THE MARYLAND COMPREHENSIVE HISTORIC PRESERVATION PLAN:
Planning the Future of Maryland's Past

by

The Maryland Historical Trust
Shaw House, 21 State Circle
Annapolis, Maryland

June, 1986

The Maryland Historical Trust is an agency of the State of Maryland, Department of Economic and Community Development.

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ACKNOWLEDGEMENTS

This planning document was written and produced by the staff and Board of Trustees of the Maryland Historical Trust, under the leadership of Charles L. Wagandt, Chairman of the Board of Trustees, and J. Rodney Little, Director-State Historic Preservation Officer. Mark R. Edwards, Deputy SHPO and Administrator of the Survey and Planning Services Division of the Trust, was the project director, and Peggy Bruns Weissman, the Trust's Preservation Planner, was the principal author of the document. Barbara Shepherd was the typist for the project. The following Maryland Historical Trust staff members also contributed to the document: Ronald L. Andrews, Pamela J. Caldwell, Wayne E. Clark, Richard B. Hughes, Peter E. Kurtze, William J. Pencek, Jr., and Orlando Ridout V.

The document has been reviewed by an advisory group, the Ad-Hoc Committee on the Maryland Comprehensive Historic Preservation Plan, appointed by the MHT Board of Trustees in the fall of 1984. The members of the committee, listed below, were selected to represent diverse areas of expertise in the fields of historic preservation, comprehensive planning, economic and community development, and public policy, in both the private and public sectors, and at the local, state, and national levels. Ten committee meetings, held during 1985 through May, 1986, provided an opportunity for intensive review and discussion of the planning document, and substantively assisted in shaping the plan as it is presented here. The staff and Board of Trustees of the Maryland Historical Trust wishes to gratefully acknowledge the valuable contributions made by the Committee members, and in particular the direction provided by Ad-Hoc Committee Chairman Tim Dugan.

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PREFACE

The preservation of Maryland's historic properties improves the lives of Marylanders and the quality of our environment in several ways. Preservation of the state's archeological sites, historic buildings, objects, districts and landscapes is essential not only for recording and understanding Maryland's past, but also for providing the "roots" and a sense of place which people need in their lives.

Preservation also serves the State of Maryland by improving the appearance and quality of our environment; strengthening and revitalizing community life and organizations; conserving natural and built resources (energy, building stock, agricultural land); and improving the state's economy (adding to the tourism industry, creating jobs, and stimulating re-investment in Maryland's building stock).

However, the survival and integrity of Maryland's historic properties is increasingly threatened by a variety of natural forces and human activities, as described in Chapter II. The alarming rate of loss of historic properties statewide is illustrated by the fact that 30% of the housing structures which stood in Maryland in 1940 (and now potentially considered "historic") were destroyed by 1980; in some counties, the rate was as high as a 54% loss.

When the existing programs, legislation, and funding for preservation activity are analyzed (in Chapter III and IV) it is clear that current programs are inadequate to meet the need and demand for assistance. Thus, in this document, the Maryland Historical Trust describes and evaluates these benefits of preservation, and the need and urgency for further action. Our recommendations concern not only standard preservation programs in the state but also discuss the opportunities for mutual benefit which exist in related fields such as planning, conservation, design, and the private sector. By broadening the scope of preservation activity to address the needs of all Marylanders, and working to better integrate preservation into the activities of related land use planning and development programs, the potential benefits of preservation can be realized.

The Maryland Historical Trust and the Framework for Historic Preservation in Maryland

The current framework for historic preservation activity in Maryland operates both within the various levels of government, and in the private sector, as described in greater detail in Chapter III of this document. The Maryland Historical Trust plays an important role in coordinating most state and federal government programs in Maryland relating to historic properties and plays a more limited role in the State's private sector preservation activities.

The Trust was founded in 1961 as a quasi-public organization with a Board of Trustees (and originally, no staff). In 1970, it became a unit of the Maryland Department of Economic and Community Development. Since its establishment, the Trust has grown to an agency with 24 Board members, 41 staff positions, and a budget of approximately $1.9 million (as of 1985). In addition to its role as a State agency, the Trust also administers Federal preservation programs in Maryland, through the National Historic Preservation Act of 1966 which created a system of State Historic Preservation Offices (SHPO) in each state. The Trust is the Maryland SHPO, responsible for administering in the State all Federal programs, located primarily within the Department of the Interior, National Park Service and the Advisory Council for Historic Preservation. These include the National Register of Historic Places, the Section 106 compliance review process, survey and planning activities and grants-in-aid, Certified Local Government programs and grants, and grants and tax act certifications for preservation projects. As part of the National Historic Preservation Act of 1966, each state is required to conduct comprehensive planning activities which must meet the Secretary of the Interior's Standards for Preservation Planning explained later in more detail (See Appendix 2). This planning process is reviewed annually by the National Park Service, and the production of this comprehensive planning document is a direct result of this requirement.

As part of State government, the Trust is the agency with primary responsibility for State historic preservation programs, such as State grants and loans for preservation projects, tax deduction review and certification, community education activities, and review of projects circulated through the

Department of State Planning's Clearinghouse for Intergovernmental Assistance. The Trust also operates the Jefferson Patterson Park and Museum in Calvert County. Under the 1978 Board of Public Works Policy on the Preservation of Properties of Historic and Architectural Significance Owned or to be Acquired by the State, which urged State agencies to identify and protect historic properties in their care, the Trust has worked with a number of agencies in survey and project review activities. Now, under recently enacted state legislation, (SB 744, signed on May 28, 1985), compliance regulations similar to those at the federal level require state agencies to survey, register, and protect their historic properties.

Within the Trust's parent Department of Economic and Community Development are several other agencies concerned with Maryland's history and culture. These include the office of the State Folklorist, located within the State Arts Council; the St. Mary's City Commission; the Commission on Afro-American History and Culture; and the Commission on Indian Affairs.

The Trust also works to assist other types of economic and community development programs within its parent department, such as the Main Street program and the Maryland Housing Rehabilitation Program.

While the Trust is directly involved in many archeological activities at the federal, state, and local level, archeological work is also conducted by the office of the State Archeologist, located in the Division of Archeology of the Maryland Geological Survey, within the Maryland Department of Natural Resources. The Trust is also involved with other units of the Department of Natural Resources, such as parks and recreation, open space and agricultural land preservation, and through special projects such as the recent Maryland Historical Trust-Bureau of Mines survey of the Western Maryland Coal Basin. The Maryland Environmental Trust, also a unit of the Department of Natural Resources, is active in land conservation throughout the state, primarily through its easement programs.

In the area of documentary research and historical records curation, the Maryland State Archives is the lead agency in State government. The State Archives is an independent agency which contains the Hall of Records and is the principal repository for the state archives and manuscripts collection. while there is no state-operated museum for Maryland history as in some states, the privately operated Maryland Historical Society in Baltimore is

the state's leading museum and research library for Maryland history.

The Maryland Historical Trust also works closely with local governments through its Survey and Planning grants-in-aid program, through the Maryland Association of Historic District Commissions, and the Certified Local Government Program, channeling federal and state funds to local governments for a variety of preservation programs.

While the Trust does work with many private sector preservation organizations throughout the state, and does have its own volunteer network (called the "County Committee System"), the focal point for private statewide preservation activity is the organization now known as Preservation Maryland (formerly the Society for the Preservation of Maryland Antiquities). Preservation Maryland ("PM") is a membership organization which maintains a number of historic properties across the state, and has an active educational outreach program. A recent report by the Johns Hopkins University Center for Metropolitan Planning and Research (funded by Preservation Maryland and the Trust) has evaluated the public-private partnership in Maryland preservation, and recommendations from this study are reflected in the Trust's own document.[1] In addition, the Maryland Historical Trust also supports academic and field research in Maryland archeology and architectural history, through projects with universities and colleges, historical societies, and professional organizations.

Purpose and Scope of the Planning Document

The Maryland Comprehensive Historic Preservation Plan is designed to serve a number of different purposes, and to be useful to several different audiences. First, the plan is intended to educate a wide audience about the philosophy, goals, and benefits of historic preservation, and is intended to promote interest and greater participation in preservation activity in Maryland. The scope of the preservation field, the types of cultural resources which are involved, the justification for their preservation, the mechanisms available for preservation, and the historic, social, and economic benefits of preservation are clearly illustrated and described. As an educational tool, the plan is written to be understandable not only to preservationists and academics, but to government officials

involved in all aspects of land use planning, at the federal, state and local government levels, and to private interests in both the commercial and non-profit sectors. The shorter version of the document which will follow completion of the technical document will be more suitable for distribution to the general public.

Secondly, the plan is designed to clearly explain the urgent need for preservation in the State, through description and analysis of the natural and social stresses affecting the survival of cultural resources. Available statistics on the estimated rate of loss of these resources clearly illustrate the rapid rate at which resources are being destroyed, and in which areas of state. This kind of information only only can define priorities in preservation activity, but can serve to inform decision makers outside of the preservation field of the real need to deal actively and effectively with these threats.

Thirdly, the plan describes the existing framework for the preservation system in Maryland, and evaluates this system for effectiveness. Through this analysis, statewide issues affecting the entire preservation community, both public and private, can be addressed. In this regard, the results of the previously described recent report on the relationship of public and private preservation organizations, prepared by the Johns Hopkins Center for Metropolitan Research and Planning, have been integrated into the plan. Similarly, this kind of systems analysis has also been conducted to determine the relationship of preservation agencies to those agencies and organizations involved in other, related land use planning fields, in order to identify both gaps/deficiencies as well as "targets of opportunity" in the system.

Fourthly, the plan is also intended to serve as an internal operating document for the Trust's own programs. This kind of long-range program analysis has not been conducted since the Trust published the Maryland Historic Preservation Plan in 1970, and there is a critical need for compilation and analysis of statistics on the distribution of historic resources and Trust projects and funding. The Trust has identified areas of the state and types of resources which have received either disproportionate attention or neglect in our activities, in order to better direct all office programs in the future.

In order to conduct this analysis, a system for organizing information on the Trust's programs and Maryland's historic

properties has been created. The Trust is using the "historic context" concept and Resource Protection Planning Process (RP3) model recommended in the Secretary of the Interior's Standards for Preservation Planning as the basis for this system, and adapting it for use in Maryland's program analysis. For each of the activities described below, resource and program data will be organized according to historic context, so that all known data about each context will be available for analysis. The comprehensive preservation planning model identified the following sets of preservation activities:

*Resource Identification (research and survey)

*Resource Evaluation (National Register)

*Resource Protection and Treatment (Technical Preservation Services Division activities and compliance review)

*Resource Interpretation and Education (Community Education Services Division activities).

Note: The Trust's Jefferson Patterson Park and Museum conducts some of all the above activities.

Fifth, the plan is intended to serve as a model for decision-making by other agencies at all levels of government and the private sector, to assist in creating their own preservation planning systems and thus in making more informed and reasonable preservation decisions. In order to make decisions both about specific resources and larger programs, the information which will be analyzed needs to be evaluated using a set of decision-making guidelines/criteria. Many factors need to be evaluated for potential use in this set of decision-making guidelines/criteria. First, there is the need for the establishment of standardized statewide "historic contexts" or "study units," as the primary means to organize information about the State's cultural resources, and answer questions concerning identification and evaluation of historical significance. However, in addition to historic significance, other factors, notably social and economic considerations, need to be included within this decisionmaking matrix, in order to arrive at decisions concerning resource protection, treatment, and interpretation. The Trust is adapting the Secretary of the Interior's comprehensive preservation planning model, not only to organize information about a property's historic significance, but also to evaluate socio-cultural attitudes, local community

values, needs and traditions, and economic considerations such as cost-effectiveness and the potential for stimulating the local economy of an area. By defining within the planning process the ways in which the Trust makes decisions about historic resources, it will provide not only a set of standardized "historic contexts" for the State, but also a set of guidelines for decisionmaking that will allow for flexibility in application by other governmental and private entities depending on each jurisdiction's respective priorities. Through the Certified Local Government program, the MHT has assisted the City of Rockville in the production of a city preservation plan using the RP3 approach. This is the first project of its kind in Maryland.

Sixth, as a result of the foregoing analysis, the plan is intended to recommend needs and priorities for the preservation system in Maryland, and more specific program recommendations for the Trust's own operations. These recommendations form the basis for a state preservation policy, and will guide the implementation of the recently enacted 1985 Maryland State Preservation legislation.

The planning document and the planning process within the Trust will be subject to periodic review and revision as new information becomes available and changes occur in the state's preservation system. The process for revision is explained in Appendix 1 to this document.

The Planning document is directed to the following audiences:

Direct users:

MHT Operating Document: to guide programs, create system for organizing data in-house.

State and Federal Agency Document: to serve both educational and planning purposes, to assist other agencies in planning and compliance (particularly state agencies under new state legislation), to set official State government preservation policy, and to serve as a model for establishing preservation planning systems.

Local Agencies: to serve as an educational tool for decision makers and model for establishing own preservation planning systems, allowing for standardized historic contexts and guidelines for decision making across the State but allowing for flexibility in individual application depending on needs.

Indirect Users:

Private Preservation Groups: the plan can provide a preservation philosophy for the entire Maryland preservation community and suggest changes to the current private-public preservation partnership in line with the results of the recent Johns Hopkins University public/private sector preservation study.

Private Non-Profit Conservation, Planning, and Arts Groups: to serve as educational and planning tool, suggest closer cooperative arrangements.

Private Commercial/Development Sector: to encourage rehabilitation work, educate regarding benefits.

Academic Institutions: to serve as guide to future needs in scholarly research and suggest closer coordination among Maryland research institutions.

The General Public: to serve as educational tool to raise level of awareness and participation in preservation, and provide basic information on preservation programs.

Philanthropic Foundations: to inform possible sources of funding for preservation activity.

CHAPTER I: THE GOALS OF HISTORIC PRESERVATION AND BENEFITS TO MARYLAND

CHAPTER I: THE GOALS OF HISTORIC PRESERVATION AND BENEFITS TO MARYLAND

INTRODUCTION:

Maryland has a long and rich history, reflected in the tangible reminders of our past which have shaped today's cultural landscape. The historic properties reflecting this heritage range from archeological sites left by earliest man in Maryland, from ca. 13,000 B.C., to the hundreds of thousands of historic structures built during the past three centuries which are still in use today. For example, it is estimated that as of 1980, there were approximately 346,000 buildings in Maryland which were built before 1939. (This includes 287,000 housing structures, which represent 25% of the state's housing units).[1] Using the generally recognized "50 year cutoff" period for historic designation, many of these buildings can be considered "historic" by 1989. It is clear that historic properties, (standing structures, archeological sites and historic districts and landscapes) comprise a very large segment of the state's man-made environment, and that the conservation of these irreplaceable resources can affect every aspect of our lives.

These properties, whether in the form of buildings, structures, archeological sites, districts (rural or urban), objects, or historic landscapes, are important to protect for many reasons. Historic preservation can be used as a tool to accomplish the Maryland Historical Trust's five major purposes or goals which improve Maryland's cultural and social life and enhance the state's physical and economic development. Each goal and its specific objectives, as well as its benefits, are described in this chapter. These goals and objectives will guide the more detailed recommended actions which are presented in Chapters IV and V of this document.

Each of the following five broad goals provides an important benefit to the State of Maryland, and all goals are considered to be of equal value. Each goal has been defined to be consistent with the Maryland Historical Trust's legislated responsibilities; no one goal will be pursued or met at the expense of another goal.

The five goals of the Maryland Historical Trust are:

GOAL I: INCREASE PUBLIC KNOWLEDGE AND UNDERSTANDING OF MARYLAND'S CULTURAL LIFE THROUGH IDENTIFICATION, EVALUATION, PROTECTION, AND INTERPRETATION OF THE STATE'S TANGIBLE HISTORIC PROPERTIES.

GOAL II: ASSIST IN THE MANAGEMENT OF ENVIRONMENTAL CHANGE; MAINTAIN AND ENHANCE THE APPEARANCE AND ENVIRONMENTAL DESIGN QUALITY OF MARYLAND'S COMMUNITIES AND LANDSCAPES; PRESERVE PLACES OF BEAUTY AND CULTURAL IMPORTANCE TO THE STATE'S CITIZENS, AND INCREASE THE PUBLIC'S LEVEL OF AESTHETIC AWARENESS.

GOAL III: STRENGTHEN COMMUNITY AND NEIGHBORHOOD COHESION AND PRIDE, AND INCREASE LOCAL REVITALIZATION ACTIVITY BY RESIDENTS, COMMERCIAL INTERESTS, AND DECISIONMAKERS BY ASSISTING A BROAD RANGE OF COMMUNITY NEEDS AND INTERESTS.

GOAL IV: CONSISTENT WITH ADOPTED STATE POLICY ON CONSERVATION AND DEVELOPMENT, MAINTAIN, CONSERVE, AND PROMOTE THE EFFICIENT USE OF MARYLAND'S NATURAL AND BUILT RESOURCES, PARTICULARLY THE STATE'S HISTORIC BUILDING STOCK, TRANSPORTATION AND OTHER FACILITIES, AS WELL AS LAND AND ENERGY RESOURCES.

GOAL V: EXPAND THE ROLE OF PRESERVATION ACTIVITY IN ASSISTING THE ECONOMIC DEVELOPMENT OF MARYLAND AND ITS COMMUNITIES.

DEFINITION OF GOALS AND OBJECTIVES:

Planning for historic preservation, as in any field, requires the definition of ideal goals which reflect what we wish to accomplish in the future, as well as problems which interfere with achieving those goals. In the Maryland Comprehensive Historic Preservation Plan, the Maryland Historical Trust is attempting to define goals and objectives, not only for its own programs, but also for the preservation community in Maryland, and as a guide for State government policy on preservation.

While the Trust cannot and should not assume sole responsibility for preservation in the State, the goals, objectives and recommendations included in the Comprehensive Historic Preservation Plan are intended as suggested guidelines for use by all agencies and organizations involved in preservation within Maryland.

In planning, goals are generally long-range,broad, abstract statements of future aspirations; they reflect what we want to accomplish. Goals represent the basic values that are held by most people in the community. Objectives suggest ways in which goals can be accomplished; they are short-term, more specific, and more immediate statements of what actions are needed to translate goals into actions. Once goals and objectives have been defined, policy recommendations are made which supply more detail on how these actions can be implemented.

GOAL I: INCREASE PUBLIC KNOWLEDGE AND UNDERSTANDING OF MARYLAND'S HISTORY AND ENRICH MARYLAND'S CULTURAL LIFE THROUGH IDENTIFICATION, EVALUATION, PROTECTION, AND INTERPRETATION OF THE STATE'S TANGIBLE HISTORIC PROPERTIES.

Objective 1: Create a more complete and representative data base including information about the state's historic properties; increase our knowledge and understanding of the past by accelerating the rate of coverage in documentation, analysis and protection of Maryland's significant historic resources.

Objective 2: Improve existing programs and support new programs which protect and preserve Maryland's historic properties.

Objective 3: Encourage closer cooperation among various academic disciplines (history, anthropology, folklife, architecture, geography) involved in the study of the state's history, particularly through the state's academic institutions and other research organizations, in order to better interpret and synthesize information about Maryland history.

Objective 4: Promote increased public and professional appreciation for the value of history in its broad sense (and of Maryland and local history in particular) through educational programs held in conjunction with relevant organizations.

Objective 5: Promote increased appreciation of the contribution of archeological resources in the study of Maryland's history, and publicize the economic and practical advantages of preserving such archeological sites.

One of the major purposes of historic preservation activity in Maryland is to provide the State's citizens with a record and

an understanding of the State's history; this is not simply an academic, scholarly exercise, but provides real social and cultural benefit for all Marylanders. Knowledge of history has always been acknowledged as holding an important value in society; the dangers of forgetting the lessons of the past are reflected in the frequently quoted phrase "Those who cannot remember the past are condemned to repeat it." (2) Many other observers have also described the basic human need for both private and collective memory in order to maintain a sense of personal, familial, community, and cultural identity. As the 1984 California Heritage Task Force report explains:

> Why heritage preservation? At its most basic level it is a personal need for understanding ourselves. We are the families and traditions and communities in which we were raised and in which we now live.
>
> ...
>
> The long term goal is preservation of a heritage resource base for the good of the California citizenry, for the preservation of knowledge and objects as they hold value for long-term cultural coherence. It is not the preservation of an individual building per se, or ability to focus on a specific archeological research topic or arts topic, out of context of its relationship to the overall cultural needs of Californians. (3)

Preservation of the tangible reminders of our past in today's environment similarly enriches Marylanders' lives in many ways: it helps us understand our past, it provides social and cultural identity, conveys a sense of "roots" and of time and place, a continuity between past, present and future, and association with the cultural and ideological origins of our society. An example of a common type of historical association for many people occurred when Colonial Williamsburg was chosen by President Reagan as the location for the Ninth Assembly of World Industrialized Powers in 1983. This choice was explained by the statement that "Colonial Williamsburg has the ability to give people an idea where we came from, not only in structure but also...ideologically." (4)

This example illustrates the political and ideological

associations a historic site conveys of the past, and helps to explain the popularity of historic places as tourist attractions. The real value of preservation, however, lies in its broader social benefit. This benefit was well stated in the 1966 study, With Heritage So Rich, which outlined the basic themes of the modern preservation movement. Describing the rapid rate of environmental change, increased mobility, rootlessness, and search for stability and belonging that has recently occurred in the U.S., the study concluded:

> If the preservation movement is to be successful, it must go beyond saving bricks and mortar. It must go beyond saving occasional historic houses and opening museums....It must attempt to give a sense of orientation to our society, using structures and objects of the past to establish values of time and place. (5)

This basic role for preservation in modern society has been more recently and broadly stated in the publication Cultural Conservation: The Protection of Cultural Heritage in the US (1983) (6) where the need for cultural conservation and the need to maintain cultural identity through encouragement and preservation of both tangible and intangible expressions is clearly explained from the viewpoint of folklife studies. The report illustrates the many examples which show that "The American people are acutely aware of the importance of their cultural heritage." (p. 3) and notes that "The pervasiveness of such efforts reflects both pride in community heritage and a profound desire to keep alive the context and expression of cultural identity." (p. 5) The report describes the two different types of cultural expression - the tangible artifacts, buildings, objects, archeological sites, landscapes, and the intangible elements - (local traditions, oral history, folklore) and asserts that both are equally significant and need to be interpreted together to create cultural identity. (p. 7) While the historic preservation movement's primary focus is on tangible resources, the interpretation of those resources must be done in conjunction with the broader context of intangible cultural expressions.

The importance of history and historic preservation to both the general public and the nation's leaders has most recently been shown in a 1986 Gallup Poll on attitudes toward America, conducted for the Urban Land Institute. According to this poll, 75% of all Americans believe that "a good job is being done to

restore historic buildings and districts." There is strong agreement both by the public and by "Opinion Leaders" that "retaining a sense of the past" is a very important historic preservation goal (95% Opinion Leaders, 54% General Public), and that "creating a historically interesting environment" is also very important (95% Opinion Leaders, 54% General Public). Strong support was also found for tax deductions enabling the restoration of historic homes (69% of the General Public) and commercial buildings (55%).

When asked which groups should take the lead responsibility for historic preservation activity, "94% of Americans believe that citizens in general should have a strong say in the decision-making process for historic preservation." Other groups are assigned a slightly less important role as follows: neighborhood groups, 91%; local government, 90%; local history experts, 87%; state government, 82%; local developers, 76%; and federal officials, 70%. This strong bias toward local preservation efforts is shared by the Opinion Leaders, who feel that local officials (96%) and citizens in general (94%) should have a more significant role in preservation than state officials (65%) and federal officials (57%). local focus

GOAL II: ASSIST IN THE MANAGEMENT OF ENVIRONMENTAL CHANGE; MAINTAIN AND ENHANCE THE APPEARANCE AND ENVIRONMENTAL DESIGN QUALITY OF MARYLAND'S COMMUNITIES AND LANDSCAPES; PRESERVE PLACES OF BEAUTY AND CULTURAL IMPORTANCE TO THE STATE'S CITIZENS, AND INCREASE THE PUBLIC'S LEVEL OF AESTHETIC AWARENESS.

Objective 1: Promote awareness of the overall importance of environmental quality, design, and aesthetics by explaining the psychological importance to, and positive impact of, quality design on the state's citizens.

Objective 2: Educate the public, professionals, and decisionmakers as to special contributions of historic buildings to the environment in terms of providing human scale, quality design and construction, cultural identity, and a sense of time and place.

Objective 3: Improve the appearance of Maryland communities and landscapes by encouraging new development which is compatible in design with the existing environment; assist planning and design programs to better manage environmental change.

Historic preservation is important to Maryland for its capacity to maintain and enhance the visual appearance and design quality of the state's environment and for the role it can play in managing environmental change. The visual appearance and environmental design quality of Maryland's communities and landscapes are important to Marylanders; preserving good quality structures and places of beauty contributes to a good quality environment where new design is in harmony with the existing setting. Good preservation projects follow basic standards of architectural design, respecting architectural integrity and the character, scale, and design of neighboring structures.

Aesthetics and environmental design are of basic importance to our society, and not just "amenities." In studies of

environmental perception and psychology, the effects of environmental surroundings and design on people and their behavior have been researched. There is still a basic need, however, to improve general environmental awareness and education among our citizens, as noted by planner Edmund Bacon in 1966, in "The Townscape," in With Heritage So Rich:

> Basic to the entire question of the future of American cities was the fact noted by the panel that American education is almost totally innocent of instructions leading toward an awareness of and sensitivity to the urban physical environment.
>
> ...In addition to learning about the urban environment, the school children in every area of the city should experience beauty in their lives in their physical surroundings.[8]

In the early and mid 1960s, when the conservation and preservation movements ("Keep America Beautiful") were organizing, a basic theme was the assumption that there is value to beauty, and that beauty and harmony in the environment is important in our lives. President Johnson, in his address to the White House Conference on Natural Beauty (1965), explained that beauty in the environment is a way to improve the quality of life for all Americans; and that it is essential to bring beauty into the surroundings and daily lives of people:

> ...For natural beauty is not a luxury for the satisfied. It is not a pleasant frill or a superficial enjoyment. Natural beauty, as you and I conceive it, is the world that we live in. It is the environment in which we were born, and grow to maturity, and live our lives.
>
> It is more than a rich source of pleasure and recreation. It shapes our values. It molds our attitudes. It feeds our spirt, and it helps to make us the kind of men and women that we finally become. And the kind of men that we finally become in turn makes this great Nation.[9]

Preservation plays a vital role in contributing to the beauty and harmony of the American environment; it is a valuable tool for protecting places of beauty, quality, and interest for the benefit of Maryland's citizens. Preservationists have come to realize the significance of structures and districts aesthetically as well as for their historical associations since 1966, when With Heritage So Rich recommended that:

> First, the preservation movement must recognize the importance of architecture, design and esthetics as well as historic and cultural values. Those who treasure a building for its pleasing appearance or local sentiment do not find it less important because it lacks "proper" historic credentials.[10]

The special role of older and historic resources in improving the quality of the environment needs to be more widely communicated and appreciated. Historic buildings, sites, and places are important to the landscape and townscape because they contribute a special and unique sense of time and place, a more human scale than many modern buildings, and good quality design and construction. Collections of these resources which are harmonious in exterior design and scale create a pleasant and human environment. Good environmental planning should respect the existing setting when alteration or new construction is designed, taking into account the relationship between old and new design, so that environmental change is managed in the most compatible way.

GOAL III: STRENGTHEN COMMUNITY AND NEIGHBORHOOD COHESION AND PRIDE, AND INCREASE LOCAL REVITALIZATION ACTIVITY BY RESIDENTS, COMMERCIAL INTERESTS, AND DECISIONMAKERS BY ASSISTING A BROAD RANGE OF COMMUNITY NEEDS AND INTERESTS.

Objective 1: Encourage the stabilization of neighborhood/community populations and reduce potential displacement problems; promote the use of innovative programs which assist citizens of all economic and social levels within Maryland communities.

Objective 2: Assign high priority to preservation projects which identify and protect places of special importance to local communities and offer the greatest potential for generating community interest and activity.

Objective 3: Develop working partnerships with other government agencies and private organizations involved in community development activities.

The preservation of local heritage, traditions, and significant places is important to strengthen Maryland's communities and neighborhoods and stimulate community revitalization, improvement and development. Building a local capacity for heritage preservation at the neighborhood and community level is an important tool for strengthening a sense of community, increasing civic pride, stimulating other revitalization activities, and making communities more livable. As stated at a 1980 national preservation conference, one goal of preservation is:

> To assist, catalyze and work as a partner in community enhancement and revitalization efforts in neighborhoods, business centers, small towns and rural areas.[11]

President Reagan, in his remarks for a national videotape conference on the revitalization of America's downtowns (Sept.

18, 1984) noted the "pioneering accomplishments" of the National Trust for Historic Preservation's National Main Street Center. After noting the economic benefits of increased reinvestment, new business creation, and the federal tax program, he concluded:

> When you leave this conference, I know your efforts will help to give our towns more restored buildings, more jobs, and a renewed sense of pride, and that will be good for our entire Nation.[12]

Clearly, the goals of historic preservation support those of the Maryland Historical Trust's parent agency, the Maryland Department of Economic and Community Development, whose enabling legislation directs it not only to promote the State's economic development but to"...protect and enhance the social, economic, cultural and fiscal viability of the State's communities."[13] In addition, preservation supports many of the policies and principles of the Governor's Executive Order "Policies to Guide State Actions for the Physical and Economic Development of Maryland," particularly Principle A, "The viability of Maryland's existing communities and urban areas will be enhanced."

Because the significance of any historic resource is directly related to a specific place, it is inherently of interest and concern to local residents. As Christopher Tunnard commented on President Johnson's February 8, 1965 Message to Congress on Natural Beauty:

> The President correctly emphasized the importance of citizen participation in this movement. By its very nature - the fact that it deals with immovable objects which have a close relationship with the land - there is involved a strong element of local participation and pride."[14]

This is one of the most important benefits of local history, preservation and folklife studies - the ability to create local interest and community participation. Thus, it is a powerful tool for stimulating new neighborhood improvement activity, increased civic pride and community cohesion, and increased economic investment. Preservation can have the greatest impact on communities by placing priorities on those projects which

involve places of special interest and importance to the community and those with the greatest potential to stimulate additional activity. These projects may not always necessarily be those with the greatest "historic" value, but their major importance may lie in their traditional importance to the social or cultural life of a community and their capacity to stimulate additional citizen activity.

Many of the techniques used in historic preservation - easements, revolving funds, and historic district ordinances - have by now become commonly used tools in local communities, and the importance of local organizing efforts to save threatened landmarks has been recognized as an important stimulus for strengthening local activism:

> This change of semantics - and this change in perception - is taking place because these and other tools previously associated with historic preservation are proving effective and efficient in meeting neighborhood needs. Ranging from legal protections to funding devices, most preservation strategies and techniques are designed for use by ordinary citizens - operating on their own initiative and at the local level.
>
> Developed over several decades of experience, historic preservation techniques are important instruments in our national urban conservation policy....[15]

Preservation activity can affect the stability of a community's population in many ways. While gentrification and displacement in some cities have resulted in some negative publicity for preservation, this is not necessarily the inevitable consequence of rehabilitation work; residential change in historic areas is a complex process which also involves other socio-economic factors in addition to rehabilitation. More often, preservation activity has been shown to be an effective tool for increasing a sense of neighborhood or community, often enabling local residents to improve their homes and remain in them; one of the most successful projects of this type was in Savannah, Georgia, where a housing rehabilitation program was formed specifically to assist low-income residents. This is the kind of program which should serve as a model for Maryland

communities.

The Neighborhood Housing Services program for housing rehabilitation in cities across the country has also shown the viability of home and neighborhood improvement programs, and it is with programs such as this that preservation can work in partnership. The potential for using preservation as a tool for community improvement is greatly enhanced by working in closer coordination with other types of government agencies and private organizations which are also working to improve our communities. Preservation agencies such as the Maryland Historical Trust should be actively

> Creating partnerships that will protect the integrity of neighborhood cohesion, utilizing economic, social, organizational, political and technical strategies to improve community livability.[16]

GOAL IV: CONSISTENT WITH ADOPTED STATE POLICY ON CONSERVATION AND DEVELOPMENT, MAINTAIN, CONSERVE, AND PROMOTE THE EFFICIENT USE OF MARYLAND'S NATURAL AND BUILT RESOURCES, PARTICULARLY THE STATE'S HISTORIC BUILDING STOCK, TRANSPORTATION AND OTHER FACILITIES, AS WELL AS LAND AND ENERGY RESOURCES.

Objective 1: Provide information describing the need for, and benefits of, conserving nonrenewable land and energy resources and maintaining historic buildings, roads, bridges, and other facilities.

Objective 2: Promote retention of existing building stock and encourage the creation of new usable space through rehabilitation rather than new construction, thereby conserving energy and nonrenewable resources.

Objective 3: Help to implement adopted State policy by maintaining, enhancing and protecting existing town centers, open space, agricultural and undeveloped lands through work with conservation, agricultural, and other land preservation organizations and agencies.

Historic preservation in Maryland helps to maintain and conserve the physical fabric of the State's existing building stock and "infrastructure" (transportation facilities, utilities, etc.) and encourages the efficient use of these non-renewable resources where possible rather than requiring use of new natural resources and energy sources. Preservation activity also helps to protect Maryland's open space, agricultural and forest land, and existing town centers, by assisting in planning for Maryland's physical growth and development (as stated in Governor Hughes' Executive Order 01.01.1982.08, "Policies to Guide State Actions for the Physical and Economic Development of Maryland").

Preservation serves an important utilitarian, practical purpose in assisting in the maintenance and repair of the existing building stock and bridges, roads, rail systems and other types of facilities upon which we depend. Older and

historic structures comprise a large percentage of Maryland's (and the nation's) building stock, and conservation of these structures should be considered an essential ingredient in the economic and physical development of the country and state. It has been estimated that:

> ...collectively as a Nation we add only 2 percent each year to the built environment; consequently, 98 percent of it has to be maintained. In these terms, repair and recycling are activities essential to national well-being.[17]

Nationally, it is estimated that there are approximately 17.3 million structures which were constructed before 1933, which could potentially be considered historic; this is 27% of the total building stock, and the replacement value of these structures is estimated at $1.5 trillion.[18] And, in terms of the nation's housing units, nearly a third (31% or 26.7 million units) are in structures built before 1940, providing homes for 65 million people.[19]

In Maryland, 1980 US Census figures show that 346,511 housing units, or 25% of the state's total, are located in structures built before 1939.[20] The Maryland Historical Trust estimates that this number of units equals approximately 287,000 housing structures and our projections are that there may be 345,000 structures of all types built before 1939.[21]

Clearly, older and historic structures comprise a large portion of the state's building stock, and this is probably also true for much of the state's infrastructure, although figures are not available at this time. Thus, preservation is essentially conservative - to maintain and repair structures which are still potentially useful. This utilitarian function of preservation is well illustrated by Walt Whitman, who

> ...emerges as the first modern preservationist in his emphasis on the utility of older structures. In an article for The American Review entitled "Tear Down and Build Over Again," Whitman proclaimed: "What we have that is good, that is fully equal to our present capacities and wants, that, if destroyed, would doubtlessly be replaced by

> something not half as excellent: let it stand."[22]

This practical, common sense approach is shared by people in every segment of society:

> Indeed, preservation is a basic way of looking at life. Those who believe in it believe in using something until it is no longer usable. An editorialist in Small Town touched the philosophical underpinnings of preservation when he wrote: "It is very difficult for me to be persuaded that a new building is going to more energy efficient than an old one when demolition destroys not only irreplaceable building materials - bricks burned at the cost of thousands of cords of wood - but also negates the human energy that went into construction. Demolition is but a signal to our youth that we have resources to waste."[23]

By retaining the existing housing stock, and creating new housing through rehabilitation of older buildings, we create much needed housing space for our citizens, usually in buildings that are superior to modern housing construction in terms of durability, quality of design, and energy savings. The same is true of conserving and re-using non-residential building space.

The energy savings of rehabilitating older buildings has been well documented in studies which show that re-use is more energy efficient than new construction for two reasons. First, through rehabilitation, energy is saved by not abandoning or demolishing an existing historic structure and constructing a new building. "Because energy is required to construct a building, an existing building represents 'embodied energy' already invested."[24] The energy savings increases even more dramatically if energy is required to demolish a structure, and if a new building requires the construction of new supporting infrastructure.[25]

Rehabilitation work on an existing structure uses less energy than would be required to build a new one. Rehabilitation is inherently resource efficient; since it is so highly labor intensive, and uses existing building materials, fewer natural

resources are used in producing new construction materials. "ERDA conducted a study that determined rehabilitation consumes 23% less energy than new construction. In 1967...it took 49,000 BTUs per square foot to rehabilitate a structure compared to 65,200 BTUs per square foot to build it new."[26]

Secondly, once an older historic building has been rehabilitated, it usually requires less energy to operate and maintain than do more modern buildings. A study by the National Trust for Historic Preservation has found that:

> Older and historic buildings, built to take advantage of natural energy-saving features, need less energy for heat, cooling and lighting than new ones. This is particularly true of commercial buildings, which were built before the availability of air conditioning and often included operable windows, thick masonry walls and other energy-saving features.[27]

In an analysis of energy use of buildings by date of construction, this study (using a Department of Energy 1980 survey) found that pre-1900 commercial buildings are "naturally energy efficient," and that buildings built prior to 1940 use less energy than newer ones. Those built from 1940-1959 are least energy efficient. The study notes that older residential buildings can be made even more energy efficient by adding modern energy saving features such as attic insulation.

Preservation also conserves energy in that it requires less new and expensive infrastructure required to support new construction and development, such as public utilities and transportation facilities. In this sense preservation clearly supports the following principles embodied in the Governor's Executive Order "Policies to Guide State Actions for the Physical and Economic Development of Maryland," cited earlier:

> E. The efficient use of non-renewable energy resources will be promoted and the exploration and development of new and alternate energy sources will be encouraged.
>
> F. The efficient provision of transportation, utilities, water and sewer facilities, and

other public investments will be pursued.[28]

Under principle F there is particular reference in the listed policies which specify the promotion of growth in existing areas and discouraging diffused growth, and "Encourage the maximum use of the existing infra-structure in the State." (F(6))

In addition, preservation of structures and archeological sites in their historic settings conserves valuable natural resources by encouraging the conservation of agricultural land and woodland, (particularly rural historic landscapes). Principle B of the Governor's Executive Order illustrates this benefit:

> B. Productive agricultural land will be protected, the conservation and wise, balanced use of Maryland's natural resources will be assured, and recreation and open space resources for the use of and enjoyment of this and future generations will be secured.

GOAL V: EXPAND THE ROLE OF PRESERVATION ACTIVITY IN ASSISTING THE ECONOMIC DEVELOPMENT OF MARYLAND AND ITS COMMUNITIES.

Objective 1: Place high priority on Trust - assisted projects with the greatest potential for economic impact and for stimulating commercial revitalization, particularly in those localities most in need of economic assistance.

Objective 2: Create a more harmonious working relationship with commercial development interests by streamlining existing preservation mechanisms and create new ones in order to minimize conflict between preservation and other interests in economic development issues.

Objective 3: Encourage greater interest and investment in preservation projects by publicizing the economic benefits of preservation to a broad range of property owners, the development community, and to relevant decisionmakers.

Objective 4: Publicize the benefits of preservation to the tourism industry, business and industrial agencies, and economic development agencies, to encourage greater coordination for mutual benefit.

Objective 5: Develop partnerships with the state's construction/home improvement/renovation industry and the real estate community, particularly by informing those interested about proper treatment of historic structures, and promotion of mutual benefits.

While the historic preservation movement has been instrumental in efforts to preserve and enhance our State's historic buildings, urban historic districts, and rural landscapes -- important ends in their own right -- historic preservation activities have now been shown to be consistent with the economic and community development of Maryland. Preservation has enhanced the development "climate" in the State, and strengthened our economy in many ways. Preservation activities stimulate private investment and economic revitalization through greater cost-effectiveness, jobs creation, and other advantages over comparable new construction, thus strengthening the State's economy. Preservation also enchances the attractiveness of the State to new business investment through its quality of life

benefits and amenities. And, lastly, preservation/rehabilitation of historic properties is a major factor in two of Maryland's largest industries, the highly important tourism industry and the construction/real estate industry's renovation and remodeling activities.

