

Ownership

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

Ineligible Activities

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

Matching Requirement

Grant Type	Trust Fund pays:	Applicant pays:
Construction	80%	20%
Acquisition	50%	50%
Preservation Planning / Construction Documents		
If > $5,000	80%	20%
If ≤ $5,000	100%	0%

- Applicant shall show evidence of matching funds in hand or demonstrate clearly the ability to match the grant requested.
- Need guarantee from town / other sources in case match source e.g. NJHT grant is not successful.

Easement Requirement

- **An easement agreement with a 30-year term with the County of Morris is required for:**
  a) All acquisition projects and
  b) Construction grants over $50,000, applied cumulatively over any number of funding cycles.

- **Easements are not required for non-construction projects resulting in plan development.**

Unexpended Funds

All unexpended balances will be canceled and returned to the Trust Fund to be made available for the next HP grant round.

Grant Extensions

- Initial extension not to exceed 2 years
- Second extension not to exceed 1 year
  - More than 50% of work must be completed
  - Prove circumstances beyond applicant control
- All extensions are reviewed by the HP Review Board

2023 Review Schedule

Feb. 28	Declaration of Intent due
Mar. 31	Application deadline
May~June	Review Board In-Person site visits Final Presentations via Webex
Late June	Review Board makes funding recommendations to Commissioners
Early July	Commissioners make grant awards

Application Submission

- We are waiving the requirement for paper submission for the 2023 grant applications.
- We will provide a link through which all applicants can submit the digital application materials. The time of receipt of your digital application will be considered the official time of submission of your application.
- If submitting more than one application, please prioritize each project on the application form.

Application Submission

Video

(For all sites that have not provided a video before)

- 10-minute video in MP4 or MOV format
- Historic significance, property setting, general views of the exterior and interior, areas specific to the grant request
- Can use PowerPoint, voice over, save as MP4
- Must be submitted with the application by Friday, March 31, 2023.

Application Review

Site Visit **In-Person**

- 30-minute visit with at least one HP Review Board member and County staff in May
  (Whole Board for new sites)
- No more than 4 applicant representatives

Final Presentation via Webex

- 15-minute video conference with HP Review Board in early June
- PowerPoint must be submitted one week before your final presentation date
- No more than 4 applicant representatives

2023 Morris County Historic Preservation Trust Fund

File Naming Convention
(PDF files)

Application Form	Professional Qualifications
501(c)(3) Documentation	Cost Estimates
By-Laws / Leases	Drawings
Applicant Personnel	Specifications
Register Nomination	Match Commitment
Maintenance Plan	Site Plan / Location Map
Professional Proposals	Long Range Plan
Professional Services Checklist	Preservation Plan Checklist
Photos (Labels)	Certificate of Eligibility

Morris County Historic Preservation Trust Fund

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A StoryMap Celebrating 20 Years of Historic Preservation