

2022-24 Strategic Plan

Department of Historic Resources [423]

Mission, Vision, and Values

Mission

The Department of Historic Resources (DHR) encourages and supports the stewardship and use of Virginia's significant architectural, archaeological, and historic resources as valuable assets for the economic, educational, social, and cultural benefit of citizens and communities.

Vision

We envision a future for Virginia where historic places are recognized and managed as valuable and irreplaceable economic, cultural, and educational assets for the benefit of individual property owners and for the communities in which we live, play, and work--and where people recycle buildings as routinely as they recycle cans and glass. We also envision the Department of Historic Resources as a nationally recognized historic preservation and customer service agency that provides the tools and the leadership to inspire and assist property owners, community members, developers, local governments and public agencies to ensure that Virginia's historic buildings, districts, sites and other historic properties are appropriately considered in public and private decision-making, effectively preserved and used for the benefit of our communities today and for many generations to come.

Values

- Transparency
- Integrity
- Customer Service
- Inclusiveness

Agency Background Statement

Established as the Virginia Historic Landmarks Commission in 1966, the Department of Historic Resources (DHR) helps citizens, state and federal agencies, and communities to reach their respective economic, education, and historic preservation goals and promotes the use of historic resources to build a better future for the Commonwealth of Virginia--supporting conservation and historic preservation goals, tourism and economic development, emergency and climate change preparedness, and education. DHR is a small agency with a large and complex mission and programs with high expectations for performance both internally and externally and a strong commitment to citizen access. Its organization and services have evolved over the decades fulfilling both state and federal mandates as Virginia's State Historic Preservation Office (SHPO).

Agency Status *(General Information About Ongoing Status of the Agency)*

DHR will continue to conduct studies and projects that support both preparedness for and responses to rising sea level and extreme weather conditions associated with ongoing climate change. In response to Executive Order 64, staff will continue to encourage good stewardship of state-owned historic resources. To that end, DHR is directed by law (§ 10.1-2202.3) to prepare a biennial report on the stewardship of state-owned property that identifies significant resources that are eligible for listing on the VLR but are not yet listed landmarks. The 2023 Biennial Report on the State Stewardship of Historic Properties will build on priorities identified in earlier reports, such as improving resiliency of state-owned historic properties to sea-level rise and caring for documented and undocumented cemeteries on state land. Review staff will continue to work with state officials to meet these goals amid increased demands placed upon them by the review of ongoing large, complex infrastructure projects in order to help state agencies become better stewards of lands and buildings. In addition, Executive Order 64 encourages state agencies, authorities, departments, and institutions of higher learning to pursue listing on the VLR historically significant properties they own or control, especially those related to the history of African Americans, Virginia Indians, and women, to utilize DHR's state highway marker program to educate the public about Virginia's rich history, and to prepare preservation plans to guide stewardship of historic properties under their control.

DHR will also continue to ensure inclusiveness in relevant programs to make them both accessible to and representative of the full range of stakeholders and cultural and ethnic influences in Virginia history. Lastly, through our partnership with the Virginia Department of Transportation, DHR will continue to work to utilize technology to enhance the accessibility of information in VCRIS, Virginia's Cultural Resource Information System.

Information Technology

Major IT investments underway include:

Expanding DHR's network storage space from 2TB for all agency files to 3TB for general file storage plus a separate storage area within VCRIS for digital archives relating to specific properties in DHR's inventory. This will allow staff to do business effectively and decrease risks associated with inadequate digital preservation of files.

Enhancements to VCRIS, that will continue to improve the service it provides to the customer base, and in particular VDOT, which is a major partner in the development and use of the cultural resource information system, and continued planning and implementation of upgraded components.

DHR continues its partnership with the Virginia Museum of Fine Arts. In January of 2019, DHR entered into a Memorandum of Understanding with the Virginia Museum of Fine Arts in order for both agencies to most effectively meet their information technology needs. Through this partnership, VMFA has provided to DHR an AITR and manages DHR's IT needs and operations; in turn, an ISO using DHR existing funds and MEL supports both DHR and the VMFA.

Information Technology Plans/Needs:

Development of a tax credit database is critical to DHR's ability to record, analyze, and provide information and statistics on tax credit projects and the program as a whole.

Digital storage capacity continues to operate at critical mass for the agency, and further investments will need to be made in the immediate future. Additional server space cost estimates are averaging an additional \$24,000/year.

Both a Collections database and a Digital File Management System are needed in order to continue to responsibly steward and manage the Commonwealth's significant artifacts and cultural information.

Workforce Development

The DHR workforce is faced with the need to service programs that continue to grow in both numbers and complexity. There is an increasing demand for legal expertise in order to minimize the risk particularly in the Easement program, a high-impact and high-profile program area. The growing program/legal complexity is expected to continue for the foreseeable future.

In addition to this challenge, both staff recruitment and retention issues face the agency as a whole, with particular difficulties in filling positions in the administrative division. Even though staff salaries have been increased in recent years, DHR still does not keep pace with other larger state agencies with larger budgets. Turnover in the Administrative Services Division is typical every few years; therefore, no institutional knowledge is built or maintained consistently. Vacant positions are difficult to fill, requiring these positions to be posted numerous times creating lengthy periods of existing staff taking on additional full workloads, placing a huge burden on staff that do remain.

Staffing

Authorized Maximum Employment Level (MEL)	54
Salaried Employees	45
Wage Employees	16
Contracted Employees	2

Physical Plant

The Department of Historic Resources currently has 3 leases throughout the Commonwealth in support of its mission. The total annual lease amount paid in FY 22 was \$450,644. The overwhelming majority of annual lease fees pay for headquarters office space in Richmond which houses 40 of our 45 FTEs. Other leases include those of our Northern and Western regional offices at Stephens City and Salem which house collectively 5 FTEs. Management of these leased spaces is a collective effort between DHR and the Department of Real Estate Services (DRES). In 2021, DHR received funding to expand the collections repository space on the first floor by nearly 7,000 square feet and archives and office space on the third floor. In 2022, DHR received \$360,000 for the design and build of a compacted shelving system to address storage needs in the expanded collections space. DHR will be working with a consultant to design and build a system that meets federal standards for curation and conservation and provides for appropriate access to our more than six million artifacts to a variety of constituents in an appropriate manner.

DHR, with the assistance of DRES, renegotiated its lease in 2017 with the Virginia Historical Society for another ten years. As of August 2022, the lease with the Stone House Foundation for the Northern Regional Office in Stephens City is under negotiation.

Key Risk Factors

1. Changing Demographic Pressures on Historic Resources: There are several population and related trends that strongly impact historic assets in communities throughout Virginia.
 - A. A movement out of suburbs and back into city cores provides both an opportunity to rehabilitate urban residential neighborhoods and adaptively reuse older commercial and industrial buildings (as has been done with great success in Richmond, Roanoke, Norfolk, and Arlington for example), but can also pose threat if less visionary development leads to large-scale demolition of historic assets.
 - B. Growing transportation and energy needs put pressure on historic communities, landscapes, battlefields, and archaeological sites with new roads, widening of existing roads, and the construction of commercial renewable energy projects and major power lines to support a growing digital economy. Such large projects often need detailed studies and must balance competing social and economic priorities. Impacts to historic resources are best considered early in the planning process to avoid or minimize unexpected consequences and potentially damaging conflict.
 - C. Deterioration of rural and agricultural resources when people and industry move away from communities (particularly in Southside and Southwest Virginia) can be nearly as damaging to historic places as rapid development—including the trend of clearing land for industrial parks in the hopes that someone will come to the region to use those cleared areas in the future.
2. Climate Change/Rising Sea Level/Catastrophic Storm Surges: From prehistoric and colonial archaeological sites to Historic Jamestowne, Tangier Island, and Fort Monroe, virtually all historic resources in Virginia's Atlantic and Chesapeake coastal areas are extremely vulnerable to changing weather patterns and rising waters. Regardless of the causes, increased flooding, changing shorelines, and potential loss of historic fabric in hundreds of coastal communities are realities that need careful and meaningful study, preparation and response. DHR's identified Climate Change Impact Area includes NOAA 5' sea level rise projection data combined with VDEM's Category 4 hurricane storm surge data. Nearly 12% (23940) of recorded architectural properties and 9% (4624) of recorded archaeological sites are at risk, including 1167 properties listed on or eligible for listing on the Virginia Landmarks Register and the National Register of Historic Places. Recent surveys of the Chesapeake Bay and Atlantic shorelines and inland rivers statewide have indicated devastating losses and continued threats to both archaeological and architectural historic resources. With knowledge of known sites, coupled with a threat analysis, a comprehensive action plan needs to be developed to recover data before it is lost forever.
3. IT Costs and Demands: The rising cost of basic services and the ongoing costs of electronic storage space are large issues, especially for a small agency with no dedicated IT budget or funding. Having completed overhauling the agency's online historic resources inventory (VCRIS) and developing the nation's first on-line project review/data-sharing system (ePIX), the agency needs both to maintain and continue to enhance these systems amid rising costs. Further, new systems need to be developed to integrate related program records and management. Paper records on more than 700 easements, thousands of rehabilitation projects, and thousands of publicly-funded or licensed projects and more than 200,000 historic places need to be digitized. As DHR's digital data store increases, so does the ongoing cost of storage.
5. Workforce Capacity and Continuity: Primary factors affecting the workforce are the high volume of demand and complexity of the work, the changing nature of historic preservation services, and the market competition from other agencies and the private sector. In addition, 13% of the agency staff are eligible for retirement beginning in this biennium and into the next.