Rehabilitation/Renovation Industry Nationwide:

Nationally, reinvestment in and renovation of existing structures has become a major growth industry of the 1980s. Increasingly, Americans are conserving and improving historic buildings, and renovation of existing buildings of all types and ages has rapidly become an enormous industry.[29] A major portion of the construction industry depends heavily on renovation and rehabilitation work. At least half of the work and dollars expended in residential construction involves rehabilitation; renovation equals one-third of non-residential construction and is the fastest-growing segment of the industry.[30] The total investment in renovation of all existing buildings is estimated at $105 billion annually; for "historic" buildings (over 50 years old), the amount is estimated at $28 million.[31]

Investment in Designated Historic Properties Under State, Local, and Federal Preservation Programs:

The impressive total dollar volume invested in historic rehabilitation projects is illustrated by the following figures for preservation programs. Under the FY 83-84 Emergency Jobs Act, for example, $70 million was invested in preservation projects. (This represents only 28% of the assistance actually requested by applicants, illustrating the great demand for preservation assistance.[32])

Federal tax incentives to encourage investment in historic properties began in 1976, and were significantly strengthened in 1981 through passage of the Economic Recovery Tax Act (ERTA) of 1981. Under the Tax Reform Act of 1986 (H.R. 3838), the investment tax credit (ITC) will be somewhat modified. Investment in rehabilitation projects certified under federal tax programs nationwide from FY 1982 to FY 1985 now totals nearly $8.18 billion and has improved 11,600 historic properties.[33]

Significantly, national surveys show that 65% of the owners of certified rehabilitation projects since 1976 would not have undertaken these projects without the tax benefits.[34] This program encourages a tremendous amount of private investment with only a relatively small loss in tax revenue to the U.S. Treasury.[35] In Maryland, 779 rehabilitation projects representing an investment of $353 million have been certified by

the MHT and the National Park Service. Nationwide, Maryland has been a leader in federal tax act projects, and Baltimore City has been especially active in using the tax incentives.[36]

The Maryland State income tax deduction program for the preservation of historic property (known as the "502-H Program") has also assisted a large number of historic properties. Since the program's inception in 1975, the MHT has reviewed for certification over 200 projects representing more than $7,000,000.00 in private investment. At the local level, there are three jurisdictions in Maryland which provide city or county tax deductions for the rehabilitation of historic properties within local historic districts.[37]

Advantages of Rehabilitation Over New Construction:

Preservation and rehabilitation of historic structures has been proven to be a highly cost-effective and safe financial investment when compared to similar new construction. Rehabilitation/renovation work is generally considered to be a less risky financial investment than new construction and is less affected by changing economic cycles. As Randolph Seifert, vice president of the National Home Improvement Council has noted, "the renovation/remodeling market has always been considered virtually recession-proof."[38]

Rehabilitation projects usually cost about one-half to one-third less than similar new construction[39], for several reasons:

1. Initial construction costs are lower because demolition costs are minimal and there is little expense for foundation and/or structural work; as a result, rehabilitation projects are usually faster to complete (often less than a year, compared to two or more years for new construction). One project which illustrates the financial advantages of rehabilitation work is the Center Stage theater in Baltimore, converted from the former Loyola College and High School (1856). The project took less than a year and cost $1.7 million; a new building would have taken two to three years and cost $2.5 million.[40]

2. In rehabilitation projects, "selective" rehabilitation (where as much of the building fabric is retained and repaired as possible) is much more cost-effective than complete remodeling or "gutting" of interior building materials. The Enterprise Foundation, a non-profit, low-cost housing

assistance organization based in Columbia, Maryland, has found that a selective approach to rehab work can trim up to 50% off per unit rehab costs, and is a better investment since it improves loan-to-value ratio.[41]

3. Rehabilitation projects have additional economic benefits, such as providing central and convenient site location; sound and durable quality construction; unique aesthetic and design value; and the public relations value of positive image and greater publicity opportunities.[42]

4. As described earlier, important financial advantages exist to encourage the rehabilitation of older buildings, under federal and state tax incentive programs. In addition, it is often easier to obtain financing for rehabilitation projects, especially if the property has been owned over a long period of time with accrued equity.[43]

5. Once a structure has been renovated, operating and maintenance costs are usually about the same or less than for comparable new construction; some costs are far less.[44] (The energy savings of rehabilitation projects are described in greater detail under Goal IV of this chapter).

Preservation Projects Create Employment Opportunities:

Rehabilitation/preservation projects in Maryland have been proven to create more jobs and have a greater impact on the local economy and unemployment rate than comparable new construction projects. This impact is due to the higher labor intensity of rehabilitation projects (75% vs. 50% for new construction[45]):

> "The type of work involved in rehabilitation is repair and replacement--working around and within an existing structure. This type of work requires fewer materials than new construction but more skilled labor; thus, a larger share of the total costs of a preservation project goes toward labor."46

Thus, more of the money from these construction jobs stays in the local economy through what is known as the "higher multiplier"; this is especially important since the greatest numbers of unemployed workers usually reside in areas with the most older buildings.[47] Many preservation projects also offer the opportunity for on-the-job training for unemployed workers.

Preservation Stimulates Economic Revitalization and Private Investment, and Increases the Local Tax Base:

There are many far reaching positive economic and social impacts of preservation activity on Maryland communities. Usually, preservation tends to improve a community by increasing retail trade, attracting new businesses and other investment, returning vacant buildings to use, increasing local tax revenue, adding jobs, and in general stimulating pride and enthusiasm for the community on the part of local residents and business people as well as attracting new residents.

There are many towns and cities in Maryland and in other states where the success of preservation activity in economic revitalization has been proven. Savannah, Georgia is a nationally known example of how a relatively small amount of preservation seed money, made available through a revolving fund,has leveraged a much greater share of private reinvestment in the community.[48]

The Main Street program of the National Trust for Historic Preservation has been extremely successful in revitalizing historic downtown areas, and "...reports that preservation activity in 30 participating small cities has generated 355 new businesses in two years and stimulated private investment totaling $23 million."[49]

Historic preservation activity and designation helps "create a more favorable climate for investment," according to an Urban Land Institute study of 26 cities.[50] This activity stimulates increased interest in reinvestment as vacant and underused buildings are returned to use and once again provide tax revenue for local governments, without increasing the cost of city services.[51] Many studies have shown that property values tend to increase faster in historic areas than in the community as a whole.[52]

While a rise in property values is usually of great benefit to a community, the potential displacement of residents who can no longer afford to maintain their property must be considered as a possible problem which should be addressed in some communities.[53] There are however, many other social, economic, and legal factors which work together to cause change in each community.

Impact of Historic Preservation on Maryland's Tourism Industry:

Tourism is now the third largest industry in Maryland, and is an important and fast-growing segment of the State's economy. Historic properties are an important attraction for visitors to the state, and are responsible for creating a large share of Maryland's tourism revenue. In 1985 alone,tourism generated approximately $4.4 billion in spending in Maryland, according to the State's Office of Tourist Development, Department of Economic and Community Development.[54] (This includes not only direct expenditures by visitors, but also payroll income, jobs, and state and local tax revenue.) A study of out-of-state visitors prepared for the state tourism office evaluated the economic impacts of tourism and the relative importance of the various types of tourist attractions.[55] The study did not assign a monetary value to specific types of tourist activities, but shows clearly that historical attractions rank high in popularity among visitors, usually second only to water-related activities such as boating and beaches. Thus, historic sites are responsible for generating a very large share of Maryland's tourism revenue-perhaps hundreds of millions of dollars annually.

Other travel statistics support the popularity of historic sites among tourists in Maryland and in other states. Visiting historic sites in the Mid-Atlantic region is the second most popular activity among 17 choices according to the U.S. Census of Transportation.[56] Attendance figures at National Park Service areas for 1979 showed that the largest number of people visited "National historical, archeological, and military areas" within the national park system.[57] Attendance figures at Federal, State, and privately operated historic attractions in Maryland attest to their popularity among thousands of visitors annually.[58]

The few studies on this issue which have been prepared in other states also show that historic and cultural resources play a vital role in attracting visitors and generating a large amount of tourist spending. A study by the California Heritage Task Force concludes that:

> California's historical and cultural resources clearly play an important part in attracting visitors to California and in stimulating intrastate travel by California residents. Indeed, California tourism promotion efforts are built to a very large extent on the draw of such historical and cultural sites as San Francisco's Chinatown, Hearst Castle, the California Missions...[59]

The California study describes the results of studies in South Dakota and Oregon, which both show clearly that visitors with an interest in historic sites generally stay a day or more longer and spend more money on their visit.[60]

Similarly, historic properties enhance Maryland's environmental quality and its quality of life, thus making Maryland an attractive and interesting destination for tourists. In Maryland, as in other states, many of the most popular attractions for visitors are historic towns which have developed into tourist centers, such as Annapolis, Oxford, St. Michaels, Solomons Island, St. Mary's City, Frederick, and areas of the City of Baltimore such as Federal Hill and Fells Point. There are many other historic places in the state which also have great potential as tourist centers. The Eastern Shore of Maryland is a good example of an area which is popular with tourists for its maritime setting and well-preserved history and traditions.

As an illustration of the very basic role which is played by historic properties in the state's tourism industry, analysis of Maryland state and local government tourism promotional literature shows that the overwhelming majority of the attractions publicized in the various brochures and guides are in fact historic sites, places or events which relate to the state's traditional culture. In the Maryland Guidebook (1984), for example, the listings of points of interest in each county are almost entirely historic sites.[61]

The very essential role played by historic resources in the State's tourist industry has not been fully appreciated, and there is much potential for even greater development of the historic sites component of the tourism field. The California report noted previously concludes that "Both the public and private sectors need to become more aware of the need for promoting, protecting and preserving California's cultural and historic resources that attract these visitors and tourists whose expenditures benefit local economies." This is true in Maryland and other states as well. The Department of Economic and Community Development tourism study described earlier recommended an increase in the promotion of historic properties by the State's tourism division, and this is certainly a first step in the right direction. Through the preservation, enhancement, and promotion of our historic resources, Maryland can be made even more attractive to visitors, thus increasing the economic benefits of this important industry, and stimulating further economic development.

CHAPTER II: THREATS TO MARYLAND'S HISTORIC RESOURCES

CHAPTER II - THREATS TO MARYLAND'S HISTORIC PROPERTIES

Introduction:

The inevitable process of environmental change places constant stresses on the survival and integrity of historic resources:

> Environments change. A sudden disaster may destroy a city, farms will be made from wilderness, a loved place is abandoned, or a new settlement is built on an obscure frontier. Slower natural processes may transform an ancient landscape, or social shifts cause bizarre dislocations. In the midst of these events, people remember the past and imagine the future.[1]

To publicize the urgent need for preservation activity in Maryland and to determine the direction for preservation in the future, we need to consider the many forces and processes of change affecting the state's historic resources. By evaluating the extent and rate of loss caused by the possible types of stresses, and deciding which of these pose the most urgent threats, we can better plan our programs to minimize the damaging effects of change by targeting those forces, those types of resources which are most threatened, and those geographic areas of the state which appear to need the most attention.

The regional cultural resource management plans which have been produced by the MHT's regional preservation centers have already begun to address stresses on the resource base, particularly for archeological resources. These plans and their authors (listed in the Bibliography) are: Custer, Upper Delmarva Region; Davidson, Lower Delmarva Region; Pogue and Smolek, Southern Maryland; and Wall, Western Maryland. In addition, other MHT studies have discussed stresses; see especially the Wilke-Thompson study of the Maryland Coastal Zone and the Steponaitis Lower Patuxent Drainage study (both for archeological resources), and Ware et. al., Coal Basin Region report (for above-ground resources).

Historic properties in Maryland are disappearing or being damaged at an alarming rate. For example, the Maryland Historical Trust estimates that 31% of the housing structures which stood in Maryland in 1939 were destroyed by 1980.[2] In many counties, especially in the Western Shore region, the loss was as high as 40-50%. For archeological sites, it is still difficult to estimate the rate of destruction. While the destruction of a historic property is the most serious loss to the state's historic record, serious loss can also occur when a historic structure, archeological site or historic district is damaged through alteration or removal of original features, or when the historic context of environmental setting is changed.

In this chapter, we will discuss the causes of this loss and damage - the variety of human and natural processes which can threaten the survival and integrity of historic properties in Maryland. A brief introduction will describe how properties are lost, damaged, or their setting altered, and the Maryland Historical Trust's best estimates of the extent and rate of loss will be presented. Following this introduction, the chapter will describe and evaluate the processes which place stress on historic properties. While almost any kind of human or natural event can threaten historic properties, we will focus on those major stresses on historic properties in Maryland and those which can be planned for and managed to some extent. In this chapter, we pose the question: "What processes and activities are the most serious in damaging and destroying historic resources, where are they occurring, and what solutions can be proposed to meet these stresses?"

In the description of stresses, natural or environmental processes (in particular, erosion, sedimentation and deposition) will be discussed first, followed by six types of forces or processes caused by human activity. These social forces are: 1) attitudes and education; 2) pressure for new land use leading to demolition or site disturbance; 3) functional obsolescence leading to vacancy and abandonment; 4) inappropriate alteration or incorrect restoration; 5) vandalism, theft, arson and artifact collecting; and 6) changes in the environmental setting.

1. Destruction of Historic Properties in Maryland and Estimated Rates of Loss:

Complete destruction of a resource occurs both through man-made and natural forces. Acts of nature (such as storms, erosion, flooding or fire) do destroy resources, but human activity represents a more serious and pervasive potential stress. Resources are destroyed either when there is a demand for a new land use, due to growth and development pressure, or when there is no longer a use for a building or site resulting in vacancy, abandonment, and deterioration or demolition. Or, destructive acts like arson and vandalism can destroy a resource.

Whatever the cause, the rate of loss of Maryland's historic resources has rapidly accelerated in recent years as the rate and scale of environmental change has increased dramatically. The rate of loss for historic structures and archeological sites can only be roughly estimated at this time. Research has begun to attempt to create predictive models for estimating the universe of standing structures and archeological sites and rate of loss in the state or in any of its regions. Much more work is needed however, to develop these estimates in Maryland.[3] In other states, estimates are that prehistoric archeological resources have been lost at extremely high rates. In Arkansas 25% were lost between 1962-72, and in the San Francisco Bay area, perhaps only 10% of these resources may remain.[4]

In Maryland, the best estimate of total resources and rate of loss is based on the Trust's own analysis of statistics from the U.S. Census of Housing, which records data on changes in the housing stock over time. (See Appendix 7)[5] Comparison of figures from the 1940 and 1980 censuses (see Tables II-1 to II-3) shows a dramatic loss in the numbers of pre-1940 housing units and structures which existed by 1980, particularly in certain counties and regions of the state, as described below. Since it is estimated that housing structures may comprise 80% of the historic building stock, these figures are probably the best available indicators of rates of loss, and of vacancy rates, among historic structures.

From the table, it is clear that the highest rates of loss occur in the Western Shore region of the state: Calvert, Charles, and St. Mary's counties all rank near the top of the list with 54%, 47% and 40% losses, respectively, while Anne Arundel and Prince George's counties have 32% and 30% losses. Conversely, many of the Piedmont region counties are clustered at

the low end of the list, with generally lower rates of loss. Western Maryland and Eastern Shore counties are more evenly distributed.

TABLE II-1

RATES OF LOSS OF PRE-1940 HOUSING UNITS, 1940-1980*

MARYLAND AVERAGE: -31%

County:		Region:
CALVERT	-54%	W.S.
CHARLES	-47%	W.S.
SOMERSET	-46%	E.S.
GARRETT	-45%	W.M.
WORCESTER	-41%	E.S.
WICOMICO	-40%	E.S.
ST. MARY'S	-40%	W.S.
QUEEN ANNE'S	-36%	E.S.
DORCHESTER	-36%	E.S.
BALTIMORE CITY	-36%	PIEDMONT
ANNE ARUNDEL	-32%	W.S.
KENT	-32%	E.S.
PRINCE GEORGE'S	-30%	W.S.
TALBOT	-28%	E.S.
MONTGOMERY	-27%	PIEDMONT
CECIL	-24%	E.S.
ALLEGANY	-25%	W.M.
HOWARD	-22%	PIEDMONT
BALTIMORE COUNTY	-20%	PIEDMONT
CAROLINE	-17%	E.S.
FREDERICK	-13%	PIEDMONT
HARFORD	-15%	PIEDMONT
CARROLL	- 9%	PIEDMONT
WASHINGTON	- 8%	W.M.

W.S.= Western Shore
E.S.= Eastern Shore
W.M.= Western Maryland

*When converted to rates of loss for housing structures, rates appear to be the same as for units.

Data source: U.S. Census of Housing, 1940 and 1980

TABLE II-2, Estimated Number of pre-1940 Structures in Maryland, compared to number of known sites. Data Source: U.S. Census of Housing, 1940 and 1980

County	Housing Units 1940	Pre-1939 Housing Units - 1980	Rate of Change 1940-1980	Housing Structures: 1940 (% of Units)	Existing # Pre-1939 Housing Structures: Method #1 1980	Method #2 1980	Estimated Total # All Types Pre-1939 Structures Method #1 1980	Method #2 1980	# Known pre-1930 sites (1986)	% of estimated sites surveyed, as of 1986 Method 1	Method 2
Maryland	509,156	346,513	-31%	414,544 (83%)	267,024	287,604	320,429	345,125	49,118	15%	14%
Allegany	22,313	16,654	-25%	17,645 (79%)	14,169	13,165	17,003	15,798	2,435	14%	15%
Anne Arundel	22,151	15,100	-32%	20,939 (95%)	12,646	14,345	15,175	17,214	2,428	16%	14%
Baltimore City	236,442	152,210	-36%	175,505 (74%)	111,423	112,635	133,707	135,162	15.165	11%	11%
Baltimore County	41,653	33,512	-20%	37,258 (89%)	26,225	29,826	31,470	35,791	3,813	12%	11%
Calvert	4,252	1,963	-54%	4,194 (99%)	1,901	1,943	2,281	2,332	835	37%	36%
Carroll	9,857	8,970	- 9%	8,824 (90%)	7,916	8,073	9,499	9,688	980	10%	10%
Caroline	5,172	3,521	-17%	5,009 (97%)	3,309	3,415	3,971	4,098	499	13%	12%
Cecil	7,695	5,859	-24%	7,135 (93%)	5,199	5,449	6,239	6,539	2,503	40%	38%
Charles	4,306	2,295	-47%	4,255 (99%)	2,102	2,272	2,522	2,726	447	18%	16%
Dorchester	7,803	4,946	-36%	7,348 (94%)	4,446	4,649	5,335	5,579	708	13%	13%
Frederick	14,674	12,750	-13%	13,235 (90%)	11,080	11,475	13,296	13,770	4,526	34%	33%
Garrett	5,416	2,958	-45%	5,090 (94%)	2,703	2,781	3,244	3,337	2,796	86%	84%
Harford	8,799	7,505	-15%	8,250 (94%)	6,306	7,055	7,567	8,466	1,940	26%	23%
Howard	4,068	3,184	-22%	3,872 (95%)	2,532	3,025	3,038	3,630	850	28%	23%
Kent	4,363	2,951	-32%	4,092 (94%)	2,693	2,774	3,232	3,329	1,106	34%	33%
Montgomery	23,255	16,933	-27%	21,146 (91%)	12,452	15,455	14,942	18,546	1,806	12%	10%
Prince George's	22,348	15,537	-30%	20,802 (93%)	10,170	14,449	12,204	17,339	1,038	8%	6%
Queen Anne's	4,232	2,724	-36%	4,199 (99%)	2,584	2,697	3,101	3,236	472	15%	15%
St. Mary's	3,593	2,153	-40%	3,571 (99%)	1,938	2,131	2,326	2,557	426	18%	17%
Somerset	6,108	3,313	-46%	5,815 (95%)	3,112	3,147	3,734	3,776	610		16%
Talbot	6,092	4,403	-28%	5,707 (94%)	3,975	4,139	4,770	4,967	566	12%	11%
Washington	18,351	16,803	- 8%	14,739 (80%)	13,657	13,442	16,388	16,130	2,773	17%	17%
Wicomico	10,101	6,058	-40%	9,338 (92%)	5,357	5,573	6,438	6,688	152	2%	2%
Worcester	7,042	4,151	-41%	6,526 (93%)	2,752	3,860	3,302	4,632	244	7%	5%

TABLE II-3. Estimated Number of pre 1939 Structures, Using Method #1

	PRE 1900 HOUSING UNITS											PRE 1939 HOUSING UNITS					PRE 1939 HOUSING STRUCTURES					PRE 1939 STRUCTRS. ALL TYPES	TOTAL NUMBER OF KNOWN SITES & % SURVEYED
	TOTAL UNITS	TOTAL TRAILERS	TOTAL NON-TRAILERS	NUMBER SINGLE UNITS	PERCENT SINGLE UNITS	NUMBER DOUBLE UNITS	PERCENT DOUBLE UNITS	NUMBER 3-4 UNITS	PERCENT 3-4 UNITS	NUMBER FIVE+ UNITS	PERCENT FIVE+ UNITS	TOTAL	NUMBER SINGLE UNITS	NUMBER DOUBLE UNITS	NUMBER 3-4 UNITS	NUMBER FIVE+ UNITS	NUMBER SINGLE UNITS	NUMBER DOUBLE UNITS	NUMBER 3-4 UNITS	NUMBER FIVE+ UNITS	TOTALS		
MARYLAND	1549682	28453	1521227	1055258	69.30	62199	4.15	55779	3.66	346703	22.81	315511	240394	14534	13199	79825	240394	7197	3628	15805	267024	328429	49118 (15%)
B.Anundel	126732	3254	123478	96567	78.21	3994	3.23	3132	2.53	19795	16.03	15102	11889	497	332	2421	11889	244	189	484	12646	15175	2423 (16%)
Allegany	31585	911	30644	23602	77.38	2767	9.03	1630	5.32	2539	8.29	20664	12881	1579	966	4381	12881	758	253	276	14169	17803	2435 (14%)
Balt. City	322425	319	322146	197662	52.18	28974	3.57	2423	7.53	62569	20.71	152218	94520	14569	11581	31520	94520	7284	3315	6304	111423	133797	15165 (11%)
Balt. Co.	243318	194	241272	171935	71.25	7399	3.07	7055	2.93	54266	22.49	33512	23582	1171	532	7227	23882	556	288	1587	26225	31470	3813 (12%)
Calvert	12571	530	11941	11365	95.18	288	2.41	43	0.36	273	2.29	1963	1869	42	7	45	1866	21	2	7	1901	2261	835 (37%)
Caroline	8313	817	7996	7225	91.11	252	3.15	155	1.94	396	3.63	3521	3298	112	68	143	3282	55	29	27	3389	3971	499 (13%)
Carroll	32855	664	31391	25843	82.33	2198	6.99	1092	3.48	2266	7.22	8976	7365	626	212	648	7385	313	89	130	7916	9499	984 (10%)
Cecil	21558	1755	19803	18536	83.50	1099	5.53	611	3.09	1557	7.86	5323	4892	325	181	451	4892	163	52	92	5199	6239	2583 (40%)
Charles	22618	900	21718	19269	88.72	299	1.36	501	2.31	1649	7.59	2495	2036	32	52	174	2036	16	15	35	2102	2522	447 (18%)
Dorchester	12397	710	11687	9865	84.41	618	5.53	387	3.31	625	5.35	4946	4175	343	154	265	4175	171	47	53	4446	5335	788 (13%)
Frederick	39431	967	38524	31319	81.30	1959	5.13	1388	3.60	3818	9.91	12750	10365	662	453	1264	10365	331	131	253	11080	13296	4526 (34%)
Garrett	9549	1190	8359	7265	86.91	442	5.29	256	3.06	396	4.74	2958	2571	156	91	140	2571	78	26	28	2723	3244	2796 (86%)
Harford	49345	2522	46823	36797	78.59	1332	2.84	1650	3.52	7044	15.04	7525	5898	213	154	1129	5898	107	76	225	6306	7567	1940 (26%)
Howard	42486	830	41656	30684	73.67	865	2.07	549	1.32	9658	23.14	3184	2339	66	42	737	2339	33	12	147	2532	3838	858 (22%)
Kent	6745	290	6455	5598	86.72	369	5.72	120	1.86	368	5.70	2551	2559	159	53	168	2559	84	16	34	2693	3232	1186 (34%)
Montgomery	216852	571	215481	142856	66.30	1640	0.46	3470	1.61	68115	31.61	15383	11259	82	273	5368	11259	41	78	1074	12452	14942	1886 (12%)
Pr.George's	236363	1553	234810	132116	56.27	1878	0.80	5672	2.42	95142	40.52	15537	8742	124	375	6295	8742	62	107	1259	10170	12204	1838 (8%)
Q. Anne's	9751	521	9230	8586	92.16	291	3.15	216	2.36	215	2.33	2724	2510	86	64	63	2510	43	18	13	2584	3181	472 (15%)
St. Mary's	21895	2561	19334	15965	86.14	491	2.65	675	3.64	1403	7.57	2153	1855	57	78	163	1855	29	22	33	1938	2363	425 (18%)
Somerset	7582	635	6947	6383	98.73	271	3.90	147	2.12	226	3.25	3313	3086	129	78	188	3086	65	20	22	3112	3734	
Talbot	11138	439	10695	9898	85.84	781	6.55	363	3.39	537	5.02	4483	3744	288	149	221	3744	144	43	44	3975	4770	566 (12%)
Washington	42089	1735	40274	29375	72.94	3209	3.12	2297	5.70	5333	13.24	16803	12256	1364	953	2225	12256	682	274	445	13657	16388	2773 (17%)
Wicomico	24559	1461	23098	19345	83.76	927	4.01	574	2.49	2251	9.75	6258	5074	243	151	538	5074	122	43	118	5357	6438	152 (2%)
Worcester	19535	1274	18261	10223	55.98	715	3.92	725	3.97	6598	36.13	4151	2324	163	165	1500	2324	81	47	300	2752	3382	244 (7%)

Source data: 1980 U.S. Census of Housing

2. Direct Damage, Removal, or Alteration of the Fabric of a Resource:

While the total loss of a resource is the most serious problem, the quality and integrity of a resource can be so seriously damaged that the historic character of the property is seriously compromised and it no longer reflects its historic character. In judging the significance of a resource, the "integrity", or degree of intactness of a resource, is extremely important. Integrity refers to the amount of original material and design which remains in a building or archeological site, and whether changes to the resource have been sensitive to the historic character of the resource. In archeological sites especially, integrity is essential; if the site has been disturbed and the context of artifacts has been removed and destroyed, the amount of information which can be learned from the site is greatly diminished.

Change and damage to resources occur in many ways, most frequently through human activity. Erosion, however, is a major natural stress on resources, especially archeological sites. Damage from human activity appears to occur most often from several sources: vacancy and abandonment, insensitive alterations and rehabilitation, acts of vandalism, theft and arson, and air pollution. The extent of damage from these sources is impossible to measure, but they are generally recognized as major stresses on historic properties.

3. Changes in the Environmental Setting:

While the previous section described the direct removal or alteration of the fabric of a structure or site, the next type of activity affects the historic setting of a resource. The setting or environmental context of a resource is extremely important to its historic character. Whether the historic property associated with the resource is a small yard, many acres, or many streets, the quality of the property and its surrounding environment is important in maintaining the sense of a historic place. These qualities can be visual, or can be atmospheric (as reflected in air and noise quality levels) or can include changes in socio-economic setting and cultural character of an area. In assessing any impacts, both the area within the historic property boundaries and the larger surrounding environment outside the property are considered.

The visual quality of a historic setting is probably the most frequently considered aspect, occurring when new construction, alteration or removal of surrounding structures changes the visual appearance and historic character surrounding a property. Also, air and noise pollution can affect historic properties by gradually damaging their fabric or by making a place less pleasant to live and work.

Again, it is impossible to measure the scope of this problem for both sites and structures, but from observation, we know that alterations to the surrounding environment are commmonplace. A change in the setting is generally more of a problem for structures than for archeological sites, which can be protected more easily from visual intrusions.

I. NATURAL (ENVIRONMENTAL) FORCES AND PROCESSES

Damage to historic resources from natural forces can either occur randomly and unpredictably, or can be scientifically forecasted. Random natural occurrences such as weather disturbances (thunderstorms, lightening, hurricanes, tornadoes, snowstorms) can destroy historic properties, but these are generally rare and infrequent in Maryland.

There are, however, some ongoing natural processes that have serious impacts on historic sites in Maryland; fortunately, these water related processes of erosion, sedimentation, and flooding can be predicted and managed by natural resource agencies such as the Maryland Department of Natural Resources and relevant federal agencies.

Shoreline Erosion, Sedimentation, and Flooding:

These processes all cause changes in the state's historic shorelines and landscapes over time, destroying historic sites at an increasingly rapid rate. Archeological sites are threatened much more seriously by these changes than structures, and the MHT regional management studies previously mentioned have identified erosion as one of the most serious threats to the state's archeological resources, especially in the Eastern Shore and Western Shore regions.[6] Erosion and deposition (other than by tidal action) are also accelerated by man-made construction, cultivation, and development activities, so that as the scale of development increases, so does the rate of erosion. Shoreline erosion is the most serious of these processes, occurring constantly and at a rapid rate, estimated to be at least one foot per year and higher in some sections of the Chesapeake Bay by the Army Corps of Engineers.

The causes of erosion have been described as follows:

> "While the causes of shoreline erosion are complex and not completely understood, the primary processes responsible for erosion are wave action, tidal currents, and ground water activity. Waves generated by wind, especially during hurricanes or other large storms, are the cause of most of the shoreline erosion in the Bay Region. In some busy harbors and waterways, the wakes of passing ships are also a significant erosive force."[9]

Erosion causes property damage, loss of land, loss of habitats, and increased sedimentation: sedimentation in turn requires dredging, affects water quality and the biota of the Bay.[8] Sedimentation/deposition can also greatly alter the landscape; for example, as the Piedmont region becomes more heavily developed, greater sedimentation occurs along its waterways and the shoreline actually extends into the water. (At Joppa Town, in Harford County, for example, the site of this once flourishing 18th century port town is now located at a distance from the present waterline.)

While the Chesapeake Bay and the Atlantic Ocean and their drainages are the areas of critical erosion problems, erosion also occurs along rivers and streams throughout the state. Riverine and coastal erosion due to floods in the Piedmont and Western Maryland regions can be serious at times, and in these areas top soil stripping of sites can be damaging. On the Chesapeake Bay and Atlantic shorelines in particular, however, the rapid rate of erosion is considered an extremely serious threat to historic resources, especially to archeological sites. In the Lower Delmarva regional management study for example, Davidson explains just how resources are affected:

> Cultural resources are not simply submerged in a more or less intact form by the rising water level; they are torn apart by storm and tide action and their original context is lost. The coastline erosion process has been going on for several millennia at varying rates of speed.[9]

As detailed in Davidson's study, coastline erosion is rapidly destroying historic resources in some areas of the region, while in other areas, the rate is much slower.

According to the Army Corps of Engineers recent study of Chesapeake Bay erosion, the problem is quite serious; of the total (7,300), miles of shoreline in Maryland and Virginia, about 1/3 (2400 miles) suffer significant erosion losses. It is estimated that during the years 1842-1942, approximately 25,000 acres of bay shoreline in Maryland have been lost to erosion.[10] This large loss of land has serious implications in terms of survival of the historic resources; already, many sites have

probably been lost to erosion. The Army Corps study has identified Bay areas which are subject to the most serious erosion problems. Table II-4 gives average loss of land by erosion per county. While the average rate of erosion in the Maryland portion of the Bay is 1.3 feet per year, many areas have a higher rate of 4-10 feet per year.[11] The implications for historic resources are that much of the coastline that has not yet eroded away probably holds high potential for prehistoric and historic sites, since much early settlement occurred in shoreline areas.

Tidal flooding is also a serious threat to the Bay shoreline, due to hurricanes or other tropical storms. The Army Corps of Engineers has identified 31 communities in the Bay region with a "critical"tidal flooding problem. Hurricanes and storms are recurring, and future storms and flooding are expected; a flood forecasting and warning system has been recommended by the Corps study.[12] While techniques are used to combat erosion and flooding (e.g., bulkheads and jetties), these construction activities can also place additional stresses on historic resources, especially ground disturbance of archeological sites.

Erosion, deposition, and flooding are processes which are being studied and managed by many state, federal, and local agencies, such as the Army Corps of Engineers, The Chesapeake Bay Critical Areas program, and the Maryland Department of Natural Resources' Coastal Zone Management program. The Trust needs to continue to work with these agencies and use the data generated by these programs to predict critical erosion areas with high potential for historic site location, and also to promote further research into the effects of these processes on the historic landscape.

TABLE II-4

SUMMARY OF CHESAPEAKE BAY
HISTORICAL SHORELINE EROSION DATA

County	Shoreline Measured (miles)	Average Erosion Rate (feet/year)
STATE OF MARYLAND		
Western Shore		
Anne Arundel	138	1.1
Baltimore	67	1.1
Calvert	69	0.9
Charles	92	0.3
Harford	81	1.1
Prince George's	21	0.3
St. Mary's	127	1.2
SUBTOTAL	595	1.0
Eastern Shore		
Caroline	13	0.8
Cecil	78	0.8
Dorchester	333	1.8
Kent	100	1.0
Queen Anne's	129	1.2
Somerset	233	1.3
Talbot	189	1.5
Wicomico	35	1.4
SUBTOTAL	1,110	1.4
TOTAL	1,705	1.3

Source: Table III-4, reproduced from
Chesapeake Bay Shoreline Erosion Study
Progress Report No. 2, p. III-30
June 1985
U.S. Army Corps of Engineers, Baltimore and Norfolk Districts

II. SOCIAL/CULTURAL FORCES

PROCESS 1: CULTURAL CLIMATE, NEGATIVE ATTITUDES, AND LACK OF PRESERVATION AWARENESS AND EDUCATION AS A THREAT TO HISTORIC PROPERTIES

Before proceeding to processes #2-6 which can physically damage or destroy resources, there is a need to understand the way in which attitudes influence decisions concerning historic resources. Clearly, educating the people of Maryland about the value of historic resources will improve the climate for preservation activity and result in increased support for historic resources.

Maryland preservationists need to evaluate the existing political and cultural climate for preservation, the general level of preservation awareness and knowledge, perceptions and attitudes towards preservation, the social value placed on history in general, and the various attitudes and levels of sophistication within the preservation movement itself, which is composed of diverse types of groups and individuals. Many preservationists do share a common view that the general lack of knowledge, appreciation, and sensitivity to historic properties in Maryland is one of the greatest threats to historic resources in the state. There is a tremendous need to educate people about the important social and economic benefit of preservation which were described in Chapter I, and to increase the use of preservation activity as a tool to achieve these benefits. One of the major problems to be faced are the common negative misperceptions of preservation as "elitist" (with benefits only for a small groups of Marylanders), as "obstructionist," (causing problems and interfering with progress), or as restrictive (interference on the rights of property owners).

The need to correct these negative attitudes and misperceptions applies not only to the general public, property owners, and commercial interests, but also to the decisionmakers in the public and private sectors who shape the state's public policy and who make important land use management decisions. This includes planning agencies, local government officials, state legislators, development and construction companies, architectural firms, civic and community groups, as well as related environmental and arts groups. All of these groups and agencies are described and evaluated for their potential partnerships with preservation in the later chapters of this planning document.

It is difficult to measure just how much public and professional value is placed on our state, local, and national history, and on the historic structures and archeological sites which represent that history.[13] To measure these attitudes would require sophisticated social science techniques which the Trust is not now equipped to conduct, but which might be considered as a project for an outside consultant. The experience of preservationists in Maryland however illustrates that one of the major hurdles they face is dealing with a lack of understanding of the importance of history and historical resources. The public's appreciation for landmarks and museums like the State House, the Hammond-Harwood House, or Antietam Battlefield does not usually extend to the historic resources in our own towns or neighborhoods.

To many citizens, there is a misconception that preservation is frivolous, costly, elitist, an impediment to "progress" and even an infringement upon their property rights. For example, when National Register listing is suggested to local citizens, there is often the misconception that somehow an individual's property rights will be infringed upon. Part of this belief derives from the traditional American protection of private property, but also there may be a general lack of sensitivity to good design and to the quality of the environment. The perception that preservation is elitist will hopefully diminish as the movement continues to expand its emphasis on the broad social and economic values of preservation and benefits to all types of people and places.

Regional differences in attitude and climate for preservation are difficult to categorize, but perhaps some generalizations can safely be made. The Eastern Shore and Western Maryland regions, due to their relative distance from major urban population centers, very strong regional/cultural traditions, and less urgent development pressure, may have stronger local opinions towards preservation than the Piedmont and Western Shore regions. In the Eastern Shore and Western Maryland, there may be somewhat more of an "isolationist" attitude and less of a sense of urgency than in the more developed regions in the central part of the state. In the metropolitan areas of the Piedmont and Western Shore, preservation also has become very popular among certain segments of the population as the benefits of preservation have become more widely known.

Educating the public and professionals about the need for and benefits of preservation will be a long term challenge, and

improving attitudes towards preservation will require profound changes in thinking. To counteract negative attitudes toward preservation, especially the misperception that it is an elitist activity, the Trust and preservation movement in Maryland must have a broader-based constituency and spend less effort educating those who are already aware of the value of preservation. This means not only the general public, but those professionals in business, government, development, planning and land use planning, who make crucial policy and land use decisions affecting historic properties. The value of history and the benefits of preservation which are described in Chapter I need to be better communicated to these audiences, and, we need to promote programs and activities which genuinely meet the state's social, cultural, and economic needs. The preservation philosophy needs to become an integral part of conservation and land use planning, economic development, community revitalization, and environmental design programs so that mutual benefits, rather than conflicts, are recognized. This kind of positive use of preservation will be permanent and broad-based.

PROCESS 2: DEVELOPMENT PRESSURE AND DEMAND FOR NEW LAND USE LEADS TO DESTRUCTION OF HISTORIC PROPERTY

The State's economic climate and patterns in growth and development can have profound impacts on historic resources. Changes in the economic base of a state or region, changes in demographics (population rates and densities), and changes in land use patterns are all interrelated, and all create stresses and pressures on the traditional character of an area and its historic resources. These are the forces which shape the historic landscape and our environment.

A period of economic growth and prosperity usually creates demands for new construction and for new land for development, with radical changes in types of land use, causing obvious pressures on historic resources of all types. Conversely, in a period of economic decline, there is little demand for new development; either existing buildings are used or vacancy occurs. By studying trends of fastest/slowest population growth/decline, and the simultaneous patterns of land development/abandonment, we will know where to expect either high pressures on historic properties (as described here) or the process of abandonment and vacancy described under Process 3. It should be noted, however, that these trends should be considered only to the extent that these criteria are predictable, which varies regionally within the state. However, the data available from the Department of State Planning and other planning agencies provide the best indicators available on these subjects.

The demolition of structures and archeological sites when land is needed for new construction is a serious problem in Maryland, especially in those areas of the state where the most growth, development, and new construction is occurring. Rapid change and new land use places increased pressure on historic resources, which are frequently destroyed to make way for new construction. In many parts of the state, the rate and scale of change is so great that not only are individual resources destroyed but entire landscapes and townscapes are altered or erased and a totally new environment created. The most striking examples of this process are in fast growing counties such as Montgomery, Prince George's, Howard and Anne Arundel, where new housing and commercial developments have virtually erased the historic landscape in large sections of these counties. Here farms, small settlements, towns, and archeological sites are

destroyed or gradually eaten away. Germantown, in Montgomery County, is an example of an historic town in a formerly agricultural area that has become an anachronism, surrounded by new housing development, commercial complexes, and government facilities; the new highway construction required to support this growth has combined with the new development to threaten the appearance and existence of the town.

Another type of land use which causes extreme change in the historic landscape is extractive industry, such as coal mining and sand and gravel operations. In Western Maryland's coal region, changes to the historic landscape have been widespread especially from strip-mining; however, the modern mining industry has developed some reclamation techniques to help restore the landscape when possible. Two regional studies (Wall, archeological resources, and Ware, et. al., standing structures) sponsored by the MHT and the Maryland Bureau of Mines have addressed the impacts on historic properties from the mining industry.[14]

More commonly, historic resources are demolished in a more piecemeal fashion. For example, new subdivision construction may destroy archeological sites, or an historic building may be torn down in a small town to provide land for a new branch bank building or post office. Or, in Baltimore, a block of buildings may be demolished to provide a site for a new hotel building. In the process, the buildings are demolished and the ground disturbance from new construction can also destroy any potential for archeological investigation. Many types of land use can also destroy archeological sites; the impact of agricultural practices on archeological sites, for example, has been discussed in the MHT regional plans mentioned previously. The scope of the problem appears to be widespread, especially in those parts of the state which are growing most rapidly and where land use patterns are changing most radically. The exact extent of loss of resources is difficult to measure, especially for archeological sites.

