

LCHIP

Land & Community Heritage Investment Program



HISTORIC RESOURCE

STEWARDSHIP PLAN

The purpose of a Stewardship Plan is to assist in planning for and carrying out routine maintenance and non-routine projects to be undertaken during the LCHIP Stewardship Term. The Stewardship Plan also serves as central repository for information critical to responsible stewardship of the historic resource. A Stewardship Plan should be a living document, updated regularly as conditions and circumstances change over time.

Developing the Stewardship Plan - The Stewardship Plan may be completed by the Recipient or by a paid (or volunteer) consultant. Any costs associated with completing the Stewardship Plan can be included in the LCHIP project budget. A preliminary draft of the Stewardship Plan must be submitted as part of the Preconstruction Documentation Package, with the final plan submitted with the Final Project Documentation Package.

- Pre-Construction – An outline of the plan, showing at least some sections in draft form. If less than 50% of the Plan is in draft form, an updated draft showing progress in developing the plan should be submitted with the Midpoint Documentation Package.
- Final – A complete Stewardship Plan. To avoid delays in closing out the LCHIP grant, recipients may wish to submit the full report in draft form prior to submitting the Final Documentation Package. Report should be submitted to LCHIP for review and approval prior to submission.

Coordinating the Stewardship Plan, Qualified Preservation Plan, and Current Conditions Report – The Stewardship Plan works in concert with, and refers to, the Qualified Preservation Plan (QPP) and Current Conditions Report (CCR) for the resource (see separate guidance documents). Recipients may find it helpful to work on the CCR and Stewardship Plan simultaneously.

Recipients who have previously received an LCHIP grant may have completed an earlier Stewardship Plan containing much of the required information. Contact LCHIP's Historic Resource Specialists to obtain a copy of an earlier plan.

When a QPP for the resource has been accepted by LCHIP, Recipients may provide references to the QPP and applicable page numbers rather than drafting new text or copying text from the QPP.

STEWARDSHIP PLAN CONTENTS

1. Contact Information – Provide emergency contact information for key members of the stewardship team (e.g. plumber, electrician, building manager and/or contactors with special skills that may be useful in properly responding to maintenance needs).
2. Document Inventory – A brief list indicating where important drawings, plans, and legal documents describing the resource are stored.
3. Safety Considerations (*if applicable*) – In a bulleted list, briefly describe any known floor load limits, hazardous materials, (lead paint, asbestos, etc.) or other safety concerns and/or considerations.
4. Legal considerations (*if applicable*) – Describe any known legal restrictions on use of the resource. For example, include LCHIP approval requirements for future construction or rehabilitation, as indicated in the Grant Agreement. Other

legal considerations may include a donor's requirement that the building be open for certain uses in perpetuity, permitting requirements based upon the property's location in a locally designated historic district; or restrictions binding upon leased properties by the owner; etc.

5. Monitoring and Inspection Program – A description of when and how the resource will be inspected and by whom. Include a description of the extent of the inspection required or provide a template inspection form to ensure a consistent and thorough inspection. LCHIP can provide a template form upon request.
6. Cyclical Maintenance Plan (CMP) – The CMP is the most important component of the Stewardship Plan. The CMP should include a schedule of planned maintenance activities that, if followed, will maintain the building in good condition.

List, in chronological order, each anticipated maintenance activity to be undertaken during the LCHIP Stewardship Term, including a description of the work to be done, the related Preservation Briefs, and a rough estimate of cost. Include non-routine, but planned, improvements (e.g., additions, rehabilitation, etc.). Estimates of cost should reflect appropriate increases for inflation. These estimates will facilitate the planning and fundraising necessary to ensure sufficient financial and other organizational resources are available when needed.

7. Use Guidelines – Develop or describe general recommendations/requirements to educate and inform those who use the resource about how to protect and preserve it. Examples of use guidelines may include requiring that a mat be placed at all points of egress; prohibiting the attachment of decorations or other items to walls or trim; or requiring that all lights be turned off, and windows closed when a room is not in use.

Note: Standardize the use of terms across all LCHIP reports (i.e. Stewardship Plans, Current Conditions Reports, and Qualified Preservation Plans), retaining names and terms used in the QPP where possible. For example, if the QPP refers to the “North Chamber”, referring to that same room in the Stewardship Plan as the “Main bedroom” will confuse future readers and should be avoided.