Finance

Financial Overview

The Department of Historic Resources (DHR) carries out a variety of programs that encourage the preservation of Virginia's historic resources. Preservation programs include (but are not limited to) the Virginia Landmarks Register, Review of State and Federal Projects, State and Federal Historic Rehabilitation Tax Credits, Easements, Historical Highway Markers and Archaeological programs. Also, DHR administers grants to non-state entities under the Financial Assistance for Historic Preservation program. Administrative Services consists of Budget Management, Human Resources, Procurement, Fiscal, and Grants Administration. 75% of Administrative Services Appropriation is general fund and 25% non-general funds. The Director's Office carries out and oversees such functions as policy and planning, communications, and information technology. DHR's funding comes from general funds, federal appropriation and grants, the Commonwealth Transportation Fund, fees for participation in the historic rehabilitation tax credit program and easement program, archives research, and curatorial fees. Other sources include sales and royalties from publications, copy machine fees, interest, federal grant cost recoveries, and occasional private gifts and donations.

Biennial Budget

	2023 General Fund	2023 Nongeneral Fund	2024 General Fund	2024 Nongeneral Fund
Initial Appropriation for the Biennium	36,310,796	3,614,068	10,587,956	3,614,068
Changes to Initial Appropriation	0	0	0	0

Revenue Summary

Revenue is generated through the fees charged for review of state rehabilitation tax credit applications. The fees are paid by all applicants and are based on the estimated project cost (Part 2 application: Description of Rehabilitation) and the actual project costs (Part 3 application: Request for Certification of Completed Work). These application fees are paid for review of the proposed project by DHR tax credit staff, which returns comments on the scope of work or completed project. These fees support the administration of the tax credit program and the staff resources and expertise necessary to review the projects and provide guidance to applicants on appropriate preservation treatment. Additional revenue is generated by Easement Administrative Fees, which assist the agency's capacity to accept new easements while sustaining its commitment to the protection of those historic resources already under easement. The acquisition and stewardship of perpetual preservation and conservation easements requires a substantial commitment of resources on behalf of the Commonwealth. These fees for specific activities related to new and existing easements help to offset the costs associated with numerous factors including the number and complexity of the historic resources protected, additional restrictions necessary to meet the requirements of grant funding, the property's proximity to areas experiencing substantial growth and development, and relationships with grant funding entities and co-holders.

Each year DHR applies for and administers a Historic Preservation Fund grant received from the National Park Service, the amount of which is based on a complex funding formula. In addition, DHR frequently receives special federal grants, most frequently though not exclusively from the National Park Service. Applying for, administering, and reporting on these federal grants is very time-consuming and involves multiple staff. In addition to the revenue described above, a very modest amount of revenue is also generated from the sales and royalties of publications as well as private gifts and donations.

The private sector, state and federal agencies, and planning departments provide revenue by licensing access to the Virginia Cultural Resource Information System. These fees provide the bulk of the revenue needed on an annual basis to host, maintain and develop the software and the data it collects. Fees earned by VCRIS can be expected to grow depending on the amount of economic development activity ongoing in the Commonwealth as the information service provided by VCRIS informs decisions essential to project design and execution in the areas of transportation, construction, energy transmission, and communications. On a much less substantial basis, the Archives area of the Agency collects user fees for services provided to researchers from both the public and private sector.

Agency Statistics

Statistics Summary

Virginia has long been nationally recognized for having both an abundance of nationally important historic places and one of the leading historic preservation programs in the nation. The cultural and economic value of Virginia's historic assets has been confirmed in study after study. Similarly, programs and services of the Department of Historic Resources (DHR) touch virtually every state and federal agency and every community across the Commonwealth. The following statistics illustrate the breadth of services provided by DHR and are based on both state and federal fiscal year 2016 data:

Economic impact of the state and federal historic rehabilitation tax credits (since 1997) – \$5.16 billion

National ranking for rehabilitation plans approved (National Park Service; federal fiscal year 2022)-- 4

National ranking for listing historic properties (buildings, sites, districts) in the National Register of Historic Places (National Park Service; federal fiscal year 2022)--2 Total number of historic preservation easements – 677 as of the end of fiscal year 2022

Total number of acres preserved through historic preservation easements – approximately 77, 600 acres

Total number of Civil War and Revolutionary War battlefield acres preserved by Virginia Battlefields Preservation Fund (2006-2021) – 9,960

Number of requests received and handled to review and advise on state or federal projects (2022) – 3,660

Statistics Table

No data

Customers and Partners

Anticipated Changes to Customer Base

DHR's customer base includes individuals, agencies, and organizations that own or otherwise benefit from historic resources. Stakeholders deal directly with DHR to register historic homes and commercial buildings and seek guidance and incentives to rehabilitate buildings, to conduct research on Virginia history or to support sound private and public decision-making, or, perhaps most importantly, to use historic places as platforms for educating both children and adult learners. They also include travelers and citizens who experience the economic, cultural, and quality of life benefits of tourist attractions and livable historic communities. Demand for and reliance on DHR services from one customer group to another varies greatly depending on the nature of the service (e.g. educational materials vs technical assistance) and on changing economic situations of the customers/industry served. For example, as economic pressures affect both public and private construction, the number of projects on which DHR is consulted may go down, but the complexity of requests may increase because the requesting organization or agency lacks experience and expertise. Overall, the numbers of customers tend to be relatively stable, but the service they require continues to grow. The number of historic property owners continues to grow as Virginia's building stock ages, as more historic properties are identified, and as more owners choose to place those properties under protective easements. For example, in the past decade, the number of easements that DHR oversees has risen from roughly 200 to nearly 700.

