

# FLORIDA'S HISTORIC PRESERVATION TOOLKIT

*A guide for protecting our state's historic places*

## PROACTIVE PRESERVATION



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### **Florida Trust for Historic Preservation**

The Florida Trust for Historic Preservation is the statewide nonprofit dedicated to protecting Florida's extraordinary history and heritage, and sharing the inclusive and diverse stories of those who came before us. The Florida Trust is a 501(c)(3) charitable nonprofit organization, funded through public support and our members. Founded in 1978, the Florida Trust has collaborated to save irreplaceable Florida treasures like the Historic Florida Capitol and is a statewide partner of the National Trust for Historic Preservation.



### **National Trust for Historic Preservation**

The National Trust for Historic Preservation is a private, non-profit organization dedicated to protecting significant places representing our diverse cultural experiences by taking direct action and inspiring broad public support. For decades, the National Trust has been committed to the goal of ensuring that the full American story is represented in the places we save. As the leading advocate for the protection of significant places and cultural landscapes, we help Americans protect and reuse irreplaceable historic resources; model best practices in stewardship and interpretation through our network of National Trust Historic Sites; and promote investment in historic urban neighborhoods and Main Streets to build stronger communities.

### **Toolkit created with assistance from:**



**Adrienne Burke, AICP, Esq.**  
Community Planning Collaborative LLC  
info@planningcollab.com  
planningcollab.com



**Sarah Marsom**  
Heritage Resource Consultant  
me@sarahmarsom.com  
sarahmarsom.com

### **Design by:**

Karen Essic Creative  
karenessic@gmail.com  
karenessic.com

### **Additional Assistance:**

Bender and Associates Architects  
J.J. Scott, MLD Architects  
David Luna, Cinematographer  
Austin Historical  
Florida Trust Board of Trustees  
Preservation advocates across the state

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## **PROACTIVE PRESERVATION**

### **In this section, you'll find:**

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and Non-Financial Incentives

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Cemetery Friends Group

Finding Partners



Understanding the importance of saving historic building features, like historic windows, is an important part of historic preservation. Photo courtesy: Florida Trust

## PRESERVATION INCENTIVES

### Grants

Grant funding is not available for private properties. Grant projects are for public entities such as counties or municipalities, school districts, state colleges or universities, agencies of state government or nonprofits. Grants are competitive application processes that require management and administration. In many cases, grant applications require the applicant to provide a cash or in-kind match for the amount of award requested.

#### National Park Service

The Park Service provides funding for a variety of projects. Grant requirements and application deadlines vary. Grant programs include African American Civil Rights, History of Equal Rights, Underrepresented Communities, Battlefield Land Acquisition, Maritime Heritage, Historically Black Colleges and Universities, Disaster Recovery and Tribal Heritage. National Park Service grant requirements and application deadlines vary.

[www.nps.gov/history/grants.htm](http://www.nps.gov/history/grants.htm)

#### Library of Congress

The Library of Congress through the American Folklife Center funds cultural heritage projects for field research and documentation within diverse communities. Oral history projects and documentary efforts are examples of eligible projects. Projects are archived at the American Folklife Center.

[www.loc.gov/programs/of-the-people/collect-and-preserve/community-collections-grant-application/](http://www.loc.gov/programs/of-the-people/collect-and-preserve/community-collections-grant-application/)

#### National Trust for Historic Preservation

The National Trust provides funding for a variety of projects. Most grants are for planning preservation projects. Other grants are limited to specific geographic regions or support nonprofit training. The National Trust funds the African American Cultural Heritage Action Fund and Preserving Black Churches grant programs. National Trust grant requirements and application deadlines vary.