While the extent of demolition still needs to be established, we will be able to predict to some extent those areas of the state which are experiencing the most rapid growth and change in land use, by using the data described on the growth indicators of population, employment, new housing construction and other factors. Trends in these various areas will directly affect historic resources either by placing increased pressure or by creating vacancy problems. While these trends can not be altered,

preservationists can be prepared for change and plan for it. For example, the loss of agricultural land across the state is a known and statistically quantifiable process,[15] indicating that agriculturally-related historic resources are threatened. While abandonment of some farm properties may result in vacancy, more often, land use change from agricultural to residential development will cause increased demolition of farm structures.

Overview of Growth Trends in Maryland:

Analysis of data on growth trends show some clear patterns of growth in some areas of the state; in these areas, we can expect increased pressure on the survival of historic properties. By the year 2000, over 90% of the state's increases in population and housing and 86% of the acreage needed for new non-residential use will occur in the Piedmont and Southern Maryland (Western Shore) regions.[16] While some newly developing areas of Montgomery and Prince George's Counties will continue to experience intense development, the trend observed by the Department of State Planning is that the older more densely developed areas of these counties will grow more slowly.[17] This trend is seen across the state; the most growth will occur in those formerly rural areas which are now partially developed. Fast growth areas will be for formerly rural southern Maryland counties of the Western Shore, especially Charles, Calvert, St. Mary's, and Anne Arundel Counties, and in the Piedmont areas of Baltimore County, (on the northern border of Baltimore City) eastern Howard County, western-central Montgomery County, southern Frederick County, and southern Carroll County. Pockets of rapid growth will also occur in the Eastern Shore such as on Kent Island in Queen Anne's County, and at Ocean City in Worcester County.

Development indicators: population and employment change (Tables II-6,7,8)

Here, Department of State Planning projections for population and employment in Maryland[18] are presented and analyzed in order to identify those counties in the state where growth and development are expected. Trends in employment are included as the major indicator of economic growth and commercial development, since changes in employment generally reflect growth or decline in economic activity. For similar projections on counties with expected low growth or loss of population and jobs, see the following: Process 3: Vacancy and Abandonment.

Projected Population Change, 1980-2000:

Highest growth:

Howard (78.5%), Calvert (68.3%), Charles (54.6%), Queen Anne's (45.1%), Carroll (39.0%), Frederick (38.7%), and St. Mary's (36.9%). These counties were also among the fastest growing in population during the past decade. For these counties, population change at this rapid a rate can place severe stresses on existing patterns of land use and on existing cultural resources if this rapid growth is not carefully planned for.

Moderate growth:

Other counties which will continue to grow at a more moderate rate include Montgomery (28.1%), Worcester (26.9%), Anne Arundel (23.4%), Harford (22.7%), Cecil (22.4%), Wicomico (18.2%), and Garrett (17.0%). In contrast, more traditionally urbanized metropolitan counties such as Baltimore and Prince George's as a whole rank lower in population growth (5.7%, and .5%, respectively, for 1970-80; 5.2%, and 11.2% for 1980-2000). These rates are on a county-wide basis; it should be noted, however that some parts of these counties are experiencing dramatic growth such as in central and southern Prince George's County, and in areas of Baltimore County to the north of Baltimore City.

Projected employment growth, 1980-2000:

In general, Maryland's economy is highly diversified and tends to remain fairly stable over time in terms of the various sectors (Trade and Services, Agriculture and Forestry, Mining, etc.) The state has however, lost a large number of manufacturing jobs. Over the next 20 years it is expected that overall, employment will gradually continue to rise; however, it will slow after 1990.[19]

Employment figures show that some of the fastest growing counties in terms of population will also increase in employment at a high rate, while in others, the rates of increase in population and jobs will be quite different. As shown in Table II-7, jobs in the following group of counties will increase at the highest rate over the next 20 years: Howard (89.6%), Calvert (58.3%), Charles (48.2%), Montgomery (46.7%), Prince George's (41.2%), and Worcester (36.4%). The table shows that Howard,

Montgomery, Worcester, Charles and Prince George's counties will continue the rapid growth in employment which occurred during the decade 1970-80.

In Calvert County, however, growth will be much higher than during the 1970-80 period. In Garrett and Baltimore Counties, the high growth seen during 1970-80 will slow during 1980-2000.

Table II-5: Population/Land Area of Maryland Subdivisions Ranked by Population Density, as of April 1, 1980

Subdivision	Land Area in Sq. Mi.	% of Md. Total	Population	% of Md. Total	Population Density People/Sq. Mi.
Maryland	9,836.76	100.0	4,216,975	100.0	428.7
Baltimore City	80.34	0.8	786,775	18.7	9,793.1
Prince George's	487.01	5.0	665,071	15.8	1,365.6
Montgomery	495.44	5.0	579,053	13.7	1,168.8
Baltimore	597.60	6.1	655,615	15.6	1,097.1
Anne Arundel	418.37	4.3	370,775	8.8	886.2
Howard	251.00	2.6	118,572	2.8	472.4
Harford	447.64	4.6	145,930	3.5	326.0
Washington	454.97	4.6	113,086	2.7	248.6
Carroll	451.98	4.6	96,356	2.3	213.2
Allegany	420.76	4.3	80,548	1.9	191.4
Frederick	662.72	6.7	114,792	2.7	173.2
Wicomico	379.10	3.9	64,540	1.5	170.2
Cecil	359.55	3.7	60,430	1.4	168.1
Calvert	213.23	2.2	34,638	0.8	162.4
Charles	451.58	4.6	72,751	1.7	161.1
St. Mary's	372.54	3.8	59,895	1.4	160.8
Talbot	258.62	2.6	25,604	0.6	99.0
Caroline	320.79	3.3	23,143	0.6	72.1
Queen Anne's	371.86	3.8	25,508	0.6	68.6
Worcester	474.86	4.8	30,889	0.7	65.0
Kent	278.34	2.8	16,695	0.4	60.0
Somerset	338.41	3.4	19,188	0.5	56.7
Dorchester	593.22	6.0	30,623	0.7	51.6
Garrett	656.83	6.7	26,498	0.6	40.3

Sources: Land area compiled by the U.S. Bureau of the Census, Geography Division, Computer Graphics Staff, 1981. U.S. Department of Commerce, Bureau of the Census, 1980 Census of Population, Final Report PC80-1-B22 Maryland. (Courtesy of DECD Division of Research)

Table II-6: Rate of Population Change in Maryland Subdivisions, 1970-80 and 1980-2000, ranked by rate of increase.

	1970-80	1980-2000 (projected estimate)	
Maryland	+ 7.5%		+15.6%
Howard	+90.0%	Howard	+78.5%
Calvert	+67.5%	Calvert	+68.3%
Charles	+52.6%	Charles	+54.6%
Carroll	+39.6%	Queen Anne's	+45.1%
Queen Anne's	+38.5%	Carroll	+39.0%
Frederick	+35.1%	Frederick	+38.7%
Harford	+26.5%	St. Mary's	+36.9%
St. Mary's	+26.4%	Montgomery	+28.1%
Worcester	+26.4%	Worcester	+26.9%
Anne Arundel	+24.4%	Anne Arundel	+23.4%
Garrett	+23.4%	Harford	+22.7%
Wicomico	+19.0%	Cecil	+22.4%
Caroline	+17.0%	Wicomico	+18.2%
Cecil	+13.4%	Garrett	+17.0%
Montgomery	+10.8%	Caroline	+14.9%
Washington	+ 8.9%	Talbot	+12.1%
Talbot	+ 8.1%	Prince George's	+11.2%
Baltimore County	+ 5.7%	Somerset	+10.0%
Dorchester	+ 4.1%	Washington	+ 8.4%
Kent	+ 3.4%	Baltimore County	+ 5.2%
Somerset	+ 1.4%	Dorchester	+ 2.2%
Prince George's	+ .5%	Kent	+ .03%
Allegany	- 4.2%	Allegany	- 3.7%
Baltimore City	-13.1%	Baltimore City	- 7.8%

Source: Maryland Historical Trust percentage calculations based on figures in Department of State Planning Population Projections for Maryland Subdivisions (revisions, September, 1985).

Table II-7: Rate of Employment Change in Maryland Subdivisions, 1970-80 and 1980-2000, ranked by rate of increase.

	1970-80	1980-2000 (projected estimate)	
Maryland	+ 21.6%		+25.3%
Howard	+149.3%	Howard	+89.6%
Montgomery	+ 51.5%	Calvert	+58.3%
Garrett	+ 45.4%	Charles	+48.2%
Baltimore County	+ 37.5%	Montgomery	+46.7%
Worcester	+ 36.5%	Prince George's	+41.2%
Anne Arundel	+ 35.4%	Worcester	+36.4%
Charles	+ 34.9%	Talbot	+32.4%
Prince George's	+ 30.2%	Frederick	+30.4%
Frederick	+ 29.0%	St. Mary's	+29.9%
Carroll	+ 28.5%	Carroll	+28.0%
Talbot	+ 24.4%	Anne Arundel	+26.4%
Calvert	+ 22.0%	Wicomico	+26.1%
Queen Anne's	+ 20.6%	Caroline	+25.3%
Washington	+ 18.1%	Garrett	+23.9%
Harford	+ 11.3%	Baltimore County	+22.6%
Wicomico	+ 9.8%	Queen Anne's	+22.4%
Kent	+ 8.7%	Harford	+19.9%
St. Mary's	+ 8.6%	Somerset	+19.7%
Caroline	+ 5.3%	Kent	+14.7%
Dorchester	+ 3.8%	Washington	+12.8%
Somerset	- 3.2%	Dorchester	+12.3%
Baltimore City	- 3.5%	Cecil	+ 9.0%
Allegany	- 4.6%	Baltimore City	+ .4%
Cecil	- 14.9%	Allegany	+ .3%

Source: Maryland Historical Trust percentage calculations based on employment figures in Employment and Labor Force in Maryland, Trends and Projections, 1967-2005, Maryland Department of State Planning, Baltimore, 1986.

Table II-8: Maryland Subdivisions Ranked by Relative Population and Employment Growth, 1970-80 and 1980-2000. (1=greatest increase; 23=lowest increase or greatest decline).

	POPULATION			EMPLOYMENT		
	1980 Pop. /Density	1970-80 Growth	1980-2000 Growth	1980 Jobs	1970-80 Growth	1980-2000 Growth
Allegany	11/10	23	23	10	23	24
Anne Arundel	5/5	10	10	5	6	11
Baltimore City	1/1	24	24	1	22	23
Baltimore Co.	3/4	18	20	3	4	15
Calvert	16/14* (15)	2	2	23	12	2
Caroline	22/18	13	15	20	19	13
Carroll	10/9	4	5	11	10	10
Cecil	14/13	14	12	16	24	22
Charles	12/16	3	3	13	7	3
Dorchester	18/23	19	21	18	20	21
Frederick	8/11	6	6	9	9	8
Garrett	19/24	11	14	19	3	14
Harford	6/7	7	11	8	15	17
Howard	7/6	1	1	6	1	1
Kent	24/21	20	22	21	17	19
Montgomery	4/3	15	8	2	2	4
Prince George's	2/2	22	17	4	8	5
Queen Anne's	21/19	5	4	22	13	16
St. Mary's	15/14 (15)	8 (9)	7	14	18	9
Somerset	23/22	21	18	24	21	18
Talbot	20/17	17	16	17	11	7
Washington	9/8	16	19	7	14	20
Wicomico	13/12	12	13	12	16	12
Worcester	17/20	8 (9)	9	15	5	6

*two figures (14) refers to a tie (e.g. for 14-15th place) with another (15) subdivision.

Source: Maryland Historical Trust rankings based on the data from the Maryland Department of State Planning and other sources cited in Tables II-5, II-6, and II-7.

PROCESS 3: FUNCTIONAL OBSOLESCENCE OR ECONOMIC NECESSITY LEADS TO VACANCY, ABANDONMENT, NEGLECT AND DETERIORATION OR DEMOLITION OF A HISTORIC PROPERTY

A major problem for historic structures in particular is the ongoing process of cultural, economic and technological change which results in obsolescence, disuse and vacancy. The most common solution is "adaptive re-use," if this is economically and structurally feasible. For archeological sites, obsolescence and vacancy are less of a problem, in fact, vacancy can both create and protect an archeological site.

Statistics from the U.S. Census of Housing can be used to estimate the extent of vacancy among the state's structures, and among potentially historic structures in particular. The tables for housing characteristics show the numbers of pre-1939 housing units in the state, and whether these are occupied or vacant; these figures can be converted to obtain an estimate of vacant pre-1939 single family structures, as shown in Table II-9. Most importantly, from these figures, it can be seen that pre-1939 housing units comprise the largest percentage (28.5%) of all the vacant housing units in the state. Thus, vacancy is a particularly serious problem for historic structures in Maryland.

The seriousness of the vacancy problem varies from county to county within the state, as shown in Table II-9. In Allegany County and Baltimore City, for example, the percentages of vacant units which were built before 1939 is extremely high (70.4% and 62.7% respectively). By using current and projected data on population and employment trends in Maryland, and correlating this with data on vacant buildings, it can be seen which regions and counties of the state are or will be losing population and jobs, resulting in lower demand for building space.

There appears to be a correlation between vacancy and slow growth rates or loss of population, as will be seen in the vacancy figures by county in Tables II-6 and II-9. Baltimore City will continue to lose population (-13% for 1970-80; -7.8% for 1980-2000). Allegany County also will continue to lose population (-3.7%). The Eastern Shore counties of Dorchester and Kent will have a very slight population increase (.03%, 2.2% range). In these areas of population decline or only small increase, vacancy rather than development pressure may be a more serious stress.

These figures of course are for residential buildings only, and do not include the many vacant commercial and other types of buildings throughout the State; figures on these building types are not currently available. We can safely predict, however, that cultural and technological change will mean obsolescence for certain building types, particularly in some areas of the state, and as patterns of development change. In the area of transportation, for example, it is clear that train stations are now less used and more threatened; new uses must be found for these structures in order to preserve them. Similarly, as old roads are bypassed by interstate highways, old motor courts and motels can eventually become a threatened resource. Other trends in the use of buildings are also evident in the state. For example, demographics show that the school-age population is declining in some areas, so that vacant school buildings are another commonly abandoned building type. And, as agricultural land and the number of farms decline, agricultural properties become threatened.

In recent years, it has become popular to convert all types of buildings to new uses - factories into artists' studios or apartments, schools into shopping malls. This depends however on the location, economics, market need, and feasibility of such a project. In many cases, there is seemingly no practical way to re-use an obsolete and vacant building and no demand for it; in these cases, especially for highly significant resources, new techniques and solutions must be found.

TABLE II-9

VACANCY RATES FOR PRE-1939 HOUSING UNITS, AS OF 1980

	% of all units	% of all vacant units
MARYLAND	22.4%	28.5%
Counties:		
ALLEGANY	52.8%	70.4%
ANNE ARUNDEL	11.9%	14 %
BALTIMORE CITY	50.3%	62.7%
BALTIMORE COUNTY	13.8%	14.2%
CALVERT	15.6%	11.7%
CAROLINE	40 %	57.2%
CARROLL	28 %	37.5%
CECIL	27.2%	20.5%
CHARLES	10.1%	13 %
DORCHESTER	39.9%	51.4%
FREDERICK	32.3%	36.8%
GARRETT		33.6%
HARFORD	15.2%	20.4%
HOWARD	7.5%	7.6%
KENT	43.8%	46.1%
MONTGOMERY	7.9%	8.1%
PRINCE GEORGE'S	6.6%	4.7%
QUEEN ANNE'S	27.9%	37.2%
ST. MARY'S	10.2%	10 %
SOMERSET	43.7%	45.5%
TALBOT	39.5%	50 %
WASHINGTON	40 %	57.3%
WICOMICO	24.7%	28 %
WORCESTER	21.2%	5.7%

SOURCE: 1980 Census of Housing

PROCESS 4: A HISTORIC PROPERTY IS INAPPROPRIATELY ALTERED, INCORRECTLY OR OVERLY RESTORED, OR, MAINTENANCE IS NEGLECTED, THUS DAMAGING THE FABRIC AND INTEGRITY OF THE PROPERTY

The problem of insensitive alteration and improper restoration of historic structures (and less frequently, of archeological sites) is among the most widespread threats to cultural resources although it is difficult to quantify the extent of this problem and geographic distribution. Removal of portions of the original fabric of a structure and addition of inappropriate building materials diminishes the integrity of the resource and can also affect the quality of an entire streetscape or landscape. In using modern aluminum siding, for example, not only is the appearance of a historic structure altered, but the application of this material can also actually cause structural damage to the building by concealing rot and encouraging excessive moisture buildup in the inner walls.

When a structure is remodeled or rehabilitated, it is usually with the purpose of improving the appearance and condition of the structure. The property owner, building contractor, or government agency, if unaware of proper methods of rehabilitation a structure, can unintentionally damage the structure and lower the value, appearance, and condition of the property. Cost is always an important consideration in any renovation project, and often, in an attempt to save money, the owner or building contractor tends to avoid what he might perceive as expensive "historic" treatments and substitute "cheaper," inappropriate modern building materials.

This results in the widespread, inappropriate use of modern building materials, such as aluminum siding and modern style window sash and doors on historic structures. In applying these new materials, often the original woodwork and other decorative trim is removed, the placement of window and door openings is changed, or chimneys are removed. Insensitive alterations to historic structures are common in our communities; every street has examples of buildings which have been drastically altered. And, as preservation becomes more popular, there is the danger of overly-restored buildings, which may blur the distinction between original and new fabric and seem overly "quaint."

Incorrect restoration differs from remodeling/rehabilitation

work, in that the intent is to "restore" a property to its original condition. Even with the best intentions, if this is done without proper technical knowledge of methods and materials, the result can be inaccurate and misleading, creating false history.

For rehabilitation, remodeling, and restoration work, greater public education is needed to increase awareness and sensitivity in treatment of historic structures among property owners, builders and government agencies. In addition, more local permit review process would help in design review. Standards and guidelines for restoration and rehabilitation work are available from the Maryland Historical Trust, along with a technical preservation services staff and environmental review staff to provide technical assistance. In the future, the Trust plans to expand its technical services assistance to reach an even wider audience in order to meet this important need for information and guidance.

PROCESS 5: A HISTORIC PROPERTY IS DAMAGED OR DESTROYED BY VANDALISM, THEFT, ARSON, OR ARTIFACT COLLECTING.

Often, but not always, related to obsolescence and vacancy, are the problems of vandalism, theft, and arson. As previously described, pre-1939 houses, for example, comprise the largest percentage of all vacant houses in the state; therefore, these structures are most likely to be easy targets for vandalism, theft and arson. Archeological sites and standing structures are equally vulnerable to vandalism and theft; both can be targets for artifact collectors, "pot-hunters," building salvage collectors, and underwater divers. Sites and structures can also be the target of indiscriminate, random destruction. Arson can occur at random, but can also be an action taken by a property owner for financial gain.

On a statewide basis, the scope of these destructive actions is difficult to evaluate. No statistics are currently available to show the extent of the problem. These activities occur in isolated instances, in certain types of places and settings. While they may occur most often in urbanized areas (Baltimore City especially has serious problems), properties in isolated rural areas or in parks and forests are often unprotected and open targets. Farm outbuildings, such as barns, for example, have often been the targets for arson. The variation in extent of these problems for historic properties by region is difficult to measure, except by general observation. Baltimore City would probably have the most critical problem, and arson directed at farm buildings in some Piedmont counties has also been observed. Vandalism and theft at archeological sites may be most serious in the Piedmont and Western Shore regions due to publicity of sites and large population centers. Site disturbance due to metal detectors (Civil War artifact hunters); bottle hunters (especially in Baltimore City and at rural sites); repeated surface collection by amateur archeologists; and scavenging of underwater sites and shipwrecks by divers are serious threats to the State's archeological sites which may require additional protective legislation.

In order to combat the problem of vandalism, theft, and arson at historic sites, preservationists need to work with existing law-enforcement programs in these areas and evaluate any new legislation which may be needed.

PROCESS 6: THERE IS A CHANGE IN THE HISTORIC CONTEXT OR ENVIRONMENTAL SETTING OF AN HISTORIC RESOURCE

Many types of impacts can affect the environmental setting, which is extremely important to the historic character and integrity of a resource. Whether the historic property associated with the resource is a small yard, many acres, or many streets, the quality of the property and its surrounding environment is important in maintaining the sense of a historic place. These qualities can be visual or atmospheric (as in air and noise quality levels) or can include changes in socio-economic setting and cultural character of an area. In assessing these impacts, we consider both the immediate area within the historic property boundaries associated with a resource, and the larger surrounding environment outside these property boundaries.

A change in the visual setting of a resource is probably the most common problem, occurring constantly across the state whenever new construction, alterations, or removal of adjacent structures changes visually the appearance of the environment surrounding the resource. For example, a new highway may intrude on the vista of a historic property, or a new highrise building may be out of scale with the surrounding neighborhood. Such changes are inevitable, and a museum-like setting is not possible or desirable for every historic resource. However, these changes can be accomplished in a manner which sensitively recognizes the historic character of a resource and compatibly fits new construction into the existing setting to minimize any harmful effects.

As might be expected, visual intrusions on historic resources occur most often in those areas of the state which are developing most rapidly. New housing subdivisions, highways, commercial complexes, public utilities such as power plants can all visually impact historic sites. Thus, generally speaking, the Piedmont and Western Shore regions are probably most frequently the place where the setting is altered.

Conversely, in slowly developing parts of the state, the loss of historic resources can alter the historic setting; this however is a much less serious problem than introducing a new element into the landscape. Loss of neighboring historic

resources however, can turn a single resource into an anachronism.

Although visual impacts are probably the most common type of impact considered in Maryland, there are other aspects of the physical environment to be considered. The primary factors here are air and noise quality levels, which can seriously affect both the condition and continued use of cultural resources. These levels can be measured and estimated scientifically according to professional standards, so an objective evaluation of potential impacts can be readily made.

Air quality becomes an important problem for cultural resources when there are increases in air pollution. This can affect resources in two ways. First, it can diminish the quality of life for people using the resource and discourage continued use. Secondly, it can directly damage the fabric of the structure or artifacts. Acid rain, for example, is probably the best known example of air pollution causing deterioration in building materials. While it is currently still difficult to find a specific source (industrial or other wise) for acid rain, damaging effects from other types of air pollution can be more easily linked to a specific source, such as certain industries, increased traffic, or other causes. These types of sources, which have the most potential for lowering air quality, are among those considered in assessing impacts.

Noise levels can also be damaging to the condition and continued use of resources. Higher noise levels can discourage use of a property, especially in residential areas, and damage can occur through increased levels of vibration. This can cause structural problems, for example in buildings located close to roadways with a high volume of traffic. As with air quality, sources for increased noise are usually industrial, commercial, or transportation related projects.

Regionally, these types of changes also occur most frequently in the highest developed and/or industrialized areas. The Piedmont, Western Shore, and Western Maryland regions are more likely to experience these problems than the Eastern Shore.

Visual impacts can be minimized through the use of accepted aesthetic principles in architecture and landscape architecture. In new building construction compatibility of design, scale, height, materials, and setback are important factors. For historic landscapes, there are guidelines for assessing scenic

qualities and views and ways to screen new construction. The same types of principles are applied whether planning construction in or near an individual building or archeological site, an historic district, a streetscape or landscape. Air and noise quality, however, is more diffuse and more difficult to control.

CONCLUSION: RECOMMENDED STEPS/ACTIONS TO APPROACH STRESSES

1. Investigate and explain in greater detail the effects of each stress and the process by which each stress impacts historic sites; promote further research where insufficient information exists.

2. Develop methodologies to compile and analyze available data in order to evaluate the following factors for each type of stress; identify gaps in knowledge and promote further research in each area.

   a. Identify the impact of each stress statewide by developing methodologies for estimating rates of loss or scope of damage of historic resources through each stress.

   b. Compare the relative urgency/seriousness of the various types of stresses affecting historic resources.

   c. Identify the geographic regions of the state most seriously affected by each type of stress.

   d. Identify those types of historic resources most vulnerable and threatened, and in which regions of the state.

   e. Identify the mechanisms/tools available to deal with each stress.

3. Create a methodology and matrix for each stress which links the above factors to historical and social/economic significance in order to identify the regions of the state and the types of historic properties which are most seriously threatened and the tools and solutions available.

4. Compile and publicize information on alternatives, techniques, solutions, and treatments available to minimize destruction and damage through each stress; promote further research where gaps exit.

5. Publicize the urgency, need and benefits of planning to meet stresses and target appropriate decisionmaker audiences for

each type of stress.

6. Direct preservation activity to those programs which address the needs and issues identified above; in particular, place priority on Trust programs which address these needs (e.g., in grants awards).

7. Propose new public and private sector mechanisms to deal with identified needs (e.g., revolving fund for endangered buildings). See also: Chapter III.

8. As discussed in Chapter III, work with local governments in regions with identified needs to encourage greater attention to endangered resources.

9. Work with relevant state and federal agencies on specific types of stress, co-sponsoring special studies (e.g., with the Department of Natural Resources' Coastal Zone Management program on impact of erosion on historic sites).

10. Work with private preservation groups and other private organizations at all levels.

11. Improve attitudes/increase sensitivity to historic properties through educational activities.

CHAPTER III: PRESERVATION MECHANISMS IN MARYLAND

CHAPTER III PRESERVATION MECHANISMS IN MARYLAND

Introduction:

This chapter describes and evaluates the existing organizational framework for preservation in Maryland, within the public and private sectors on the national, state, and local levels. This framework includes not only preservation and historical programs, but the allied land use planning fields of conservation, environmental protection, comprehensive planning, and economic and community development. The existing agencies, organizations, programs and legislation in these areas are assessed for their current and potential contributions to preservation in Maryland. By dividing all the relevant programs into the public and private sectors and then by level of jurisdiction, we can identify issues, gaps, problems and opportunities in the existing system.

It must be noted however, that this organizational framework reaches only a small percentage of the property owners who actually control the fate of the State's historic resources. Ownership (and thus, the maintenance and protection) of the vast majority of historic properties lies in the hands of the private sector-private individuals, homeowners, organizations, developers, commercial and industrial interests. For the most part, these elements are not part of the organized preservation system or the other land use planning fields described in this chapter. While the mechanisms described in this chapter - government legislation, regulations, tax incentives, grants, loans, and agencies, and the activities of private organizations - are effective, they are only the beginning in terms of what is actually needed to protect the state's historic resources.

Education and awareness programs can help to change attitudes by providing information describing the urgent need to protect historic properties and the benefits which result, thus encouraging better treatment of historic properties. However, this is a long-term challenge, and in the meantime, it is clear that stronger, more comprehensive mechanisms are needed to extend further the scope of preservation coverage in the State to reach the vast majority of property owners who are now uninvolved in preservation activity. The needs for more outreach programs and locally based initiatives, more alliances among existing agencies

and groups and creation of new programs are suggested in this chapter.

First, (A) the public (governmental) sector is examined; under each level of government, existing preservation/historical programs are described along with assessments of needs, issues, and opportunities. Then, the same kind of description and assessment of related land-use planning programs in other fields follows. Secondly, (B) the private sector is evaluated in the same way, by level of jurisdiction, for both preservation/historical and related fields. Since the Maryland Historical Trust is a state agency concerned with preservation planning on the statewide and local levels, the chapter discusses first state, then local, then national programs.

PUBLIC (GOVERNMENTAL) SECTOR

A.1. STATE GOVERNMENT

A.1.(a) Historic/Preservation Programs:

Description:

The various programs within the Executive Branch of State government involved with history, preservation, and culture are located principally in three different departments: the Department of Economic and Community Development (DECD), the Maryland State Archives (i.e., Hall of Records Commission, and the Department of Natural Resources (DNR). Within DECD are located the Maryland Historical Trust (MHT) (including the Jefferson Patterson Park and Museum in Calvert County), the St. Mary's City Commission, the Commission on Afro-American History, the Maryland Ethnic Heritage Commission, Commission on Indian Affairs, and the State Arts Council, which contains the office of the State Folklorist. The second major agency is the Maryland State Archives, which contains the Hall of Records, the repository for the state's archives and manuscripts collections. Third, the Department of Natural Resources contains several programs with historic functions, most importantly the office of the State Archeologist, located within the Division of Archeology of the Maryland Geological Survey. DNR also plans for the preservation, maintenance, and interpretation of historic properties in its care through the Maryland Forest and Park Service.

Through the Office of the Comptroller of the Treasury (with applications reviewed by the MHT) preservation tax incentives for the rehabilitation of certain types of certified historic structures are available through the state "502H" income tax deduction, which covers 100% of rehabilitation costs. These tax benefits are used by a relatively small number of individuals, probably because their availability has not been widely publicized. In addition, preservation opportunities exist in the state-operated colleges and universities, where departments of history, architecture and anthropology conduct research and educational programs.

The Trust's working relationship with other State agencies

until recently has been primarily through the State Clearinghouse for Intergovernmental Assistance review process (an outgrowth of Presidential Executive Order 12372, replacing the old OMB "A-95" review process), and through the 1978 Board of Public Works "Policy on the Preservation of Properties of Historic and Architectural Significance Owned or to be Acquired by the State." This policy urges, but does not require, State agencies to survey and protect historic and archeological resources under their care. However, new State preservation legislation introduced by Governor Hughes in 1985 and enacted by the General Assembly (S.B. 744 now Chapter 500 of the Acts of the General Assembly of Maryland of 1985, Article 41, Section 181) created a new State compliance process (similar to the Section 106 process on the federal level), which requires state agencies to develop plans for the preservation of significant properties in their care and establishes an Advisory Council to mediate any disputes.

The new legislation revises the earlier version of Article 41, Section 181 (A-KA), Annotated Code of Maryland, which originally created the Trust in 1961. New features of the 1985 legislation include the above-mentioned State compliance process, creation of a Maryland Register of Historic Properties (which defines eligibility for state protection and benefits); increased authority for the Trust in State preservation program; and increased protection for archeological resources.

Another State responsibility is the Jefferson Patterson Park and Museum, created through deed of gift and MHT agreement, and administered by the MHT. The state will develop the Park and Museum under a 10 year master plan.

Other major pieces of existing State preservation legislation include Article 66B, Section 8.01 et seq., which enables local governments to enact historic district zoning and code enforcement reviews. There are several pieces of legislation dealing specifically with archeology, including the Maryland Archeological Resources Act of 1968; Article 78 A Section 2A, "Inclusion of Archeological Costs in Capital or Operating Budget"; 1974 Public Service Commission Order 60673; and legislation regarding caves.

The MHT has a system of county volunteer groups known as the County Committees, which are composed of local citizens. These groups provide local input on preservation issues and participate in survey, research, National Register, and educational activities. They cannot, however, conduct advocacy activities,

due their MHT affiliation.

Assessment:

1. Location of Functions within State Agencies/Inter-Agency Coordination:

It is clear that historic, cultural and preservation programs within State government are fragmented and located within many different agencies. Closer formal arrangements among these agencies (especially among preservation, archeology and folklore) should be initiated, and particularly those heritage and cultural agencies already located within DECD, such as Ethnic Heritage, Afro-American, and Indian Affairs. For example, there already exists a formal procedure for coordinating historical matters between the MHT and DNR through a liaison in DNR's Forest and Park Service. The MHT and the DOA do coordinate on many archeological projects; however, there is considerable overlap in the functions of the two offices and consolidation of the two archeology programs has been suggested. One agency where the MHT clearly needs closer contact is the office of the State Folklorist; since intangible cultural values are increasingly an integral part of preservation, investigation of some formal arrangement, or consolidation of efforts, should be made.

In addition, there is no State historical museum with artifact conservation facilities where technical preservation activities can be conducted. However the new Patterson Park facility will fill the MHT artifact conservation and museum function and can be developed into a statewide conservation, education and interpretation program, working cooperatively with the St. Mary's City Commission. Traditionally, the Maryland Historical Society (privately operated) has served as the major museum for the state's history, with a library and museum exhibits. This institution, however, is heavily oriented toward geneological research, the fine and decorative arts, and Baltimore area history.

The state system of colleges and universities also offers opportunities for the MHT to help develop research topics which need attention (identified and specified through this document); classes in preservation can participate in

additional activities such as survey and National Register nominations. These academic departments offer the expertise and personnel that should be taken advantage of by the MHT. For example, the University of Maryland, School of Architecture now offers a Master's-level certificate in historic preservation. In 1984, the University's School of Architecture and Art Gallery (with advice from the MHT and grants from several other sources) sponsored an exhibition and catalog on "350 Years of Art and Architecture in Maryland."

One area where change has been suggested is in the MHT County Committee system, and whether a volunteer network more appropriately belongs within a private preservation organization rather than as part of a State agency. A major concern is the limitation on these groups in terms of lobbying activity, due to their MHT affiliation. An Ad Hoc Committee of the Board of Trustees was created by MHT to study the issue, and submit recommendations. (See also under section B.1.(a), Private statewide preservation groups).

2. Preservation Legislation and Regulations:

Within the limitations on its political activity as a State agency, the MHT can influence and improve State preservation legislation and State agency compliance. The existing State Clearinghouse review process, the BPW preservation policy, the 1985 legislation and the other pieces of legislation have established a broad framework for State preservation activity. Implementation and compliance with the new legislation will be a major task in the near future, as mechanisms are established to administer the new activities.

While these existing mechanisms provide a basic framework, there are a number of other legislative needs which should be considered in the future. These include: (1) modification to Section 8 of Article 66B, Zoning and Planning, to include stronger references to the importance of archeological resources; (2) establishment of state "historic buildings cooperative use act," to encourage mixed use of state-owned historic facilities; (3) establishment of historic building code for rehabilitation or restoration of historic buildings in the state's care; (4) the establishment of an emergency revolving loan fund to preserve endangered historic properties; and (5) legislation regarding the protection and management of underwater archeological resources (proposed in

the 1984 session but withdrawn).

The existing State tax incentive program for preservation (502H deduction), needs to be more widely publicized and more property owners should be encouraged to use it. This deduction applies only for owner-occupied, residential, National Register-listed properties, and the possibility of similar tax advantages and other economic incentives for other types of structures and projects could be considered. However, local governments may not favor state legislation that decreases the taxable base and/or reduces income subject to the "piggyback" tax.

A. 1 (b) Related Land Use Planning Programs:

Description:

Within State government, there are a number of agencies with responsibility for comprehensive planning, conservation and environmental protection, and community and economic development, all of which share some common goals with the Trust. Within DHCD, the Trust's parent department, are several programs of particular relevance to the Trust such as the Office of Tourist Development, the Maryland Home Improvement Program, and the Maryland Mainstreet Program.

Within the Department of Natural Resources, an agency which shares with the Trust a common goal of conserving the State's resources, are relevant programs dealing with the preservation of open space, recreational land, and natural/scenic areas (in addition to the historical programs previously described). An agency with conservation goals which parallel those of the MHT is the Maryland Environmental Trust, also located within DNR, created to conserve and promote public interest in the state's natural and cultural environment. The MET's primary activity is a conservation easement program which now protects approximately 20,000 acres of land across the state.

Within the Department of Agriculture is the Agricultural Land Preservation Foundation, which preserves and protects the state's agricultural land and woodland for productive use and open space, primarily through agricultural preservation districts and acquisition of easements. Currently 37,302 acres of agricultural land are protected by easements and 70,555 acres are located within districts.

The Department of State Planning (DSP) holds two major areas of responsibility for planning in the State: "Its major functions are first, to plan for State government itself, primarily through the capital program and through assistance to State agencies, and second, to plan for overall State growth and development, conservation and preservation of resources, and coordination of economic, environmental, and social policies and programs." [1] The DSP contains the comprehensive Policy Planning Division, the State Clearinghouse for Intergovernmental Assistance and the Office of Planning Data, programs of particular relevance to the Trust. In addition, DSP coordinates a number of inter-agency state land use planning programs in which the Trust participates, such as the State Development and Conservation Council. DSP is currently preparing a Consolidated State Land Preservation Plan (1988 release) to achieve closer coordination between the State's land preservation programs; this plan will also serve as the State's 5-Year Recreation and Open Space Plan. The DSP also coordinates the State's Critical Areas Program and the EPA's Chesapeake Bay Study. The Department also approves capital requests for improvements to historic properties by MHT and JPPM, and circulates National Register nominations to State and local agencies for review.

Assessment:

The MHT can better integrate its activities with those of other State agencies through greater participation in existing inter-agency land use planning programs and through creation of formal partnerships with individual agencies to exchange data and initiate joint projects.

1. Comprehensive planning:

Inter-agency coordination and comprehensive planning is now formalized through the existing inter-agency programs previously described and through the preservation regulations described earlier. The MHT contributes information to Department of State Planning database and participates in the existing review processes, and plans its programs in accordance with the stated goals and policies of State government. The Secretary of State Planning and two staff members have served on the Ad Hoc Committee which guided this planning document. One inter-agency program in which the MHT can more actively participate is the Consolidated Land

Preservation Program, which is an attempt to bring about closer coordination between the various State land preservation programs. The MHT Easement Program contributes to State land preservation efforts by preserving farmlands, woodlands and open space associated with historic buildings and sites. With 6,705 acres under historic preservation easements, the MHT Easement Program is one of three major State easement programs. The future contribution of the MHT Easement Program to State land preservation efforts may be significant; it will be determined to a large extent by program priorities (to be developed) and by the level of funding and staff available for the Program. The DSP'S recent Agriculture and Forest Land Preservation Study has been of use in the MHT's planning process by providing data on changes in land use and development trends.

The state's Critical Areas program is also administered by the DSP, and although the program is not very active, the MHT should investigate its applicability to the preservation of highly significant historic places or areas. The DSP also acts as coordinator of state agency activity on the Chesapeake Bay Study project (with the EPA); the MHT has also discussed the relevance of preservation to the study, in terms of protection of historic towns along the Bay shoreline. It has been proposed that the MHT seek a grant from the National Trust for Historic Preservation to conduct a model study for towns of this type, to better dovetail Critical Areas land use regulations with local historic design review efforts.

Within the Department of Economic and Community Development, the Office of Program Analysis is responsible for program planning for the entire agency. This office has had extensive participation in MHT's planning process, with its Director serving on the Ad-Hoc Committee which advised this planning document.

2. Economic and Community Development:

Within the MHT's own parent department of DECD, there is a pressing need to bring preservation into the mainstream of DECD activity, to increase the visibility/awareness of our programs, and communicate and promote the importance of preservation to the agencies of DECD. The Division of Public Affairs can assist the MHT in this effort. The MHT needs to continue to brief other DECD agencies about our programs, and

the need and benefits of historic preservation. While the MHT has already initiated some partnerships (such as a review process with the MHRP, and also works with the Maryland Mainstreet program on specific projects), there may be other building rehabilitation and construction assistance programs which could benefit from MHT technical information on rehabilitation. A reorganization of DECD to combine Mainstreet programs within the MHT should be considered.

There is much potential for other such partnerships within DECD. One of the most important of these opportunities is the exploration of ways to increase the coordination between the MHT and the Office of Tourism Development; the role of historic properties in attracting tourist travel to the state and the potential use of historic properties for accommodations and other facilities for tourists is increasingly recognized. For example, the theme of the 1985 Maryland Governor's Tourism Conference was "Maryland's Heritage: Marketing Maryland Memories." As described in Chapter I of this document, the benefits of historic preservation to the tourist industry and to the State's economy are proven, but need to be more widely publicized; the research and analysis produced during the course of the MHT's planning process could be published by DECD, for the use of the MHT and the OTD, for distribution to other State, Federal, and local agencies. The attractiveness of historic properties to visitors to the State has the same kind of appeal to "quality of life" that DECD promotes to potential business and industrial investment clients. In terms of data exchange and analysis, the DECD Research department is a good source of data for the MHT, and their staff expertise could be better used by the MHT staff to provide more sophisticated analysis techniques for our programs. In the same way, the Programs Analysis Office described earlier, can also continue to provide expertise in program planning.

3. Land Conservation/Environmental Protection:

In the area of land protection and conservation, the easement/acquisition programs (included in the DSP Consolidated Land Program) of the Maryland Environmental Trust and the Agricultural Land Foundation referred to earlier may offer additional opportunities for MHT's own easement program. (Some MHT easements are already jointly held with the MET.) At the least, a list of the properties protected by these agencies should be made available to the

MHT (and vice versa) so that this office is aware of the complete extent of protection already existing for natural and historic properties. Within the Department of Natural Resources, several programs which protect natural and scenic properties can also affect historic properties; for example, with the Coastal Zone Management program, perhaps a joint study of the effects of erosion on historic sites could be undertaken. Special programs such as the National Park Service Scenic Rivers Study, (for the Maryland Department of Natural Resources) to which the MHT contributed data, may help protect historic sites, through the generation of specific recommendations for action. The land acquisition programs such as Program Open Space, and the Chesapeake Bay Critical Areas Program also need to be investigated for their relevance (if any) to preservation.