Current Customer List

Predefined Group	User Defined Group	Number Served Annually	Potential Number of Annual Customers	Projected Customer Trend
Consumer	General public and tourist	500,000	8,300,000	Stable
Higher Education Institutions	Scholars and researchers	300	2,000	Stable
Local or Regional Government Authorities	Local governments	45	300	Increase
Underrepresented	Native American tribes and other Native American groups	11	11	Stable
Non-Profit Agency (Boards/Foundations),	Historic attractions and museums	60	700	Stable
Non-Profit Agency (Boards/Foundations),	Non-profit organizations that purchase, conserve, and manage Civil War battlefield lands and easements	7	10	Stable
Organization	Memorial associations and other organizations caring for the graves of Confederate and Revolutionary War Veterans and certain African Americans	380	450	Increase
Organization	Preservation organizations and professionals	100	600	Stable
Property Owner	Owners of historic properties	1,000	100,000	Increase
State Agency(s),	State Agencies that own or impact historic resources	630	80	Stable
Student	Students, teachers, and educational institutions	2,000	1,000,000	Stable
Federal Agency	Federal Agencies	70	80	Stable

Partners

No data

Major Products and Services

Agency products and services are a closely interwoven and inter-dependent set of tools used to identify, evaluate, protect, and recognize historic resources. Other programs guide and support a wide variety of stakeholders as they ensure that Virginia's rich history continues to play a role in building an economically and environmentally strong future for the Commonwealth, its citizens, and its communities. The agency's mission-critical services include:

- Surveys to identify and share information about buildings, sites, districts, objects and structures of national, state and local historic significance
- The Historical Highway Markers Program to recognize historic places and educate the public about their significance
- State and National registers to honor and document the significance of historic places and inform the rehabilitation tax credit and environmental review responsibilities discussed below
- An archive available to the public for purposes of research and a constantly expanding online cultural resource inventory of 270,000 records detailing individual properties, sites, and districts. Records are accompanied with the evaluative information regarding historic significance, and specific mapping and geographic information essential for infrastructure and development project planning.
- Review of proposed historic rehabilitation projects and technical assistance to property owners to ensure the work conducted meets the program requirements in order to qualify for tax credits. Potential changes to the state and federal tax credit programs may impact the volume of new tax credit applications; staffing changes within the National Park Service office that administers the federal program may also affect how applications are processed. DHR's aging IT infrastructure hinders the ability to collect, analyze, and distribute data on the program and projects; accessibility and accuracy of this data is critical to providing the Executive Branch agencies, General Assembly, and public with information on the program.
- Protection of historically significant properties (including buildings, structures, archaeological sites, battlefields, and cultural landscapes) through perpetual historic preservation and conservation easements, and partnership with owners in the stewardship of such properties to ensure compliance with easement and appropriate treatment of historic resources. If state and/or federal grant funding increases, DHR would be challenged to meet higher demand for new easements that are required as a condition of the grant with current staffing levels. DHR's ability to execute new easements would also be impacted if staffing levels at the Office of the Attorney General are reduced. So too, DHR's stewardship and monitoring responsibilities increases as the portfolio of protected properties expands each year.
- Environmental review of major state and federally funded, permitted, or licensed projects that may affect significant historic resources.

While streamlining agreements have reduced the overall number of projects that require DHR's review, recent Federal pandemic response and infrastructure programs and engaged stakeholders who often oppose larger development have resulted in a dramatic increase in the complexity of projects reviewed by DHR and the resources needed to complete those reviews. Controversial public utility projects, including gas pipelines, electric transmission lines, and renewable energy, dramatically expand the demands on review staff. Such projects significantly increase the volume of cultural resource studies that must be professionally reviewed, generate high public interest resulting in a rise of general inquiries and information requests under the Freedom of Information Act and require DHR to take a leadership role in complex mitigation plans developed to address historic resource impacts. Technical assistance to localities in the review of projects subject to local ordinances and other projects that may affect significant historic resources.

- Grants to preserve historically significant battlefield lands and the graves of Revolutionary War soldiers and "persons rendering service to the Patriot cause in the Revolutionary War" and those of certain African Americans. If the funding allocated by the General Assembly and the Governor to the Virginia Battlefields Preservation Fund (VBPF) increases, more applicants for funding from various organizations devoted to battlefield preservation will increase and more preservation easements will be required, impacting DHR's Easement Program staff and the DHR's management of the VBPF. Funding for maintenance of historical African American cemeteries through the African American Cemetery & Graves Fund has increased, affecting current staff workloads.
- A federally mandated program to certify and provide grants to local government preservation programs. Each year the federal government provides DHR with funding for preservation, development, and planning projects to be awarded competitively to Virginia's 37 Certified Local Governments (CLGs). Qualified local governments continue to apply for CLG status each year and, if successful, will expect to compete for CLG funding that may deplete the CLG funding sooner and result in fewer projects awarded statewide.
- Archaeological field and collections based research to document sites, especially those that are threatened with destruction, and to bring the lessons learned from those sites to the public through research reports, public lectures, exhibits, partnerships, and through diligent management and stewardship of the state's collection of several million artifacts.
- Emergency response guidance and assistance to property owners, localities, the Federal Emergency Management Agency, and the Virginia Department of Emergency Management when historic places are impacted.
- Education and technical assistance to help public and private property owners understand and preserve historic places in a 21st century world. Providing support for preservation projects for property owners and managers through the acquisition and management of federal funding such as the FEMA/NPS Emergency Supplemental Historic Preservation Fund, the NPS Maritime Heritage Grant fund, and others as they become available through federal programs.

Performance Highlights

As the State Historic Preservation Office for the Commonwealth, this agency serves as the primary coordinating agency for historic preservation in Virginia. DHR administers a complex menu of interrelated state and federal programs managed by a highly qualified staff that must meet prescribed professional qualifications.

Evaluating and documenting the historical significance of resources is paramount for ensuring the protections mandated for their preservation by state and federal law. It is also essential for determining eligibility for access to state and federal grants and other financial incentives designed to benefit preservation and economic development. Prior to making such determinations, historic properties must be surveyed and data must be reviewed, inventoried and stewarded so that management decisions can be made relative to them. In this regard the Agency has invested in the development, maintenance and enhancement of a data inventory system known as the Virginia Cultural Resource Information System (VCRIS), which is widely acknowledged as one of the most advanced in the nation. VCRIS serves an audience primarily composed of private sector cultural resource management professionals who are contracted by federal, state and private sector entities to assess impacts to them from construction and other forms of economic development activity and ensure that mitigation balanced in the best interest of the public, the economy and historic resources takes place. Similarly, the Agency invests in professional staff who employ established criteria in order to make evaluations of historic significance about properties as part of that process. During State Fiscal Year 2022, the Agency added records for 7,412 historic properties to VCRIS, evaluated 69 properties for eligibility for listing in the Virginia Landmarks Register and the National Register of Historic Places, and ultimately listed 42 historic properties in them – a process that typically takes nine months or more to achieve. At present, VCRIS contains records on 270,748 historic resources.

The Agency also administers, in partnership with VDOT, the Historical Highway Markers program. As the nation's first program of its type, it turned 95 years old in 2022, DHR is committed to maintaining the iconic role the program has played in presenting Virginia's history to travelers along the Commonwealth's byways. To date, more than 2,600 markers have been placed on Virginia's roads. The challenge is to maintain them, place them in safe locations, and as new information is known, update them so that they remain relevant to current and future generations. DHR's portion of the program is managed by a single FTE and a wage employee who have very specific expertise in Virginia history, with volunteer assistance from an editorial committee composed of experts in Virginia history and the Board of Historic Resources which ultimately approves marker topics for addition to the program. In order to make the rich content of the program applicable to students of all ages, as well as to tourists, DHR has utilized markers to develop itineraries (in print form) that complement the education, tourism and economic development goals of other State agencies.

This effort will increase access to the program content as well as open up avenues to incorporate the program into k-12 education in innovative ways. Investment in the program is reliant upon private sponsorship of new markers which covers the cost to have them produced. The Commonwealth has not directly funded the program since the 1970s; however, VDOT has funded a program to methodically review the existing

condition of markers so that DHR can make recommendations to the Board of Historic Resources about retiring or replacing damaged or deficient markers. Replacement, when it occurs, requires that marker texts be re-evaluated for accuracy and updated to incorporate the results of new scholarship which requires additional staff time.

Adaptive reuse of historic buildings using rehabilitation tax incentives has proven to be the single most effective tool in successful urban revitalization. A 2017 report on the economic benefits of historic preservation by Virginia Commonwealth University documents the long-term economic impact and performance of one of the Department of Historic Resources' most critical program services—technical assistance and certification of private historic rehabilitation projects that qualify for state and/or federal tax credits. As stated in the report, during the 17-year period covered by the study, \$1.2 billion in tax credits leveraged \$4.5 billion in private investment, resulting in the rehabilitation of 2,564 buildings—ranging from warehouses, hotels, theaters and even part of a prison complex to private residences. Expenses of \$5.8 billion for these rehabilitation projects serves as a catalyst on sectors of the economy to stimulate an additional estimated \$4.5 billion in activity, adding to the state's overall economic well-being, according to the study. Annual performance for the Department of Historic Resources is summarized in the bullets and table below.