[savingplaces.org/grants](http://savingplaces.org/grants)



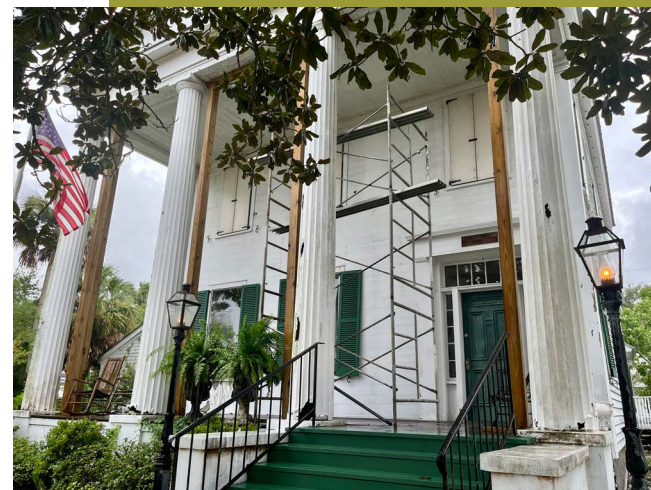
Top photo: The Okahumpka Rosenwald School received a Florida Trust 11 to Save Grant in 2022 to help return the school to public use. Credit: Florida Trust

### Florida Division of Historical Resources

Florida DHR provides grant funds from the State legislature and the National Park Service for preservation and protection of the state's historic and archaeological sites and properties. Two types of grants are available: small matching and special category. Small matching projects include survey, planning, National Register nominations, heritage education and historical markers. These grants are eligible for awards up to \$50,000. Special category grants fund bricks and mortar projects such as preservation, restoration, rehabilitation or reconstruction of historic properties open to the public, archaeological research, museum exhibits for Florida history museums and acquisition of historic properties or archaeological sites. These grants are eligible for awards up to \$500,000. Applications are typically accepted in April/May and project awards are for the following year; for example, applications accepted in 2024 are for projects that would start in 2025. [dos.myflorida.com/historical/grants/](https://dos.myflorida.com/historical/grants/)

### Florida Humanities

Florida Humanities funds development and presentation of humanities-based cultural resources and public programs. Grants include funding for Florida Humanities' speakers, public media, film or digital projects and community projects. Florida Humanities grant requirements and application deadlines vary. [floridahumanities.org/funding-opportunities/](https://floridahumanities.org/funding-opportunities/)



Middle photo: The Debs Store restoration in Jacksonville's Eastside is funded in part by grants from the State of Florida's African American Cultural Heritage Grant. Credit: Adrienne Burke

Bottom photo: The Rainey House Museum in Apalachicola is utilizing a Division of Historical Resources preservation grant to repair elements of the building. Credit: Melissa Wyllie

## Tax Exemptions

### Federal

Tax incentives and exemptions are available for eligible private properties. The Federal Historic Preservation Tax Incentives program is administered by the National Park Service and the Internal Revenue Service. The primary incentive is a 20% federal tax credit that is available for rehabilitation of historic, income-producing buildings. The first place to start with pursuing these federal tax credits is to contact the Florida Division of Historical Resources. There are consultants who assist with federal tax credit applications.

### State

The Florida legislature has authorized two types of ad valorem tax exemptions for historic preservation. These exemptions are found in Florida Statutes 196.1961, 196.1997 and 196.1998. Local governments have to adopt these exemptions as local ordinances. One exemption is available for eligible historic properties that are open to the public, and another exemption is available for rehabilitation projects on eligible historic properties. Properties that are eligible get a percentage of their ad valorem taxes exempted. The business exemption must be renewed annually. The rehabilitation exemption is valid for ten years.

### Preservation Easements

Another incentive for historic preservation exists that can lead to federal tax deductions. These are called preservation easements. A preservation easement is a legal agreement between a property owner and a third party. These agreements lay out restrictions and conditions on the property that help to preserve the property. The third party is responsible for monitoring and enforcing the terms of the agreement. The tax deductions are determined based on approval by the federal Internal Revenue Service. It is recommended that if you are interested in pursuing a preservation easement on your property that you first speak with a land use or real estate attorney.