4. Arts/Cultural Agencies:

The MHT has almost no contact with the State Arts Council, which could be approached about holding joint arts-awareness activities (promotion, publications, special events). Also, joint lobbying efforts for the arts is an extremely important activity, which the Arts Council and the MHT can assist through their respective citizen advocacy groups such as Preservation Maryland.

A.2 LOCAL AND REGIONAL GOVERNMENT

A.2 (a) Historic/Preservation Programs:

Description:

In Maryland, 29 county and municipal governments have established special preservation bodies such as historic district commissions which function in tandem with each respective locality's planning agency. State preservation legislation provides for the local establishment of historic district/preservation commissions which have the authority to designate individual landmarks and concentrations of buildings, known as historic districts. Importantly, commissions can have the authority to regulate proposed changes to designated historic buildings, require ample justification for demolition of such resources based on economic considerations, and monitor the design of new construction within designated areas. All preservation ordinances are written to conform with Article 66B, Section 8, "Historic Area Zoning," of the Annotated Code of Maryland (except in the eight chartered counties).

Perhaps the single most important new mechanism of benefit to local governments is the Certified Local Government (CLG) program, a federal program administered by the MHT in Maryland. Where communities meet certification standards (which involves review of actions and composition of their historic district commissions) Certified Local Governments can then perform many functions currently conducted by the MHT office in Annapolis, such as review and comment on local National Register nominations, Section 106 compliance review, and Tax Act certification. (Currently, only the National Register program area authority is delegated; other program areas are planned to be added in the next 5 years.)

The Maryland Association of Historic District Commissions plays an important role in coordinating the efforts of the State's historic district commissions and in assisting in the creation of new commissions. MAHDC works in concert with the MHT to assist local governments in improving their local historic preservation commission functions, so that they may successfully meet State standards for inclusion in the CLG program.

Regional planning agencies (described below) can also have preservation programs; the Maryland-National Capital Park and Planning Commission has the most active preservation program of these regional agencies, with a full-time preservation planner on the staff and an ongoing historic sites survey.

Assessment:

Assisting in the decentralization of preservation functions and building increased local government capability for preservation activity is an important aspect of the MHT's planning program. With the MAHDC and the CLG program, the MHT is working to assist local governments in increasing this capability. A basic and important need is for educating local decisionmakers about threats to historic properties and the economic/cultural benefits of preservation to communities; improved awareness of preservation will help to facilitate the following activities:

1. Create New Preservation Programs:

With the assistance of MAHDC, the MHT can help expand the scope of preservation programs through creation of new preservation commissions and agencies where none currently exist through the CLG program. Also, the eventual creation of new preservation staff positions for architectural historians and archeologists in local governments can be assisted by funding from the Trust. For example, in Anne Arundel County, a MHT-NPS matching grant-in-aid has helped fund a historic sites surveyor/preservation planner for the county; the surveyor works within the County's Office of Planning and Zoning, and in addition to survey and NR work, has been increasingly involved in preservation planning and project review. As a result of the success of this program, the county government has become increasingly aware of the value of preservation to the county and has created a permanent preservation staff position; the MHT is continuing to provide some limited financial support to this project.

The MHT also needs to continue encouraging local governments to jointly sponsor Regional Historic Preservation Centers; two or more neighboring counties,

for example, can provide funding to support a regional center such as those currently existing at several of the state's universities. These centers can be staffed by both archeologists and architectural historians, although to date, the centers are principally archeological; standing structures survey continues to be conducted primarily on a county-wide basis rather than regionally.

2. Strengthen Local Legislation and Improve Review Processes:

As at the State level, there are recognized needs in many of the local governments' preservation legislation. These include: inclusion of information on criteria for designation of archeological sites; information on project review to allow coordinated efforts to review effects of rehabilitation and modern construction on designated resources; and passage of parallel legislation to impose fines for destruction or vandalism of designated archeological sites. Tax incentive programs are also needed at the local level, such as the 5-10% local income tax credit for rehabilitation in the City of Laurel, and in Montgomery and Prince George's counties. Other possible programs which could be used include incremental tax assessment, whereby after rehabilitation a building is assessed at the current level for three years, then increased gradually to value over next three years.

In terms of design issues, local governments need to: adopt specific written guidelines for rehabilitation (the Secretary of the Interior's Standards for Rehabilitation are a good interim measure); adopt specific written guidelines for new construction/infill; place parallel administrative systems in place to work in tandem with building permits departments (to ensure buildings are not inadvertently destroyed); and enact new documentation requirement systems to ensure that when an historic property is lost, information (written and photographic) is automatically produced and shared with the MHT as an archival record.

3. Strengthen Certified Local Governments:

An essential activity for the MHT is to help build the

capability of more local governments to become certified and increase the abilities of existing CLGs to review more National Register applications and expand additional program areas, specifically Section 106 review and ERTA project review.

A.2 (b) Related Land-Use Planning Programs:

Description:

Local governments usually have many agencies involved in land use planning activities. Planning and zoning departments, community and economic development programs, tourism offices, conservation, parks and recreation departments, and agricultural land preservation programs are all concerned with land use, both in terms of comprehensive planning and site-specific project reviews. The development of comprehensive master plans and zoning and review procedures are areas where preservation planning can be better integrated into local government activities. There is also the need for better education of local governments as to the social and economic benefits of preservation, publicizing the economic revitalization of communities, cost-efficiency, and the value of historic properties to the tourist industry. The MHT has also begun cooperative projects with two counties (Anne Arundel and Howard) for review of subdivision proposals for impacts on archeological sites, and often works with local governments on review of HUD-funded Community Development Block Grant projects for impacts on historic resources.

Regional governments, responsible for planning in several counties, also offer opportunities for preservation in their programs. The Tri-County Council of Western Maryland funded an MHT survey during the 1970s and the Maryland-National Capital Park and Planning Commission, as mentioned above, funds a preservation planner staff position. The Regional Planning Council (Baltimore region), Patuxent River Commission, Tri-County Council for Southern Maryland, and the Delmarva Advisory Council also offer the potential for preservation promotional efforts particularly in the area of tourism development.

Local and regional government officials are also represented by professional associations such as the Maryland Association of County Planning Officials and the Maryland Association of Park and Recreation Administrators.

Assessment:

As on the State level, there is great potential for the MHT to expand its work with both local and regional governments in integrating preservation concerns into the areas of comprehensive planning, planning and zoning project review, tourism promotion, and other economic and community development and open space/recreational land planning programs. To this end, it is important to educate decisionmakers in these agencies as to the economic and cultural benefits of preservation in their communities and the stresses and crucial need for preservation, and to provide the data necessary to assist in this integration process.

1. Comprehensive planning:

Local governments are often not fully informed about the need to include preservation issues in their planning programs, as they do for other natural, scenic, environmental, and cultural features. For example, county master plans often include only cursory coverage of known (often only National Register-listed) historic sites, rather than a comprehensive discussion of the stresses on resources and the need for preservation planning as well as the benefits. The MHT needs to not only provide the most up-to-date mapping, inventory and National Register data to local governments, but also information on goals and benefits of preservation, stresses on historic resources, and available tools (all of which has been generated during the preparation of this planning document) for incorporation into the local planning process and zoning review. Professional planners are represented by the APA chapters described under Private sector: State.

2. Economic and Community Development:

Similarly, these agencies of local government need more information on the value of preservation to their efforts, especially in terms of the benefits to economic and community development. Specific areas of mutual interest include tourism promotion, housing rehabilitation programs, and Main Street revitalization projects. The MHT should initiate contact with local governments on these programs; for example, an experimental project with a selected local government to promote tourism and historic sites could serve as a model for other localities.

3. Land Conservation/Environmental Protection:

Less useful to preservation are local land conservation programs, which are often limited in scope to parks and recreational land development and open space programs, with little direct impact on historic properties. There are exceptions of course when local governments develop park properties at historic sites, as at the Benjamin Banneker archeological site in Baltimore County. Some counties, also have active agricultural preservation programs (such as Carroll, Calvert, Montgomery, and Howard counties) and other conservation programs whose properties may include historic sites. The MHT needs to investigate further the scope of these programs and whether historic resources are included.

4. Arts/Cultural Programs:

Local governments generally do not have strong arts/cultural programs; these often are undertaken by the private sector. Thus, for local governments, this area of activity has little relevance for preservation.

A.3 FEDERAL GOVERNMENT

A. 3 (a) Historic/Preservation Programs:

Description:

While most Federal historic and preservation programs have been placed organizationally within the Department of the Interior, National Park Service, (NPS), other departments, such as the Department of Transportation, the Department of Housing and Urban Development, and the General Services Administration, administer their own preservation programs. Other important Federal historical agencies and research institutions relating to preservation include the National Archives, the Smithsonian Institution and the Library of Congress. The American Folklife Center, located at the Library of Congress, is directly involved in joint projects with Maryland institutions. Another Federal historical mechanism is the grants program of the National Endowment for the Humanities and the National Endowment for the Arts.

Most Federal preservation programs are administered by the National Park Service and the Advisory Council for Historic Preservation, an independent agency which advises the President and Congress on preservation matters and through the Section 106 process, comments on Federally-assisted projects involving National Register-quality properties. While the Antiquities Act of 1906 and the Historic Sites Act of 1935 created some important preservation mechanisms (such as the Historic American Buildings Survey and the Historic American Engineering Record, now located within the NPS), it was the National Historic Preservation Act of 1966 and its 1980 amendments which establish most of the present federal preservation framework.

In addition, the 1966 legislation authorized a system of state preservation offices (SHPOs) to administer these federal programs in each state; the Maryland Historical Trust functions as the Maryland SHPO.

Most of the administration of Federal preservation programs lies within the National Park Service, through which the Trust receives annual Federal allocations and to which the Trust is responsible for satisfying program requirements. The Park Service, headquartered in Washington, has regional offices

throughout the country; the Trust works both with the Washington office and the Mid-Atlantic Regional Office in Philadelphia. Through the National Park Service, the Trust administers in Maryland the National Register of Historic Places program, grants-in-aid programs for survey and planning projects, and the Certified Local Government (CLG) program which channels federal funding to local governments. In addition, under preservation tax incentives enacted in 1976, 1978, 1980, and 1982, the Trust and the Park Service certify tax act rehabilitation projects.

Through Sections 106 and 110 of the 1966 NHPA, the Trust conducts environmental and historic preservation compliance review for federal projects in coordination with the Advisory Council on Historic Preservation (rather than with the Park Service). Several other pieces of preservation legislation offer additional protection. These include the National Environmental Policy Act of 1969, Executive Order 11593 on the Protection and Enhancemeht of the Cultural Environment, the Archeological and Historic Preservation Act of 1974, and the 1976 Amendment to the Land and Water Conservation Fund.

In the other agencies outside the Department of Interior, several other specialized protective mechanisms exist, relating to the activities of each particular program. The Department of Transportation Act of 1966 (through Section 4(f) directs that transportation projects consider potential effects to historic sites of all levels of significance, not only those sites of National Register quality. This involves the Federal Highway Administration, the Federal Aviation Administration, the Federal Railroad Administration, Urban Mass Transportation Administration, and the U.S. Coast Guard. The General Service Administration also has its own preservation regulations: the "Surplus Real Property Act" (which is the 1972 Amendment to a 1949 act), and the Public Buildings Cooperative Use Act of 1976 both authorize the GSA either to convey or acquire historic structures for preservation purposes.

The Department of Housing and Urban Development also has several pieces of authorizing legislation related to preservation: The Emergency Home Purchase Assistance Act of 1974 authorizes loans for rehabilitation and restoration; the Housing and Community Development Act of 1974 established the Community Development Block Grant (CDBG) programs, which may include funds for preservation projects; and the Housing and Community Development Act of 1980, which requires Urban Development Action Grant (UDAG) projects to consider the effects of such grants on

historic properties.

Assessment:

The role of the Trust as Maryland's State Historic Preservation Office in relation to Federal preservation programs is clearly defined and mandated in the legislation described previously. The Trust must follow certain procedures and meet strict review requirements. Thus, the major needs in this relationship are primarily administrative issues of improved coordination of existing State and Federal activities, for example in terms of NPS review time for grants, tax act certification, or National Register nominations. One particular need is for better Federal agency compliance with Section 106 and other preservation regulations.[2]

As only one of 57 SHPO offices within the States and territories, the Trust is not in as strong a position to influence or change Federal preservation legislation or administration as it can on the State level. However, it can assist in defining needs and direction for Federal programs. In coordination with other SHPOs through the National Conference of State Historic Preservation Officers (NCSHPO) and other preservation organizations, problems and policy issues (such as the federal apportionment formula) can be addressed.[3]

Similarly, the research facilities of the major Federal historical agencies such as the National Archives, the Smithsonian, the Library of Congress, and the American Folklife Center could be better utilized by the Trust in its research, survey, and publications programs and conversely, the Trust can contribute to these institutions.

The grants programs of the NEH and the NEA offer possibilities for Maryland research and educational activity; most of the MHT's interaction with these programs has been through grants from the Maryland Council on the Humanities, which has on occasion give the MHT grant funding. For example, a NEH grant through the Maryland Council for the Humanities funded the preparation and publication in 1979 of New Life for Maryland's Old Towns which won a 1980 award from the Maryland Chapter of the American Society of Landscape Architects for excellence, and sponsorship of a series of "public policy workshops" in 1983 to explain the benefits of the Comprehensive Plan to Maryland's citizens. In addition, NEH awarded a planning grant to Jefferson Patterson Park and Museum to develop a statewide program for

students centering on creating a better understanding and appreciation of the State's archeological heritage.

A.3 (b) Related Land Use Planning Programs:

Description:

Federal agencies in other areas of land use planning offer limited opportunities for increased coordination and integration of preservation activity in Maryland. The resource conservation goals and general direction of many programs in agencies such as HUD, the Environmental Protection Agency, the Council on Environmental Quality, (and of course the Department of Interior in areas other than historic preservation) can all dovetail to some extent with the interests of preservation, although in practice there is relatively little interaction. Many of these agencies are allied with preservation programs in their emphasis and their shared interest in managing the built and natural environment, conservation of energy and irreplaceable resources, preservation of land for ecological, agricultural, scenic open space or recreational use, and in assisting in the economic and physical development of local communities. The Office of Management and Budget conducts federal comprehensive planning and policy analysis for the Executive Branch and the various agencies also conduct their own internal planning and policy programs.

Assessment:

Practically speaking, there is less opportunity for the MHT to interact with the Federal government when compared to State and local governments. Within the very real constraints on the ability of a State agency to initiate any new partnerships with Federal agencies, there may be ways to encourage better coordination with the MHT for Federal programs in Maryland. Aside from the requirements under Federal preservation regulations (particularly Section 106 and Section 110 Guidelines) where Federal agencies must comply in environmental review activity, there may be some opportunities for non-mandated program coordination. The most likely approach is with the local and regional branch offices of Federal agencies which handle Maryland programs. Here again, a basic need is for education of these officials about preservation and increased awareness/sensitivity to historic resources, perhaps in workshop settings (which has been done on a small scale in the past). This would not only improve the compliance process but perhaps spark more voluntary action. Conversely the MHT can benefit from

learning more about the operations of other programs.

1. Comprehensive Planning:

OMB's planning is national in scope, and centralized, so that without regional contacts, there is little the MHT can do to influence this office. The same is true of the planning/policy analysis programs of agencies such as HUD.

2. Economic and Community Development:

Again, the MHT cannot realistically interact with the central administration of these federal programs, but can work with the local and regional offices, particularly with HUD. Again, the need is more education and increased awareness of the benefits of preservation to housing programs, economic revitalization of cities and towns, and in tourism promotion. The MHT has already been working with communities on HUD's CDBG and UDAG projects as part of the Federal compliance process. to increase communication and awareness, the MHT should meet with staff from the local branches to provide the information noted above as well as the technical information the MHT has already presented through the compliance process. These officials could be invited to MHT workshops and conferences, which could more often be geared to their needs.

3. Land Conservation/Environmental Protection:

These Federal agencies also need to be more aware of the value of historic properties in their programs. Within the Department of the Interior, the NPS serves as liaison for historic properties. Their programs concern not only the natural environment and scientific studies, but also environmental impacts and the cultural landscape. Acid rain, for example is a problem being studied by the EPA for its effects on historic properties. The Army Corps of Engineers study of the Chesapeake Bay has already provided the MHT with data on erosion which is used in this planning document. The USGS and NOAA are other Federal agencies which provide data, especially to the archeological community.

4. Arts/Cultural Programs:

The NEA and the NEH are the leading arts programs, aside from the art museums run by the government (e.g., the Smithsonian); their grants could be sources of funding for Maryland projects.

B. PRIVATE SECTOR PROGRAMS

B. 1. STATEWIDE ORGANIZATIONS

B. 1. (a) Historic/Preservation Groups:

Description:

Within the private sector, the leading statewide private preservation group is Preservation Maryland (formerly known as the Society for the Preservation of Maryland Antiquities), whose membership is presently concentrated in the Baltimore City and County areas of the state. The activities of Preservation Maryland currently involve primarily the preservation of historic buildings, rather than archeological sites, and the organization maintains several historic properties across the state. It publishes a newsletter, the Phoenix, holds educational tours, and assists in the creation of other preservation organizations. Preservation Action (Maryland Chapter) is now a moderately active lobbying group. A very important, semi-public/semi-private organization (previously described) is the Maryland Association of Historic District Commissions, which coordinates the activities of local historic district/preservation commissions across the state.

For archeology, the Council on Maryland Archeology, or COMA, is the leading professional organization; the Archeological Society of Maryland also has an active membership. There is no similar professional association for historians/architectural historians in the state, although some of the nationwide scholarly organizations for study in architectural history (described under National private organizations) do have regional or Maryland chapters. The Society of Architectural Historians, Victorian Society of America, Society for Industrial Archeology, and the Vernacular Architecture Forum are probably the most active groups.

For historical research, the Maryland Historical Society is the leading private membership organization, with a museum, library, and publications program. Other important centers of research in Maryland history are the history, architecture, and anthropology departments of colleges and universities such as Goucher, Johns Hopkins, Washington College, and the University of

Baltimore. An interesting recent development is the formation of the Maryland Chapter of the National Coordinating Committee for the Promotion of History, (an offshoot of the American Historical Society, formed to involve academics in public policy issues). If the Maryland chapter were strengthened, it could perhaps serve as an umbrella group for the institutions and organizations involved in historical and archeological research in the state.

Assessment:

1. Functional Relationships:

While each of the historic and preservation groups described earlier serves an important and unique role in Maryland preservation, the functions of these groups in relation to each other and to the Trust should be re-examined to determine where improvements could be made. For example, none of these groups currently operates a revolving fund for endangered properties, which is a pressing need in Maryland. In addition, none of these groups has the existing capability to operate a strong statewide lobbying and advocacy network.

The 1985 study by the Johns Hopkins University Center for Metropolitan Planning and Research, sponsored jointly by the Trust and Preservation Maryland, addressed many of these types of issues.[4] The study recommended a number of improvements, including expansion of Preservation Maryland's activities in education and membership, and in assisting a statewide private preservation advocacy network. Other recommendations involved joint efforts by Preservation Maryland and the Trust in creating a state-wide revolving fund and production of publications.

The functional relationship of the Trust and Preservation Maryland is a complex issue which is currently under study by the respective organizations. Suggested changes have concerned primarily the broadening of Preservation Maryland's membership and activities through encouraging the organization to undertake more public education activities such as conferences and a newsletter. This could strengthen the organization and better coordinate the activities of local private preservation groups across the state. As part of this expansion, PM could have wider geographic diversity in its membership and possibly represent archeological interests as well.

2. Advocacy Network:

An important need is for better coordination of private historic and preservation organizations and the formation of a statewide advocacy network for lobbying and other activities. If Preservation Maryland does not currently have the capability, then the MHT could help strengthen it to lead a statewide association of preservation groups, historical societies, and other institutions. Or, if were strengthened, the Maryland Chapter of the National Coordinating Committee for the Promotion of History could assist in this organization. Also, while COMA and ASM represent the archeological community in the state, there is no parallel organization which represents Maryland architectural historians and historians.

3. Research with Private Colleges and Universities:

As was discussed under the state college and university system, the MHT should work with private schools to encourage academic research on important research topics, and to use faculty and students in these disciplines to conduct surveys, prepare National Register nominations, and undertake other preservation activities where possible, as has been done at Goucher College, which offers a major in historic preservation.

B. 1. (b) Related Land Use Planning Organizations:

Description:

In the area of conservation and environmental protection, the most active private groups in the State are probably the state chapter of The Nature Conservancy, and the Chesapeake Bay Foundation, which although regional in focus, is important to much of eastern Maryland. The Maryland Environmental Trust, a State agency described earlier provides many of the land trust functions often performed by private conservation groups in other States.

Most statewide planning and community and economic development programs are located in government agencies, as described earlier. However, important resource organizations are the numerous statewide associations and professional organizations serving government and municipal officials such

as the Maryland Municipal League and the Maryland Association of Counties, which represents county planning officials and county park and recreation administrators. Another resource is the American Planning Association, with a Maryland Chapter and a Washington, D.C. (National Capital) area chapter. Similarly, associations of builders, architects, realtors, engineers, etc., also offer opportunities for new preservation partnerships. The American Institute of Architects, through their Baltimore and Chesapeake chapters, is a resource for preservationists in the state. Organizations which promote the arts, such as the Mid-Atlantic States Arts Consortium, offer additional opportunities for preservation.

Assessment:

The MHT generally has only occasional contact with the State's private and use planning groups, rather than any formal, ongoing agreements or partnerships. A number of possible partnerships are suggested here:

1. Planning:

While most planning on the statewide level is conducted by State agencies rather than the private sector, the professional organizations representing the State's planning officials offer potential for cooperative efforts in research, education, and special activities. The American Planning Association (APA) has two local chapters as described previously; both of these publish newsletters and conduct programs. The APA, Baltimore chapter newsletter has already published an article on the MHT's planning process; this is only the beginning of the information exchange programs that could be occurring. Some activities of the APA already parallel the interests of the MHT; for example the Baltimore chapter, together with the AIA chapter, sponsored a tour of the Power Plant in Baltimore prior to its conversion to the Six Flags entertainment complex.

In addition, the Maryland Association of County Officials offers an excellent opportunity for the MHT to reach the state's decisionmakers. The MHT staff have already spoken to MACO at the 1985 meeting of this group about the MHT's historic preservation plan. During the course of this event, it became evident that there is much interest on the part of local officials about the benefits and programs of

preservation and a great need for basic information on what programs exist. Similarly, the Maryland Municipal League also represents a large group of public officials. Thus, these organizations offer a good opportunity for the MHT to reach directly the state's public officials, a very important group which needs to be targeted. In addition, an attempt should be made by the MHT to include these officials in the Trusts' own conference and workshop activities, perhaps holding special sessions especially for these groups.

2. Economic and Community Development:

Private groups in this field which are statewide in scope are rare; most are locally based and located in Baltimore as described in the next section. There are however, professional organizations which represent these interests, such as the Maryland Municipal League.

3. Land Conservation/Environmental Protection:

There is good potential for the MHT and private preservation groups such as PM to expand our opportunities in terms of existing land conservation/environmental groups in the state. The state chapter of the Nature Conservancy for example, could be approached for joint efforts in land acquisition, environmental education, and lobbying and advocacy for environmental legislation. The Chesapeake Bay Foundation, although regional, is also influential statewide in lobbying for environmental issues and improving environmental education.

4. Arts/Cultural Groups:

Private arts groups also offer an excellent resource for alliances with preservationists, especially in arts awareness and lobbying/advocacy activities. A citizens advocacy group of the State Arts Council worked with Preservation Maryland during the 1985 session.

5. Commercial/Development Interests:

Since the private, for profit, commercial sector of the state controls so many historic properties, these interests and the organizations which represent then are extremely important to preservation efforts. Statewide associations of builders, contractors, realtors and developers (such as Board of

Realtors, Maryland Chapter of Homebuilders Association) should be contacted by the MHT and provided with information about the benefits of preservation, both in written form and in person through meetings and workshops. Case studies of successful preservation projects in the state should be given wide publicity, along with material on the economic benefits of rehabilitation projects.

B.2 LOCAL AND REGIONAL ORGANIZATIONS

B.2.(a) Historic/Preservation groups:

Description:

In Maryland, there are over 350 local historical and preservation organizations and museums which vary widely in terms of membership, financial status, staff, and capability. Some are extremely active and have some staff (such as Historic Annapolis, Inc.) while others are composed of citizen volunteers. Local historical societies and museums often are not heavily involved in preservation issues, but the potential for their involvement is there and they play an important role in promoting interest and understanding of Maryland's past. Many local preservation groups are off-shoots of local historical groups, sometimes organized in response to a particular issue in a community. There are relatively few regional historical/preservation groups; notable exceptions are environmentally-based groups such as the Potomac River Basin Consortium, which is supported by member institutions.

While the MHT's County Committees are composed of local citizens, these groups are not considered independent, private groups. Their functions are discussed in detail earlier in this chapter in the section on state government describing the Maryland Historical Trust. County Committees could, however, be used to help form private preservation groups.

Assessment:

The large number of private preservation and historical groups in the state makes this sector an important component of the state's preservation network. These groups can perform a vital role in educating local communities about their heritage, acting to preserve threatened properties, and conducting research, survey, and publications activities. Currently, the MHT's relationship with these groups is usually project-specific, oriented to a particular issue in a community. Staff liaison is usually through the Community Education Services Division (particularly the Assistant County Committee Administrator), or when other MHT staff members are involved in local preservation projects or are

asked to speak at local meetings. There is much potential for these local groups to help build more support for preservation in their communities and to conduct lobbying/advocacy activities; to do this, either the MHT or Preservation Maryland needs to provide some staff assistance to these groups. Local groups also can work effectively with local historic district commissions and other governmental bodies.

1. Formation of Local Groups/Strengthening Existing Groups:

Well-established historical societies might be used as the nucleus for formation of new preservation groups where none exists. In some larger communities, architectural conservancies might be considered, like those that have been successful in cities such as Hartford, Connecticut. One of the clearest needs is for a strong city-wide private preservation organization in Baltimore City. Baltimore Heritage, Inc. can help fill this need, by forming a network to bring decisionmakers together and serve as an advocacy group to work with the city. With a wider membership and increased financial resources, it can help unite the city's numerous local community and neighborhood preservation groups.

The MHT needs to provide staff assistance and/or funding to assist in strengthening the capability of these groups; the Trust's grants program, for example, aids in the preservation of structures owned by local preservation groups, thus increasing the group's visibility in a community. The capability of these groups clearly varies depending on the kind of expertise of their leaders; in cases where local organizations are led by individuals with little professional knowledge of preservation, then the MHT and/or PM need to provide additional training and education.

2. Advocacy Network/Organization of Private Groups Statewide:

As noted earlier under discussion of private, statewide preservation, a major need is to form a statewide alliance of preservation and historical groups, which could effectively lobby for preservation and improve the quality of the state's local groups. This network would need leadership, probably from an established private group like Preservation Maryland; PM, however, does not currently have the staff or funding to undertake this effort, and the MHT should consider assisting

PM to do so. The Maryland Chapter of the National Coordinating Commission for Promotion of History could also assist in this effort.

B. 2 (b) Related Land Use Planning Groups:

Description:

Local and regional conservation/environmental groups also vary in terms of their size and capabilities. Groups like the Chesapeake Bay Foundation are relatively large in terms of staff and are well known in the state. Some groups form in response to a particular need in a specific area, for example, to protect a river or other natural feature. Some groups are formed to acquire and protect specific natural and scenic lands in an area; land trusts might have a special relevance to preservation as a potential protective mechanism for historic properties. Other groups are more involved with research and study of an area, such as the Potomac River Basin Consortium.

Local economic and community development activities in the private sector are probably fewer than in public agencies, but some organizations have formed for community revitalization, such as Baltimore's Neighborhood Housing Services (part of a nationwide network), Citizens Housing and Planning Association of Baltimore, and the Community Investment Institute. These groups serve city-wide functions or concentrate only on certain neighborhoods and communities within a city. The St. Ambrose Housing Services Center in Baltimore is an example of the role religious-affiliated institutions can play in housing rehabilitation.

Assessment:

Some of the following types of groups can be of mutual benefit to the MHT, while others have less relevance to preservation.

1. Comprehensive Planning:

Private planning organizations serving the local level are rare in the State, and therefore of little applicability here.

2. Economic and Community Development:

Local private community and economic development organizations are an important resource for the State's preservationists. Whether they are involved in housing rehabilitation programs or in neighborhood improvement activities, these groups can be very useful in terms of generating pride and interest in local communities, and can serve as the impetus for civic improvement activity, including preservation work. These groups can inform local residents about rehabilitation and preservation programs and encourage a greater awareness of the benefits of preservation to the community. The MHT could meet with representatives of these groups or furnish published material to inform them of available preservation mechanisms which could be of use to them, and to generally increase their sensitivity to historic properties in their community.

3. Land Conservation and Environmental Protection:

While few local land trusts appear to exist in the State, the local conservation groups which do exist offer potential for joint environmental education programs lobbying/advocacy, and perhaps joint land acquisition activity. For example, the Chesapeake Bay Foundation might be interested in sponsoring some joint programs with the MHT on the cultural history of the Bay region, changes in the landscape/natural environmental over time etc. and in proposing new environmental programs/legislation.

4. Arts/Cultural Organizations:

These groups can be extremely useful to preservation in the areas of advocacy, lobbying, and in educating the public about the importance of aesthetics and the arts. These groups are generally concentrated in Baltimore City and are often influential groups with high public visibility.

B.3 NATIONAL ORGANIZATIONS

B.3. (a) Historic/Preservation Groups:

Description:

On the national level, there are a number of private preservation groups which can play a role in Maryland preservation efforts. The National Trust for Historic Preservation is the largest membership organization of this type in the nation; the National Trust functions as an educational, lobbying, publishing and research organization and also maintains historic house museums. The Trust operates a series of regional offices across the country; the Mid-Atlantic Regional Office in Philadelphia works most directly in Maryland through programs such as the Preservation Services Fund and rural preservation programs.

Other national organizations include Preservation Action, a preservation advocacy group with a Maryland Chapter, and several scholarly organizations such as the Vernacular Architecture Forum, the Society of Architectural Historians, Victorian Society in America, Society for Industrial Archeology, the Society for American Archeology, and the Society for Historical Archeology. The American Association for State and Local History is another leading historical organization which is involved to some extent in preservation activity.

An important gap in national preservation programs is the lack of a private organization which can quickly acquire endangered properties through a revolving fund; there is no parallel to the successful programs of the Nature Conservancy (see below), which preserves natural and scenic properties. The Archeological Conservancy, however, does acquire property to some extent.

Assessment:

The several national organizations and local chapters described earlier offer some opportunities for joint projects in Maryland, and are sources of research and reference information on many subjects in preservation and history. In addition, the Trust is occasionally involved with national organizations in lobbying and other efforts to formulate national preservation policy and administration. In practical terms, the Trust's

relationship to national organizations is occasional rather than continuing, through special activities. A direction to be considered in the future should be establishment of more regular, ongoing joint partnerships with national organizations.

For example, the MHT co-sponsored the National Trust's annual historic preservation conference in Baltimore in 1984, and conducted joint projects in Maryland under the Main Street program and the Rural Preservation programs. The National Trust's Critical Issues Fund is a program which the MHT should consider applying for, to study some important area of research in Maryland; it has been suggested that the MHT seek funding to conduct a study of a model historic port town along the Chesapeake Bay in conjunction with the current Chesapeake Bay Critical Areas study.

B. 3 (b) Related Land Use Planning Groups:

Description:

In the fields of conservation and environmental protection, there are many national organizations which operate to varying degrees in Maryland. The Nature Conservancy operates a revolving fund for endangered properties and has regional offices and state chapters, including a Maryland Chapter (see: Private, Statewide). In many states, the properties owned or on which easements are held also contain historic resources in addition to natural and ecological features. The Nature Conservancy is perhaps the most active national organization in terms of land conservation and the National Lands Trust also acquires property. Other groups, such as the Sierra Club or Audobon Society play a major role in environmental education, public awareness, and advocacy but are less involved in land conservation. The Urban Land Institute and the Conservation Foundation, with offices in Washington, D.C., are other groups with a special role in preservation; primarily research and publishing institutions, they produce reports studying both the natural and the built environment.

In the area of economic and community development, most national programs are located within public agencies rather than in the private sector. There are however, some important private groups, such as Partners for Livable Places, an international, multi-disciplinary coalition of diverse organizations and individuals concerned with quality of life issues and economic development. The Neighborhood Reinvestment Corporation

(federally chartered) coordinates a network of Neighborhood Housing Services programs in 135 cities. The Enterprise Foundation, founded by James Rouse to assist low-income housing and community revitalization, is an important national model for rehabilitation programs. In addition, many associations exist which represent professional groups, such as national associations of mayors, governors, builders and realtors. The American Planning Association is a particularly useful resource for preservation planning, and has a Maryland chapter and a Washington, D.C. (National Capital) area chapter. The American Institute of Architects and the American Society of Landscape Architects also have local chapters. Associations of groups promoting the arts and museums may also offer opportunities for preservation alliances.

Assessment:

The MHT's relationship with non-preservation national organizations is extremely occasional, but some groups do offer opportunity for the MHT in terms of joint pilot projects in Maryland, providing research data, and serving as models for Maryland groups to follow. It is somewhat more likely that the MHT will become involved in partnerships with the state or local branches of these organizations (see also: Private, Statewide organizations).

One exception, and an example for the future, is the Trust's participation in SEARCH, the consortium of private and public environmental research institutions recently created in conjunction with the Trust's new Jefferson Patterson Historical Park and Museum in Calvert County. The Patterson project has also involved other public and private conservation and land preservation groups to protect not only the Patterson property but adjacent land.

1. Comprehensive Planning:

   The most active national planning organization is the APA, which has local chapters as described under statewide organizations.

2. Economic and Community Development:

   The organizations in this field can be used in two ways; first, the MHT could seek some projects in Maryland, (for example, by the Enterprise Foundation) and secondly the

techniques used by these organizations can serve as examples for the formation of similar organizations on the state or local level here in Maryland, perhaps through existing groups.

3. Land Conservation/Environmental Protection:

Similarly, the MHT should approach these national groups to determine whether there is any interest in sponsoring projects in Maryland. At the least, the MHT needs to determine whether any of these groups already hold property in the state that may include historic resources. Again, the most likely approach might be through any state branches, such as the Nature Conservancy, which has an active land acquisition program in many states.

4. Arts/Cultural Organizations:

These kinds of national groups are rare, and therefore of little relevance in this plan. Groups such as American Association of Museums, or any alliances of arts groups can be invaluable in lobbying for arts legislation and funding, but the MHT's interaction is likely to be rare, other than through its Jefferson Patterson Park and Museum Division.

5. Commercial/Development Sector:

National organizations representing these interests are plentiful and influential, such as the National Associations of Builders, Realtors, Homebuilders and other construction industry organizations and trade groups (such as AFL-CIO apprenticeship programs). Again, the MHT's relationship with these groups would likely be very occasional.

CHAPTER IV: MARYLAND HISTORICAL TRUST PROGRAMS: NEEDS AND RECOMMENDATIONS

CHAPTER IV: MARYLAND HISTORICAL TRUST PROGRAMS: NEEDS AND RECOMMENDATIONS

Introduction:

The Maryland Historical Trust was created in 1961 as a quasi-public body of the State of Maryland, due to the efforts of private sector preservationists. In 1966, the office became the liaison for federal preservation programs in Maryland as the State Historic Preservation Office (SHPO), and achieved full State agency status in 1970. The staff has grown from a part-time Director in 1961 to its current level of 41 employees. Today, the Trust is composed of five major administrative divisions:

*Technical Preservation Services Division

*Survey and Planning Services Division

*Community Education Services Division

*Jefferson Patterson Park and Museum

*Administrative and Fiscal Services Division

In this chapter, we will first describe how comprehensive planning is being implemented at the Trust, and then, program needs and recommendations for each division of the office (except for Administrative and Fiscal Division) will be organized by linking them to each of the five major goals of the MHT described in Chapter I.

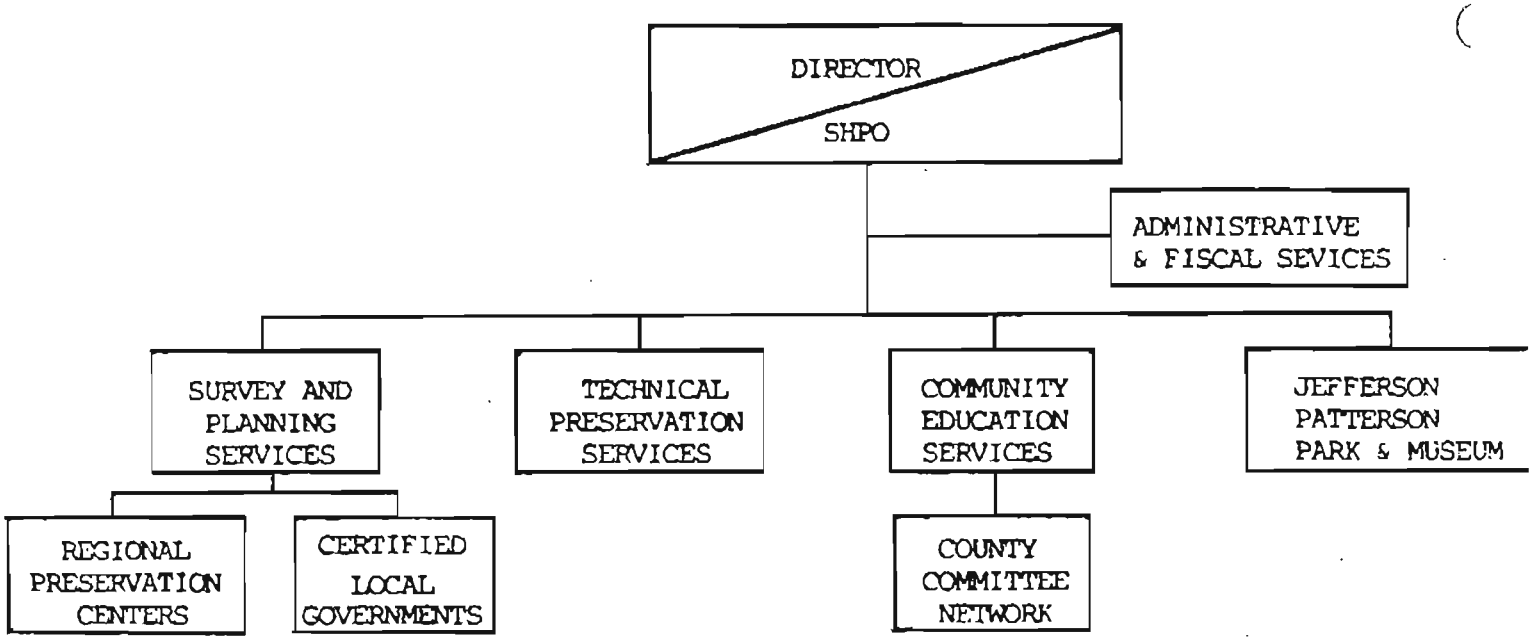
Comprehensive Planning at the Maryland Historical Trust:

In this chapter, the programs of the MHT are described and assessed in terms of their functions under the three major areas of preservation activity identified in the Secretary of the Interior's Standards for Preservation Planning model: Identification, Evaluation, and Protection/Treatment. (See Appendix 2) The following pages describe these functional relationships and levels of activity, and explain how preservation planning can be implemented in each program area. In this system, decisions about resources can be made by linking

the identification and evaluation of data and resource significance to decisions/actions on the appropriate level of protection and treatment. The historic contexts described under Identification will be used as the basic organizing structure for information on all types of programs; for example, statistics on the numbers/amounts/geographic distribution of National Register properties or grants awarded by the Trust will be available for each context through the aid of computerization and this information will be used to help build the data base for each context. For more detail on implementation of the planning process within the MHT, and description of procedures for review and updating of planning information, see Appendix 1.