Highlighted outcomes of other agency programs and services include:

- During state fiscal year 2022, DHR worked with developers to bring 111 rehabilitation projects to successful completion for a total of \$264 million in private investment.
- DHR archives and collections served 2,568 researchers either in person or through research requests.
- Sponsored or cosponsored training and educational activities reached 12,353 adults and students through workshops, field schools, lectures, and other educational activities ranging from Archaeological Resource Kits used in school classrooms to exhibits at major conferences and events and training in cemetery preservation and state and federal review processes. In addition, DHR reached over 2 million social media video views of the opening of the cornerstone and builder boxes from the Robert E. Lee monument.
- Exhibits using Department archaeological artifacts around the state reached an audience totaling approximately 508,042 people of all ages in FY22. We anticipate growth in this measure as museums hosting these exhibits continue to recover post-pandemic visitation numbers.
- In fiscal year 2022, staff visited more than 35% of the total easement properties to ensure compliance with existing easements.
- DHR filed the 2021 Biennial Report on the State Stewardship of Historic Properties which identifies preservation priorities for state-owned resources and highlights preservation successes reached through public-private partnerships. The Biennial Report also features a section on the stewardship of documented and undocumented cemeteries on state-owned land. The 2023 Biennial Report is in production and will be presented to the Governor and General Assembly in May 2023. DHR continues to collaborate with state agencies to develop preservation measures for historic properties under state control.

Selected Measures

Measure ID	Measure	Alternative Name	Estimated Trend
423.0006	Percentage of historic properties newly identified or revisited on the statewide inventory that are within defined climate change impact areas		Improving
42350205.002.004	Percentage of agency responses that comply with the 30-day federal response requirement for state, federal, and local project review		Maintaining
42350205.002.002	Amount of private investment (in millions of dollars) leveraged rehabilitation tax credits to reuse historic buildings and stimulate local economies		Improving
423.0002	Completion rate for battlefield preservation projects		Maintaining
42350205.005.003	Number of historical highway markers approved for placement on Virginia's Highways		Improving
42350205.001.004	Number of historic properties newly identified and recorded or for which new data is added to the statewide inventory.		Improving
42300000.002.001	Number of projects that rehabilitate and reuse historic buildings as certified to meet the criteria for tax credits		Improving

Agency Goals

- **Achieve full inclusion in historic preservation in Virginia by embedding equity and inclusive excellence into our agency culture and programs and be accountable for results and outcomes.**

Summary and Alignment

This goal aligns with the agency's mission as it ensures that all of the Commonwealth's historic and cultural resources are identified and evaluated and properly stewarded and that the agency itself is supportive of and actively promotes an inclusive environment.

Objectives

» **5.A: Identify and breakdown structural barriers in our preservation practices that impede diversity, equity, and inclusion (DE&I).**

Description

This objective ensures that the agency do its part to work towards a field of preservation that is more diverse, equitable, and inclusive in all areas.

Objective Strategies

• 5.A.1: Partner with the Governor's Office of Diversity, Equity, and Inclusion to involve Virginia Indians, African Americans, and other diverse community members in educating the agency about their concerns and suggestions. 5.A.2: Identify underserved and underrepresented areas of the state and create and implement strategies based on information gained in 5.A.1 (above) to better serve constituents' preservation needs in these areas. 5.A.3: Engage with the NCSHPO to identify institutional barriers that exist; e.g. the Secretary of Interior's Professional Qualification Standards. 5.A.4: Collaborate with other agencies and SHPOs to share best practices and opportunities for diverse engagement both internally and externally. 5.A.5: Ensure the themes of Diversity, Equity, and Inclusion are included in agency-sponsored staff trainings and professional development.

» **5.B: Broaden the historic preservation audience to include more of Virginia's diverse and minority communities, younger constituents, and underserved areas of the state.**

Description

This objective ensures that agency staff actively promote its programs within all communities and groups in the Commonwealth.

Objective Strategies

• 5.B.1: Reach out to Native American, African American, and other diverse communities to identify and register historic resources important to these communities. 5.B.2: Identify and implement preservation partnership opportunities with Virginia's historically Black colleges and universities. 5.B.3: Promote and strengthen student internship and volunteer opportunities at DHR. 5.B.4: Develop outreach programs to students in public and private schools and institutions of higher learning to enlighten and involve them in historic preservation at an early age. 5.B.5: Partner with the National Park Service and National Trust for Historic Preservation in a survey of African American Watermen Communities in the Virginia Chesapeake Bay region. 5.B.6: Partner with Preservation Virginia and other organizations in identifying, registering, and preserving Rosenwald schools, African American urban and rural communities, and African American churches and cemeteries in Virginia. 5.B.7: Revise and create program materials that speak to a diverse community of constituents.

• **Identify, evaluate, and recognize the historical significance of Virginia's archaeological, architectural, and cultural historic resources.**

Summary and Alignment

By using programs, tools, and public engagement, this goal directly aligns with the overall mission of the agency

Objectives

» **1.D. Promote the stewardship of collections and other archaeological resources around the state.**

Description

DHR conservation, collections, and archaeology staff have unique expertise in stewarding collections and site (terrestrial and underwater) identification, evaluation, research, and interpretation. Partnering with organizations who manage similar collections and/or sites provides opportunities to share that expertise to promote best practices and appropriate solutions to the challenges faced with managing these resources by organizations without in-house expertise.

Objective Strategies

• 1.D.1: Partner with stakeholders outside of DHR to develop and deliver information and training on best practices and practical solutions for stewardship of collections. 1.D.2: Provide training in curatorial best practices for stewards of collections and other resources. 1.D.3: Recognize effective stewardship by highlighting specific resources and their stewards through social media platforms. 1.D.4: Launch an underwater archaeological program to locate, study, and protect Virginia's vast underwater historic archaeological resources.

» **1.E: Evaluate and promote the listing of significant historic properties in the Virginia Landmarks Register and the National Register of Historic Places.**

Description

Listing a property on the Virginia Landmarks Register and the National Register of Historic Places is an honorary designation that officially recognizes the historic significance of a place, building, site, or area. The listing process can be lengthy, but more guidelines, historic contexts, and other guidance materials and their use by property owners, localities, students, and consultants can often expedite and enrich the process of listing for DHR, property owners, communities, and other clients.

Objective Strategies

- 1.E.1: Manage and improve the process of listing properties in the Virginia Landmarks Register and National Register of Historic Places through collaboration with property owners, localities, and others. 1.E.2: Develop historic contexts, guidance documents, and multiple property nominations to help guide preservation planning, evaluation, and stimulate registration of high priority and underrepresented properties. 1.E.3: Identify and register significant publicly-owned properties. 1.E.4: Increase the number of listed properties significant to minority, underrepresented, tribal, and diverse communities in Virginia. 1.E.5: Continue to enhance and “brand” DHR’s “VLR [Virginia Landmarks Register] Online” web-based feature by showcasing listed sites on DHR social media channels. 1.E.6: Create instructional/educational videos (of 5-to-10 minutes) for the public that explain key concepts (e.g. Preliminary Information Forms, Historic Resources Survey) and/or processes involved in listing properties on the registers. 1.E.7: Distribute and build the audience for a monthly Registers Program Updates newsletter to showcase listed properties and inform the public about the listing process and various Register issues. 1.E.8: Develop internship projects to nominate new properties and revise nominations of currently listed properties.

» **1.A. Assess statewide architectural and archaeological coverage to identify priorities, gaps, and areas of urgency.**

Description

By analyzing existing survey coverage along with unsurveyed areas, date of previous survey, as well as level and quality of previous survey, DHR will be equipped to make sound decisions to enable stewardship of Virginia’s historic resources.

Objective Strategies

- 1.A.1: Create and update geospatial analyses for both architectural and archaeological survey coverage, including the development of predictive models and risk models considering factors like climate change impacts and development. 1.A.2: Develop internal GIS-based probability models for archaeological site sensitivity to be evaluated against reported survey data, reconnaissance, and public engagement. 1.A.3: Engage stakeholders outside of DHR to identify priority areas and topics for architectural and archaeological survey. 1.A.4: Revise DHR’s Guidelines for Conducting Historic Resource Survey in Virginia, consulting with stakeholders on needs and issues, and update to reflect best practices.