The Florida Trust hosted a tour of the Union Terminal Warehouse in Jacksonville as part of the organization's work to create a state historic tax credit project. Credit: Florida Trust



The Matheson House in Gainesville has an easement with the Florida Trust for Historic Preservation. Credit: Florida Trust for Historic Preservation

## Other Incentives

Non-financial incentives can also help promote and encourage preservation in a community. These types of incentives provide support and encouragement for historic property owners. They also communicate the value of preservation to a community and elected officials.

## Preservation Awards

Historic preservation award programs are initiatives that recognize and celebrate individuals, organizations or projects that have made contributions to the preservation of historic resources in a community. These awards promote awareness of the value of historic preservation, encourage best practices and inspire others to take on similar efforts. Awards programs could be managed by a city or by a local nonprofit, historic society or museum.

## Educational Workshops

Hosting educational workshops can be a proactive way to help historic property owners manage different projects. For example, a workshop on historic window repair can assist owners by giving them the tools to do work on their properties. Workshops could also be on different topics in historic preservation, such as finding insurance for historic homes, understanding how to prepare for hurricanes in a historic building or current trends in the preservation field. The sky is the limit for educational workshops and potential ideas. Partnering with other organizations can help make the workshop easier to coordinate and bring in different audiences.



Hosting a hands-on workshop like this window session in Fernandina Beach can be a great way to incentivize preservation. The Florida Trust hosts Lunch & Learn workshops. The public is invited to learn about historic preservation during their lunch hour. Meetings are now hosted online. Credit: Sal Cumella

## Be an Advocate

Proactive preservation requires being an advocate. Check out the Preservation Advocacy section of the Toolkit for more detailed information on preservation advocacy. Some ways you can generally help advocate for historic resources are:

**Educate:** Spread the word about the importance of historic preservation. Share histories, host events and educate others about the cultural, economic and environmental benefits of preserving our past.

**Explore:** Visit historic sites, museums and landmarks and invite others. By experiencing our history, you gain appreciation for its significance and inspire others to do the same.

**Celebrate:** Attend heritage festivals, exhibitions and events. Celebrating our history helps create a sense of pride and unity within our communities.

**Document:** Help record and document oral histories, photographs and artifacts. These memories and artifacts contribute valuable information about our heritage, families and communities.

**Advocate:** Engage with your city, town, county, local organizations and state and federal elected officials to advocate for policies that protect and support historic preservation efforts.

**Volunteer:** Get involved in preservation projects. Whether it's restoring a historic building, cataloging historic documents or leading tours, you can be a steward for local heritage.

**Donate:** Your financial support can support restoration projects, educational programs and awareness campaigns that share the value of our history.

## HISTORIC RESOURCE SURVEYS

Identifying and documenting historic places is important for a number of reasons and a great way to do proactive preservation. One of the most common ways this is done is through a historic resource survey. This is a project that records information about historic buildings and properties and includes photos of the site. In Florida, this information is recorded using the Florida Master Site File. FMSF information is kept with the Florida Division of Historical Resources.

Historic resource surveys can help to:

- Identify and protect historic resources that are at risk of being lost.
- Tell government agencies where historic sites are located.
- Inform planning and land development decisions.
- Provide information for National Register nominations and local designations.
- Assist in education and public awareness about historic places.
- Promote economic development by attracting tourists and businesses to historic areas by sharing information about the community history.
- Increase community pride and sense of place.
- Serve as a basis for requesting grant funding for historic places.

Surveys are usually done by consultants who specialize in this work. The Florida Trust for Historic Preservation is a good resource for finding out who does historic resource surveys. They are most commonly funded and managed by a local government or nonprofit organization. Surveys are good candidates for grant funding.

Survey team documenting the Dozier School for Boys as part of the Jackson County Historic Resource Survey. Credit: Johnson, Mirmiran & Thompson, Inc.





Florida Trust for Historic Preservation and the Division of Historical Resources working together to do a Main Street Survey. Credit: Mark Krancer

## CONTINUING EDUCATION

Staying up to date in historic preservation is essential for keeping up with changes in a dynamic field. Preservation is in a state of evolution. Understanding conversations in the field can help you be proactive in your community.