ADMINISTRATIVE ORGANIZATION

MARYLAND HISTORICAL TRUST



A. Identification Programs: Document and Interpret the Historic Record

Survey and Planning Services Division Program:

* establish system for organizing information (Historic contexts or "Study Units")

S&P Services Division Historic Sites Survey and Archeology Programs and the Jefferson Patterson Park and Museum:

* conduct research, survey, analysis, maintain archive

Community Education Services Division and the Jefferson Patterson Park and Museum Division:

* interpret research results and educate the public and professionals

B. Evaluation Programs: Analyze and Evaluate Level of Historic Significance, Social/Economic Value, Threat, and Mechanisms

S&P Services Division Planning Program:

* develop historic contexts
* develop social/economic value criteria
* analyze stresses
* analyze mechanisms
* link these factors

S&P Services Division National Register Program:

* administer NR Program using historic contexts and NR criteria of significance

C. Protection/Treatment Programs: Make Decisions/Actions on Resources by Linking Level of Treatment to Level of Historic and Social/Economic Significance, Threats, and Available Tools

S&P Services Division Planning Program:

* create linkage, matrix for decisionmaking and analyze existing preservation system/tools

S&P Services Division Compliance Program:

* conduct federal and state agency reviews weighing these factors

Technical Preservation Services Division Programs:

* provide financial and technical assistance weighing these factors

Community Education Services Division Programs:

* make decisions on publications, conferences, education by assessing needs/factors

Jefferson Patterson Park and Museum Division Programs:

* develop and administer park property, education, and conservation programs using these factors; conduct preservation compliance in region

A. IDENTIFICATION PROGRAMS

Identification activity conducts research, field survey, and analysis in order to document Maryland's historic record and interpret this information to academics, preservationists, and the public through publications and other educational activities. The planning component (within the Survey and Planning Services Division) establishes the system (historic contexts or "study

units") for organizing data and identifying research needs/gaps in information; this is used by the Historic Sites Survey Program and the Archeology program (also in the S&P Services Division) to conduct research and survey projects and administer/select S&P grants-in-aid projects. The S&P Services Division also performs an archival function through maintaining the Maryland Inventory of Historic Sites and library collections.

From the data that is compiled, publications and other educational activities (lectures, workshops) are produced which present and interpret this information to increase public and professional knowledge of Maryland history. Within the Trust's Annapolis office, publications and workshops are usually the responsibility of the Community Education Services Division (CES) which coordinates these public information projects with members of the S&P staff. The Jefferson Patterson Park and Museum also performs survey, research and educational activities related to Chesapeake Bay and Southern Maryland history. The JPPM administers an archeological program for gifted high school students with the Maryland Department of Education; sponsors fieldschools and other projects with area universities; and its museum will interpret 12,000 years of Bay region history.

Identification activities involve not only the archeological and architectural history fields (which are the primary expertise of the MHT), but also require coordination with academics and experts in other disciplines, particularly history, folklife studies, and cultural geography. This interdisciplinary approach to the study of Maryland's past provides the broad perspective on the patterns of Maryland's historical development which is needed for the next phase, where the documentation is sorted and evaluated to create historic contexts and determine the relative historic significance of any given historic property.

A major focus of the MHT's planning process has been the creation of an organizational structure for information on Maryland history and prehistory, the "study units" or historic contexts recommended in the Secretary of the Interior's Standards for Preservation Planning model. These contexts organize information and are used in evaluation to measure the historic significance of an individual resource. This historic significance is then combined with analysis of community and economic significance, level of threat, and available tools in the Evaluation phase, in order to arrive at the appropriate Protection/Treatment decision.

Historic Context Organization for Maryland:

"Study units" in the Maryland Comprehensive Historic Preservation Plan are organized first by geographic region, then by time/developmental period, and then by theme (field of activity or area of significance) and the types of cultural resources associated with each theme. This structural framework will provide a necessary context for the description and analysis of all known or expected cultural resource types, and the basis for evaluating the significance of these resources.

An outline of the major geographic, chronological, and thematic divisions is shown below; more detailed description of each region, period, theme, and resource types associated with each theme is included in Appendix 3 of this plan. Specific guidelines for development of historic contexts in Maryland are included in Appendix 4. The research questions and needs which have been identified for the archeology and historic sites survey programs are also located in Appendix 5 and 6 of this document.

I. Geographic Organization:

1)	Eastern Shore	(all Eastern Shore counties, and Cecil County)
2)	Western Shore	(Anne Arundel, Calvert, Charles, St. Mary's, and Prince George's counties)
3)	Piedmont	(Harford, Baltimore, Carroll, Frederick, Howard, and Montgomery counties, and Baltimore City)
4)	Western Maryland	(Washington, Allegany, and Garrett counties)

II. Chronological/Developmental Periods:

1)	Paleo-Indian	10000-7500 B.C.
2)	Early Archaic	7500-6000 B.C.
3)	Middle Archaic	6000-4000 B.C.
4)	Late Archaic	4000-2000 B.C.
5)	Early Woodland/Archaic	2000- 500 B.C.
6)	Middle Woodland	500- 900 B.C.

7)	Late Woodland	900-1600 A.D.
8)	Contact and Settlement Period	1570-1750 A.D.
9)	Rural Agrarian Intensification	1680-1815 A.D.
10)	Agricultural-Industrial Transition	1815-1870 A.D.
11)	Industrial/Urban Dominance	1870-1930 A.D.
12)	Modern Period	1930-present

III. Prehistoric Period Themes:

1) Subsistence
2) Settlement
3) Political
4) Demographic
5) Religion
6) Technology
7) Environmental Adaptation

IV. Historic Period Themes:

1) Agriculture
2) Architecture, Landscape Architecture and Community Planning
3) Economic (Commercial and Industrial)
4) Government/Law
5) Military
6) Religion
7) Social/Education/Cultural
8) Transportation

For each of the resource types listed under historic period themes, several classes of site types can then be analyzed. These site types include:

1. Archeological Sites
2. Standing Structures
3. Landscape Features
4. Town/City Plans
5. Objects
6. Intangibles

For one region (Western Maryland), the following organizational structure illustrates how one theme, within one prehistoric and one historic period, would be examined:

PREHISTORIC PERIOD EXAMPLE:

REGION: IV. WESTERN MARYLAND

PERIOD: LATE WOODLAND 900-1600 A.D.

THEME: POLITICAL

RESOURCE TYPE: a. Fortified Villages

SITE TYPES:

1. Archeological Sites
2. Standing Structures
3. Landscape Features
4. Town, Village and City Plans
5. Objects
6. Intangibles

b. Cemeteries
1-6 as above

c. Hamlets
1-6 as above

HISTORIC PERIOD EXAMPLE:

REGION: IV. WESTERN MARYLAND

PERIOD: H. RURAL AGRARIAN INTENSIFICATION 1680-1815 A.D.

THEME: 1. AGRICULTURE

RESOURCE TYPE: a. Small family farmsteads

SITE TYPES:

1. Archeological Sites
2. Standing Structures
3. Landscape Features
4. Town, Village and City Plans
5. Objects
6. Intangibles (Folklore)

b. Plantations
1-6 as above

c. Tobacco Farms
1-6 as above

d. Grain Farms

e. Livestock/Dairy Farms

f. Fruit Production (Orchards)

G. Agribusiness

H. Other

B. EVALUATION PROGRAMS

The evaluation phase of activity involves analysis of data to determine the level of importance of a given resource, not only its historical significance but also its social and economic importance to the community. Evaluation also includes analysis of the level of stress/urgency of threat to a resource, and of the mechanisms available to protect/treat the resource. Through evaluation of these factors, the MHT can decide the appropriate level of protection for an historic property. An important goal of this planning process is to distinguish which properties are more important than others, and to concentrate preservation efforts on those which really deserve the most attention, since the Trust cannot and should not attempt to preserve all historic resources.

The National Register of Historic Places is an established federal program with a set of criteria for determining the historic significance of a property; these criteria should be used in conjunction with the historic contexts which have been established in this planning document. In a 1985 analysis of the National Register program in Maryland, contexts ("study units") have been used as the organizing structure for arranging statistics on the current National Register listings, giving us a profile of National Register coverage by region, time period, and theme (area of significance). This illustrates which contexts are best represented in Register listings, and which ones have been neglected.

While historic significance then can be measured in some way through the contexts and National Register program, there is no existing system in preservation for measuring the value of a historic property to a community or the economic benefit of preserving it for the community. These factors however need to be considered in making decisions about resources, and the planning component at the Trust will be attempting to create some criteria for addressing these values.

The other factors, of level of threat and of available

mechanisms, have been discussed in Chapters II and III of this document, and the planning program at Trust will establish a system to link these factors to the levels of historic and social/economic significance. The seriousness of a threat to a resource, and whether there is really any practical solution (such as adaptive re-use) for a threatened property need to be evaluated when protection decisions are made in the compliance and preservation assistance programs.

C. PROTECTION/TREATMENT PROGRAMS

Decisions and actions dealing with the protection/treatment of historic properties need to be made after considering the various factors described under the Evaluation phase. The level of effort given to any resource should be directly related to its significance, the threat, and whether any practical solutions are available to protect it, especially since the funding, staff capability etc. of preservation agencies and organizations is so severely limited.

Within the Maryland Historical Trust, several programs deal directly with decisions regarding appropriate protection and treatment of resources. The compliance component within the Survey and Planning Services Division reviews Federal and State projects for environmental impacts and appropriate treatments of historic properties. The Technical Preservation Services Division (TPS) of the Trust contains several programs offering financial and technical assistance and must make decisions on where to provide this assistance most effectively. The Community Education Services Division (CES) must make decisions on publications projects, conference topics, and public affairs activities, based on what appears to be the most essential need for education. The Jefferson Patterson Park and Museum (JPPM) makes daily decisions on the park's maintenance, development and project activities, as well as conducting preservation compliance review in Southern Maryland through the Lower Southern Maryland Regional Preservation Center. Its conservation facilities also fill a direct protection need. Underlying all these programs is the work of the planning program at the Trust, which provides information from the Identification and Evaluation activities to these protection programs and creates a system for linking these activities.

TECHNICAL PRESERVATION SERVICES DIVISION

Description of Programs:

This division of the Maryland Historical Trust administers several different programs of financial and technical assistance to public and private property owners in the State. These include a State grant and loan program, review of State 502H tax deduction for rehabilitation, review of Federal tax act projects, an easement program, and when available, NPS grants for preservation projects and special grant funds such as the Jobs Bill program. In all of these programs, decisions are made on a daily basis about the level of historic significance, the need for assistance (the urgency and threat), the practicality of proposed plans for rehabilitation and the value of the project to the community. In making decisions about grant and loan awards, a list of criteria (The Open Project Selection Process) have been developed in order to rank project applications. However, targeting available financial assistance to the most significant and threatened properties is one of the major needs for this program.

In addition, the TPS Division is responsible for providing technical assistance, guidance, and training and serves as an information source for technical questions from the public, property owners, developers, and government agencies. The Technical Preservation Services Division of the Trust administers three programs which provide direct financial assistance for capital projects and three which provide indirect assistance in the form of tax credits and deductions, all described below:

Direct financial assistance is available to owners of historic resources through:

1. The Revolving Loan Fund: Private individuals, non-profit organizations and foundations, business entities and political subdivisions may apply for these funds, which are replenished by repayments and by appropriations from the Maryland General Assembly. Applications are accepted at any time during the year on a "first come, first served" basis. Funds may be used for acquisition of, or capital improvements to, all categories of historic real property. Loans have a maximum repayment term of twenty (20) years. The interest rate is keyed to the interest rate on the bonds sold to replenish the fund. (During 1984 the rate charged averaged 8-1/2%.) A perpetual historic preservation

easement on the assisted property is conveyed to the Maryland Historical Trust prior to the release of loan funds. Structures for which funds are sought must be listed in or determined eligible for the Maryland Register of Historic Properties and are evaluated on the basis of the Trust's established Open Project Selection Process criteria.

2. State Capital Grant Fund: Private individuals, non-profit organizations and foundations, business entities, and political subdivisions may apply for these funds. While applications for assistance to privately-owned properties are accepted, the Trust's Open Project Selection Process criteria discourage their selection unless they are of outstanding architectural or historical significance. The size of the fund, which is determined annually by the Maryland General Assembly, varies from year to year. In the recent past, between $200,000 and $300,000 has been available each year. Grant funds can be used for acquisition of or capital improvements to all categories of historic real properties. The average grant is $30,000. There is no specific matching requirement for grants to projects owned or sponsored by non-profit groups, but private parties are required to provide a 25% match and political subdivisions a 50% match. Projects for which funds are sought must be listed in or determined eligible for the Maryland Register of Historic Properties. Grant recipients must agree to convey a perpetual historic preservation easement to the Trust in exchange for the grant funds.

3. Federal Matching Grants-in-Aid for Development Projects: Until 1981, Federal matching Grants-in-Aid were available annually from the National Park Service, U.S. Department of the Interior, through the Maryland Historical Trust. Since 1981, Congress has appropriated funds for this program only once, as part of the Emergency Jobs Bill of 1983. The program is included here as a possible source for funds because Congress may reinstate monies in the future. Properties for which funds are sought must be listed in the National Register of Historic Places or within the boundaries of a National Register-listed historic district. Non-profit organizations and foundations, private individuals, business entities, and political subdivisions may apply for these funds. While applications for assistance to privately-owned properties are accepted, the Trust's Open Project Selection Process criteria discourage their selection unless they are of outstanding architectural or historical significance. All grants require a dollar-to-dollar match. Funds can be used for capital improvements only.

Indirect financial assistance is available to owners of historic resources through:

1. The Economic Recovery Tax Act of 1981: This program enables the owners or holders of a long-term lease on an income-producing certified historic structure (listed in the National Register of Historic Places, or a contributing element within the boundaries of an historic district which is either locally certified or listed in the National Register), to receive a Federal tax credit for 25% of the costs of a rehabilitation which is certified as complying with the Secretary of the Interior's Standards for Rehabilitation Projects. The application contains three (3) parts: Part I is an application for certification that the structure contributes to the historic district in which it is located (structures individually listed in the National Register do not need a Part I application); Part II is for certification that the rehabilitation (either proposed or in progress) meets the Standards; Part III is for certification that the completed rehabilitation has been carried out as described in Part II and does meet the Standards. Applications are submitted to the Trust for review and recommendation and then forwarded to the National Park Service for review and certification. A sliding-scale processing fee is imposed by the Park Service for all projects entailing construction costs of over $20,000.

2. The 502-H Program: This program enables the owner-occupants of a residential certified historic structure to receive a state tax deduction for 100% of the costs of a rehabilitation which is certified as complying with the Secretary of the Interior's Standards for Rehabilitation Projects. Applications are available from the Trust and are submited with the owner's income tax return. The Comptroller of the Treasury reviews the application for eligible expenditures; the Trust reviews the application to establish that the property is a certified historic structure and that an appropriate rehabilitation has been undertaken. Structures for which these benefits are sought must be individually listed on the National Register of Historic Places or be a contributing element within the boundaries of an historic district which has been either locally certified or listed in the National Register prior to the time that the project is carried out.

3. The Gift Easement Program: Owners of properties individually listed in the National Register of Historic Places

or located within locally certified or Register-listed historic districts may convey a perpetual historic preservation easement as a gift to the Maryland Historical Trust. The tax consequences of a gift easement to the donor are, for the most part, directly related to the value of the gift. The value of a preservation easement is equal to the loss in value of the property which results from subjecting it to the easement. Since the gift of an easement may have beneficial income, estate, and property tax consequences for the donor, the consequences must be determined between the potential donor, assisted by his attorney and other professional advisor, and the taxing authorities.

TECHNICAL PRESERVATION SERVICES: NEEDS AND RECOMMENDATIONS

Introduction

The first goal of the Maryland Comprehensive Historic Preservation Plan, that of protecting the State's historic properties, is a major goal of the Maryland Historical Trust and the central mission of the Technical Preservation Services Division. As such, many of the recommendations made to accomplish this goal will also apply to the Plan's other four goals.

Analysis of the TPS Division program which has involved both MHT staff and the Ad Hoc Committee has pointed to the need to consider shifts in priority among the division's various grant, loan, easement and technical assistance programs, in order to best utilize available staff and financial resources. For each of the plan's goals, different preservation tools and techniques will be effective. When dollars spent and numbers of resources protected are measured, the cost-effectiveness and preservation benefits of grant and loan programs, for example, may actually be less than the benefit derived from ERTA program review or technical assistance program.

GOAL I: INCREASE PUBLIC KNOWLEDGE AND UNDERSTANDING OF MARYLAND'S HISTORY AND ENRICH MARYLAND'S CULTURAL LIFE THROUGH IDENTIFICATION, EVALUATION, PROTECTION, AND INTERPRETATION OF THE STATE'S TANGIBLE HISTORIC PROPERTIES.

Objective 1: Create a more complete and representative data base including information about the State's historic properties; increase our knowledge and understanding of the past by accelerating the rate of coverage in documentation, analysis and protection of Maryland's significant historic resources.

Objective 2: Improve existing programs and support new programs which protect and preserve Maryland's historic properties.

Objective 3: Encourage closer cooperation among various academic disciplines (history, anthropology, folklife, architecture, geography) involved in the study of the

state's history, particularly through the State's academic institutions and other research organizations, in order to better interpret and synthesize information about Maryland history.

Objective 4: Promote increased public and professional appreciation for the value of history in its broad sense (and of Maryland and local history in particular) through educational programs held in conjunction with relevant organizations.

Objective 5: Promote increased appreciation of the contribution of archeological resources in the study of Maryland history, and publicize the economic and practical advantages of preserving such archeological sites.

Overview: Goal Relationship to Technical Preservation Services Division

Through its financial and technical assistance programs, the Technical Preservation Service Division helps the Maryland Historical Trust provide direct protection and treatment for Maryland's historic properties. These properties are under constant stress from many forces, and while current programs are able to protect many resources, the demand for assistance is much greater than current programs can supply. These forces -- demolition (either deliberate or by neglect), arson, insensitive alterations, land use change and growth pressure, obsolescence natural forces like erosion, and lack of education -- all threaten historic properties. In the face of these demands, the Trust's current financial and technical assistance programs only begin to meet the need. Therefore, the following actions are recommended to help the Trust better meet its goal of providing the maximum protection for the State's historic resources.

Program Activity 1 - Financial Assistance

a) Need: More reliable, predictable, and renewable statewide program of grants and loans for preservation projects. Currently funded as part of the State's capital budget, the

annual appropriations provided have varied greatly and have been woefully short of meeting the need.

Recommendation: Establish a stable and renewable statewide funding program, either through State government or within a private statewide preservation organization. (Ideally, this should be a revolving fund, where funds could be released quickly in emergency situations; see below).

b) Need: Make some grant and loan funds available on an "ASAP" basis in emergency situations. This is currently not possible in State capital grant and loan funds due to State procurement regulations.

Recommendation: However, some way to release some funds more quickly should be investigated, until an independent revolving fund can be established.

c) Need: Maximize existing financial resources through more creative financing methods. Current direct grants and loans may not be the most effective use of our funds.

Recommendation: Investigate the possibility of other uses for existing state loan and grant funds, such as using grant funds for low-interest Community Development Administration loans, etc.

d) Need: More preservation grants and loan sources in local government and in the private sector. Federal funds are non-existent and current State funding does not meet the need. Therefore, the Trust must widen its funding sources within local governments and the private sector.

Recommendation: Encourage the establishment of preservation grant and loan fund programs within local governments, State and local preservation groups. Seek funding sources in private national organizations where possible. To do this, we need to provide concrete models of successful programs elsewhere as examples.

e) Need: Promote public knowledge and increased use of existing Federal and State preservation tax incentive programs and create similar programs on the local level.

Recommendation: Through a broad public information

dissemination program, publicize the availability, eligibility, and benefits of Federal tax incentive program (ERTA) and the underused State 502H tax deduction, upgrade the quality of work to meet standards, and increase the number of properties which are eligible for these benefits. In the Federal review process, the National Park Service should be encouraged to expedite project review. At the State level, the possibility for expanding benefit coverage to other building types and uses should be investigated. At the local level, the Trust should work with the Maryland Association of Historic District Commissions to initiate the establishment of similar tax legislation with local governments.

f) Need: Easements are an extremely valuable preservation tool, but the potential of this program needs to be better publicized by increasing the use of State easements and encouraging the creation of more local easement programs in local governments and organizations.

Recommendation: Increase the number of easements acquired by the Trust through creation of an Easement Administrator staff position. Coordinate easement acquisition with other state agencies such as the Maryland Environmental Trust, Agricultural Land Preservation program, and private groups such as the Nature Conservancy and local land trusts. Seek favorable tax treatment for easements by the Internal Revenue Service.

g) Need: Maximize source of financial and legal assistance which exist outside of the preservation system.

Recommendation: Identify and pursue available funding opportunities within related agencies and organizations which share common purposes, such as tourism agencies, business associations, conservation groups.

Program Activity 2 - Project Selection

a) Need: Better target existing funds and assistance to those historic properties which are most worthy and most in need of assistance, in accordance with the MHT's stated goals.

Recommendation: Develop "priority lists" which rank those types of historic properties which are a) rare or b)

endangered; these will be identified in conjunction with the State Plan. For easements, especially, this should establish priorities in acquisition.

b) Need: Perform aggressive, broader outreach and solicitation of high quality project applications and easements.

Recommendation: Initiate program of soliciting applications and easements in accordance with the "priority lists" described above.

c) Need: Provide increased assistance for archeological sites, which are rarely assisted by TPS Division programs.

Recommendation: Ensure that archeological site treatment is mentioned in standard TPS Division program literature; prepare "case examples" of how funds could be used.

d) Need: Distribute funding and assistance to larger numbers of projects.

Recommendations: Set policy of distributing larger number of grants in smaller amounts.

Program Activity 3 - Project Administration

a) Need: Streamline staff review processing time for ERTA, 502-H tax projects and other review projects (MHRP).

Recommendation: Develop historic contexts for those resource types which are most often reviewed (e.g., rowhouses), and adapt treatment standards appropriate to level of significance within that property type/resource class.

b) Need: Improve monitoring of Trust easements.

Recommendation: Seek permanent Easement Administrator position; continue to use volunteers when possible; initiate use of self-monitoring easements through questionnaires, photographs.

c) Need: Expedite NPS review time for ERTA projects.

Recommendation: Provide information on NPS delays to appropriate Congressional oversight committees, in order that NPS may make changes in processing procedures to allow for

more timely review.

Program Activity 4 - Technical Assistance and Education

The most underdeveloped of all Technical Preservation Services Division activities, but potentially most valuable, is the provision of technical assistance and information beyond that associated with the formalized project review process. Although some limited discretionary time has been available for such "non-financial aid," there are many, many needs which if met, could help the Trust meet this goal.

a) Need: Improve staff technical competence in review and inspection of assisted work.

Recommendation: Continue to train existing staff and hire new personnel at the highest level of technical competence to ensure high quality review work.

b) Need: Improve quality of assisted work.

Recommendation: Provide education and training to public and professionals as described below. Seek development of technical research and guidelines by federal preservation programs and other national organizations.

c) Need: Expand the Trust's historical architectural design services.

Recommendation: Technical Preservation Services Division capabilities should be expanded to include historical architectural design services, which would be made available, at cost, (initially) to State agencies, for the provision of full architectural services for State-owned historic properties. Such services could then be expanded to include the provision of design guidelines and plans to local government and groups for neighborhoods, main streets, etc.

d) Need: Provide technical assistance to state agencies in order to implement 1985 State historic preservation legislation.

Recommendation: In the interim, until the above design

services can be created, prepare guidelines and conduct training sessions for state agencies.

e) Need: Provide greater technical assistance to local governments and non-profit groups.

Recommendation: Significant staff resources should be devoted to the promotion and creation of locally based protective programs (grants, loans, emergency grants and loans, tax incentives, easements, technical assistance, etc.) and the provision of models, guidelines and training to local governments and non-profit organizations.

f) Need: Provide a broad public education and technical information dissemination program for the public and professionals. The demand for such information and assistance is extremely high.

Recommendation: Provide staff resources to answer requests for technical information, and develop publications and training materials to assist homeowners, tradespeople, craftsmen, builders and architects in their work. In the area of eduction, the teaching of simple lessons like "preservation through preventive maintenance" will ultimately reduce the demand for financial assistance.

g) Need: Provide technical training and certification for builders, craftsmen, architects, etc. involved in preservation projects in order to ensure high quality work.

Recommendation: Investigate the feasibility of co-sponsoring a training and certification program, possibly with the Maryland Association of Historic District Commissions or Preservation Maryland.

h) Need: More original technical research by MHT staff.

Recommendation: Original research as well as the compilation of existing work should be undertaken to address prioritized technical subjects and questions to benefit Maryland resources. Such work should be ongoing, coordinated with universities, professional societies, and other groups, and address problems relevant not only to buildings, but districts, sites, structures and objects.

i) Need: To investigate any possible changes to Maryland State

building codes which affect historic properties.

Recommendation: Work with the Department of General Services to develop standards to be used when State funds affect properties listed in or eligible for listing in the Maryland Register of Historic Properties.

GOAL II: ASSIST IN THE MANAGEMENT OF ENVIRONMENTAL CHANGE; MAINTAIN AND ENHANCE THE APPEARANCE AND ENVIRONMENTAL DESIGN QUALITY OF MARYLAND'S COMMUNITIES AND LANDSCAPES; PRESERVE PLACES OF BEAUTY AND CULTURAL IMPORTANCE TO THE STATE'S CITIZENS, AND INCREASE THE PUBLIC'S LEVEL OF AESTHETIC AWARENESS.

Objective 1: Promote awareness of the overall importance of environmental quality, design, and aesthetics by explaining the psychological importance to, and positive impact of quality design on the State's citizens.

Objective 2: Educate the public, professionals, and decisionmakers as to special contributions of historic buildings to the environment in terms of providing human scale, quality design and construction, cultural identity, and a sense of time and place.

Objective 3: Improve the appearance of Maryland communities and landscapes by encouraging new development which is compatible in design with the existing environment; assist planning and design programs to better manage environmental change.

Overview: Goal Relationship to Technical Preservation Services Division

Since historic properties are estimated to comprise a large portion of the State's buildings (at least 25% built before 1940), they clearly help shape the appearance of the built environment. And, many of the most significant and beautiful features and places in our towns and cities and countryside are historic properties. Many projects assisted by the Technical Preservation Services Division are visually and environmentally significant, either as architectural landmarks or as part of larger groups, thus contributing to the quality of the planned/designed environment. In addition, the division's technical assistance in the form of written treatment and design guidance assists other agencies and organizations to improve the environment.

Many factors threatening the visual appearance of

historic properties -- such as insensitive alteration and remodeling, incorrect restoration, and the introduction of intrusions, and incompatible elements -- are due to lack of awareness of basic design standards. These standards for the treatment of structures, streetscapes, districts, and landscapes are important not only for preserving the historic environment, but for enhancing the general quality, cohesiveness, integrity, and beauty of the man-made environment. Basic design standards of architectural quality and integrity, compatability of design elements, materials and scale are all aesthetically important contributions which can result as a result of preservation programs. Archeological programs too can contribute as well through preservation of open space and landscapes; however, the role of archeological sites within the Technical Preservation Services Division needs to be expanded.

Within the TPS Division, while all the assisted grant, loan, easement, and tax act projects to directly enhance the environment, the most important activity for improving the aesthetic and environmental quality of Maryland is the area of technical assistance and education. Here, the Technical Preservation Services Division can make a significant contribution towards improving the awareness of the public to the aesthetics of historic architecture and environmental design, and in providing guidance and assistance to other groups.

Program Activity 1 - Financial Assistance

Many of the funding needs to meet this goal are similar to those previously described for Goal I. More local government and private sector grant and loan projects for preservation would help meet this goal, as would expansion of tax act programs and easement programs which protect the appearance and setting of historic properties. In addition to those mechanisms already described, the Trust must:

a) Need: Secure greater state funding for arts and design projects.

Recommendations: Join with agencies such as the State Arts

Council, DECD's Main Street program, Office of Tourism Development, the Maryland Housing Rehabilitation Fund Program, and other programs involved in art and design projects to seek increased funding. Work with these agencies in order to maximize the financial resources available.

b) Need: Expand arts and environmental design funding at local, State and Federal government levels and in the private sector.

Recommendation: Seek assistance from private foundation, business/corporations and join with local government arts agencies, local chapters of the American Institute of Architects and the American Planning Association to strengthen the relationship between preservation and design/planning, and increase available funding.

Program Activity 2 - Project Selection

a) Need: To provide funding for projects which emphasize planning and design values.

Recommendation: Currently, many projects of this type are funded through the Trust's Survey and Planning Services Division grants-in-aid program. However, in its project selection process, the Technical Preservation Services Division needs to solicit project applications which are specifically geared to protection of properties of aesthetic and environmental significance and which have the greatest visual and environmental impact. To do this, a "priority list" should be created for those types of projects which are most necessary and could serve as models for other projects.

Program Activity 3 - Project Administration

The administrative issues (such as streamlining the review process, monitoring easements, etc.) described earlier under Goal I also apply to this and the following goals.

Program Activity 4 - Technical Assistance/Education

There is a great potential for the Technical Preservation Services Division to make an important contribution towards this goal in this area of activity, by providing aesthetic

and environmental education (in conjunction with the Community Education Services Division), design guidance, and technical training.

a) Need: Increase preservation design services capability.

Recommendation: To reach this goal, the Technical Preservation Services Division should initiate a historical architectural design services program and guidelines for state and local agencies and private groups, as described previously under Goal I.

b) Need: More public and professional education and training in design.

Recommendation: With the Community Education Services Division and with groups such as the American Institute of Architects, American Planning Association, Maryland Environmental Trust and The Nature Conservancy, plan programs and publications to promote awareness and knowledge of environmental design, both for the general public and for professionals.

GOAL III: STRENGTHEN COMMUNITY AND NEIGHBORHOOD COHESION AND PRIDE, AND INCREASE LOCAL REVITALIZATION ACTIVITY BY RESIDENTS, COMMERCIAL INTERESTS, AND DECISIONMAKERS BY ASSISTING A BROAD RANGE OF COMMUNITY NEEDS AND INTERESTS.

Objective 1: Encourage the stabilization of neighborhood/community populations and reduce potential displacement problems; promote the use of innovative programs which assist citizens of all economic and social levels within Maryland communities.

Objective 2: Assign high priority to preservation projects which identify and protect places of special importance to local communities and offer the greatest potential for generating community interest and activity.

Objective 3: Develop working partnerships with other government agencies and private organizations involved in community development activities.

Overview: Goal Relationship to Technical Preservation Services Division

Technical Preservation Service Division projects and technical assistance programs can stimulate civic pride and interest in other local improvement activities, enhance the quality of life for Maryland communities, and strengthen the sense of time, place and tradition for Maryland's citizens. As has been demonstrated, the use of preservation projects as a tool for community and cultural improvement offers great potential, and this potential needs to be developed in TPS Division programs. Preservation need no longer be perceived as an academic, "elitist" activity, of interest to only a minority of Marylanders, but instead, its full potential for helping to improve the lives of all of Maryland's people can be realized.

It is important that in pursuing this goal, the Trust keep in mind the problems of public attitudes and perceptions of preservation and issues such as

gentrification and displacement, which are among the stresses acting on the state's historic resources. By directing our financial and technical assistance programs to these issues and needs, and extending the range of our activity among a wider segment of Maryland's citizens, we can begin to work towards this goal.

Program Activity 1 - Financial Assistance

As stated previously under Goal II, all funding issues and needs described for Goal I also apply to meeting this goal. Those financial assistance programs which are most effective in meeting this goal are the direct grants and loans which stimulate community involvement, and tax incentive projects which help economically revitalize neighborhoods and communities and provide much-needed housing for Maryland's citizens. Other financial assistance needs are:

a) Need: A more flexible funding source for broad-based, publicly oriented non-standard preservation projects with high community value and visibility.

Recommendation: With the assistance of the Department of Economic and Community Development, the Maryland Association of Counties and the Maryland Municipal League, request state funds to implement this program within the Trust, or as a program of DECD's Division of Local Government Assistance.

b) Need: Work with and assist other types of agencies and programs (low-income housing rehabilitation, civic improvement, community action groups) which can be of mutual benefit, provide a broader financial base of support for preservation activity, and counterbalance potential displacement problems.

Recommendation: Investigate new, creative financing techniques (such as using TPS grants and loans to "buy down" points in low-interest CDA loans, to allow retention of historic fabric on DECD rehabilitation projects) which could be implemented with other organizations and agencies. Approach these groups and agencies with information about preservation tools which could be off benefit to their programs.

Program Activity 2 -Project Selection:

a) Need: Consider community and social values more strongly in project selection.

Recommendation: Project "priority lists" should have criteria which place greater emphasis on social/community values; project applications should also be solicited which have greater public support. Projects which will have high community visibility, will serve as a stimulus for community organization, and will assist those Maryland citizens who are most in need, should be sought out and favored in the selection process. In project selection, the social impacts of our assistance needs to be considered (for example, potential displacement problems). And, we need to provide assistance to projects which are not only primarily of historic significance but of some social/cultural value to a community.

Program Activity 3 - Project Administration:

Needs and recommendations are the same as for Goals I and II.

Program Activity 4 - Technical Assistance:

a) Need: Broaden technical education programs to reach new audiences, and show how preservation can help improve people's lives and be practical and affordable.

Recommendation: Develop model projects and case studies to illustrate:

- impacts of preservation projects on Maryland communities, including information on the relationship of preservation to gentrification and displacement.

- modest rehabilitation projects which combat the misperception that preservation is an expensive and difficult process.

GOAL IV: CONSISTENT WITH ADOPTED STATE POLICY ON CONSERVATION AND DEVELOPMENT, MAINTAIN, CONSERVE, AND PROMOTE THE EFFICIENT USE OF MARYLAND'S NATURAL AND BUILT RESOURCES, PARTICULARLY THE STATE'S HISTORIC BUILDING STOCK, TRANSPORTATION AND OTHER FACILITIES, AS WELL AS LAND AND ENERGY RESOURCES.

Objective 1: Provide information describing the need for, and benefits of, conserving nonrenewable land and energy resources and maintaining historic buildings, roads, bridges, and other facilities.

Objective 2: Promote retention of existing building stock and encourage the creation of new usable space through rehabilitation rather than new construction, thereby conserving energy and nonrenewable resources.

Objective 3: Help to implement adopted State policy by maintaining, enhancing and protecting existing town centers, open space, agricultural and undeveloped lands through work with conservation, agricultural, and other land preservation organizations and agencies.

Overview: Goal Relationship to Technical Preservation Services Division

Technical Preservation Services Division assistance directly results in the conservation of Maryland's building stock, land, and energy resources, which are constantly threatened by development pressure, erosion, and other stresses. Since historic buildings are estimated to comprise at least 25% of the State's existing building stock, conservation of these properties protects a major portion of the State's building stock. Preservation tools hold great potential for conserving not only this large segment of the building stock, but also for protecting the open space and agricultural land associated with historic buildings, archeological sites, and districts. In order to develop the opportunities for conservation which are offered by TPS Division programs, the following recommendations are outlined.

Program Activity 1 - Financial Assistance:

As stated previously under Goals II and III, all of the funding issues described under Goal I also apply to the Trust's conservation goal. A particularly important need in attaining this goal is the expansion of the use of State and Federal tax incentive programs, which are an important tool for conserving the State's building stock through rehabilitation and re-use. The tax benefits should be promoted most strongly in those regions of the State where the building stock is most seriously deteriorating. For conservation of open space and agricultural land, the Trust's easement program is especially important and needs to be improved as stated in Goal I.

Additional needs for conservation activity are:

a) Need: A more flexible funding source which would emphasize conservation of larger numbers of properties to less strict preservation standards. Current preservation programs link funding to adherence to strict rehabilitation standards, which only a relative minority of projects can meet. A funding source which would allow more widespread, smaller, repairs and maintenance is needed (see also: Activity 2, Project Selection).

Recommendation: Currently, the best opportunity for this kind of funding probably rests outside of standard preservation programs, in the area of housing rehabilitation, Main Street, and weatherization programs, such as those administered by DECD. The TPS Division needs to continue working with these programs to ensure appropriate treatments for historic buildings, and to seek additional funding for these types of programs. Local governments and private sector housing assistance programs also offer similar program opportunities.

b) Need: Join with conservation and environmental agencies which share a common purpose of conserving Maryland's natural resources.

Recommendation: Agencies and groups which protect open space, undeveloped land, agricultural land, and energy sources offer opportunity for mutual benefit. State and

Federal agencies, for example, which are involved in combating erosion, can help the Trust deal with that particular stress through their established programs. Conservation groups and agencies offer protective tools and financial resources which could be used by preservationists (such as conservation easements) and more coordination must be established in order to increase use of these tools.

c) Needs: Support and encourage financial mechanisms and policies which favor rehabilitation of existing buildings over new construction, and promote conservation and development planning in Maryland.

Recommendation: Support State and local policies which promote conservation goals and planning. Investigate the impact of financial mechanisms such as tax assessments and building codes on conservation of buildings, land, and energy. Assist private preservation lobbying groups to ally with conservation groups for more funding.

Program Activity 2 - Project Selection

a) Need: As with the previous goals, project selection should target projects with specific benefits, (in this case conservation benefits) and existing funding should be used as effectively as possible in meeting these goals.

Recommendations: "Priority lists" should target grant, loan and easement projects which demonstrate conservation benefits. Existing funding should be distributed in smaller amounts to a wider range of projects to encourage increased conservation activity. Easement acquisition should be coordinated with other state agency easement programs such as the Maryland Environmental Trust, the Agricultural Land Preservation Foundation, and the State Consolidated Land Preservation program. Private conservation groups such as The Nature Conservancy and local land trusts should be approached for sponsorship of joint projects where both historic and natural resources are involved.

Program Activity 3 - Project Administration

Needs and recommendations are similar to those previously described under Goal I.

Program Activity 4 - Technical Assistance and Education:

a) Need: To broaden TPS Division research and education efforts to address conservation issues and measures.

Recommendation: Work with local agencies and groups to explain methods for appropriate maintenance and treatment; develop training/certification program for builders as described previously. Develop case studies illustrating the energy benefits of rehabilitation projects. Inform conservation organizations of preservation tools and benefits which could be of use in their work.

GOAL V: EXPAND THE ROLE OF PRESERVATION ACTIVITY IN ASSISTING THE ECONOMIC DEVELOPMENT OF MARYLAND AND ITS COMMUNITIES.

Objective 1: Place high priority on Trust - assisted projects with the greatest potential for economic impact and for stimulating commercial revitalization, particularly in those localities of the State most in need of economic assistance.

Objective 2: Create a more harmonious working relationship with commercial development interests by streamlining existing preservation mechanisms and create new ones in order to minimize conflict between preservation and other interests in economic development issues.

Objective 3: Encourage greater interest and investment in preservation projects by publicizing the economic benefits of preservation to a broad range of property owners, the development community, and to relevant decisionmakers.

Objective 4: Publicize the benefits of preservation to the tourism industry, business and industrial agencies, and economic development agencies, to encourage greater coordination for mutual benefit.

Objective 5: Develop partnerships with the State's construction/home improvement/renovation industry and the real estate community, particularly by informing these interests about proper treatment of historic structures, and promotion of mutual benefits.

Overview: Goal Relationship to Technical Preservation Services Division

As part of the Department of Economic and Community Development, the Maryland Historical Trust's assistance programs directly contribute to enhancing the climate for economic development in the state (tourism and business investment), and stimulating private investment in our communities. The potential economic benefits of preservation projects have only begun to be recognized, and, this potential benefit needs to be publicized and

used to full advantage. Increased levels of funding for preservation projects is needed to leverage even greater economic impact on Maryland in the future.

With increased growth pressure and demand for land, the economic considerations of property owners can often place stresses on the survival of historic properties. Much demolition work and in some cases arson, for example, are a response to an owner's economic difficulties. This negative perception of historic properties as costly and unprofitable needs to be countered, and the opportunities for economic growth through re-use promoted.

Program Activity 1 - Financial Assistance:

As with the preceding goals, all the funding needs addressed under Goal I will also help to achieve this goal. In order to maximize the economic contributions of preservation, increased levels of funding for preservation projects is urgently needed. A particular need is to expand and promote the use of existing preservation tax incentives and create new ones, as described under Goal I. The tax incentive programs are probably the single most effective tool for stimulating private re-investment and enhancing the attractiveness of the State for business and tourism development.

Additional needs for this goal are:

a) Need: Join with other agencies and organizations with a similar interest in economic development which can benefit from the use of preservation tools and at the same time expand the financial base for preservation activity.

Recommendation: Identify relevant agencies and financial resources available in the economic development field (such as State and local tourism agencies, business and industrial development agencies, and real estate, development and construction industries). Inform these sectors of preservation tools and benefits and initiate partnerships through specific joint projects. The preservation and tourism partnership is an especially important opportunity to pursue.

Program Activity 2 - Project Selection:

a) Need: To target grant, loan and easement projects with the greatest potential for economic impact.

Recommendation: These programs should target those projects with the greatest and most visible economic impacts, considering factors such as location in depressed regions of Maryland, numbers of jobs created, etc. Also, some projects should be targeted for their contribution to the State and local tourism industry. When possible, a policy of larger number of grants and loans in smaller amounts should be made to increase the distribution of financial resources and re-investment activity.

b) Need: Increase the amount of tax incentive activity in those regions of the State most in need of economic revitalization.