» **1.B. Maintain, innovate, and expand VCRIS, DHR’s statewide survey database.**

Description

Technical enhancements to DHR’s information infrastructure will allow DHR staff and outside stakeholders to make efficient and accurate decisions about stewardship and preservation as well as create opportunities for education and engagement with Virginia’s historic resources.

Objective Strategies

- 1.B.1: Develop system enhancements by incorporating user feedback, programmatic needs, and best practices for cultural resource information infrastructure. 1.B.2: Engage with the public at the community level to identify and record resources.

» **1.C. Improve and strengthen the accuracy, accessibility, integrity, and use of DHR’s electronic and archival information on historic resources and their associated artifactual and documentary collections.**

Description

By increasing the quality and extent of archival information at DHR, the agency will facilitate research by staff and external clients in order to support resource stewardship as well as create opportunities for education and engagement with Virginia’s historic resources.

Objective Strategies

- 1.C.1: Digitize appropriate hardcopy records from multiple program areas and integrate information about historic resources across the agency. 1.C.2: Enrich DHR’s electronic records with legacy data to increase comprehensiveness and enable effective decision-making. 1.C.3: Develop and apply policies for accessioning, maintaining, and preserving digital cultural heritage data in alignment with best practices.

• **Provide incentives, guidance, and tools to preserve and protect Virginia’s archaeological, architectural, and cultural historic resources.**

Summary and Alignment

The preservation of historic buildings benefits communities and connects us to our heritage, while also providing demonstrable economic benefits. Through the federal and state rehabilitation tax credit programs, property owners are given substantial incentives for private investment in preservation, resulting in enormous advantages to the public.

Objectives

» **2.A: Promote and strengthen the role of state and federal rehabilitation tax credits in revitalizing historic residential, commercial, and industrial historic resources and neighborhoods.**

Description

Achievement of this measure communicates the role of preservation within communities as an economic development tool.

Objective Strategies

- 2.A.1: Continue to profile exemplary tax credit projects on DHR's website and in its Quarterly Newsletters. 2.A.2: Continue to review and update tax incentives program materials to improve operations and application procedures. 2.A.3: Continue to make presentations on the tax credit program to targeted audiences at workshops, webinars, etc.

» **2.B: Provide technical assistance to owners of historic properties to ensure their proper stewardship through perpetual preservation easements.**

Description

This measure focuses on the importance of regular communication between property owners and DHR via project review requests, stewardship monitoring visits and technical assistance conversations. It emphasizes the importance of connecting property owners with information and qualified professionals to ensure appropriate protection of preserved conservation values.

Objective Strategies

- 2.B.1: Update and revise DHR's online (PDF) publication, A Handbook and Resource Guide for Owners of Virginia's Historic Houses. 2.B.2: Update and revise DHR's easement program policies to encourage efficient communication of stewardship expectations and responsibilities. 2.B.3: Ensure continued easement protection of battlefield lands acquired by property owners awarded funding through the Virginia Battlefield Preservation Fund.

» **2.C: Advise and assist state and federal agencies to ensure the protection of Virginia's significant historic and cultural resources.**

Description

DHR assists state and federal agencies in meeting their responsibilities under applicable code to identify historic resources that may be affected by their projects, assess potential effects to those properties eligible for listing in the Virginia Landmarks Register and National Register of Historic Places, explore ways to avoid or minimize adverse effects, and mitigate those adverse effects that cannot be sufficiently minimized.

Objective Strategies

- 2.C.1: Provide timely response to Federal and state agencies and their agents to review requests made under Section 106 of the National Historic Preservation Act and state preservation law. 2.C.2: Pursue the development of programmatic agreements and other program alternatives to streamline the Section 106 review process and increase efficiency. 2.C.3: Upon notification of a state of emergency and activation of the Commonwealth of Virginia Emergency Operations Plan and the Virginia Emergency Support Team, provide technical assistance to federal, state, tribal, and local authorities to assess, stabilize, and restore structures of historic significance and mitigate damage to cultural resources. 2.C.4: Encourage the development and implementation of management strategies through participation in the state review process and the biennial State Stewardship Report.

» **2.D: Strengthen and expand local government preservation programs through the Certified Local Government and Cost Share programs.**

Description

Communities strengthen and expand their local preservation programs through Certified Local Government (CLG) designation. This federal program establishes a partnership between local governments, the federal historic preservation program, and DHR as Virginia's State Historic Preservation Office (SHPO). The program allows DHR to recommend for certification local governments that have put key elements of a sound local preservation program in place in their communities. CLG designation also allows a jurisdiction to apply for CLG grants through federal Historic Preservation Funds (HPF) to fund planning, survey, register, architectural review board training, and development projects. Ten percent of all HPF monies that come to the Commonwealth of Virginia must be distributed to CLGs. DHR does this through a competitive grant process, open only to CLGs.

Objective Strategies

- 2.D.1: Promote certification and enable participation in the Certified Local Government program through funding preservation planning, development, survey, and register projects important to local governments. 2.D.2: Continue to hold training workshops for CLGs and other local governments with local historic preservation commissions. 2.D.3: Promote and manage the state-funded Cost Share program to enable more local governments to benefit from survey and planning projects.

• **Manage financial and physical assets to support and sustain historic preservation in Virginia.**

Summary and Alignment

The purpose of this goal is to effectively prioritize both the funding and funding opportunities and use them to support historic preservation and the care of Virginia's significant historic assets and archaeological resources.

Objectives

- » **3.A: Identify and manage effectively, responsibly, and transparently state and federal funds and grant programs to carry out DHR's mission, programs, and services.**

Description

A recent trend in the increase of funding for preservation programs from the state and federal governments has allowed DHR to distribute needed funding, often competitively, to local governments, preservation organizations, underrepresented communities, and threatened or damaged historic sites.

Objective Strategies

- 3.A.1: Continue to fund survey, register, development, and planning projects through the Cost-Share, Certified Local Government, and other grant programs. 3.A.2: Leverage the state-funded Virginia Battlefield Preservation Fund to allow organizations to purchase easements or battlefield lands associated with the Revolutionary War, War of 1812, and Civil War. 3.A.3: Promote and provide state funding for the maintenance and preservation of Revolutionary War and African American cemeteries and graves. 3.A.4: Administer the Hurricanes Florence and Michael Emergency Supplemental Historic Preservation Fund by managing sub-awards based on federal program guidelines. 3.A.5: Promote and assist eligible applicants seeking federal funding from the National Park Service's Underrepresented Communities, African American Civil Rights, and Historically Black Colleges and Universities grant programs. 3.A.6: Award and administer grants from DHR's Threatened Sites program. 3.A.7: Provide technical assistance to preservation projects funded by Virginia General Assembly grants awarded to non-profit organizations.
- » **3.B: Lead as an example in the maintenance and preservation of historic properties owned or occupied by DHR and assure a safe, healthy, and affirmative workplace.**

Description

This objective assists in managing the agency's physical assets to support and sustain historic preservation in Virginia.

Objective Strategies

- 3.B.1: Develop and implement appropriate short- and long-term management strategies for DHR's headquarters in Richmond and the regional office facilities in Stephens City and Salem. 3.B.2: Continue to update and improve the DHR's plan for disaster response mitigation. 3.B.3: Create and sustain an agency infrastructure that effectively supports progress and accountability in achieving diversity, equity, and inclusion goals. 3.B.4: Manage Clermont, a DHR-owned farm in Clarke County, Virginia, responsibly and resourcefully, in collaboration with the Clermont Foundation.
- » **3.C: Promote the responsible conservation, protection, and stewardship of DHR's expansive and significant archaeological collections.**

Description

DHR manages an estimated six million artifacts and associated documentation in the archaeological collections. These collections provide valuable information for interpreting and understanding the past through research, exhibit, and educational programs. Providing access to these collections requires that physically and culturally appropriate methods be developed and implemented with our many partners.