The Florida Trust for Historic Preservation and Florida Main Street partner each year to host an annual conference, Preservation on Main Street. The location changes, but the educational sessions are great for people interested in learning more about the latest in historic preservation.

National organizations like the National Trust for Historic Preservation and National Alliance of Preservation Commissions also offer conferences and online learning opportunities. Some of the NAPC webinars are available on their YouTube channel.

### Send Information to the Florida Master Site File

#### PRO TIP

The Florida Master Site File is an official inventory of documented historic and cultural resources. Resources listed on the Site File include archaeological sites, historic structures, historic cemeteries, historic bridges and historic districts, landscapes and linear features. There are over 200,000 cultural resources included on the Site File.

The Site File is the first place government agencies and design professionals in Florida will look for information on historic sites, including cemeteries. So it is very important to make sure places are included. When a historic site is not documented, it is more at risk and there is less information available. Having sites on this list is a great first step in helping a historic site.

Anyone can submit a Florida Master Site File form. There is no cost to submit a form. Being listed on the Master Site File does not apply any rules or regulations to a property. Forms can be updated anytime when more information becomes available. Staff at the Florida Master Site File can assist you in finding out if a building or site is already included or not.

Sites associated with women and historically excluded communities are underrepresented on the Florida Master Site File. Having more sites associated with these communities documented on the Florida Master Site File is needed.

You can reach FMSF staff at [sitefile@dos.myflorida.com](mailto:sitefile@dos.myflorida.com) or at (850) 245-6440.



Left; Preservationists get together and network during a coffee session at Preservation on Main Street, Ocala 2023. Credit: Adrienne Burke  
Right; Panelists and Kathie Beck with Florida Main Street at a Preservation on Main Street session, Ocala 2023. Credit: Adrienne Burke

## BEING CLIMATE READY

Stronger hurricanes, increased extreme weather events, routine nuisance flooding and predicted elevated sea levels are facing all coastal communities in Florida. The majority of Florida's population lives along the coast so historic property owners need to be prepared.



Having an emergency plan for vulnerable historic structures, like this fishing cabin in Charlotte County, is extremely important in light of rising seas and increased storm events. Credit: Melissa Wyllie

Knowing how to be ready before and after a weather event is critical. Here are some considerations to think about when planning for climate impacts and historic buildings:

### Before an Event

- Assess any building weaknesses in the roof, windows, doors and foundation and have them repaired.
- Have an emergency plan that includes evacuation procedures, emergency contacts and steps for securing anything valuable or vulnerable like historic documents or artifacts.
- Protect windows and doors with storm shutters or plywood.
- Secure any outdoor elements.
- Elevate important and/or historic materials inside or outside above potential flood levels.
- Shut off utilities and get a generator if needed.
- Trim overhanging branches or remove dead trees and limbs.
- Document the structure with photos so you have a record.

### After an Event

- Ensure your safety before entering the building and be mindful of any safety hazards like downed power lines, flooding or a potentially unsafe structure. Do not enter the building if these situations have not been addressed.
- Contact your local government to understand any steps for taking emergency protective action for your building.
- When it is safe, conduct an assessment of the building.
- Document any damage with photos and written descriptions.
- Prioritize areas that need immediate attention. Take temporary measures to secure or protect damaged areas such as putting tarps on the roof and boarding up windows or openings.
- Remove standing water as quickly as possible. Before removing any flooring or walls, use dehumidifiers or fans for drying. Plaster and wood may not need to be removed as it is more water resistant than modern materials.
- Salvage and store any historic building materials that can be reused during any restoration process.
- Engage with local and state preservation offices to understand options for restoration.
- When things have calmed down, create a plan with lessons learned to help prepare in the future.