Recommendation: Efforts should be initiated to publicize and solicit State and Federal tax incentive projects in targeted regions of the state.

Program Activity 3 - Project Administration:

Needs and recommendations are the same as those identified under Goal I.

In addition:

a) Need and recommendation: Request and maintain more detailed statistics on the costs and economic benefits of Trust - assisted projects, so that cost-benefit analysis can be conducted and publicized as described under the next program activity (4).

Program Activity 4 - Technical Assistance:

a) Need: Research, analyze and present information on the economic benefits of preservation to Maryland.

Recommendation: Compile cost-benefit analysis information, statistics on Technical Preservation Services Division projects and case studies, and publish/publicize this data with the Community Education Services Division. Also, educate groups of developers, realtors, builders, other

business interests, and government officials as to the economic benefits of preservation projects.

SURVEY AND PLANNING SERVICES DIVISION

Program Description:

The Survey and Planning Services Division of the Trust is responsible for the majority of the office's identification and evaluation activities, and also performs protection functions through its National Register and environmental review programs. The division's archeology and historic sites survey programs administer research and fieldwork projects and participate in the MHT's publication of academic and inventory information with the CES division. In addition, the division serves as the liaison with the state's Certified Local Governments and with historic district commissions in the state. The division also conducts planning activities, primarily the preparation of this planning document, but also acts as liaison for State, local, and Federal planning activities that relate to land use management.

The division's programs are briefly described as follows; program needs and recommendations for the division as a whole will then be presented.

National Register of Historic Places:

The National Register Program was created by the National Historic Preservation Act of 1966 as a list of properties acknowledged by the federal government as worthy of recognition and consideration for preservation because of their significance in American history and culture. National Register properties include districts, sites, buildings, structures, and objects of significance to their local community, state, or nation. Within the Register program, the National Historic Landmark program lists properties of great national significance. The National Register program is part of a national policy to recognize and protect the country's historic and cultural heritage, and is maintained by the Secretary of the Interior and administered by the National Park Service. In Maryland, the National Register Program is administered by the State Historic Preservation Office within the Maryland Historical Trust.

The benefits of listing in the National Register are as follows: prestige of formal recognition; consideration in planning for Federally-assisted projects, eligibility for Federal preservation tax benefits; eligibility for Maryland tax benefit (502H); eligibility to apply for Federal grants for historic

preservation projects. Analysis of properties which have been listed in the Register shows that both increasing the rate of registration activity and achieving more balanced representation of resource types and regions are major needs.

Compliance and Environmental Review:

This program reviews Federal and State agency-involved projects to determine the nature of any impacts on historic properties, in accordance with Federal regulations under Section 106 and Executive Order 11593, and under the new State preservation legislation enacted in 1985. During this review, decisions are made as to the level of historic significance of a property (which determines the extent of protection by law), and whether plans involving the property have an impact. Decisions are made as to the proper treatment of the property itself, (as in building rehabilitation programs), and on alternatives to proposed plans which would afford greater protection for the property (as in changes in proposed highway alignments near historic sites). As noted in Chapter III, improvement needs to be made in the extent of compliance by Federal and State agencies with preservation regulations, and better education of officials in these agencies will increase cooperation and sensitivity.

Archeology Program:

The study of archeology in Maryland has grown from the antiquarianism and collecting activities of the 19th century to a modern, scientific discipline. The Maryland Geological Survey, within DNR, traditionally served as the State's center for archeological research until 1966, when the National Historic Preservation Act of 1966 authorized the MHT, as the Maryland State Historic Preservation Office, to conduct Federally mandated archeological work. The MHT'S archeological program expanded in the 1970s from primarily Section 106 compliance review and National Register nominations to broader comprehensive surveys, development of predictive models, public education programs, and establishment of regional preservation centers at several area universities (partly funded by NPS/S&P grants).

In order to better assign priorities for allocation of grants and staff time, a list of research questions to guide work in Maryland archeology is given in Appendix 6 to this plan, and assessments of coverage by region and county will be published as a technical supplement to the document. This analysis shows that as in the National Register program, the rate of identification

and evaluation, and distribution of coverage, as well as relationship of site data to research questions, are key needs. Also, additional protective mechanisms for archeology are essential.

Historic Sites Survey Program:

Like archeology, the approaches and methodologies in studying the history of Maryland's buildings have grown from antiquarianism to a scholarly branch of the larger historic profession. And, like archeology, the emphasis has gradually broadened from study and preservation of the great early landmarks to interest in a wide range of types and periods of historic sites in the context of cultural history.

In the Maryland Historical Trust standing structures survey program, identification, evaluation and analysis of the State's above-ground resources are carried out through National Park Service survey and planning grants, matched by funds from local governments or private institutions, and also by compliance surveys of federal and state agency holdings. The survey program also works with volunteer groups and works with the Community Education Services Division of the MHT on publications projects.

As with the archeological program, assessment of the level of progress in identification of the state's historic sites and coverage within regions and counties of the state has been conducted, and a summary of research needs and survey coverage has been produced which is available from the Trust. Research questions for the study of above-ground resources (standing structures, historic districts and landscapes) are listed in Appendix 5 of this document.

TABLE IV-1

NATIONAL REGISTER
OF
HISTORIC PLACES

COUNTY	NATIONAL REGISTER LISTINGS (1986)	% OF MD. TOTAL
Allegany	38	4%
Anne Arundel	67	7%
Baltimore City	152	16%
Baltimore County	62	6%
Calvert	18	2%
Caroline	11	1%
Carroll	30	3%
Cecil	44	4%
Charles	23	2%
Dorchester	18	2%
Frederick	58	6%
Garrett	20	2%
Harford	48	5%
Howard	24	2%
Kent	30	3%
Montgomery	50	5%
Prince George's	50	5%
Queen Anne's	26	3%
St. Mary's	25	3%
Somerset	42	4%
Talbot	55	6%
Washington	61	6%
Wicomico	13	1%
Worcester	13	1%
TOTALS:	978	100%

TABLE IV-2

MARYLAND ARCHEOLOGICAL SITES SURVEY

COUNTY	ARCHEOLOGICAL SITES LISTED	% OF MD. TOTAL
Allegany	177	3%
Anne Arundel	619	10%
Baltimore City	58	1%
Baltimore County	310	5%
Calvert	251	4%
Caroline	81	1%
Carroll	171	3%
Cecil	190	3%
Charles	301	5%
Dorchester	165	3%
Frederick	596	10%
Garrett	300	5%
Harford	152	3%
Howard	131	2%
Kent	298	5%
Montgomery	267	4%
Prince George's	304	5%
Queen Anne's	212	3%
St. Mary's	550	9%
Somerset	142	2%
Talbot	234	4%
Washington	328	5%
Wicomico	75	1%
Worcester	151	2%
TOTALS:	6,063	100%

as of: May 1986

TABLE IV-3

HISTORIC STANDING STRUCTURE LISTINGS IN
MARYLAND INVENTORY OF HISTORIC SITES

COUNTY	HISTORIC SITES INVENTORY LISTINGS 1986	% OF MD. TOTAL	TOTAL # ALL CONTRIBUTING PROPERTIES (1986)	% OF MD. TOTAL	PROJECTED ESTIMATED (1980 CENSUS)	% OF MD. TOTAL	% OF ESTIMATE WHICH HAS BEEN SURVEYED (1986)
Allegany	921	3.5%	2,435	4.9%	15,798	5%	15.4%
Anne Arundel	2,587	9.8%	2,428	4.9%	17,214	5%	14.1%
Baltimore City	4,118	15.6%	15,165	30.8%	135,162	39%	11.2%
Baltimore County	2,306	8.7%	3,813	7.7%	35,791	10%	10.7%
Calvert	800	3.0%	835	1.7%	2,332	1%	35.8%
Caroline	284	1.1%	499	1.0%	4,098	1%	12.2%
Carroll	1,160	4.4%	980	2.0%	9,688	3%	10.1%
Cecil	1,449	5.5%	2,503	5.1%	6,539	2%	38.3%
Charles	369	1.4%	447	.9%	2,726	1%	16.4%
Dorchester	695	2.6%	708	1.4%	5,579	2%	12.7%
Frederick	1,844	7.0%	4,526	9.2%	13,770	4%	32.9%
Garrett	1,152	4.4%	2,796	5.7%	3,337	1%	83.8%
Harford	1,716	6.5%	1,940	3.9%	8,466	2%	22.9%

Howard	575	2.2%	850	1.7%	3,630	1%	23.4%
Kent	604	2.3%	1,106	2.3%	3,329	1%	33.2%
Montgomery	1,166	4.4%	1,806	3.7%	18,546	5%	9.7%
Prince George's	646	2.4%	1,038	2.1%	17,339	5%	6.0%
Queen Anne's	462	1.8%	472	1.0%	3,236	1%	14.6%
St. Mary's	369	1.4%	426	.9%	2,557	1%	16.7%
Somerset	326	1.2%	610	1.2%	3,776	1%	16.2%
Talbot	549	2.1%	566	1.2%	4,967	1%	11.4%
Washington	1,945	7.5%	2,773	5.6%	16,130	5%	17.2%
Wicomico	152	.6%	152	.3%	6,688	2%	2.3%
Worcester	187	.7%	244	.5%	4,632	1%	5.3%
TOTALS:	26,382	100%	49,118	100%	345,125	100%	14.2% (Average)

as of: May 1986

SURVEY AND PLANNING SERVICES DIVISION: NEEDS AND RECOMMENDATIONS

GOAL I: INCREASE PUBLIC KNOWLEDGE AND UNDERSTANDING OF MARYLAND'S HISTORY AND ENRICH MARYLAND'S CULTURAL LIFE THROUGH IDENTIFICATION, EVALUATION, PROTECTION, AND INTERPRETATION OF THE STATE'S TANGIBLE HISTORIC PROPERTIES.

Objective 1: Create a more complete and representative data base including information about the State's historic properties; increase our knowledge and understanding of the past by accelerating the rate of coverage in documentation, analysis and protection of Maryland's significant historic resources.

Objective 2: Improve existing programs and support new programs which protect and preserve Maryland's historic properties.

Objective 3: Encourage closer cooperation among various academic disciplines (history, anthropology, folklife, architecture, geography) involved in the study of the State's history, particularly through the State's academic institutions and other research organizations, in order to better interpret and synthesize information about Maryland history.

Objective 4: Promote increased public and professional appreciation for the value of history in its broad sense (and of Maryland and local history in particular) through educational programs held in conjunction with relevant organizations.

Objective 5: Promote increased appreciation of the contribution of archeological resources in the study of Maryland history, and publicize the economic and practical advantages of preserving such archeological sites.

Overview: Goal Relationship to Survey and Planning Services Division

Through its survey, research, registration, planning and compliance review programs, the Survey and Planning Services Division is the lead division for the majority of the Maryland

Historical Trust's resource identification and evaluation functions, and also performs important protection activities.

Since the State's historic properties are under such tremendous pressures, and the rate of loss of historic resources is so rapid, it is essential to record and analyze these properties as quickly and efficiently as possible, while preserving a representative record of the State's historic properties of all types within every region of Maryland. The documentation and analysis of Maryland's historic properties must also be combined with interpretation of their importance to the public and to the academic/professional community; in this area, the Survey and Planning Services Division works with the Community Education Services Division to publish the results of fieldwork and research efforts, and present educational programs concerning this heritage.

As noted earlier, it is estimated that there may be approximately 350,000 structures in Maryland remaining from 1940, and an untold number of archeological sites. The MHT has accomplished a great deal in identifying and evaluating the state's historic sites. The progress of identifying and registering these properties can be estimated by analyzing survey and registration coverage, shown in Tables IV-1 through IV-3.. For standing structures, the Trust's survey program has identified 26,382 listings containing 49,118 sites, or 14% of those expected; for archeological sites, 6,063 have been identified, only a small portion of those expected. On the National Register, there are currently 978 listings (containing thousands of additional individual resources), but again, only a small portion of what may be eligible for the Register in Maryland. Thus, the Trust needs to accelerate the rate of identification and evaluation, especially in certain areas of the State where coverage is low, and also for certain types of resources which are under-represented in our coverage. Underwater archeological resources, for example, are a neglected and seriously threatened type of resource needing increased attention.

Program Activity 1 - Financial Assistance:

a. Need: To create a more stable statewide funding source for survey and research activities (especially in light of decreased federal funding supporting joint federal-state preservation efforts).

Recommendation: Establish a statewide grant fund for survey and planning projects.

b. Need: To provide greater financial assistance to the public for the preparation of National Register nominations.

Recommendation: Once a State survey funded is created, use more of the Maryland Historical Trust's Federal funding for National Register preparation. Assist more jurisdictions to become "Certified Local Governments," and increase capability of same to perform registration work. Expand training on preparation standards to enable more citizen volunteers to prepare good quality forms at lower cost. Continue to require National Register nominations from state and federal compliance surveys.

c. Need: To increase State agency funding sources to support Trust survey and registration activities.

Recommendation: Investigate other agencies which can mutually benefit from funding survey projects, especially State cultural agencies such as Office of Tourism Development, State Folklorist, St. Mary's City. Work cooperatively to increase state government support for historical and cultural funding. Use State college and university classes to conduct survey and registration work.

d. Need: To increase local government funding for survey and registration activities.

Recommendation: Assist and strengthen "Certified Local Government" program, and especially develop their potential for local archeology programs. Seek to establish local preservation programs and professional staff support, and support integration of activities with Regional Preservation Centers for neighboring jurisdictions.

e. Need: To increase private sector funding for survey and registration activities.

Recommendation: Identify private foundations and other organizations which can provide funding, and pursue

same.

Program Activity 2 - Project Selection:

a. Need: To accelerate rate of coverage in State and Federal registration and survey programs.

Recommendation: Assign priorities to those projects which result in the identification and registration of large areas containing multi-property resources. (Historic districts, thematic studies). Develop historic contexts as the result of all Survey and Planning projects to enable identification and evaluation decisions to be made more thoroughly.

b. Need: To select projects according to greatest need (level of threat and level of historic significance.)

Recommendation: In conjunction with the ongoing State comprehensive historic preservation planning process, identify those types of historic properties which are most endangered, and in which areas of the State, and direct survey and registration activity to take into account those needs.

c. Need: To achieve more representative coverage of the state's historic properties and to provide important and useful historical information.

Recommendation: Select survey projects according to the coverage assessments and research questions and data gaps stated in the state plan. Develop "study lists" for more aggressively soliciting National Register nominations which help to publicize and recognize these areas of inquiry.

d. Need: To increase the number of archeological sites included in the National Register, to more equitably "balance" these listings in comparison with standing structures, and better portray the State's prehistory.

Recommendation: Increase archeological listings by improving training for archeologists to prepare National Register nominations.

e. Need: To continue current efforts to link survey and

registration activity.

Recommendation: Computerize Maryland Historical Trust survey and registration site data according to the State's historic context organization, in order to better compare, understand and evaluate individual properties within larger groups of similar resources. Develop a model for one resource type which will define important features, level of integrity required, and appropriate treatment for preservation.

f. Need: To increase research and protection programs for Maryland's underwater archeological resources.

Recommendation: Encourage and assist S&P Services Division research, survey, and protection projects which address this important need. Continue to work to protect these sites through existing compliance regulations, and with the State Archeologist; assist the MHT in seeking new State legislation, regulations, and guidelines for conducting such excavations. Work with the Jefferson Patterson Park and Museum in conducting research on this issue.

Program Activity 3 - Administration:

a. Need: To link all Maryland Historical Trust financial assistance and environmental review project data to survey and inventory system.

Recommendation: Ensure that site data and documentation from these projects is added to Trust inventory system, through in-house procedures manual.

Program Activity 4 - Technical Assistance and Education

a. Need: To improve quality of National Register documentation nominations submitted and link/develop individual and multiple property nominations to established historic contexts.

Recommendation: Produce training materials, slide tape presentation on National Register procedures, showing models of how historic context information can be used in the registration process.

b. Need: To provide increased and more sophisticated training to local groups, surveyors and volunteers in survey methodology.

Recommendation: Produce a "survey training manual;" hold training sessions.

c. Need: To assist State and Federal agencies in carrying out compliance responsibilities and streamline environmental review process and reduce conflict.

Recommendation: Produce guidance papers, training workshops for State and Federal officials; identify previous survey, registration, planning efforts, on an agency-by-agency basis; use contexts to guide identification, evaluation, and planning activities; add more permanent compliance review staff at the Trust; prepare more memoranda/programmatic memoranda of agreement with agencies/governments.

d. Need: To improve accessibility and use of site survey and other archival materials.

Recommendation: Computerize indexes; complete mapping; develop in-house procedures manual.

e. Need: To publish more results of research with the Community Education Services Division.

Recommendation: Produce more thematic studies, follow recommendations in State plan for research and publications priorities.

f. Need: To increase coordination among Maryland's academic and professional research organizations.

Recommendation: Provide copy of Maryland Comprehensive Historic Preservation Plan, research questions to targeted groups, colleges and universities; solicit research papers, joint studies on an annual basis to fill data gaps, answer research questions, expand historic contexts.

g. Need: To increase public awareness of history; explain the value of archeology.

Recommendation: Work with the Community Education Services Division, the County Committee System, and "Certified Local Governments," to provide wide array of information on same.

GOAL II: ASSIST IN THE MANAGEMENT OF ENVIRONMENTAL CHANGE; MAINTAIN AND ENHANCE THE APPEARANCE AND ENVIRONMENTAL DESIGN QUALITY OF MARYLAND'S COMMUNITIES AND LANDSCAPES; PRESERVE PLACES OF BEAUTY AND CULTURAL IMPORTANCE TO THE STATE'S CITIZENS, AND INCREASE THE PUBLIC'S LEVEL OF AESTHETIC AWARENESS.

Objective 1: Promote awareness of the importance of environmental quality, design, and aesthetics by explaining the psychological importance to, and positive impact of quality design on the State's citizens.

Objective 2: Educate the public, professionals, and decisionmakers as to the special contributions of historic buildings to the environment in terms of providing human scale, quality design and construction, cultural identity, and a sense of time and place.

Objective 3: Improve the appearance of Maryland communities and landscapes by encouraging new development which is compatible in design with the existing environment; assist planning and design programs to better manage environmental change.

Overview: Goal Relationship to Survey and Planning Services Division

While the Technical Preservation Services Division assumes the lead role for technical and design guidance, the Survey and Planning Services Division does participate in many programs dealing with the visual aspects of the environment. Through its S&P grants-in-aid program, some projects have been funded for design studies in Maryland communities; the "Certified Local Government" program administered through the S&P Services Division also contributes to design standards and review, as does the division's work with the Maryland Association of Historic District Commissions. Through its compliance programs, the division helps to maintain and enhance the aesthetic qualities of Maryland communities. The research activities of the division play a key role in identifying and registering those significant architectural and design features in the state. The planning program helps assist in the integration of design considerations into other planning and review processes.

Program Activity 1 - Financial Assistance:

a. Need: To seek sources of funding outside of standard preservation programs which would support design projects relating to preservation and further research/provide model studies.

Recommendation: Identify relevant organizations and agencies and seek funding and joint partnerships.

Program Activity 2 - Project Selection:

a. Need: To target projects which identify and evaluate significant architectural and environmental features and properties in Maryland.

Recommendation: In the survey and registration programs, compile data and evaluate architectural significance; work with professional architectural, design, and environmental planning agencies to help identify priorities.

b. Need: To initiate model studies which deal with design treatment of specific resource types.

Recommendation: Solicit projects which propose to deal with this issue; for example, investigate use of National Trust for Historic Preservation Critical Issues funding for study of Chesapeake Bay port towns in conjunction with overall Bay environmental planning.

Program Activity 3 - Technical Assistance:

a. Need: To develop design review guidance, until the Technical Preservation Services Division can more fully develop its technical assistance outreach program.

Recommendation: Through S&P grants-in-aid and CLG program assistance, provide design guidance and continue to work with the Maryland Association of Historic District Commissions on design review issues.

b. Need: To maximize the potential for using the environmental review process to inform and guide agencies on design matters.

Recommendation: Continue to assist in design treatment guidance and use the architectural expertise of compliance staff; continue to review for compatibility of new construction with existing historic environments.

c. Need: To work with architectural and environmental agencies to integrate preservation concerns into other design and planning activities.

Recommendation: Use planning program to provide information and assist with integration; work with Community Education Services to educate about the interrelationships of preservation with other fields.

GOAL III: STRENGTHEN COMMUNITY AND NEIGHBORHOOD COHESION AND PRIDE, AND INCREASE LOCAL REVITALIZATION ACTIVITY BY RESIDENTS, COMMERCIAL INTERESTS, AND DECISIONMAKERS BY ASSISTING A BROAD RANGE OF COMMUNITY NEEDS AND INTERESTS.

Objective 1: Encourage the stabilization of neighborhood/community populations and reduce potential displacement problems; promote the use of innovative programs which assist citizens of all economic and social levels within Maryland communities.

Objective 2: Assign high priority to preservation projects which identify and protect places of special importance to local communities and offer the greatest potential for generating community interest and activity.

Objective 3: Develop working partnerships with other government agencies and private organizations involved in community development activities.

Overview: Goal Relationship to Survey and Planning Services Division

The Survey and Planning Services Division contributes to the improvement of Maryland's community and cultural life through helping communities learn about their heritage and using this awareness as a tool for further community revitalization. The Division helps develop a sense of time and place, and of cultural identity, through its research, survey and registration activities which promote pride and recognition of local history. Through its planning and environmental review programs, the division helps protect historic properties and places which are of value to local residents and helps preserve a coherent, stable built environment.

Program Activity 1 - Financial Assistance:

a. Need: More flexible funding source for community oriented research, survey, and registration activity.

Recommendation: Seek statewide funding source described

under Goal I and investigate mutually beneficial funding opportunities with related local groups and government agencies.

Program Activity 2 - Project Selection:

a. Need: To select survey and National Register projects with the greatest public support and demonstrated community need, and increase public participation in these projects.

Recommendation: Encourage and solicit nomination projects with strong community support and interest.

b. Need: To better use survey and registration activity as a tool to stimulate local pride and community improvement.

Recommendation: Solicit projects in areas of the State where these activities will have the greatest impact on communities, either by working with local groups who have already created a base of popular support and seek our assistance, or conversely, in areas where there is little community interest and survey and planning projects can be a vehicle for creating community involvement. In either case, ensure that there is appropriate publicity given to these efforts.

c. Need: Identify those places which are of local social/cultural value and assign priorities in survey and registration work.

Recommendation: Initiate public solicitation and work with folklife studies researchers to identify significant community places and properties.

d. Need: To develop criteria for assigning social/cultural and economic values to be used in conjunction with already established standards for determining historic significance.

Recommendation: Within MHT planning program, work to develop a set of guidelines or criteria to be used in decisionmaking.

e. Need: To use survey and registration activity as a tool

for improving ethnic and cultural awareness for those groups not usually involved in historic preservation activity, thus broadening the scope of the preservation movement in Maryland.

Recommendation: Work with ethnic and cultural groups to research and interpret their history.

f. Need: To better integrate survey and registration activity with the study of intangibles, folklife studies, and with other academic disciplines, to ensure that traditional culture is studied and protected.

Recommendation: Work with the Maryland State Folklorist on model projects, and investigate the possibility of consolidation of folklife studies within the MHT.

Program Activity 3 - Technical Assistance:

a. Need: To provide local groups and agencies with information about survey and planning programs which can assist in community revitalization.

Recommendation: With the CES Division, educate re: local and state history; provide training in survey and National Register through training manuals and workshops.

b. Need: To build local base for survey and registration activities.

Recommendation: With the CES Division, strengthen county committees role in survey and registration and provide guidance; work to establish programs within local government.

GOAL IV: CONSISTENT WITH ADOPTED STATE POLICY ON CONSERVATION AND DEVELOPMENT, MAINTAIN, CONSERVE, AND PROMOTE THE EFFICIENT USE OF MARYLAND'S NATURAL AND BUILT RESOURCES, PARTICULARLY THE STATE'S HISTORIC BUILDING STOCK, TRANSPORTATION AND OTHER FACILITIES, AS WELL AS LAND AND ENERGY RESOURCES.

Objective 1: Provide information describing the need for, and benefits of, conserving nonrenewable land and energy resources and maintaining historic buildings, roads, bridges, and other facilities.

Objective 2: Promote retention of existing building stock and encourage the creation of new usable space through rehabilitation rather than new construction, thereby conserving energy and nonrenewable resources.

Objective 3: Help to implement adopted State policy by maintaining, enhancing, and protecting existing town centers, open space, agricultural and undeveloped lands through work with conservation, agricultural, and other land preservation organizations and agencies.

Overview: Goal relationship to Survey and Planning Services Division

The Survey and Planning Services Division contributes to this goal through the protection afforded by the National Register program, the Federal and State environmental review processes, and through its planning program, which conducts analysis of the state's built and natural resources and works with other planning programs in order to integrate preservation and conservation into public policy and to better manage growth and development in Maryland.

Program Activity 1 - Financial Assistance:

a. Need: To maximize the potential use of existing rehabilitation and conservation agencies through the environmental review process.

Recommendation: Work with relevant agencies not only to conduct project specific environmental review, but also to develop stronger partnerships and potential funding sources for conservation/preservation.

b. Need: To support and encourage financial mechanisms and policies which favor rehabilitation over new construction and promote conservation and development planning.

Recommendation: Continue to participate in existing programs which coordinate planning across the state and support legislation and programs which work towards this goal. See also: TPS (1,C).

Program Activity 2 - Project Selection:

a. Need: In selecting survey and registration projects, target those projects which demonstrate specific conservation benefits, either of building stock or natural resources, or which provide incentives for conservation activity.

Recommendation: Identify and target those areas and communities of the State where the building stock is most seriously deteriorating. Target projects which compile data on conservation benefits and stresses on resources or are models for integrating conservation concerns into the planning process.

b. Need: To more actively work with allied conservation groups in both rehabilitation and land conservation.

Recommendation: Place emphasis on projects which involve cooperative efforts, joint projects with these groups and can serve as models. One important type of project would be rural historic districts, which involve both preservation and conservation groups.

Program Activity 3 Technical Assistance:

a. Need: To compile and distribute data illustrating the need and benefits of conservation and the stresses threatening built and natural resources.

Recommendation: Use the planning program to continue to research and analyze data and distribute same with the CES Division.

b. Need: In compliance review, to educate and train agencies re conservation needs and benefits.

Recommendation: Work with agencies, particularly those like HUD, to promote conservation and provide training in preservation compliance.

c. Need: To better integrate preservation planning into other conservation and land use management programs.

Recommendation: Use comprehensive planning program to provide information and assist other agencies and groups to institutionalize preservation and conservation planning. Contribute to statewide coordinated conservation planning and support state policies on conservation.

GOAL V: EXPAND THE ROLE OF PRESERVATION ACTIVITY IN ASSISTING THE ECONOMIC DEVELOPMENT OF MARYLAND AND ITS COMMUNITIES.

Objective 1: Place high priority on Trust-assisted projects with the greatest potential for economic impact and for stimulating commercial revitalization, particularly in those localities of the state most in need of economic assistance.

Objective 2: Create a more harmonious working relationship with commercial development interests by streamlining existing preservation mechanisms and create new ones in order to minimize conflict between preservation and other interests in economic development issues.

Objective 3: Encourage greater interest and investment in preservation projects by publicizing the economic benefits of preservation to a broad range of property owners, the development community, and to relevant decisionmakers.

Objective 4: Publicize the benefits of preservation to the tourism industry, business and industrial agencies, and economic development agencies, to encourage greater coordination for mutual benefit.

Objective 5: Develop partnerships with the State's construction/home improvement/renovation industry and the real estate community, particularly by informing these interests about proper treatment of historic structures, and promotion of mutual benefits.

Overview: Goal Relationship to Survey and Planning Services Division

The division contributes to the State's economic development through many of its programs. The National Register program is the key to the ERTA program and other financial assistance programs which benefit the State's economy; the survey program for standing structures and archeological sites provides important information which can be used by state and local tourism agencies in promoting local and State historic properties; the environmental review program often can provide technical and design assistance to rehabilitation projects and

can actually help cut project costs; and the planning program conducts research and analysis on the economic impacts of preservation which will be of interest not only to preservationists but to the economic development community as well.

Program Activity 1 - Financial Assistance:

a. Need: To provide S&P grant-in-aid funding for projects which stimulate re-investment or enhance the state's economic climate (tourism and business/industrial development).

Recommendation: Seek joint projects and funding sources with DECD agencies such as Office of Tourism Development (and local tourism agencies) and with Business and Industrial Development which promote the value of historic sites in tourism promotion and appeal to quality of life issues. These partnerships will be of mutual benefit and also expand the financial base for preservation activity.

Program Activity 2 - Project Selection:

a. Need: In project selection in survey and registration, select some projects which will clearly provide an economic benefit.

Recommendation: Emphasize survey and registration work in geographic areas of the state which are economically depressed and where such projects will stimulate rehabilitation activity, particularly Federal and State tax incentive projects.

b. Need: To develop historic contexts in order to streamline project review process in TPS Division and in S&P Services Division environmental review program, thus assisting commercial development activity.

Recommendation: See Goal I on development of historic contexts.

Program Activity 3 - Technical Assistance

a. Need: To compile and provide information from the MHT historic and archeological sites survey to appropriate

tourism agencies for promotional and educational purposes.

Recommendation: Planning and survey programs should initiate joint publication with the Department of Economic and Community Development's Office of Tourism Development on benefits of tourism and should seek model project with local tourism agency where MHT information is provided for local use.

b. Need: To facilitate development projects reviewed for Section 106 or state compliance to reduce potential conflicts which would cause delay or financial loss.

Recommendation: Provide training to officials and private developers so that there will be fewer delays once projects have reached more advanced stages.

COMMUNITY EDUCATION SERVICES DIVISION

Program Description:

The Community Education Services Division seeks not only to provide technical and scholarly information to the preservation community in Maryland, but also to increase awareness of preservation and other environmental issues among the general public, the private sector, and those officials and other decisionmakers who shape public policy in Maryland. Major areas of activity are: publications and media projects; conferences and workshops; the Trust volunteer or "County Committee" network and other work with local and State private organizations; and preservation curriculum development in schools and colleges. The division also is involved in special events such as "Preservation Week" activities and monitors State legislation which relates to preservation issues. Thus, the division is involved in identification and evaluation functions through its educational/publications and conferences, and also performs important protection functions in promoting preservation activity in Maryland. To a large extent, the work priorities for the division are based on the educational and public relations needs of the Technical Preservation Services and the Survey and Planning Services Divisions, and the recommendations which follow reflect these inter-divisional needs.

Publications and Media Projects:

Since the early 1970s, the Trust has had an active publications program which includes scholarly works on Maryland history, architecture, and archeology, and technical publications on various aspects of preservation as well as a newsletter and an annual report. A series of inventory volumes based on the Trust's historic sites survey program in various regions of the state have been published by the Johns Hopkins University Press as part of an ongoing project. The Trust has also published a number of archeological monographs and site reports based on work assisted by the office's archeology program. And, a number of preservation publications on various topics have been produced. The Trust's monthly newsletter, SWAP ("Some Words About Preservation") is being re-formatted and will re-emerge as a quarterly bulletin with more detailed technical information. Additional publications which have long been needed are descriptive brochures for each division and their respective

programs. Similarly, due to staff constraints, the kinds of publicity and media projects which are needed to educate and promote preservation in Maryland have been relatively infrequent, and there is a pressing need to target this kind of information to specific audiences, both public and professional. A major need is for a revolving publications fund, where the proceeds of the Trust's publications would help fund additional projects. In order to create the base for the fund, publications topics which are both necessary and marketable need to be identified.

Workshops and Conferences:

As described above under "Publications and Media Projects," the division's workshops and conference have addressed both educational needs in Maryland history, architecture and archeology, as well as preservation and environmental issues. Since 1970, the Trust has sponsored an annual conference for the preservation community in Maryland (usually co-sponsored with Preservation Maryland); this important activity, however, is an expensive and time-consuming function which could be conducted more effectively by a private preservation organization with the capacity for such programs, and this is a need to be investigated. Similarly, the Trust's workshop series (usually four per year) could perhaps be sponsored more efficiently either by or in conjunction with other organizations. In either case, the conference and workshop themes have tended to be oriented to the already committed preservation community, and in the future, some of these events should be targeted to reaching the new and special audiences referred to above.

MHT "County Committee" Network and Other Liaison with Local and State Organizations:

The Maryland Historical Trust established its volunteer "County Committee" network to serve as local liaison with preservation activity in each county, to inform communities about preservation, and to inform the Trust about local issues affecting preservation. Typical activities of committees include the preparation of National Register nominations; participation in local survey projects; generating local interest through publicity, special events and educational activities; assisting with publications projects; and working with other historical and preservation groups and local governments. While the County Committees have performed important functions for the Trust, the Committees could perhaps play a stronger role in building the statewide, private preservation network which is needed in

Maryland. The Committees are restricted in terms of their independence; as unincorporated entities, the Committees are not able to lobby for state preservation legislation or to disagree with the Trust on local issues. Thus, the Trust should help build the strength and independence of County Committees in order to eventually create a statewide network, perhaps in coordination with the private preservation organization, Preservation Maryland.

Preservation Curriculum Development:

The importance of long-term educational programs to increase public awareness of preservation and other environmental issues has long been recognized by the Trust. In 1973-74, the Trust worked on an experimental project with Catholic University to develop an environmental education program for school systems. The next major effort in this area occurred in the early 1980s, when a CES Division staff member worked closely with teachers in the Anne Arundel County school system in teaching a 4th and 5th grade course in 1981. The staff continues to work with individual teachers and groups on a request basis.

Since 1967, students from any colleges and universities have interned with the Trust on a variety of projects, including survey, National Register nominations, and legal and planning projects. In addition, Maryland Historical Trust staff members have taught college level courses in architectural history and worked with faculty members in history and anthropology departments in developing courses and projects, most often in research and survey. The Trust also has conducted an annual "College Day" to introduce preservation students to the Trust's programs and operations. In the future, however, more formal relationships with the State's colleges and universities need to be established, where the Trust (through the Community Education and Survey and Planning Services Divisions) works with development of preservation curricula and helps to guide research on Maryland history, architecture, and anthropology using the research needs defined in the Maryland Comprehensive Historic Preservation Plan (described under the Survey and Planning Services section of this Chapter, and in Appendix 5 and 6).

Given the limited staff time available for curriculum development and education, the division will have to delay intensive work in this area until an educational specialist staff position is created. The division can, however, work to help the private preservation sector, particularly Preservation Maryland,

to build its capacity for educational activities; the establishment of a preservation education fund within Preservation Maryland would be an important step in this direction.

COMMUNITY EDUCATION SERVICES DIVISION: NEEDS AND RECOMMENDATIONS

GOAL I: INCREASE PUBLIC KNOWLEDGE AND UNDERSTANDING OF MARYLAND'S HISTORY AND ENRICH MARYLAND'S CULTURAL LIFE THROUGH IDENTIFICATION, EVALUATION, PROTECTION, AND INTERPRETATION OF THE STATE'S TANGIBLE HISTORIC PROPERTIES.

Objective 1: Create a more complete and representative data base including information about the State's historic properties; increase our knowledge and understanding of the past by accelerating the rate of coverage in documentation, analysis and protection of Maryland's significant historic resources.

Objective 2: Improve existing programs and support new programs which protect and preserve Maryland's historic properties.

Objective 3: Encourage closer cooperating among various academic disciplines (history, anthropology, folklife, architecure, geography) involved in the study of the state's history, particularly through the State's academic institutions and other research organizations, in order to better interpret and synthesize information about Maryland history.

Objective 4: Promote increased public and professional appreciation for the value of history in its broad sense (and of Maryland and local history in particular) through educational programs held in conjunction with relevant organizations.

Objective 5: Promote increased appreciation of the contribution of archeological resources in the study of Maryland's history, and publicize the economic and practical advantages of preserving such archeological sites.

Overview: Goal Relationship to Community Education Services Division

The Community Education Services Division contributes by disseminating the results of the Maryland Historical Trust's research and survey work to a broad audience, thus increasing

public understanding of Maryland's history. Through the division's publications, workshops, conferences, (and currently limited involvement in developing school curricula), interest and understanding of Maryland's history and historic resources is advanced.

Program Activity 1 - Financial Assistance:

a) Need: To provide increased funding for the Maryland Historical Trust publications program.

Recommendation: Establish a revolving publications fund to support MHT publications program.

b) Need: To build financial base for education, publications, conferences in private preservation sector.

Recommendation: Assist Preservation Maryland in developing capacity for these activities, for lobbying for increased funding, and especially to create an education fund to carry out these activities.

c) Need: To assist local government and private groups to build financial base for educational activities.

Recommendation: Provide information to these groups on successful mechanisms for funding; seek assistance from Maryland Historical Trust County Committees (by requesting local sponsorship of Trust workshops, for example).

d) Need: To develop partnerships with other State agencies in promotion of history and preservation and benefit from their professional expertise.

Recommendation: Identify relevant agencies (such as the Department of Economic and Community Development's Public Affairs, Office of Tourism Development, Maryland Magazine, etc.) and initiate projects which help to promote historic preservation.

Program Activity 2 - Project Selection:

a) Need: To select and produce by level of importance publications, workshops and conferences to ensure that projects meet an important need and serve to promote public interest in Maryland history.

Recommendation: Work with the Survey and Planning Services Division to identify important research and publications needs. (See Appendix 5 and 6)

Program Activity 3 - Technical Assistance:

a) Need: To increase the number of informational publications and materials for the public and professions involved in the study and appreciation of the State's built and archeological heritage.

Recommendations: Identify major needs in the other divisions of the Maryland Historical Trust, and publish material which is readily available (such as material prepared as part of the Trust's planning document which can be used as technical supplements). Seek staff position of writer-editor to accelerate publications.

b) Need: To provide information and financial assistance to private groups wishing to erect historic markers, under the Maryland Historical Trust's new program.

Recommendations: Obtain funding to design prototype marker and fund markers in first year of operation (FY 1987 - 10 markers); obtain funding for research historian to run program in Survey and Planning Services Division.

c) Need: To create more publications models which can be used by other government agencies and other groups.

Recommendation: Devote staff time to creation of one or more models and solicit from other groups ideas about publications needs.

d) Need: To strengthen the Maryland Historical Trust County Committee network and other private preservation groups to create a strong statewide citizen network for preservation.

Recommendation: Provide assistance to Preservation Maryland so that it can provide management training to local private groups. Build independence and strength of Trust County Committees through increased training and technical assistance.

e) Need: To produce a preservation guide for use by State agencies.

Recommendation: Assign this item a priority in allocation of Community Education Services Division staff resources; work with Survey and Planning Services Division staff in preparing material for this publication.

f) Need: To target technical assistance training to local governments and State and Federal agencies involved in preservation compliance.

Recommendation: Work with the Survey and Planning Services Division to identify these audiences and plan written materials and workshops targeted to their needs.

g) Need: To develop capability for curriculum development in schools (elementary and high school levels) and colleges and universities.

Recommendation: When feasible, given other Community Education Services Division priorities, seek new staff position to develop this program, which the division is currently unable to do. Seek funds from state education department; work with Preservation Maryland and the Maryland Association of Historic District Commissions to create education fund; produce models for local school systems to follow; work with college curriculum

development (jointly with the Survey and Planning Services Division).

GOAL II: ASSIST IN THE MANAGEMENT OF ENVIRONMENTAL CHANGE IN MARYLAND: MAINTAIN AND ENHANCE THE APPEARANCE AND ENVIRONMENTAL DESIGN QUALITY OF MARYLAND'S COMMUNITIES AND LANDSCAPES; PRESERVE PLACES OF BEAUTY AND CULTURAL IMPORTANCE TO THE STATE'S CITIZENS, AND INCREASE THE PUBLIC'S LEVEL OF AESTHETIC AWARENESS.

Objective 1: Promote awareness of the importance of environmental quality, design, and aesthetics by explaining the psychological importance to, and positive impact of, quality design on the State's citizens.

Objective 2: Educate the public, professionals, and decisionmakers as to special contributions of historic buildings to the environment in terms of providing human scale, quality design and construction, cultural identity, and a sense of time and place.

Objective 3: Improve the appearance of Maryland communities and landscapes by encouraging new development which is compatible in design with the existing environment; assist planning and design programs to better manage environmental change.

Overview: Goal Relationship to Community Education Services Division

This division can play an important role in disseminating information on the need for environmental design and aesthetic awareness, in particular the special role which historic properties can play in enhancing the State's built environment. Through publication, workshops, and eventually, through school and college curriculum development, the division can promote these benefits and help achieve the objectives noted above.