Objective Strategies

- 3.C.1: Partner with stakeholders to encourage use of these collections for research, educational, and exhibit purposes. 3.C.2: Engage members of Virginia's state and federally recognized tribes to partner with DHR staff on the identification and traditional uses of artifacts and their potential use by tribal members for cultural purposes. 3.C.3: Consult with tribal partners to develop a process for including traditional knowledge in collections records and catalogs. 3.C.4: Consult with tribal partners and other descendant and community representatives to develop processes for providing appropriate handling (including potential repatriation), curation, and access to sensitive materials and data in consultation with concerned parties.
- **Educate and disseminate information about the importance of Virginia's archaeological, architectural, and cultural historic resources.**

Summary and Alignment

Part of the agency's mission is to steward the Commonwealth's most significant historic and cultural resources; this goal aligns with that mission in that education and outreach are two important ways that agency staff can work towards the most effective and comprehensive stewardship.

Objectives

- » **4.A: Reach out to public and private stakeholders to promote historic preservation values, benefits, services, programs, and tools.**

Description

This objective ensures that agency staff provide and conduct the necessary outreach in order to achieve the goal.

Objective Strategies

- 4.A.1: Provide information and technical assistance in the preservation of historic resources to all public and private stakeholders. 4.A.2: Partner with Preservation Virginia to launch the Virginia Preservation Academy, a series of virtual, interactive, educational workshops that will focus on the fundamentals of historic preservation. 4.A.3: Refine methods to utilize and expand the use of technology and social media (Facebook, Instagram, Twitter, etc.) to broaden the audience and reach more diverse communities concerning historic preservation in Virginia. 4.A.4: Maintain an exemplary DHR website, one that also features blogs by DHR staff that highlight DHR collections, DHR tax credit projects, archeology, and other programs. 4.A.5: Create and distribute an informative DHR Quarterly Newsletter that informs readers of new listings on the Virginia Landmarks Register, newly approved historic markers, profiles select recent easement donations, along with other news. 4.A.6: Create and distribute a periodic newsletter entitled Grave Matters, focusing on cemetery preservation education. 4.A.7: Provide technical advice and information on historic cemetery preservation to organizations, localities, and private owners of cemeteries throughout Virginia. 4.A.8: Integrate environmental sustainability, climate change, affordable housing, and historic preservation practices in preservation plans at all levels of government to ensure historic resources are part of a viable future. 4.A.9: Work collaboratively with Federal partners to identify and meaningfully engage stakeholders as part of compliance with preservation laws. 4.A.10: Leverage information held in DHR's Archives and Inventory to produce educational and outreach content to connect with communities and researchers. 4.A.11: Promote knowledge of archaeological resources and programs through the development and distribution of Virginia Archaeology Month tools and products including a poster, an online calendar, and programs offered both in-house and to organizations and groups outside of DHR.

» **4.B: Support national, state, and local preservation organizations to expand networks and collaborations to promote historic preservation.**

Description

Sharing funding, networks, facilities, expertise, and infrastructure among organizations and government agencies can often account for the most successful preservation projects and programs.

Objective Strategies

- 4.B.1: Support Preservation Virginia, the statewide preservation organization, and local and regional preservation organizations and historical societies in their missions, workshops, webinars, and other programs to promote historic preservation in Virginia. 4.B.2: Strengthen partnership with Virginia Tourism Corporation to promote heritage tourism through the continued support of regional heritage areas and heritage trails throughout the state. 4.B.3: Continue to partner with the National Park Service in providing technical assistance and in the promotion of Virginia's three National Heritage Areas (Journey Through Hallowed Ground National Heritage Area; Shenandoah Valley Battlefields National Historic District; and the Northern Neck National Heritage Area) and the Captain John Smith Chesapeake National Historic Trail. 4.B.4: Strengthen partnerships with National Parks, Monuments, and other federally-designated historic sites, especially those that focus on African American history, such as Booker T. Washington National Monument, Fort Monroe National Monument, and Maggie L. Walker National Historic Site. 4.B.5: Provide technical assistance in the preservation and interpretation of Native American sites and cultural history at Machicomoco and York River state parks.

» **4.C: Provide technical assistance to state agencies that own or manage historic properties and/or promote preservation and tourism in Virginia.**

Description

This objective ensures that agency staff reach out to and are responsive to sister agencies in assisting them with their preservation needs.

Objective Strategies

- 4.C.1: Provide education and technical assistance regarding public use of historic structures and cultural landscapes to state land management agencies such as state parks and state forests. 4.C.2: Support preservation planning by collaborating with other state agencies as well as state colleges and universities to implement preservation planning policies, procedures, and programs. 4.C.3: Collaborate and expand partnerships with the Virginia Department of Housing and Community Development's Main Street Program and the Virginia Department of Conservation and Recreation's Virginia Land Conservation Fund, continuing to provide technical assistance to communities and land conservation organizations awarded grants through these programs. 4.C.4: Use the biennial Report on the Stewardship and Status of Virginia's State-Owned Historic Property to highlight preservation successes and challenges and work collaboratively with noted agencies to address preservation concerns.

» **4.D: Integrate Virginia's Highway Marker program with all DHR's programs and where possible relevant programs at other state agencies.**

Description

The Virginia historical Highway Marker program documents facts, persons, events, and places prominently identified with the history of the nation, state, or region. DHR's purpose in erecting markers is to educate the public about Virginia's history. Begun in 1927, Virginia's historical marker program is the oldest such program in the nation. To date (2022), there are now more than 2,600 markers erected in the

commonwealth to highlight people, places, or events of regional, statewide, or national significance. Recent efforts to increase the number of markers associated with underrepresented and minority communities have greatly expanded participation and support from those communities, DHR divisions, and other state agencies.

Objective Strategies

- 4.D.1: Continue to reach out to tribal, diverse, and underrepresented communities to enable them to tell their cultural histories through the state's highway marker program. 4.D.2: Spread the word through press releases and media coverage of all new highway markers to be erected and encourage sponsors to host public events to dedicate them. 4.D.3: Enhance the content of the Virginia Tourism Corporation's Black History Trail.

» **4.E: Provide on-line or in-person workshops, webinars, and other educational events promoting preservation issues, programs, and best practices in historic preservation.**

Description

Training workshops, webinars, and educational events are often the most effective ways of ensuring best practices in historic preservation to the greatest number of clients.

Objective Strategies

- 4.E.1: Hold annual workshops for training members of local government architectural review boards and preservation commissions through the Certified Local Government program. 4.E.2: Hold an annual workshop on the technical aspects of preserving historic cemeteries. 4.E.3: Provide training and instruction to users of VCRIS and Archives for conducting effective research at DHR and submitting quality information to the agency.

Supporting Documents

Title	File Type
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Financial Assistance for Historic Preservation [50204]

Description of this Program / Service Area

The Governor and the General Assembly authorize matching grants to museums and historic sites through the annual General Appropriation Act for the rehabilitation and restoration of historic properties that are open to the public and that provide a combination of educational, cultural, and tourism benefits to the surrounding community. Some grants are also available for educational programs that use these historic places to interpret Virginia history. Appropriations are also made for grant programs that support battlefield preservation and the maintenance of cemeteries and restoration of the graves of Revolutionary War Veterans and those “rendering service to the Patriot cause in the Revolutionary War” and those of certain African Americans.

Payments for maintenance of the aforementioned cemeteries and graves are determined by a formula and administered by the Department of Historic Resources (DHR) through contracts with the Virginia Society Sons of the American Revolution and other qualified organizations, persons as defined in § 1-230, and localities that either own or have within its jurisdictional boundaries a historical African American cemetery.

Matching grants to preserve historically significant battlefields are awarded to specific projects through a competitive process. Requirements include, among other criteria and conditions, donation of easements to be held in perpetuity by the Commonwealth on the properties preserved using state grant funds.