The House of Refuge in Stuart has a seawall. This is an adaptation measure to help protect the building. Credit: Adrienne Burke



Evaluating damage as soon as possible after an event is critical. This building in Warm Mineral Springs Park in North Port was a candidate for a damage assessment. Credit: Florida Trust for Historic Preservation

Longer-term proactive solutions that may help a historic property is known as adaptation. Adaptation means making changes and adjustments to a property that will help it be better protected from climate impacts such as flooding and sea level rise. Adaptation measures for historic buildings to protect from flooding could include:

- Site and landscape modifications
- Protection of utilities and mechanical equipment
- Dry floodproofing
- Wet floodproofing
- Filling basements
- Elevating building foundations
- Elevating building interiors
- Abandoning the lowest floor
- Moving the building

Adaptation measures for wind damage from hurricanes may include adding bracing to a roof, obtaining storm windows for historic windows or installing hurricane shutters. It is advised to work on adaptation measures during the winter or early spring before hurricane season starts.

Work with your local government before making any changes to your property to understand the process you may have to follow.



Staff at Vizcaya in Miami do a test deployment on a temporary storm protection measure called a Tiger Dam. It is important to test any storm protection measures in advance to ensure they will be ready for an event. Credit: Adrienne Burke



Water intrusion from Hurricane Ian caused structural damage in this home, resulting in the collapse of their ceiling. Credit: Florida Trust

**PRO TIP**

**Check Out the Secretary of the Interior's Guidelines on Flood Adaptation**

The National Park Service issued a helpful document looking at best practices in flood adaptation for historic buildings. These practices comply with the Secretary of the Interior's Standards for Rehabilitation. The document goes into detail on different types of flood adaptation and what is and is not recommended for historic buildings.

Learn more: [www.nps.gov/articles/000/guidelines-on-flood-adaptation-for-rehabilitating-historic-buildings.htm](http://www.nps.gov/articles/000/guidelines-on-flood-adaptation-for-rehabilitating-historic-buildings.htm)  
[www.nps.gov/orgs/1739/upload/flood-adaptation-guidelines-2021.pdf](http://www.nps.gov/orgs/1739/upload/flood-adaptation-guidelines-2021.pdf)

# PROACTIVE CEMETERY PRESERVATION: CREATING A CEMETERY FRIENDS GROUP

One way that interested citizens and volunteers can help take care of cemeteries is to form a Friends group.

Friends groups are volunteers who come together to support a cemetery or cemeteries. The volunteers may donate time, political support, money or supplies to help a cemetery. It does not matter how small the cemetery, people can form a Friends group. Friends groups may be formal or informal. The key component is having people come together to help the cemetery. One very important thing to consider is that the Friends group is able to continue working over a long period of time or have plans for future volunteers, as maintenance and care of a cemetery is ongoing.

The Association of Gravestone Studies has created a Guide to Forming a Cemetery Friends Organization. This document provides information on how to form a group, what types of planning and projects the group can do, finding volunteers, event planning and resources for funding.

[www.gravestonestudies.org/images/Field%20Guide\\_Cemetery\\_Friends\\_Web.pdf](http://www.gravestonestudies.org/images/Field%20Guide_Cemetery_Friends_Web.pdf)

There are many active Friends groups across the country to look to for examples. While in most cases these groups are in partnership with cemeteries that are owned by local governments, Friends groups can be organized for privately-owned cemeteries too.

- **Friends of Bosque Bello** (Fernandina Beach, FL) The Friends of Bosque Bello organized in 2018 to advocate for historic Bosque Bello cemetery in Fernandina Beach. The organization is affiliated with the Amelia Island-Fernandina Restoration Foundation. For more information, contact: [friendsofbosquebello@gmail.com](mailto:friendsofbosquebello@gmail.com).
- **Friends of Decatur Cemetery** (Decatur, GA) The Friends of Decatur were founded in 1993 and work closely with the City of Decatur to preserve, maintain and educate the community about historic Decatur Cemetery. [www.decaturga.com/publicworks/page/friends-decatur-cemetery](http://www.decaturga.com/publicworks/page/friends-decatur-cemetery)