Program Activity 1 - Financial Assistance:

a) Need: To support the media and lobbying efforts of related arts and environmental design groups in order to increase available funding sources.

Recommendations: Compile materials on these relationships and advantages and initiate projects

with groups such as the State Arts Council, and the professional architectural and planning communities.

Program Activity 2 - Project Selection:

a) Need: To target some Community Education Services Division projects to publicizing the design and environmental aspects of preservation projects.

Recommendation: Work with the Survey and Planning Services Division in the selection of educational projects receiving Survey and Planning Matching funds, and ensure that products (such as design guidelines, handbooks for preservation commissions, guidelines for rehabilitation of historic structures, etc.) are published and disseminated.

Program Activity 3 - Technical Assistance:

a) Need: To provide information on the importance of aesthetics and environmental design and increase public and professional awareness of the role played by historic properties.

b) Recommendation: Target selected groups such as professional associations of architects, planners and educate them about the use of preservation in their work; work to develop school curricula at all levels which include information on environmental and design values and importance. Develop model projects which illustrate the value of design and contributions of preservation.

GOAL III: STRENGTHEN COMMUNITY AND NEIGHBORHOOD COHESION AND PRIDE IN MARYLAND, AND INCREASE LOCAL REVITALIZATION ACTIVITY BY RESIDENTS, COMMERCIAL INTERESTS, AND DECISIONMAKERS BY ASSISTING A BROAD RANGE OF COMMUNITY NEEDS AND INTERESTS.

Objective 1: Encourage the stabilization of neighborhood/community populations and reduce potential displacement problems; remote the use of innovative programs which assist citizens of all economic and social levels within Maryland communities.

Objective 2: Assign high priority to preservation projects which identify and protect places of special importance to local communities and offer the greatest potential for generating community interest and activity.

Objective 3: Develop working partnerships with other government agencies and private organizations involved in community development activities.

Overview: Goal Relationship to Community Education Services Division

The Community Education Services Division serves as the lead division within the Maryland Historical Trust for conducting broad public outreach activities, and the division's programs can play an important role in linking preservation activity to community needs and organizations. By broadening the audiences for the Trust's educational activities, the division can best serve the needs of a broad range of people and organizations within the state.

Program Activity 1: Financial Assistance:

a) Need: To fund preservation education activities which answer the needs of Maryland's communities and diverse social and economic groups.

Recommendation: Seek to identify relevant community organizations, ethnic and cultural

organizations, improvement organizations which can be assisted by Trust support in order to obtain increased funding for community based preservation activity. Innovative funding techniques should be investigated.

Program Area 2 - Project Selection:

a) Need: In project selection, seek projects which illustrate preservation's social benefits and counterbalance negative perceptions of "elitism."

Recommendation: Solicit projects which will meet this need and give them priority in publications and conference decisions.

b) Need: To obtain greater community involvement in Trust educational activities.

Recommendation: Solicit publishing projects and conference topics which demonstrate real community need and interest, which serve to strengthen local organizations, and create pride in community heritage.

Program Area 3 - Technical Assistance:

a) Need: To reach a broader audience and provide education about preservation to those who need this information.

Recommendation: Identify and target specific audiences which the Trust needs to contact (e.g., public officials) and also initiate some public education activity in the media, perhaps jointly with the Department of Economic and Community Development's public relations office.

b) Need: To provide case studies of communities where preservation has had a clear positive social and cultural impact.

Recommendation: With the Survey and Planning Services Division's planning program, compile available information and examples which illustrate these positive benefits.

c) Need: To provide information on preservation tools which can be of most use to community organizations.

Recommendation: Provide written materials and workshops which highlight how preservation techniques can benefit communities.

d) Need: To strengthen local private preservation organizations and assist them to become active community-based organizations.

Recommendation: Assist Preservation Maryland and the Maryland Association of Historic District Commissions to provide management training to local groups and provide guidance; strengthen the Trust's county committee network; increase the use of volunteers for survey and registration projects, in conjunction with the Survey and Planning Services Division.

GOAL IV: CONSISTENT WITH ADOPTED STATE POLICY ON CONSERVATION AND DEVELOPMENT, MAINTAIN, CONSERVE, AND PROMOTE THE EFFICIENT USE OF MARYLAND'S NATURAL AND BUILT RESOURCES, PARTICULARLY THE STATE'S HISTORIC BUILDING STOCK, TRANSPORTATION AND OTHER FACILITIES, AS WELL AS LAND AND ENERGY RESOURCES.

Objective 1: Provide information describing the need for, and benefits of, conserving nonrenewable land and energy resources and maintaining historic buildings, roads, bridges, and other facilities.

Objective 2: Promote retention of existing building stock and encourage the creation of new usable space through rehabilitation rather than new construction, thereby conserving energy and nonrenewable resources.

Objective 3: Help to implement adopted State policy by maintaining, enhancing, and protecting existing town centers, open space, agricultural and undeveloped lands through work with conservation, agricultural, and other land preservation organizations and agencies.

Overview: Goal Relationship to Community Education Services Division

The Community Education Services Division's major role in helping the Maryland Historical Trust achieve this goal is educating the public about the need for conservation and environmental awareness, and working with allied organizations in the conservation and rehabilitation fields to increase support and funding for these programs. The division can produce information on the need and benefit for built and natural resource conservation, using data prepared by other divisions of the Maryland Historical Trust.

Program Activity 1 - Financial Assistance:

a) Need: To increase funding for building conservation and land conservation programs.

Recommendation: See Technical Preservation Services Division for recommendations on working to

broaden rehabilitation programs in the State. In the area of land preservation, the Trust can assist private preservation groups in their lobbying efforts, which could be broadened by forming political alliances with conservation organizations in the State.

Program Activity 2 - Project Selection:

a) Need: In selecting publication and conference topics, some projects should address conservation and environmental issues.

Recommendation: Some projects should be sought which address conservation issues and illustrate how preservation and conservation organizations can work effectively together. Some contact with conservation groups should be made to determine the feasibility of joint sponsorship of publications and/or conferences.

Program Activity 3 - Technical Assistance:

a) Need: To broaden the scope of the Trust's educational activities to include information on conservation issues and increase environmental awareness.

Recommendation: Provide information and guidance to local governments and private groups illustrating model approaches and mutual benefits. Assist private preservation groups to form alliances with local land preservation organizations.

GOAL V: EXPAND THE ROLE OF PRESERVATION ACTIVITY IN ASSISTING THE ECONOMIC DEVELOPMENT OF MARYLAND AND ITS COMMUNITIES.

Objective 1: Place high priority on Trust - assisted projects with the greatest potential for economic impact and for stimulating commercial revitalization, particularly in those localities most in need of economic assistance.

Objective 2: Create a more harmonious working relationship with commercial development interests by streamlining existing preservation mechanisms and create new ones in order to minimize conflict between preservation and other interests in economic development issues.

Objective 3: Encourage greater interest and investment in preservation projects by publicizing the economic benefits of preservation to a broad range of property owners, the development community, and to relevant decisionmakers.

Objective 4: Publicize the benefits of preservation to the tourism industry, business and industrial agencies, and economic development agencies to encourage greater coordination for mutual benefit.

Objective 5: Develop partnerships with the State's construction/home improvement/renovation industry and the real estate community, particularly by informing these interests about proper treatment of historic structures, and promotion of mutual benefits.

Overview: Goal Relationship to Community Education Services Division

The Community Eduction Services Division can play an important role in informing many important groups -- the business community, property owners, government officials, the construction and real estate industries, and the tourism industry -- about the benefits of preservation to the State and local economy. Thus, the division's major function in working towards this goal is one of information dissemination and publicity.

Program Activity 1 - Financial Assistance:

a) Need: To identify and target those funding sources which could mutually benefit from involvement with preservation activity, and provide funding for preservation education and promotion.

Recommendation: Identify these sources (the groups listed earlier under the overview) and explore available funding opportunities. The tourism industry, (and tourism agencies in particular), is an example of a source of potential funding where both the Trust and the agency would benefit.

Program Activity 2 - Project Selection:

a) Need: In project selection, seek projects which serve to offset common negative misperceptions of preservation as costly, obstructionist, etc. and present a more positive view of preservation projects.

Recommendation: Publicize in publications and media those projects which illustrate successful commercial ventures and highlight the economic benefits, project savings, reinvestment activity which result.

b) Need: In project selection, develop projects with other agencies with which are of mutual use and benefit, for example, initiate a joint study which analyzes the profitable relationship between preservation and tourism, and explains how tourism agencies can promote the potential attractions of historic sites.

Program Activity 3 - Technical Assistance:

a) Need: To compile and distribute to preservation organizations, local governments, the business

community, and economic development agencies information describing the economic benefits of preservation to their particular field of interest.

Recommendation: With the planning program of the Survey and Planning Services Division, analyze and distribute case studies of preservation projects' economic benefits, and if feasible, conduct a study of the economic impacts of preservation projects on a statewide basis. This will also involve the Technical Preservation Services Division in terms of requesting more complete financial records and statistics on TPS-assisted projects, so that this profile can be produced.

b) Need: To prepare for distribution informational material describing available financial assistance programs for preservation in Maryland.

Recommendation: With the Technical Preservation Services Division, prepare descriptive material and distribute same to targeted audiences to increase awareness and use of these programs.

JEFFERSON PATTERSON PARK AND MUSEUM

Program Description:

The Jefferson Patterson Park and Museum Division of the Trust maintains and develops an 512 acre archeological and environmental preserve located in Calvert County; the property, "Point Farm," was donated to the State of Maryland by Mrs. Jefferson Patterson in 1983. The Park's operations are guided by its own Master Plan which outlines the intentions of the Maryland Historical Trust to fulfill the terms of Mrs. Patterson's gift to the State by completing the development of the facilities and programs of this new museum in a park setting. The Final Master Plan of the Jefferson Patterson Park and Museum (the museum) mandates amendment to the Master Plan in response to significant changes to the capital and operating programs; these changes incorporate the knowledge gained during two years of operations and by the terms of the Academy of Natural Sciences and the State of Maryland lease agreement which has been signed. The resultant changes will provide sufficient support facilities and staff to accomplish the objectives established in the Master Plan and Amendment A to the Master Plan of December 1985.

When fully developed in ten years, the Museum will have the facilities and staff to meet the pressing needs for preservation, education and research for the Park property, the Southern Maryland region, and certain aspects of the statewide historic preservation programs of the Maryland Historical Trust. The programs under development focus on passive recreation, public education and interpretation, interdisciplinary research, regional institutional cooperation, and statewide education, conservation and collections curation programs in archaeology. By the end of the ten year development period, the museum intends to be accredited by the American Association of Museums.

The major objectives for museum development are to:

- Adapt the existing grounds and facilities for new museum-related functions while preserving the historical character of the property.

- Study, interpret and preserve the natural, archaeological and architectural resources of the Park

property.

- Develop an interdisciplinary program of education, interpretation and research that addresses the range of natural and cultural resource concerns within the Park and the Chesapeake Bay region.

- Seek additional sources of funding and technical assistance to support the research and educational programs.

- Encourage the development of the Museum as a major artifact conservation and collections curation facility.

- Participate with other institutions and organizations to avoid duplication of efforts, facilities and programs.

- Foster public participation in and support of the Museum programs.

- Maintain active agricultural use of the Park property and foster the interpretation of past and present farming practices.

- Relocate the Estuarine Research Laboratory of the Academy of Natural Sciences in Philadelphia to the Park property and develop cooperative programs.

- Obtain museum accreditation from the American Association of Museums within the next ten years.

During the first two years of operation, significant progress has been made in meeting many of the objectives and goals specified in the Jefferson Patterson Park and Museum Master Plan. The Breckinridge Center has been established as the Museum offices. The Visitor Center renovations have been completed and the museum first exhibits have been developed. The Pavilion renovation has been completed. Other capital programs are proceeding toward completion. Many park-related passive recreation facilities have been completed. The grounds have been extensively upgraded to provide trails, picnic areas, parking and other essential park facilities. An additional $240,000 in Federal funds has been secured to support completion of the shoreline erosion program.

The research program has completed two years of excavation at the 17th-century King's Reach Site; funded partially by grants, the excavations were open to the public and provided training opportunities for students and volunteers. The Lower Southern Maryland Regional Preservation Center has conducted preservation projects throughout Southern Maryland. The education program has been awarded grants from the Calvert County Commissioners and the National Endowment for the Humanities. The program has developed a statewide training program for high school students which is being supported by the Maryland Department of Education. The education program will direct the establishment of Archaeology Study Centers at the Museum, Annapolis, and Baltimore County.

The Museum has become one of four founding members of the Solomons Environmental and Archaeological Research Consortium (SEARCH). The Trust and the Academy of Natural Sciences have signed a long-term lease which will result in cooperative programs and the Academy's New Environmental Research Center to be built on the park property. The Museum has hosted various public events during two successful public seasons. A Friends organization has been established to provide volunteer and funding support for Museum programs and membership development.

The following program activities/functions are conducted at the Park: Research, Education, and Administration

Research

Research is envisioned as an integral component of the larger Park and Museum program. However, during Phase I (1984-88) of Park development, research is necessarily directly linked to establishing the base program and, therefore, must contribute to interpretation and education. The program's long-term research topics have been identified as: 1) study of Late Woodland period prehistoric culture; 2) study of 17th-century colonial culture -- especially patterns of settlement and dynamics of cultural adaptation; and 3) the effects/events of the War of 1812 in general and of the Battle of St. Leonard Creek in particular. Completing the inventory of the Park's archaeological resources also has been identified as a Phase I priority.

Research activities at Patterson Park are organized under two major functions: the Lower Southern Maryland Regional Preservation Center, and the Museum Service Center Artifact Conservation and Collections Laboratory. The Lower Southern Maryland Regional Preservation Center, funded partially by

Maryland Historical Trust-administered Survey and Planning grants-in-aid, conducts the following activities:

a. Archeological site identification, survey, inventory;

b. Excavation, analysis, research, report preparation, popular and scholarly articles;

c. National Register nominations, easements, site preservation;

d. Compliance review: technical assistance and survey for private, county, state and federal projects;

e. Management plan development and implementation;

f. Promotes and cooperates in interdisciplinary inter-institutional research projects involving natural and cultural resources projects; and

g. Develops oral history and historic research relating to agricultural and historical themes of Southern Maryland and assists with exhibit development.

The Museum Service Center Artifact Conservation and Collections Laboratory performs the following functions:

a. Develops effective inventory and management system for curation and assessing Trust and JPPM collections;

b. Provides conservation of perishable artifacts in MHT-JPPM collections and conservation services on cost reimbursement basis to other institutions in the state;

c. Encourages donation of private collections of value to state's history and curation of same; and

d. Provides intern and workshop opportunities as well as research chair to teach conservation and curation practices and encourage scholarly study of collections.

This area of activity -- conservation services -- is one that

can be expanded into a major conservation facility serving the entire State, not only the Southern Maryland region. The creation of a State Artifact Conservation and Collections Laboratory meets the need for a central, statewide facility for the long-term conservation of artifacts derived from archeological investigations in Maryland. These collections are currently housed in over twenty government or private institutions that lack adequate conservation facilities. Many large collections remain in private hands because of the lack of State facilities. The Maryland Historical Trust recommends that the State fund the adaptation of the buildings of the Farm Manager Complex into the Museum Service Center which will house the State Artifact Conservation and Collections Laboratory. The museum is a logical location for such a facility and would provide the appropriate setting to promote the educational and research use of the collection while insuring the curation of unstable artifacts. Such a facility is not conceived to be either a base or special program at the museum but rather would be a Maryland Historical Trust program located at the museum as an addition to the base and special programs discussed in the master plan. The laboratory could also serve as the research offices of a State underwater archeology program, which is urgently needed in Maryland.

Education

The educational program at the museum conducts the following activities:

1. Coordinates volunteer program and development of affiliated organizations with JPPM;

2. Develops special events, tours, fieldtrips, lectures and other educational opportunities;

3. Develops curriculum, museum tours, and outreach program including administration of Trust/Maryland State Department of Education Center for Archaeological Research for Gifted and Talented Students;

4. Promotes fieldschools for college and high school students and adult volunteer learning opportunities in archaeology; and

5. Develops museum exhibits and publications and provides

technical advice to other institutions.

Administration:

The Administrative component of JPPM carries out the following functions:

1. Implements the Master Plan of JPPM by:

   a. Adapting existing grounds and facilities for new museum-related functions while preserving the historical character of property.

   b. Developing an interdisciplinary program of education, interpretation, and research that addresses the range of natural and cultural resource concerns within the Park and the Chesapeake Bay region.

2. Seeks additional sources of funding and technical assistance to further the research and educational program.

3. Relocates the Estuarine Research Laboratory of the Academy of Natural Sciences of Philadelphia to the Museum property and develop cooperative programs.

4. Implements modern museum standards and obtain museum accreditation from the American Association of Museums within the next ten years.

5. Continues to support educational, research, and administrative cooperative efforts through the SEARCH Consortium and other affiliated institutions in the state.

6. Promotes the utilization of the Museum by other research scientists and educators involved in historical and environmental studies while insuring preservation of agricultural, archeological, and environmental heritage of the Museum property.

JEFFERSON PATTERSON PARK AND MUSEUM: NEEDS AND RECOMMENDATIONS

GOAL I: INCREASE PUBLIC KNOWLEDGE AND UNDERSTANDING OF MARYLAND'S HISTORY AND ENRICH MARYLAND'S CULTURAL LIFE THROUGH IDENTIFICATION, EVALUATION, PROTECTION, AND INTERPRETATION OF THE STATE'S TANGIBLE HISTORIC PROPERTIES.

Objective 1: Create a more complete and representative data base including information about the State's historic properties; increase our knowledge and understanding of the past by accelerating the rate of coverage in documentation, analysis and protection of Maryland's significant historic resources.

Objective 2: Improve existing programs and support new programs which protect and preserve Maryland's historic properties.

Objective 3: Encourage closer cooperation among various academic disciplines (history, anthropology, folklife, architecture, geography) involved in the study of the state's history, particularly through the State's academic institutions and other research organizations, in order to better interpret and synthesize information about Maryland history.

Objective 4: Promote increased public and professional appreciation for the value of history in its broad sense (and of Maryland and local history in particular) through educational programs held in conjunction with relevant organizations.

Objective 5: Promote increased appreciation of the contribution of archeological resources in the study of Maryland history, and publicize the economic and practical advantages of preserving such archeological sites.

Overview: Goal Relationship to Jefferson Patterson Park and Museum

The Patterson Park and Museum program plays a key role in furthering this goal, not only in the Southern Maryland region,

but also provides important research and conservation facilities for studying the history of the entire state. The JPPM makes a major contribution to the study of Maryland history by providing conservation and curatorial facilities for the protection of artifacts and other historic materials at the State Artifact Conservation and Collections Laboratory. This facility can also conduct research on underwater archeological resources. The Museum is developing into a major center for archeological, historical, and preservation activity through its Lower Southern Maryland Regional Preservation Center and through the Museum's partnerships with other historical, archeological and scientific organizations. The JPPM also makes important contributions towards this goal in the area of Technical Assistance and Education, since educational activities are such a strong element of the JPPM program.

Program Activity 1 - Financial Assistance:

a. Need: To increase state support and funding for research and education.

   Recommendation: Continue to conduct State compliance related investigations in Southern Maryland region and establish a State fund for emergency salvage excavations. Work closely with the State Department of Economic and Community Development, Department of General Services, Department of State Planning, Department of Budget and Fiscal Planning, Executive Branch and General Assembly to insure continued support for the implementation of the JPPM Master Plan. Seek funding from other agencies (DECD) for joint publications, particularly Public Affairs and Office of Tourism Development.

b. Need: To increase local government support and funding.

   Recommendation: Pursue county-funded surveys of county-owned property to develop inventory, management, and preservation plans.

c. Need: To seek Federal government funding support for research and education.

   Recommendation: Seek operating cost supplemental support from Institute of Museum Services and other

grants for museum development and operation, educational programs and exhibits. Seek National Endowment for the Humanities support for historical archeology projects and from Maryland Humanities Council for developing teaching materials and exhibits. Seek National Science Foundation support for prehistoric studies and research issues in the Chesapeake Bay and Southern Maryland region. Seek support from the Development of Agriculture, the Smithsonian Institution and others for developing projects.

d. Need: To increase private sector financial support.

Recommendation: Increase private donations and maximize potential benefits of cooperative efforts with other private groups. Seek private donations to preservation fund, research fund, publication fund and collections fund. Develop an endowment for the Museum. Strengthen fundraising activities through the Friends of Jefferson Patterson Park and Museum, Inc. Develop a membership program to build a broad base of public support. Study the techniques used by similar organizations to increase fund raising and membership. Encourage the development of other organizations (besides Friends of JPPM, Inc.) affiliated with the museum. Share facilities of other institutions, especially SEARCH consortium members. Seek museum accreditation planning grant (MAP) from American Association of Museums to review status of museum development.

Program Activity 2 - Project Selection:

a. Need: To establish priorities for research and educational projects to ensure that JPPM projects contribute to important needs and data gaps in Maryland history.

Recommendation: In project selection, adapt and use the historic contexts, archeological research questions, and assessments of survey coverage outlined in the Maryland Comprehensive Historic Preservation Plan (see Appendix 3 and 6) and the research needs identified by JPPM's own research program and the Lower Southern Maryland Regional Archeological Preservation Plan.

b. Need: To use the JPPM to focus on the historic role of

agriculture in the Southern Maryland region.

Recommendation: Develop oral history and historical research program which studies the history of agriculture in the region in line with the context organization described in the Appendix. Build Agricultural Exhibit Building and complete interpretive exhibits for agricultural equipment and tools in the Museum's Collection. Sponsor special events and lectures related to farm history.

c. Need: To contribute to increased research on underwater archeological resources in Maryland.

Recommendation: Conduct research on this issue at the JPPM State Artifact Conservation and Collections Laboratory and work with the S&P Services Division to increase research, survey and protection activities in the State.

Program Area 3 - Technical Assistance and Education:

a. Need: To provide technical assistance and expertise to other government and private sector agencies concerned with developing museum exhibits, programs, and artifact conservation/curation programs.

Recommendation: Complete funding of positions described in the Master Plan so that JPPM can provide technical assistance and expertise to others.

b. Need: To increase joint research and educational programs with colleges and institutions in archeology, history, and environmental studies.

Recommendation: Continue to develop institutional relationships by conducting fieldschools, public lecture series, and intern programs, and providing experience in research and management projects with local and state institutions such as SEARCH consortium members, St. Mary's College, University of Maryland, George Washington University, John Hopkins University, and Historic St. Mary's City.

c. Need: To develop potential for special education programs related to archeological research.

Recommendation: Continue to provide and expand fieldwork opportunities for Maryland State Department of Education Summer Gifted and Talent Center for Archeological Research.

d. Need: To provide assistance on preservation matters to three Southern Maryland (St. Mary's, Calvert, and Charles) counties.

Recommendation: Assist in developing surveys and management plans for these counties. Work with certified local governments to revise historic district legislation for greater consideration of archeological sites (with the Survey and Planning Services Division). Work with county planning departments to establish compliance review of development impacts on archeological resources. Implement Southern Maryland Regional Archeological Preservation Plan.

e. Need: To work with local historical societies and other preservation organizations in the region.

Recommendation: Work with Calvert County Heritage Committee to coordinate local celebrations of county, State, and national heritage events. Work with MHT County Committees to promote and provide training for National Register nomination preparation, to increase preservation easements, and expand regional research.

f. Need: To provide survey work and technical assistance for federal and state agencies.

Recommendation: Through the Lower Southern Maryland Regional Preservation Center, assist those agencies involved in preservation compliance in the region. Work with these agencies involved in natural and cultural research/management programs in the Chesapeake Bay and Southern Maryland region, (such as the State Office of Environmental Planning non-point pollution study.)

g. Need: Increase involvement of volunteers and develop a strong volunteer program to support research in the region and the JPPM educational program.

Recommendation: Work with Archeological Society of

Maryland, Southern Maryland chapter, and provide training and field trips.

h. Need: To develop school teaching materials and exhibits and expand involvement in local school programs.

Recommendation: Seek Maryland Humanities Council grants and work with Community Education Services Division on curriculum development. Use expertise of State cultural agencies. Work with county school systems and educational councils in Southern Maryland to develop outdoor education programs and to incorporate historic preservation interpretation into classroom curriculum. Work with county-based anthropology classes to promote improved teaching sources for archeology and seek county involvement in state-supported summer centers for gifted and talented students (see c) above).

i. Need: To educate tourism and parks and recreation councils regarding the value of historical and archeological interpretative programs in Maryland.

Recommendation: Promote bus tours for groups from various organizations (non-profit, naturalist, conservation, museums, schools), and provide information on benefits.

j. Need: To work with Federal agencies concerned with parks and natural resource conservation.

Recommendation: Work with Federal programs in developing lectures and training opportunities for Federal employees involved in natural resource preservation regarding the value of archeology, museum interpretation, and research.

k. Need: To provide meeting and seminar facilities for use by other state programs in order to promote research, management and preservation practices.

Recommendation: Develop Patterson Center meeting facilities.

l. Need: To increase public outreach programs, special events, and promotion.

Recommendation: Continue to provide special events at the museum which focus on museum themes, develop public lectures and entertainment programs, and expand promotion of value of historic preservation for public enjoyment and education.

GOAL II: ASSIST IN THE MANAGEMENT OF ENVIRONMENTAL CHANGE; MAINTAIN AND ENHANCE THE APPEARANCE AND ENVIRONMENTAL DESIGN QUALITY OF MARYLAND'S COMMUNITIES AND LANDSCAPES; PRESERVE PLACES OF BEAUTY AND CULTURAL IMPORTANCE TO THE STATE'S CITIZENS, AND INCREASE THE PUBLIC'S LEVEL OF AESTHETIC AWARENESS.

Objective 1: Promote awareness of the importance of environmental quality, design, and aesthetics by explaining the psychological importance to, and positive impact of quality design on the State's citizens.

Objective 2: Educate the public, professionals, and decisionmakers as to special contributions of historic buildings to the environment in terms of providing human scale, quality design and construction, cultural identity, and a sense of time and place.

Objective 3: Improve the appearance of Maryland communities and landscapes by encouraging new development which is compatible in design with the existing environment; assist planning and design programs to better manage environmental change.

Overview: Goal Relationship to Jefferson Patterson Park and Museum

The JPPM helps the MHT meet this goal primarily through its active educational program, which seeks to increase knowledge and awareness of environmental quality and design and the relationships of the man-made and natural environments. The scenic qualities of the Patterson property are protected and enhanced by the JPPM program, and the property is easily accessible to the public for the enjoyment of scenic beauty. Through its work with other organizations and government agencies, the JPPM helps to improve environmental management and planning programs in the region and publicize the need and benefits of preserving places of scenic beauty such as Patterson Park and Museum.

Program Activity 1 - Financial Assistance:

a. Need: Work with related environmental/conservation agencies to further environmental and planning programs.

Recommendation: Pursue cooperative arrangement with

groups such as Maryland Environmental Trust to fund projects dealing with scenic qualities and the environment.

Program Activity 2 - Project Selection:

a. Need: In project selection, allocate resources to study environmental/landscape issues.

Recommendation: Use JPPM as example/case study for preservation of scenic places and landscapes for public enjoyment.

Program Activity 3 - Technical Assistance and Education:

a. Need: To provide public education as to value of scenic and environmental management and design.

Recommendation: In interpretive and educational programs, work to explain the importance of environmental quality and increase public awareness. Promote the historic value of preserving agricultural land and open space.

GOAL III: STRENGTHEN COMMUNITY AND NEIGHBORHOOD COHESION AND PRIDE, AND INCREASE LOCAL REVITALIZATION ACTIVITY BY RESIDENTS, COMMERCIAL INTERESTS, AND DECISIONMAKERS BY ASSISTING A BROAD RANGE OF COMMUNITY NEEDS AND INTERESTS.

Objective 1: Encourage the stabilization of neighborhood/community populations and reduce potential displacement problems; promote the use of innovative programs which assist citizens of all economic and social levels within Maryland communities.

Objective 2: Assign high priority to preservation projects which identify and protect places of special importance to local communities and offer the greatest potential for generating community interest and activity.

Objective 3: Develop working partnerships with other government agencies and private organizations involved in community development activities.

Overview: Goal relationship to JPPM

The JPPM serves an important role in building local and regional community cohesion and pride, as a center for Calvert County and Southern Maryland heritage study and education. The JPPM plays an especially active role in its outreach programs, which seek to involve many types of community groups not only in historical activities but in environmental and recreational events. The Museum has been instrumental in organizing local and regional institutional cooperation and in working with local schools and other civic institutions. Thus, it illustrates the important role preservation organizations can play in enhancing the cultural life of communities, and in strengthening the activities of other local organizations.

Program Activity 1 - Financial Assistance:

a. Need: To work more closely with local organizations and governments to increase funding support for JPPM activities which serve the community.

Recommendation: Continue to initiate projects which can be jointly sponsored by community groups, such as the Calvert County supported Heritage Committee.

Program Activity 2 - Project Selection:

a. Need: To target projects which have strong community interest and need.

Recommendation: Work with local historical and other community groups to seek their views on important projects and special events; continue to orient public education to community interests.

b. Need: To conduct research activities which help build a strong sense of regional heritage.

Recommendation: Work with local historians and folklife researchers to investigate local traditional culture and conduct educational activities which promote this regional culture.

Program Activity 3 - Technical Assistance and Education:

a. Need: To assist local groups in organizing historical and other cultural programs.

Recommendation: Provide guidance on preservation techniques and management/administrative training to local groups. Strengthen volunteers programs at JPPM and assist other groups to do so. Work with MHT local County Committees. Continue to sponsor the Southern Maryland Chapter of the Archeological Society of Maryland. Help develop farm history chapter and other special interest societies.

GOAL IV: CONSISTENT WITH ADOPTED STATE POLICY ON CONSERVATION AND DEVELOPMENT, MAINTAIN, CONSERVE, AND PROMOTE THE EFFICIENT USE OF MARYLAND'S NATURAL AND BUILT RESOURCES, PARTICULARLY THE STATE'S HISTORIC BUILDING STOCK, TRANSPORTATION AND OTHER FACILITIES, AS WELL AS LAND AND ENERGY RESOURCES.

Objective 1: Provide information describing the need for, and benefits of, conserving nonrenewable land and energy resources and maintaining historic buildings, roads, bridges, and other facilities.

Objective 2: Promote retention of existing building stock and encourage the creation of new usable space through rehabilitation rather than new construction, thereby conserving energy and nonrenewable resources.

Objective 3: Help to implement adopted State policy by maintaining, enhancing, and protecting existing town centers, open space, agricultural and undeveloped lands through work with conservation, agricultural, and other land preservation organizations and agencies.

Overview: Goal Relationship to Jefferson Patterson Park and Museum

The Patterson Park and Museum Division of the MHT is an important example of how historic and preservation programs help serve the purposes of scientific, environmental, and ecological research, protection, and education. Archeology's close relationship with scientific disciplines such as geology and geomorphology, and use of many social science methodologies is well illustrated in the JPPM's close relationships with SEARCH consortium members and other distinguished scientific institutions. In addition to this academic and scientific interdisciplinary benefit, the JPPM offers educational programs which serve to increase public awareness of natural science, land conservation etc. and publicize the benefits of natural and built resource conservation and environmental management. As an environmental preserve, the JPPM is directly contributing to this goal.

Program Activity 1 - Financial Assistance:

a. Need: Investigate funding opportunities within State government environmental and conservation agencies to

further mutual goals.

Recommendation: Seek funding support from the Department of Natural Resources, Soil Conservation Service, Department of Agriculture and other state agencies to develop model programs at the Museum to demonstrate best-use practices such as shoreline erosion and initial area buffers.

b. Need: Seek financial support from Federal conservation and environmental agencies for mutual advantage.

Recommendation: Pursue project funding from the Department of Agriculture, Smithsonian Institution, the Environmental Protection Agency and others to support scientific research and environmental management projects. Seek National Science Foundation support for prehistoric studies and research issues in the Chesapeake Bay and Southern Maryland region.

c. Need: Seek private sector funding sources and work with conservation groups.

Recommendation: Work with conservation and environmental groups such as the Nature Conservancy to increase funding, promote benefits of conservation easements, conduct joint fund raising and lobbying, sharing of facilities and joint publications.

Project Activity 2 - Project Selection:

a. Need: To continue to allocate project resources to activities with conservation benefits.

Recommendation: Expand natural science, wildlife interpretation, ecological research and education activities as suggested under Goals I and III, Technical Assistance and Education.

Program Activity 3 - Technical Assistance and Education:

a. Need: For cooperative research and educational projects with environmental and scientific institutions and federal and state agencies.

Recommendation: Continue and expand current

relationships with these agencies, such as the Academy of Natural Sciences of Philadelphia Estuarine Research Laboratory, and provide technical assistance to State and Federal agencies as described in Goal I.

b. Need: To expand public outreach and education programs in the area of environmental education.

Recommendation: Develop teaching materials, exhibits, outdoor education and interpretation of natural features of the Park through exhibits, tours and other events for naturalists, conservationists, and school groups. Work with Academy of Natural Sciences of Philadelphia to develop these programs.

GOAL V: EXPAND THE ROLE OF PRESERVATION ACTIVITY IN ASSISTING THE ECONOMIC DEVELOPMENT OF MARYLAND AND ITS COMMUNITIES.

Objective 1: Place high priority on Trust-assisted projects with the greatest potential for economic impact and for stimulating commercial revitalization, particularly in those localities of the state most in need of economic assistance.

Objective 2: Create a more harmonious working relationship with commercial development interests by streamlining existing preservation mechanisms and create new ones in order to minimize conflict between preservation and other interests in economic development issues.

Objective 3: Encourage greater interest and investment in preservation projects by publicizing the economic benefits of preservation to a broad range of property owners, the development community, and to relevant decisionmakers.

Objective 4: Publicize the benefits of preservation to the tourism industry, business and industrial agencies, and economic development agencies, to encourage greater coordination for mutual benefit.

Objective 5: Develop partnerships with the State's construction/home improvement/renovation industry and the real estate community, particularly by informing these interests about proper treatment of historic structures, and promotion of mutual benefits.

Overview: Goal Relationship to JPPM

The JPPM illustrates the important role that historic attractions can play in strengthening local, regional, and State economies. The Museum has become a tourist attraction for visitors to the Southern Maryland region, adding to the appeal of other older established historic sites such as St. Mary's City. As a center of research, education, and recreation, the Museum is adding to the quality of life of the area and thus enhancing its appeal for business, industrial, and residential development.

Program Activity 1 - Financial Assistance:

a. Need: To seek joint funding sources in State government for mutual economic benefit.

Recommendation: Especially with the MHT's parent Department of Economic and Community Development, seek increased financial support for JPPM programs as outlined under Goal I. Seek joint funding for publications and media projects to promote and advertise attractions and the economic benefits generated by the Museum and other tourist attractions in the region.

b. Need: Within local and regional agencies, promote benefits and attraction of JPPM and other historic sites.

Recommendation: Include information on JPPM in local and regional promotional material; seek to attract tour groups to Museum and publicize benefits to local governments.

Program Activity 2 - Project Selection:

a. Need: To devote some projects to issues related to economic impacts and benefits.

Recommendation: Continue to compile existing data regarding the number of tourists, amount of tourist expenditures and number of jobs created by JPPM and publicize; continue to work with Calvert County Tourism Council, Southern Maryland Tourism Council, and DECD's Office of Tourism Development to promote tourism and cooperation among tourist attractions in Maryland.

Program Activity 3 - Technical Assistance and Education:

a. Need: To provide assistance and information on economic impacts and benefits to relevant local, regional, and State agencies and groups.

Recommendation: Assemble and distribute data on economic impacts as described under Program Activity 2 above.

CHAPTER V: RECOMMENDED ACTIONS

CHAPTER V

RECOMMENDED ACTIONS

Chapter IV has provided the reader of the Maryland Comprehensive Historic Preservation Plan with a detailed discussion of how our stated broad goals and objectives are viewed by the different functional divisions of the Maryland Historical Trust. Importantly, this chapter recommended certain actions that must be taken to meet a variety of explicit "needs," which reflect in part each division's analysis of what obstacles now impede that division in fully carrying out effective preservation activities in Maryland. While this is a somewhat "inwardly directed" set of recommendations, this analysis is valuable as it helps highlight what external groups and individuals -- preservation and non-preservation alike -- might be called upon to assist in improving the overall climate for preservation in Maryland.

While this division-by-division analysis is useful, it is ultimately the combination of actions taken by all divisions within the Trust that is most important. This chapter consolidates and summarizes all recommended actions that Trust will take to meet stated goals and objectives, and organizes these for all divisions, under each goal and objective. The actions are grouped under Non-Discretionary; Discretionary: One-Time Activity; and Discretionary: Ongoing. The primary and/or secondary roles of each division are shown to the right. An asterisk indicates an external agency or program, upon which the Trust relies to help achieve, either in total or in part, certain goals and objectives.

This document is written as a five year plan to guide preservation activities in the State between 1986 and 1991. It is anticipated that these recommendations will be re-evaluated annually, so that staff and financial resources can be re-programmed each year to best meet the State's preservation needs. The Trust will conduct an annual comprehensive review of progress under the plan (as described in Appendix 1) and produce a revised document again in 1991.

GOAL I: INCREASE PUBLIC KNOWLEDGE AND UNDERSTANDING OF MARYLAND'S HISTORY AND ENRICH MARYLAND'S CULTURAL LIFE THROUGH IDENTIFICATION, EVALUATION, PROTECTION, AND INTERPRETATION OF THE STATE'S TANGIBLE HISTORIC PROPERTIES.

Objective 1: Create a more complete and representative data base including information about the State's historic properties; increase our knowledge and understanding of the past by accelerating the rate of coverage in documentation, analysis and protection of Maryland's significant historic resources.

Non-Discretionary-Ongoing:	Division/Role	Relative Priority
1. Improve quality and speed of survey and registration programs by emphasizing projects which identify large, multi-property resources.	S&P/1	Medium
2. Develop historic contexts through all survey projects, National Register nominations, and state and federal compliance projects, and work with state colleges and universities (classes) in order to better link survey and registration, and to improve decisionmaking making for protection and treatment.	S&P/1 JPPM/2	High
3. Through the Trust's "Open Project Selection Process," establish priorities within each region identifying types of resources which are relatively most important and/or endangered as identified in study lists; select projects on the above basis, as well as on the data gaps and research questions described in the Maryland Comprehensive Historic Preservation Plan in order to contribute most to our knowledge of the State's history.	S&P/1 TPS/2 JPPM/2	High

Non-Discretionary-Ongoing:	Division/Role	Relative Priority
4. Continue to assist local governments to achieve "Certified Local Government" status at the level of three or more a year, and perform local identification and registration functions.	S&P/1* CES/2	High
5. Assist in the creation of local government and private sector funding for survey, registration and planning projects, including establishment and continuation of Regional Historic Preservation Centers which emphasize archeology.	S&P/1 JPPM/2	Medium
6. Computerize Maryland Historical Trust survey, project, and collections data (using, in part, historic context organization) in order to implement comprehensive planning and increase public accessibility to such data.	S&P/1 TPS/2 JPPM/2	High
7. With other historical groups and agencies, conduct conferences, workshops, and special events; with other media, work to publicize information about our programs' accomplishments to the general public.	CES/1* JPPM/1*	High
8. Develop "models" for publications topics for other governments and organizations to follow.	CES/1	Low
Discretionary-Ongoing:		
1. Increase use of volunteers and students by developing survey training manual and workshops and	S&P/1 CES/2 JPPM/2	Medium

Discretionary-Ongoing:	Division/Role	Relative Priority
conducting volunteer recognition programs.		
2. Create a more representative composition of National Register listings by increasing numbers of archeological sites nominated.	S&P/1	Medium
3. Increase research and survey activity on Maryland's underwater archeological resources receiving S&P Division grant-in-aid assistance, through existing and proposed legislation and regulations, and by developing guidelines for conducting such investigations. Use the research facilities at the JPPM to study this issue.	S&P/1 JPPM/2	High
Discretionary-One-Time Activity:		
1. Establish a State grant fund for survey and planning activities.	MHT/1* S&P/2	High
2. Establish a publications fund to publicize the results of research, survey, registration and planning work.	MHT/1 CES/2 JPPM/2	High
3. Obtain the services of a copy editor (or staff position) to do same.	CES/1	High

Objective 2: Improve existing programs and support new programs which protect and preserve Maryland's historic properties.