DHR’s administration of the grants for rehabilitation and restoration ensures that the historic properties being funded receive appropriate treatment consistent with accepted preservation standards. Prior to disbursement of funds for rehabilitation or restoration work at historic properties, DHR reviews work and provides extensive technical assistance to ensure adequate and appropriate treatment for historic resources. Grant administration also requires that DHR contact grant recipients, receive and review grant applications, answer questions regarding grant requirements and regulations, review requests for disbursement for adequate supporting documentation and eligibility of expenditures, and process payments to grant recipients.

Grants to localities pass through DHR as well. These grants have begun and steadily increased in number and size over the last few years.

Mission Alignment and Authority

Grants administered through this service area directly align with DHR’s mission to encourage and support the stewardship and use of Virginia’s significant architectural, archaeological, and historic resources as valuable assets for the economic, educational, and cultural benefit of citizens and communities. Authority for these grants is found in Title 10.1 Chapter 22 of the Code of Virginia. Many of the "bricks-and-mortar" preservation grants restore or rehabilitate historic buildings used by the public (county courthouses or other public buildings, etc.) or open to the public as part of museum or historic site offerings. Virginia Battlefield Preservation Fund grants ensure the long-term conservation of battlefield lands and facilitate their interpretation for the public benefit. Appropriations for the maintenance of cemeteries and restoration of graves through the African American Cemetery & Graves Fund ensure the preservation of historically significant cemeteries and safe access to these public spaces. DHR’s administration of these grants supports appropriate care and treatment of the Commonwealth’s historic resources for public benefit.

Products and Services

Description of Major Products and Services

Grants to Historical Societies and Presidential Homes—Funds appropriated for restoration projects on historic properties owned by non-profit organizations for educational purposes. These projects are generally “bricks-and-mortar” rehabilitation or for educational programming interpreting historic attractions. Numbers and complexity of these projects vary greatly from year to year. Many are funded once, but represent multi-year projects that must be monitored and tracked frequently.

Grants to Confederate cemeteries and graves—Funds appropriated to maintain Confederate cemeteries and graves. Funding for these grants have not been appropriated since SFY ‘21.

Grants to Revolutionary War Veterans cemeteries and graves—Funds appropriated to maintain Revolutionary War Veterans’ graves and those “rendering service to the Patriot cause” cemeteries and graves.

Grants to historical African American cemeteries and graves—Funds appropriated to maintain historical African American cemeteries and graves.

Grants to non-profit organizations to preserve historically significant battlefield lands – Funds appropriated to facilitate the protection of battlefield lands associated with the Revolutionary War, the War of 1812, and the Civil War.

Grants to localities--Funds appropriated to localities for grants to organizations within their jurisdiction.

Products / Services					
Product / Service	Statutory Authority	Regulatory Authority	Required Or Discretionary	GF	NGF

Grants to Certain Historical Societies & Presidential Homes	§10.1-2212, 10.1-2213.1		Discretionary	0	0
Disbursement of funds appropriated for caring for Revolutionary War cemeteries and graves	§10.1-2211.1		Discretionary	23,100	0
Disbursement of funds appropriated for caring for historical African American cemeteries and graves	§ 10.1-2211.2		Discretionary	250,000	0
Virginia Battlefield Preservation Fund established; eligibility; uses	§10.1-2202.4		Required	500,000	0
Grants to Localities	Chapter 2, 2022 Acts of Assembly		Required	21,077,840	0

Anticipated Changes

Changes to this area would occur from increases or decreases to appropriations or amendments to the Code of Virginia.

Factors Impacting

- General Assembly funding for historic preservation grants
- Additions to lists of known Revolutionary War veterans and eligible historical African American graves—with associated funding
- Expansion of qualifying graves within qualifying cemeteries—with associated funding
- Availability of partner organizations Virginia Society Sons of the American Revolution (VASSAR) and other qualified organizations, persons, and localities to manage grants
- Administrative and financial capacity of grant recipients

Financial Overview

This service area supports several grants specifically identified as: Grants for maintaining Revolutionary War cemeteries and graves and historical African American cemeteries and graves and the Virginia Battlefield Preservation Fund for conservation of historically significant battlefield lands. When the General Assembly funds historic preservation grants or grants to localities in general, they are accounted for in this program area.

Biennial Budget

	2023 General Fund	2023 Nongeneral Fund	2024 General Fund	2024 Nongeneral Fund
Initial Appropriation for the Biennium	27,476,940	0	6,399,100	0
Changes to Initial Appropriation	0	0	0	0

Supporting Documents

Title	File Type
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Historic Resource Management [50205]**Description of this Program / Service Area**

This service area programmatically fulfills the Department of Historic Resources' (DHR) federal role as Virginia's State Historic Preservation Office (SHPO) as well as its mission to encourage and support the stewardship and use of Virginia's significant architectural, archaeological, and historic resources as valuable assets for the economic, educational, social, and cultural benefit of citizens and communities. Core services include collecting, maintaining and providing information on historic resources; recognition and technical support for those resources and their owners; encouraging public and private protection and use of historic resources for economic development, community revitalization and education; and statewide educational programs for different customer groups. Since most public, and virtually all private, heritage stewardship efforts are voluntary, DHR's role in educating, informing and advising the public, community and economic leaders and citizens of the next generation about the public benefits of stewarding historic resources is the most important aspect of its programs and mission.

Mission Alignment and Authority

Historic resource management lies at the core of DHR's mission to encourage and support the stewardship and use of Virginia's significant architectural, archaeological, and historic resources as valuable assets for the economic, educational, social, and cultural benefit of citizens and communities. Authority to carry out these functions is found in Titles 58.1 and §10.1 of the Code of Virginia, Title 17 of the Virginia Administrative Code, Title 54 of the U.S. Code, and Title 36 of the Code of Federal Regulations.

Archaeology—promoting and supporting identification, preservation, documentation, public education, and interpretation of Virginia's fragile archaeological resources. May include archaeological survey, excavation, analysis, report writing, prioritizing and funding archaeological studies of sites threatened with destruction, and technical advice and assistance to public and private property owners. Due to the impending threats due to sea level rise, tidal erosion, and catastrophic storm surge, shoreline archaeological sites will be given research priority. Also includes review of applications for archaeological field investigation permits as well as archaeological excavation of human remains permits and issuance of successful permit applications.

Archaeological Curation and Conservation—managing the state's archaeological collections and making them accessible for research and educational purposes statewide. Includes cataloging, conserving, processing and monitoring loans, creating exhibits, conducting lectures and workshops, establishing standards and guidelines for curation and conservation, and providing expert technical assistance to museums, public agencies, and other holders of archaeological collections, as well as researchers using our collections.

Technical Assistance—advice, guidance, on-site meetings and inspections, and other activities designed to help all customer groups meet a wide range of preservation objectives and guide them through the relevant state and federal review processes. Such assistance is an integral part of all other agency services.

Preservation Planning—Developing and implementing a statewide historic preservation plan, as well as providing information and technical assistance to support historic resources sections of local comprehensive plans. Preparing the annual HPF work plan for submission to the National Park Service (NPS).

Certified Local Governments—a federal program of grants, services, and guidance to support certain local governments in their historic preservation planning, education, and compliance efforts. Includes grant selection, project monitoring, and technical assistance for projects, guidance for local governments developing ordinances, design guidelines, and historic preservation plans.

Survey & Inventory—identifying historic resources and making information about them available for planning, economic development, disaster management, tourism and other public policy decisions. Includes project selection management to conduct surveys of localities to identify historic properties, quality control for consultant's products, data-review, entry and analysis, managing archival and electronic records on over 270,000 historic properties, sites, and districts, and retrieving and analyzing data for public agency and private planning.

Register – evaluating the significance of historic resources and listing them in the Virginia Historic Landmarks Register and the National Register of Historic Places. Listing provides official recognition for such properties but places no restrictions on private property owners. Listing is required for access to public incentives such as tax credits and grants. Involves extensive technical assistance and/or research, analysis, report writing, technical review at several stages in the process, managing public meetings, board meetings, editing, and working with property owners, community groups, local governments, and the general public.

Rehabilitation Tax Incentives—technical assistance to property owners, developers and localities to ensure that projects seeking state and federal rehabilitation tax credits meet appropriate historic preservation standards. Requires extensive and complicated property and project plan review, analysis and negotiation, working with and educating developers and property owners.