- **Friends of Mount Moriah** (Philadelphia, PA) The Friends of Mount Moriah were founded in 2011 and have worked to restore the cemetery, coordinate volunteers and clean-up events, and provide education about this historic cemetery. [friendsofmountmoriahcemetery.org](http://friendsofmountmoriahcemetery.org)
- **Friends of Jacksonville's Historic Cemetery** (Jacksonville, OR) The Friends of Jacksonville's Historic Cemetery are active volunteers that work on maintenance, restoration and preservation efforts in the cemetery. They have a cemetery block adoption program that connects volunteers with care for a specific section of the cemetery. They also conduct historic research, lead tour groups and provide education to the community. [www.friendsjvillecemetery.org/our-volunteers.html](http://www.friendsjvillecemetery.org/our-volunteers.html)
- **The Friends of Eastern Cemetery** (Louisville, KY) The Friends of Eastern Cemetery was founded in 2014 and organizes clean-up events, community education through events and provides education to other cemetery groups in the area about proper maintenance and care of cemeteries. [friendsofeasterncemetery.com/about/](http://friendsofeasterncemetery.com/about/)
- **Friends of Ancient Cemetery** (Yarmouth, MA) The Friends of Ancient Cemetery was founded in 2018 and is dedicated to the preservation, protection and promotion of Ancient Cemetery. They organize clean-up events, headstone cleaning, documentation of the cemetery and conduct historic research. [www.friendsofancientcemetery.org](http://www.friendsofancientcemetery.org)



The Friends of Bosque Bello in Fernandina Beach hold an organizing meeting at the local library and gather at the cemetery to do a headstone cleaning event. Credit: Adrienne Burke

# FINDING PARTNERS

Historic preservation is done in a range of ways. You can be a preservationist by supporting legacy businesses (businesses that have been around 30+ years); you can be a preservationist by visiting historic sites on vacation or you can be a preservationist by living in an old home.

As you seek out information on your historic building, the community you live in and/or other interesting aspects of the past, it is important to recognize that there are a wide range of organizations and individuals who are working in historic preservation. Any organization does not have to have history or historic preservation in its name and/or mission statement to be considered a valuable historic preservation resource.

Some of the community resources who may help you along your historic preservation journey include:

**Local Library/Archives**

**Local Historical Society**

**Neighborhood Nonprofits**

**Community Development Corporations**

**Main Street Organizations**

**Arts Organizations**

**Placemaking Organizations**

You can find a preservation community in all kinds of organizations. These organizations are doing preservation in ways that provide housing, tell stories through art, preserve documents and more.

## PRO TIP

### Get to Know Florida Main Street

Florida Main Street may be a great partner for your historic community. Main Street is a technical assistance program run through the Florida Division of Historical Resources. The program goal is revitalizing historic downtowns and encouraging economic development within the context of historic preservation.

Florida Main Street has been working in communities since 1985. The Florida program is a part of a network of over 40 nationally recognized programs throughout the United States.

You can find out if your community participates or how to participate at [dos.fl.gov/historical/preservation/florida-main-street/](https://dos.fl.gov/historical/preservation/florida-main-street/) or contact the Main Street office at (850) 245-6345.



*Clockwise from top left:*

Universities can make excellent preservation partners in working with professors and students. Here Florida State University students visit with the Florida Trust. Credit: Florida Trust for Historic Preservation

The Florida Trust, partnered with Florida Main Street, hosting a charette for preservationists, city planners and Main Street officials. Credit: Florida Trust for Historic Preservation

Team members working on a cultural heritage trail project in the LaVilla neighborhood of Jacksonville attend a workshop with several community members. Team partners are Community Planning Collaborative, Carla Mechele Media and Ashanta Williamson & Company. Credit: Ennis Davis

Secretary of State Cord Byrd supports historic preservation and has spoken at many Preservation on Main Street events. Credit: Florida Trust for Historic Preservation.

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