Historic Preservation Easements—work closely with property owners to ensure proper stewardship of protected properties according to terms of easement, applicable preservation guidelines, and program policies. Program requires in-depth review of proposed easements, development and regular monitoring to ensure appropriate and effective preservation of the protected conservation values.

Products and Services**Description of Major Products and Services**

Archaeology—promoting and supporting identification, preservation, documentation, public education, and interpretation of Virginia's fragile

archaeological resources. May include archaeological survey, excavation, analysis, report writing, prioritizing and funding archaeological studies of sites threatened with destruction, and technical advice and assistance to public and private property owners. Due to the impending threats due to sea level rise, tidal erosion, and catastrophic storm surge, shoreline archaeological sites will be given research priority. Also includes review of applications for archaeological field investigation permits as well as archaeological excavation of human remains permits and issuance of successful permit applications.

Archaeological Curation and Conservation—managing the state’s archaeological collections and making them accessible for research and educational purposes statewide. Includes cataloguing, conserving, processing and monitoring loans, creating exhibits, conducting lectures and workshops, establishing standards and guidelines for curation and conservation, and providing expert technical assistance to museums, public agencies, and other holders of archaeological collections, as well as researchers using our collections.

Technical Assistance—advice, guidance, on-site meetings and inspections, and other activities designed to help all customer groups meet a wide range of preservation objectives and to guide them through the relevant state and federal review processes. Such assistance is an integral part of all other agency services.

Preservation Planning—Developing and implementing a statewide historic preservation plan, as well as providing information and technical assistance to support historic resources sections of local comprehensive plans. Preparing the annual HPF work plan for submission to the National Park Service (NPS).

Certified Local Governments—a federal program of grants, services, and guidance to support local governments in their historic preservation planning, education, and compliance efforts. Includes grant selection, project monitoring, and technical assistance for projects, guidance for local governments developing ordinances, design guidelines, and historic preservation plans.

Survey & Inventory—identifying historic resources and making information about them available for planning, economic development, disaster management, tourism and other public policy decisions. Includes project selection management to conduct surveys of localities to identify historic properties, quality control for consultant’s products, data-review, entry and analysis, managing archival and electronic records on over 225,000 historic properties and districts, and retrieving and analyzing data for public agency and private planning.

Register – evaluating the significance of historic resources and listing them in the Virginia Historic Landmarks Register and the National Register of Historic Places. Listing provides official recognition for such properties but places no restrictions on private property owners. Listing is required for access to public incentives such as tax credits and grants. Involves extensive technical assistance and/or research, analysis, report writing, technical review at several stages in the process, managing public meetings, board meetings, editing, and working with property owners, community groups, local governments, and the general public.

Rehabilitation Tax Incentives—technical assistance to property owners, developers and localities to ensure that projects seeking state and federal rehabilitation tax credits meet appropriate historic preservation standards. Requires extensive and complicated property and project plan review, analysis and negotiation, working with and training developers and property owners..

Historic Preservation Easements— work closely with property owners to ensure proper stewardship of protected properties according to terms of easement, applicable preservation guidelines, and program policies. Program requires in-depth review of proposed easements, development of easement terms and negotiation with property owners to develop restrictions appropriate for historic resources present at the property, legal analysis, monitoring of easement properties to document condition of property, review of project proposals to ensure consistency with the terms of the easement, and reporting to Board of Historic Resources.

Review and Compliance—advisory review services to state, federal, and local agencies to help them meet their state and federal mandated responsibilities to identify and consider the effect of public actions on historic properties. This area also includes issuing permits for archaeological removal of human remains and archaeological investigations on state land and participation in permits issued by the Virginia Marine Resources Commission for recovery of historic artifacts from Virginia’s rivers and streams and by the Department of Conservation and Recreation for removal of human remains or artifacts from caves. Completing a high volume of highly technical reviews; training and partnering with state, federal, and local agencies, and preservation and community groups as consulting parties throughout the review process; and working with the federal Advisory Council on Historic Preservation. Education and Outreach—informing and educating all customer categories about historic resources, historic preservation tools, and the benefits of historic preservation for citizens and communities. Involves working with client groups to determine training and education needs, researching and developing range of delivery products, exhibits, lectures, workshops, field schools, publications, web features based on variety of history and preservation topics to meet the needs of particular target audiences. Also involves establishing partnerships with sister state agencies, federal agencies, preservation non-profit organizations and other NGOs.

Historical Highway Markers—coordinating processes to gain Historic Resources Board approval and Virginia Department of Transportation placement and replacement of appropriate historical highway markers along Virginia’s roadways. Involves research, writing, interpretation, working with marker sponsors, board members and various interested parties.

Products / Services					
Product / Service	Statutory Authority	Regulatory Authority	Required Or Discretionary	GF	NGF

Historic rehabilitation tax credit	§ 58.1-339.2	17 VAC 10-30, 36 CFR 67	Required	0	655,668
Virginia Landmarks Register	§ 10.1-2202(5)	17 VAC 5-30	Required	387,035	0
National Register of Historic Places	§ 10.1-2202(5)	17 VAC 10-20, 36 CFR 60	Required	0	498,603
Archaeology	§ 10.1-2202(15), 10.1 Chapter 23		Required	184,023	0
Certified local government programs		36 CFR 61.6	Required	23,100	366,947
Archaeological Curation and Conservation	§ 10.1-2202(15), 10.1-2301		Required	0	335,633
Technical Assistance	§ 10.1-2202(11)		Required	70,550	0
Preservation Planning	§ 10.1-2202(10)		Required	634,949	311,112
Survey & Inventory	§ 10.1-2202(6)		Required	347,326	169,386
Historic Preservation Easement Program	§ 10.1-2202(9)		Required	446,603	0
106 Review & Compliance		36 CFR Part 800	Required	227,121	429,902
Historical Highway Marker Program	§ 10.1-2202(12)		Required	190,559	18,750
Archaeological Field Investigation Permits	§ 10.1-2302		Required	56,780	107,476
Archaeological Excavation of Human Remains Permits	§ 10.1-2305	17 VAC 5-20	Required	23,747	0
Stewardship of Historic Property	§ 10.1-2202.3		Required	21,635	0
Protection & Preservation of Underwater Historic Resources	§ 10.1-2214		Required	96,418	0

Anticipated Changes

The nature of the Department of Historic Resources' (DHR) products and services is expected to remain constant. The demand for DHR service is expected to increase, requiring a combination of greater efficiency and a continuing shift of direct services to providing training and "self-help" tools.

DHR continues to shift its efforts to provide written technical briefs and information about historic resources and preservation from print to electronic media including greater use of web-based delivery, social media, and electronic versions of agency publications.

There is a growing need to shift from paper to digital records (including hundreds of thousands of slides and photographs along with forms, letters, project reports and more) and to find digital solutions that will integrate programs and services. There is an accompanying need to deliver more and richer information in digital format to clients, including the general public.

Factors Impacting

Increases in customer demand continue to impact DHR services. Some of these impacts include (but are not limited to):

Changes to state or federal law;

Changes to state or federal funding and staffing—not only for the agency, but equally important to the agencies customers/stakeholders/partners;

Continued importance of rehabilitation tax incentives for jobs and economic development;

Delegation of federal and state responsibilities—usually to agencies without the expertise and experience to handle those responsibilities;

General Assembly appropriations to organizations through localities;

Changes in information technology and the need to keep up with those changes, maintain adequate IT staffing, and ensure data and services are appropriately safeguarded and/or made accessible, and kept current;

Internal changes to staff expertise as senior employees reach retirement--a trend that has been a factor for several years and will continue through the next biennium--combined with issues of staff recruitment and retention. The next biennium will require concerted capacity-building efforts to make up for lost expertise and to fill gaps as the needs of the agency change.

Financial Overview

Biennial Budget

	2023 General Fund	2023 Nongeneral Fund	2024 General Fund	2024 Nongeneral Fund
Initial Appropriation for the Biennium	8,031,069	3,386,879	3,386,069	3,386,879
Changes to Initial Appropriation	0	0	0	0

Supporting Documents

Title **File Type**