Non-Discretionary-Ongoing:		
1. Seek increases in State and Federal tax incentive program use which emphasize the rehabilitation and re-use of the State's historic buildings and structures.	TPS/1 CES/2	High

Non-Discretionary-Ongoing:	Division/Role	Relative Priority
2. Implement new State preservation legislation of 1985, especially State compliance review process and establishment of Maryland Register of Historic Properties and provide technical assistance.	S&P/1 TPS/1 CES/1	High
3. Increase capacity of "Certified Local Governments" to conduct protection and treatment activities (Section 106 and ERTA review).	S&P/1 TPS/1	Medium
4. Continue to expand state conservation laboratory facility.	JPPM/1	High
5. Implement JPPM 10-year Master Plan for MHT buildings and archeological sites at JPPM.	JPPM/1	High
Discretionary-One-Time Activity:		
1. Achieve stable statewide funding level for MHT preservation projects.	MHT/1 TPS/2	High
2. Establish a revolving fund which can be used in emergency situations to release funds on an "ASAP" basis.	MHT/1 TPS/2	High
3. Expand benefits level for tax incentive programs.	TPS/1	High
4. Revise MHT grant, loan, and easement targeting processes to reflect the stated goals and objectives of the MHT and to better link project selection to level of significance and endangerment, potential benefit, and geographic distribution.	TPS/1 S&P/1	High
5. Revise MHT program directives to increase protection for archeological sites within the TPS Division.	TPS/1 S&P/2	High

Discretionary-One-Time Activity:	Division/Role	Relative Priority
6. Examine possible re-distribution of MHT staff and funding resources from direct grant and loan administration to other more cost-effective activities.	MHT-wide	High
7. With another organization, co-sponsor a technical training and certification program for builders, craftsmen, and architects.	TPS/1* CES/2	High
8. Convince the General Assembly to enact state legislation to protect underwater archeological sites, and clarify MHT/MGS-DOA responsibility under these regulations; develop guidelines for conducting underwater investigations; and study the need for additional MHT staff position(s) to carry out these activities.	MHT/1 S&P/1	High
9. Assure those local governments where applicable of the authority to designate and regulate archeological sites under Section 8, "Historic Area Zoning," Article 66B, Annotated Code of Maryland, Zoning and Planning, or related enabling legislation.	MHT/1 S&P/2	High
10. Recommend the merger of archeological services in State government under the MHT to improve archeological coordination and better protect archeological resources.	MHT/1*	High
11. Sponsor standardized training programs for local officials on integrating preservation into other planning activities.	S&P/1 CES/2	High

Discretionary-One-Time Activity:	Division/Role	Relative Priority
12. Create "priority lists" for MHT easement acquisition priorities and establish selection criteria.	S&P/1 TPS/2	High
Discretionary-Ongoing:		
1. Assist in creation of local tax incentive programs.	TPS/1 S&P/2 CES/2	High
2. Investigate innovative funding techniques to maximize leverage of existing TPS Division funding (for example, low-interest DECD Community Development Administration loans).	TPS/1	Medium
3. Acquire easements from "priority list" and seek joint easement projects with conservation agencies for mutual protection of significant historic/land resources.	TPS/1* S&P/1 JPPM/1	High
4. Assist the private sector in building a strong statewide network of preservation and historical organizations by strengthening the county committee (i.e., volunteers network) system; helping Preservation Maryland to provide management training to local groups; and studying examples of statewide associations in other states.	CES/1	High
5. Continue to monitor State legislation being considered by the Maryland General Assembly.	CES/1	High
6. Assist local governments in implementing Article 66B for archeological resource protection.	S&P/1	High
7. Implement changes in State government archeological coordination.	S&P/1	High

Discretionary-Ongoing:	Division/Role	Relative Priority
8. Provide staff resources to serve as clearinghouse for technical information requests.	TPS/1	Medium
9. Conduct original technical research and publish same.	TPS/1	Low

Objective 3: Encourage closer cooperation among various academic disciplines (history, anthropology, folklife, architecture, geography) involved in the study of the State's history, particularly through the state's academic institutions and other research organizations, in order to better interpret and synthesize information about Maryland history.

Discretionary-Ongoing:

1. Guide research activity and curriculum development within the State's college and university departments of history, anthropology, architecture, and cultural geography, to gather information on the research questions and data gaps identified in the Maryland Comprehensive Historic Preservation Plan, within the organizational framework of the state historic contexts included in the Plan.	S&P/1 JPPM/2	Low
2. Establish up to five multi-disciplinary regional preservation centers at universities and colleges to coordinate and improve the study of local and regional history.	S&P/1	Medium
3. Promote scientific and environmental research and interdisciplinary studies through SEARCH consortium.	JPPM/1 S&P/1	Medium

Discretionary-Ongoing:	Division/Role	Relative Priority
4. Seek funding for interdisciplinary studies.	S&P/1 JPPM/1	Medium
5. Assist and strengthen amateur and professional associations for the study of history and archeology.	CES/2 JPPM/2	Low
6. Assist in the dissemination of academic research through conferences and publications.	CES/1 JPPM/2	Low

Objective 4: Promote increased public and professional appreciation for the value of history in its broad sense (and of Maryland and local history in particular) through educational programs held in conjunction with relevant organizations.

Non-Discretionary-Ongoing:		
1. Obtain funds for historic markers program.	S&P/1 CES/2	Medium
2. Develop Jefferson Patterson Museum and educational programs.	JPPM/1	High
Discretionary-One-Time Activity		
1. Assist Preservation Maryland to create a preservation education fund for local groups.	MHT/2*	High
Discretionary-Ongoing:		
1. Help private sector to build strong statewide association of preservation and historical groups as described under Objective 2.	CES/1	High
2. Assist private organizations to plan educational activities which promote a greater interest and appreciation of Maryland history.	CES/1 JPPM/2	Low

Discretionary-Ongoing:	Division/Role	Relative Priority
3. Work with State agencies such as DECD's Tourism, Public Affairs, Maryland Magazine, and the Maryland State Folkorist, and with DNR to promote interest in Maryland history.	MHT/2* JPPM/1	High
4. Provide assistance and advice to others developing elementary and secondary school and college curricula for preservation.	CES/2* JPPM/2*	Medium
5. Request local sponsorship of workshops by county committees.	CES/1*	Medium
6. Obtain grants and other outside sources of funding to increase educational activities.	S&P/1 JPPM/1 CES/2	High

Objective 5: Promote increased appreciation of the contribution of archeological resources in the study of Maryland history, and publicize the economic and practical advantages of preserving such archeological sites.

Non-Discretionary-Ongoing:		
1. Use research questions identified in the Maryland Comprehensive Historic Preservation Plan as one criterion to guide selection and administration of projects receiving Trust financial assistance. In archeological reports and publications, ensure that project results and analysis address above-referenced research issues and help develop contexts.	S&P/1 TPS/1 JPPM/1	High

Discretionary-Ongoing:	Division/Role	Relative Priority
1. Assist projects which illustrate the practical utility, benefit, and public value of archeological information.	S&P/1 TPS/1	Medium
2. Compile and distribute information demonstrating utility and benefits of archeological activity.	CES/1 JPPM/1	Medium

GOAL II: ASSIST IN THE MANAGEMENT OF ENVIRONMENTAL CHANGE; MAINTAIN AND ENHANCE THE APPEARANCE AND ENVIRONMENTAL DESIGN QUALITY OF MARYLAND'S COMMUNITIES AND LANDSCAPES; PRESERVE PLACES OF BEAUTY AND CULTURAL IMPORTANCE TO THE STATE'S CITIZENS, AND INCREASE THE PUBLIC'S LEVEL OF AESTHETIC AWARENESS.

Objective 1: Promote awareness of the importance of environmental quality, design, and aesthetics by explaining the psychological importance and positive impact of quality design on the State's citizens.

Discretionary-Ongoing:	Division/Role	Relative Priority
1. Support by co-sponsorship and joint funding efforts media and educational efforts of Maryland arts design, environmental groups.	CES/1*	Medium
2. Publicize and provide information on design issues, environmental awareness.	CES/1*	Medium

Objective 2: Educate the public, professionals, and decisionmakers as to special contributions of historic buildings to the environment in terms of providing human scale, quality design and construction, cultural identity, and a sense of time and place.

Discretionary-Ongoing:

1. Publicize MHT funded projects which demonstrate design and planning benefits, particularly by Certified Local Governments.	CES/1 TPS/2 S&P/2	High
2. Provide educational programs to improve the sensitivity of local government decisionmakers to these issues.	CES/1 S&P/2	High

Discretionary-Ongoing:	Division/Role	Relative Priority
3. Produce guidelines and models of design standards as needed for state agencies, local governments (e.g. historic preservation commissions), and other agencies and publicize same.	TPS/1 S&P/2	Medium
4. Provide staff resources to serve as clearinghouse for technical information requests.	TPS/1 CES/2	High
5. Conduct original research and publish same.	TPS/1 CES/2	Low
Discretionary-One Time Activity		
1. Create a historic architectural design services office within the Trust to assist state agencies and obtain new staff.	TPS/1	High
2. With another organization, co-sponsor a technical training and certification program for builders, craftsmen, and architects.	TPS/1* CES/2	High

Objective 3: Improve the appearance of Maryland communities and landscapes by encouraging new development which is compatible in design with the existing environment; assist planning and design programs to better manage environmental change.

Non-Discretionary-Ongoing:		
1. Through implementation of the Maryland Comprehensive Historic Preservation Plan at State and local levels, institutionalize preservation into State and local planning programs.	S&P/1	High

Non-Discretionary-Ongoing:	Division/Role	Relative Priority
2. Streamline State compliance/State tax review processes in order to reduce potential development conflicts.	S&P/1 TPS/1	Medium
Discretionary-Ongoing:		
1. Work with local governments (through historic preservation commissions) and the Maryland Association of Historic District Commissions to provide guidance on rehabilitation review standards and guidelines, same for new construction/infill.	S&P/1 TPS/1	Medium
2. Provide information and work with local planning agencies and planning and design organizations on the use of preservation tools and design standards within Maryland towns and neighborhoods.	S&P/1 CES/1	Medium
3. Streamline Federal "Section 106" review, ERTA review process at national levels .	MHT/1* S&P/2 TPS/2	High
4. Provide information on benefits of use of design standards and benefits of compliance review at earliest phases of project planning.	S&P/1 TPS/1 CES/2	Medium
5. Use Survey and Planning funds, and seek other funds to undertake model studies meeting this objective (e.g., "Chesapeake Port Towns Study," with National Trust's Critical Issues Fund Program, as corollary to state Chesapeake Bay Initiatives program).	S&P/1 TPS/1	Medium

Discretionary-One-Time-Activity:	Division/Role	Relative Priority
1. Propose new legislation for a State building code for historic preservation which would help further this objective.	MHT/1	Medium

GOAL III: STRENGTHEN COMMUNITY AND NEIGHBORHOOD COHESION AND PRIDE, AND INCREASE LOCAL REVITALIZATION ACTIVITY BY RESIDENTS, COMMERCIAL INTERESTS, AND DECISIONMAKERS BY ASSISTING A BROAD RANGE OF COMMUNITY NEEDS AND INTERESTS.

Objective 1: Encourage the stabilization of neighborhood/community populations and reduce potential displacement problems; promote the use of innovative programs which assist citizens of all economic and social levels within Maryland communities.

Discretionary-Ongoing:	Division/Role	Relative Priority
1. Produce case studies of social/economic/impacts from preservation on Maryland communities.	S&P/1 CES/2	High
2. Develop new MHT funding techniques which would allow more modest preservation projects to be undertaken by a variety of economic groups and work with relevant agencies.	TPS/1*	High
3. In the TPS Division project selection process, solicit projects which visibly contribute to community improvement (there should be a demonstrated community need for the project).	TPS/1	High
4. Publish information specifically designed for a broad range of community agencies and organizations which can help achieve this objective.	CES/1 TPS/2	Medium
5. Counterbalance any negative misconceptions of preservation as	CES/1	Medium

Discretionary-Ongoing:	Division/Role	Relative Priority
"elitist," through information and publicity for examples of successful projects with community benefits.		

Objective 2: Assign high priority to preservation projects which identify and protect places of special importance to local communities and offer the greatest potential for generating community interest and activity.

Discretionary-One Time Activity:		
1. Implement system to improve flexibility in use of state grant and loan projects for rehabilitation.	TPS/1 S&P/1	Medium

Discretionary-Ongoing:		
1. In the TPS Division project selection process, solicit projects which visibly contribute to community improvement (there should be a demonstrated community need for the project).	TPS/1 S&P/2	High
2. Seek improvement in Federal funding conditions for rehabilitation projects which would allow for more flexible interpretation of preservation standards.	MHT/1*	Medium
3. Work with State folkorist to ensure that local traditions, intangibles and community values are represented in MHT decisionmaking.	S&P/1 TPS/1	Medium
4. Broaden public information programs to reach wider audiences outside of the usual preservation community by focusing on community organizations and other specific audiences.	CES/1 S&P/2 TPS/2 JPPM/2	High

Discretionary-Ongoing:	Division/Role	Relative Priority
5. Follow-through by publicizing projects which do have a strong community value as examples for others to follow.	CES/1 S&P/2 TPS/2 JPPM/2	Medium

Objective 3: Develop working partnerships with other government agencies and private organizations involved in community development activities.

Non-Discretionary-Ongoing:

1. Administer Section 106 compliance program to assure opportunity for substantive involvement by community groups.	S&P/1*	Medium

Discretionary-Ongoing:

1. Provide information on benefits of preservation tools to community agencies and organizations and assist them in their work; publicize innovative programs and successful partnerships to promote their use as models for others.	CES/1 TPS/2	High
2. Seek to increase local funding sources and improve programs to expand preservation and rehabilitation work through publicity and promotion.	CES/1*	High
3. Sponsor standardized training programs for local officials on how to integrate preservation programs into other activities.	CES/1 S&P/2 TPS/2	Medium

Discretionary-One-Time Activity:	Division/Role	Relative Priority
1. Assist Preservation Maryland or the Maryland Association of Historic District Commissions to provide administrative training assistance to local preservation groups.	CES/1	High

GOAL IV: CONSISTENT WITH ADOPTED STATE POLICY ON CONSERVATION AND DEVELOPMENT, MAINTAIN, CONSERVE, AND PROMOTE THE EFFICIENT USE OF MARYLAND'S NATURAL AND BUILT RESOURCES, PARTICULARLY THE STATE'S HISTORIC BUILDING STOCK, TRANSPORTATION AND OTHER FACILITIES, AS WELL AS LAND AND ENERGY RESOURCES.

Objective 1: Provide information describing the need for, and benefits of, conserving nonrenewable land and energy resources and maintaining historic buildings, roads, bridges, and other facilities.

Discretionary-Ongoing:	Division/Role	Relative Priority
1. Provide technical information and training to targeted audiences, such as state agencies, builders, realtors, planners, etc., in order to assist them in conservation activities. Emphasize preventive maintenance in conserving the State's built environment.	CES/1 TPS/2	Medium
2. Produce models and case studies showing rates of loss, stresses, need for resource conservation.	CES/1 S&P/2 JPPM/2	High

Objective 2: Promote retention of existing housing stock and encourage the creation of new building space through rehabilitation rather than new construction, thereby conserving energy and nonrenewable resources.

Discretionary-Ongoing:

1. Publicize existing tax incentive programs in order to increase use.	TPS/1	High
2. Publicize these programs especially in areas of the state where the building stock is deteriorating most quickly.	CES/1 TPS/2	Medium

Discretionary-Ongoing:	Division/Role	Relative Priority
3. Study the impacts of tax assessments and building codes on building re-use, and propose new programs.	TPS/1	Medium
4. Target grants and loans to projects which demonstrate conservation benefits and can serve as models for case studies.	TPS/1	Medium
Discretionary-One-Time Activity:		
1. Establish a funding source for building conservation and maintenance, which could aid existing programs by allowing for smaller repairs and appropriately flexible preservation standards.	MHT/1*	High
2. Evaluate the advantages and disadvantages of establishing policy of distributing smaller Technical Preservation Services grants and loans to larger numbers of properties.	MHT/1 TPS/2	High
3. Expand tax program eligiblity at Federal, State and local levels.	MHT*	High

Objective 3: Help to implement adopted State policy by maintaining, enhancing and protecting existing town centers, open space, agricultural and undeveloped lands through work with conservation, agricultural, and other land preservation organizations and agencies.

Discretionary-Ongoing:		
1. Coordinate easement acquisition with other State and local government agencies and private organizations;	TPS/1* JPPM/1 S&P/2	High

Discretionary-Ongoing:		Division/Role	Relative Priority
	seek joint sponsorship of projects which contain both natural and historic features with organizations such as the Nature Conservancy.		
2.	Join with related agencies to support programs for environmental management (such as erosion control.)	MHT/2* JPPM/2*	Medium
3.	Target TPS Division projects which demonstrate land and/or energy conservation benefits and can serve as models for case studies.	TPS/1	Medium
4.	Provide information to support State and local planning policies which promote conservation goals and development planning; work to create additional mechanisms.	S&P/1*	Low
5.	Assist private preservation groups to join with conservation groups to work for increased funding and legislation.	CES/1*	Low
6.	Co-sponsor environmental awareness, conservation research, publications and educational programs with conservation groups.	CES/2*	Low
Discretionary-One-Time Activity:			
1.	Obtain increased levels of easement donations by creating new staff position.	TPS/1	High

GOAL V: EXPAND THE ROLE OF PRESERVATION ACTIVITY IN ASSISTING THE ECONOMIC DEVELOPMENT OF MARYLAND AND ITS COMMUNITIES.

Objective 1: Place high priority on Trust - assisted projects with the greatest potential for economic impact and for stimulating commercial revitalization, particularly in those localities of the State most in need of economic assistance.

Discretionary-Ongoing:	Division/Role	Relative Priority
1. Maximize (through leveraging opportunities) potential advantageous economic impacts of preservation projects in Maryland by achieving both increased funding levels and improved stability in State funding.	MHT/1*	High
2. Promote and publicize existing tax incentive programs.	CES/1 TPS/2	High
3. Create new incentives at the local level.	TPS/*	High
4. Identify areas and target project selection and promotional activity to those regions of the state identified as most in need of assistance (e.g., economically depressed areas).	TPS/1 S&P/1	High
5. Work with the Department of Economic and Community Development to develop joint programs and market opportunities for re-use of buildings in distressed areas or for threatened resources.	TPS/* S&P/*	High

Discretionary-Ongoing:	Division/Role	Relative Priority
6. Target National Register nomination activity to economically depressed areas.	S&P/1	High

Discretionary-One-Time Activity:

1. Develop criteria for targeting funding assistance for projects which will serve as tourism attractions for local communities.	TPS/1 S&P/1	Medium
2. Evaluate advantages and disadvantages of policy of awarding smaller grant and loans amounts to larger number of projects, thus increasing the distribution of re-investment.	S&P/1 TPS/1	High
3. Expand eligibility for tax benefits in order to increase their use.	TPS/1	High

Objective 2: Create a more harmonious working relationship with commercial development interests by streamlining preservation mechanisms and create new ones in order to minimize conflict between preservation and other interests in economic development issues.

Non-Discretionary-Ongoing:

1. Use historic contexts developed by the Survey and Planning Services Division to help streamline project review decisionmaking time through standard treatment procedures for groups of resources.	S&P/1 TPS/2	High

Non-Discretionary-Ongoing:	Division/Role	Relative Priority
2. In Federal Section 106 and state compliance review processes, educate other agencies, local governments, and program participants more fully re procedures and treatment standards through production of "guidance papers" and through training workshops.	S&P/1 TPS/2 CES/2	High
Discretionary-One-Time Activity:		
1. Shorten the length of project review time for federal ERTA tax credit projects by working with the National Park Service to expedite federal review at Mid-Atlantic Regional Office regional level.	MHT*	High
Discretionary-Ongoing:		
1. In Section 106 review, work with Federal and State agencies and local jurisdictions to increase the use of programmatic memoranda of agreement.	S&P/1	Medium
2. Publicize those projects which illustrate benefits and successful partnerships between preservationists and business interests, to offset negative perceptions of preservation as "obstructionist," costly, etc.	CES/1 TPS/2	High

Objective 3: Encourage greater interest and investment in preservation projects by publicizing the economic benefits of preservation to a broad range of property owners, the development community, and to relevant decisionmakers.

Discretionary-Ongoing:	Division/Role	Relative Priority
1. Improve program record-keeping and statistics, require more detailed economic financial information from applicants in order to compile data and analyze cost-benefit impacts in Maryland.	TPS/1	High
2. Publish information on economic impacts in Maryland. Identify audiences and communicate benefits of preservation projects through promotion of advantages, publicity for successful projects where cost savings are clearly shown.	CES/1 TPS/2	High

Objective 4: Publicize the benefits of preservation to the tourism industry, business and industrial agencies, and economic development agencies and encourage greater coordination for mutual benefit.

Discretionary-Ongoing:		
1. Identify agencies with which the Trust can work for mutual benefit, thus expanding preservation opportunities. Conduct research and analysis on relationship of preservation to business and industrial development and seek joint projects with these agencies.	S&P/1 TPS/2	High
2. Provide data on publically-accessed historic and archeological sites to State and local tourism agencies, to assist in local tourism promotion.	S&P/1 JPPM/1	High

Discretionary-Ongoing:	Division/Role	Relative Priority
3. Provide information to agencies and groups describing benefits; in particular, seek joint Trust-DECD-Tourism Development Department publication describing mutual benefits.	CES/1 S&P/1 JPPM/1	High

Objective 5: Develop partnerships with the State's construction/home improvement/renovation industry and the real estate community, particularly by informing these interests about proper treatment of historic structures, and promotion of mutual benefits.

Discretionary-Ongoing:		
1. Provide increased technical information on how to re-use historic structures.	CES/1 TPS/1	High
2. Promote and publicize the special benefits of tax incentive programs in terms of project cost savings to this audience through case studies and publicity.	TPS/1 CES/1	High

Discretionary-One-Time Activity:		
1. With another organization, co-sponsor a technical training and certification program for builders, craftsmen, and architects.	TPS/1* CES/2	High

APPENDICES

APPENDICES

Appendix 1: System for Periodic Review and Revision of Planning Information at the Maryland Historical Trust

Appendix 2: Secretary of the Interior's Standards and Guidelines for Preservation Planning

Appendix 3: Maryland's Historic Contexts: Organization and Description

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Appendix 5: Research Issues for the Study of Maryland's Above-Ground Historic Resources

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Appendix 7: Methodology for Estimating Numbers of Pre-1940 Structures in Maryland

APPENDIX 1

PROPOSED MARYLAND HISTORICAL TRUST SYSTEM FOR PERIODIC REVIEW OF THE STATE HISTORIC PRESERVATION PLANNING PROCESS IN MARYLAND

1. Periodic Revision to SHPO State Preservation Planning Document and Process:

   To insure implementation and updating of the Maryland Comprehensive Historic Preservation Plan, the MHT Ad-Hoc Committee on the Comprehensive Historic Preservation Plan will continue to meet on a yearly or bi-annual basis, or a committee of MHT Trustees will be appointed to meet regularly. Staff representatives from all program divisions of the Maryland Historical Trust should also be included. Changes in preservation philosophy, current issues in public policy, funding situations, and new preservation mechanisms will be summarized by the Trust's Preservation Planner (currently Peggy Bruns Weissman), and revisions suggested to Ad-Hoc Committee or Board Committee and staff.

2. Periodic Review and Participation by the Various "Publics" Outside the MHT:

   Definition and contact with groups and agencies will occur, and plan will be circulated annually for updating and comment to targeted agencies and groups. Annual public meeting will be held on same, or one session at office's annual conference will be held. Special workshops for planners and academics are a third option being considered.

3. System for Internal Implementation and Revision of Planning Process within MHT Programs:

   a) Position of Preservation Planner will be continued to monitor implementation of planning document, translate State Preservation Plan recommendations into annual work schedules, assist other staff in integrating planning, guide use of historic contexts into all programs, and ensure that programs operate to meet MHT goals and objectives, as stated in planning document. The planner will facilitate the flow of project, site, and collections data among programs. This will be done

through use of historic context organization as described in Chapter IV of the Maryland Comprehensive Historic Preservation Plan, where the linkage of identification, evaluation, and protection activities is explained in detail. The planner will also develop a "model context" to illustrate how characteristics of each resource type, levels of integrity, and preservation goals for each context are defined. The model will be refined annually according to the success of those contexts which are developed and tested against the model. The planner will also revise data on stresses and criteria for judging social/economic benefits.

b) Record keeping in all programs will be improved and computerized or organized manually for site, project, and collections data according to the historic context organization described in the Maryland Comprehensive Historic Preservation Plan. A cover sheet for compliance, grant, tax act projects, survey sites, and NR nominations which assigns the site or project to an historic context will be created and maintained in monthly/yearly formats. The Preservation Planner will review and summarize the new information for contributions to the body of knowledge of each historic context. In TPS and S&P grant projects and in National Register nominations, new data should contribute to filling data gaps or answering research questions, or assist in lessening one or more stresses as identified in the state plan. The National Register program can use the accumulated information in preparing contexts for nominations, and the MHT protection programs can also employ this new information in revising protection standards for each context.

In the grant selection process in the S&P and TPS Divisions, the office will begin to require that applications be clearly linked to contexts and demonstrate real need and significance. For grant applicants, a summary explanation of MHT's planning process and historic contexts will also be sent with application materials, and it will be required that the applicant clearly state how projects relate to historic contexts. Project reports and analyses will also be required to follow historic context organization, in order to facilitate context revision and updating.

Identification:

1) Survey/Archeology Programs: After each annual grant cycle, the Historic Sites Survey Coordinator (and/or Preservation Planner) will collect the data prepared and analyzed by context by the surveyor or sub-grantee, and will add the new information to the computer base and/or office context file. The Survey Coordinator/archeologist will prepare a summary of the new information gathered by all survey projects.

2) Research/Publications/Education (Community Education Services/Jefferson Patterson Park and Museum/Survey and Planning Services Divisions): Each year the Preservation Planner (or Historic Sites Survey Coordinator/archeologist) will review current publications and research, and create an annotated bibliography according to context and summarize these new findings. The planner will add this new information to the context file.

3) Jefferson Patterson Park and Museum: Research work for past year by context will be summarized. Planner will then add this new information to that produced under survey and archeology programs noted above.

Evaluation:

1) National Register of Historic Places: Each year, a list of new entries according to historic context will be maintained. NR program staff will summarize the new information and analyze whether any data gaps, research needs, geographic imbalances etc. have been filled.

2) Planning: Each year, aside from gathering and circulating the information described under the various MHT programs, new data on stresses (such as trends in growth and development, vacancy rates, arson, erosion) will be summarized both geographically and by endangered resource type. This can be done by maintaining records on NR sites lost, compliance sites lost, and newspaper clippings on destruction of historic sites and analyzing new planning data and statistics. Also, the Preservation Planner will revise the criteria for

judging social and economic benefits of preservation projects.

Protection:

1) Compliance: Complete records on projects according to historic context, recording type of stress, type of resource, site losses, protection successes etc. will be maintained. Project data will be summarized annually for Preservation Planner to analyze. Preservation Planner will use revised NR contexts to revise standards for decisions on level of significance and appropriate treatments, according to the model context described earlier. Planner also will provide new information on social and economic impacts and on stresses and endangered resource types.

2) ERTA and 502H Tax Review Programs: Same as for compliance program above.

3) TPS Grants and Loans Programs: Same as for compliance program above.

4) Easements: Same as for compliance program above.

5) Technical Preservation Assistance: Same as for compliance program above.

6) Education/Public Awareness Programs (Community Education Services Division, Jefferson Patterson Park and Museum): Each year past work by historic context will be summarized. Assessment of needs for increased protection efforts, in terms of awareness/publicity for geographic areas of state, and for groups of historic resources, will also be made. Information on stresses generated by the Preservation Planner, and on issues in preservation which need attention, will then be used in educational outreach efforts.

4. Revision of Resource Goals and Objectives by Historic Context:

The Preservation Planner will coordinate staff recommendations for establishment of ideal goals for each historic context for identification, evaluation, and protection activities. This will be accomplished by creating

a model context which includes definition of type, characteristics, locational information, integrity level required, and recommended appropriate treatment. Each year, information gathered from all the programs as described in detail above will then be summarized for each context and ideal goals modified according to this new information.

federal register

Thursday
September 29, 1983

Part IV

Department of the Interior

National Park Service

Archeology and Historic Preservation; Secretary of the Interior's Standards and Guidelines

DEPARTMENT OF THE INTERIOR

National Park Service

Archeology and Historic Preservation; Secretary of the Interior's Standards and Guidelines

AGENCY: National Park Service, Interior.

ACTION: Notice.

SUMMARY: This notice sets forth the Secretary of the Interior's Standards and Guidelines for Archeology and Historic Preservation. These standards and guidelines are not regulatory and do not set or interpret agency policy. They are intended to provide technical advice about archeological and historic preservation activities and methods.

DATE: These Standards and Guidelines are effective on September 29, 1983.

FOR FURTHER INFORMATION CONTACT: Lawrence E. Aten, Chief, Interagency Resources Division, National Park Service, United States Department of the Interior, Washington, D.C. 20240 (202-343-9500). A Directory of Technical Information listing other sources of supporting information is available from the National Park Service.

SUPPLEMENTARY INFORMATION: The Standards and Guidelines are prepared under the authority of Sections 101(f), (g), and (h), and Section 110 of the National Historic Preservation Act of 1966, as amended. State Historic Preservation Officers; Federal Preservation Officers including those of the Department of Agriculture, Department of Defense, Smithsonian Institution and General Services Administration; the Advisory Council on Historic Preservation; the National Trust for Historic Preservation; and other interested parties were consulted during the development of the Standards and Guidelines; additional consultation with these agencies will occur as the Standards and Guidelines are tested during their first year of use.

Purpose

The proposed Standards and the philosophy on which they are based result from nearly twenty years of intensive preservation activities at the Federal, State, and local levels.

The purposes of the Standards are:

To organize the information gathered about preservation activities.

To describe results to be achieved by Federal agencies, States, and others when planning for the identification, evaluation, registration and treatment of historic properties.

To integrate the diverse efforts of many entities performing historic preservation into a systematic effort to preserve our nation's cultural heritage.

Uses of the Standards

The following groups or individuals are encouraged to use these Standards:

Federal agency personnel responsible for cultural resource management pursuant to Section 110 of the National Historic Preservation Act, as amended, in areas under Federal jurisdiction. A separate series of guidelines advising Federal agencies on their specific historic preservation activities under Section 110 is in preparation.

State Historic Preservation Offices responsible under the National Historic Preservation Act, as amended, for making decisions about the preservation of historic properties in their States in accordance with appropriate regulations and the Historic Preservation Fund Grants Management Manual. The State Historic Preservation Offices serve as the focal point for preservation planning and act as a central state-wide repository of collected information.

Local governments wishing to establish a comprehensive approach to the identification, evaluation, registration and treatment of historic properties within their jurisdictions.

Other individuals and organizations needing basic technical standards and guidelines for historic preservation activities.

Organization

This material is organized in three sections: Standards; Guidelines; and recommended technical sources, cited at the end of each set of guidelines. Users of this document are expected to consult the recommended technical sources to obtain guidance in specific cases.

Review of the Standards and Guidelines

The Secretary of the Interior's Standards for Rehabilitation have recently undergone extensive review and their guidelines made current after 5 years of field use. Users and other interested parties are encouraged to submit written comments on the utility of these Standards and Guidelines except for the Rehabilitation Standards mentioned above. This edition will be thoroughly reviewed by the National Park Service (including consultation with Federal and State agencies), after the end of its first full year of use and any necessary modifications will be made. Subsequent reviews are anticipated as needed. Comments should be sent to Chief, Interagency Resources Division, National Park Service, United States Department of the Interior, Washington, D.C. 20240.

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Secretary of the Interior's Standards for Preservation Planning

Preservation planning is a process that organizes preservation activities (identification, evaluation, registration and treatment of historic properties) in a logical sequence. The Standards for Planning discuss the relationship among these activities while the remaining activity standards consider how each activity should be carried out. The Professional Qualifications Standards discuss the education and experience required to carry out various activities.

The Standards for Planning outline a process that determines when an area should be examined for historic properties, whether an identified property is significant, and how a significant property should be treated.

Preservation planning is based on the following principles:

—Important historic properties cannot be replaced if they are destroyed. Preservation planning provides for conservative use of these properties, preserving them in place and avoiding harm when possible and altering or destroying properties only when necessary.

—If planning for the preservation of historic properties is to have positive effects, it must begin before the identification of all significant properties has been completed. To make responsible decisions about historic properties, existing information must be used to the maximum extent and new information must be acquired as needed.

—Preservation planning includes public participation. The planning process should provide a forum for open discussion of preservation issues. Public involvement is most meaningful when it is used to assist in defining values of properties and preservation planning issues, rather than when it is limited to review of decisions already made. Early

and continuing public participation is essential to the broad acceptance of preservation planning decisions.

Preservation planning can occur at several levels or scales: in a project area; in a community; in a State as a whole; or in the scattered or contiguous landholdings of a Federal agency. Depending on the scale, the planning process will involve different segments of the public and professional communities and the resulting plans will vary in detail. For example, a State preservation plan will likely have more general recommendations than a plan for a project area or a community. The planning process described in these Standards is flexible enough to be used at all levels while providing a common structure which promotes coordination and minimizes duplication of effort. The Guidelines for Preservation Planning contain additional information about how to integrate various levels of planning.

Standard I. Preservation Planning Establishes Historic Contexts

Decisions about the identification, evaluation, registration and treatment of historic properties are most reliably made when the relationship of individual properties to other similar properties is understood. Information about historic properties representing aspects of history, architecture, archeology, engineering and culture must be collected and organized to define these relationships. This organizational framework is called a "historic context." The historic context organizes information based on a cultural theme and its geographical and chronological limits. Contexts describe the significant broad patterns of development in an area that may be represented by historic properties. The development of historic contexts is the foundation for decisions about identification, evaluation, registration and treatment of historic properties.

Standard II. Preservation Planning Uses Historic Contexts To Develop Goals and Priorities for the Identification, Evaluation, Registration and Treatment of Historic Properties

A series of preservation goals is systematically developed for each historic context to ensure that the range of properties representing the important aspects of each historic context is identified, evaluated and treated. Then priorities are set for all goals identified for each historic context. The goals with assigned priorities established for each historic context are integrated to produce a comprehensive and consistent set of goals and priorities for all historic contexts in the geographical area of a planning effort.

The goals for each historic context may change as new information becomes available. The overall set of goals and priorities are then altered in response to the changes in the goals and priorities for the individual historic contexts.

Activities undertaken to meet the goals must be designed to deliver a usable product within a reasonable period of time. The scope of the activity must be defined so the work can be completed with available budgeted program resources.

Standard III. The Results of Preservation Planning Are Made Available for Integration Into Broader Planning Processes

Preservation of historic properties is one element of larger planning processes. Planning results, including goals and priorities, information about historic properties, and any planning documents, must be transmitted in a usable form to those responsible for other planning activities. Federally mandated historic preservation planning is most successfully integrated into project management planning at an early stage. Elsewhere, this integration is achieved by making the results of preservation planning available to other governmental planning bodies and to private interests whose activities affect historic properties.

Secretary of the Interior's Guidelines for Preservation Planning

Introduction

These Guidelines link the Standards for Preservation Planning with more specific guidance and technical information. They describe one approach to meeting the Standards for Preservation Planning. Agencies, organizations or individuals proposing to approach planning differently may wish to review their approaches with the National Park Service.

The Guidelines are organized as follows:

Managing the Planning Process
Developing Historic Contexts
Developing Goals for a Historic Context
Integrating Individual Historic Contexts—
  Creating the Preservation Plan
Coordinating with Management Frameworks
Recommended Sources of Technical
  Information

Managing the Planning Process

The preservation planning process must include an explicit approach to implementation, a provision for review and revision of all elements, and a mechanism for resolving conflicts within the overall set of preservation goals and between this set of goals and other land use planning goals. It is recommended that the process and its products be described in public documents.

Implementing the Process

The planning process is a continuous cycle. To establish and maintain such a process, however, the process must be divided into manageable segments that can be performed within a defined period, such as a fiscal year or budget cycle. One means of achieving this is to define a period of time during which all the preliminary steps in the planning process will be completed. These preliminary steps would include setting a schedule for subsequent activities.

Review and Revision

Planning is a dynamic process. It is expected that the content of the historic contexts described in Standard I and the goals and priorities described in Standard II will be altered based on new information obtained as planning proceeds. The incorporation of this information is essential to improve the content of the plan and to keep it up-to-date and useful. New information must be reviewed regularly and systematically, and the plan revised accordingly.

Public Participation

The success of the preservation planning process depends on how well it solicits and integrates the views of various groups. The planning process is directed first toward resolving conflicts in goals for historic preservation, and second toward resolving conflicts between historic preservation goals and other land-use planning goals. Public participation is intergral to this approach and includes at least the following actions:

1. Involving historians, architectural historians, archeologists, historical architects, folklorists and persons from related discipline to define, review and revise the historic contexts, goals and priorities;

2. Involving interested individuals, organizations and communities in the planning area in identifying the kinds of historic properties that may exist and suitable protective measures;

3. Involving prospective users of the preservation plan in defining issues, goals and priorities;

4. Providing for coordination with other planning efforts at local, state, regional and national levels, as appropriate; and

5. Creating mechanisms for identifying and resolving conflicts about historic preservation issues.

The development of historic contexts, for example, should be based on the professional input of all disciplines involved in preservation and not be limited to a single discipline. For prehistoric archeology, for example, data from fields such as geology, geomorphology and geography may also be needed. The individuals and organizations to be involved will depend, in part, on those present or interested in the planning area.

Documents Resulting from the Planning Process

In most cases, the planning process produces documents that explain how the process works and that discuss the historic contexts and related goals and priorities. While the process can operate in the absence of these documents, planning documents are important because they are the most effective means of communicating the process and its recommendations to others. Planning documents also record decisions about historic properties.

As various parts of the planning process are reviewed and revised to reflect current information, related documents must also be updated. Planning documents should be created in a form that can be easily revised. It is also recommended that the format, language and organization of any documents or other materials (visual aids, etc.) containing preservation planning information meet the needs of prospective users.

Developing Historic Contexts

General Approach

Available information about historic properties must be divided into manageable units before it can be useful for planning purposes. Major decisions about identifying, evaluating, registering and treating historic properties are most reliably made in the context of other related properties. A historic context is an organizational format that groups information about related historic properties, based on a theme, geographic limits and chronological period. A single historic context describes one or more aspects of the historic development of an area, considering history, architecture, archeology, engineering and culture; and identifies the significant patterns that individual historic properties represent, for example, Coal Mining in Northeastern Pennsylvania between 1860 and 1930. A set of historic contexts is a comprehensive summary of all aspects of the history of the area.

The historic context is the cornerstone of the planning process. The goal of preservation planning is to identify, evaluate, register and treat the full range of properties representing each historic context, rather than only one or two types of properties. Identification activities are organized to ensure that research and survey activities include properties representing all aspects of the historic context. Evaluation uses the historic context as the framework within which to apply the criteria for evaluation to specific properties or property types. Decisions about treatment of properties are made with the goal of treating the range of properties in the context. The use of historic contexts in organizing major preservation activities ensures that those activities result in the preservation of the wide variety of properties that represent our history, rather than only a small, biased sample of properties.

Historic contexts, as theoretical constructs, are linked to actual historic properties through the concept of property type. Property types permit the development of plans for identification, evaluation and treatment even in the absence of complete knowledge of individual properties. Like the historic context, property types are artifical constructs which may be revised as necessary.

Historic contexts can be developed at a variety of scales appropriate for local, State and regional planning. Given the probability of historic contexts overlapping in an area, it is important to coordinate the development and use of contexts at all levels. Generally, the State Historic Preservation Office possesses the most complete body of information about historic properties and, in practice, is in the best position to perform this function.

The development of historic contexts generally results in documents that describe the prehistoric processes or patterns that define the context. Each of the contexts selected should be developed to the point of identifying important property types to be useful in later preservation decision-making. The amount of detail included in these summaries will vary depending on the level (local, state, regional, or national) at which the contexts are developed and on their intended uses. For most planning purposes, a synopsis of the written description of the historic context is sufficient.

Creating a Historic Context

Generally, historic contexts should not be constructed so broadly as to include all property types under a single historic context or so narrowly as to contain only one property type per historic context. The following procedures should be followed in creating a historic context.

1. Identify the concept, time period and geographical limits for the historic context

Existing information, concepts, theories, models and descriptions should be used as the basis for defining historic contexts. Biases in primary and secondary sources should be identified and accounted for when existing information is used in defining historic contexts.

The identification and description of historic contexts should incorporate contributions from all disciplines involved in historic preservation. The chronological period and geographical area of each historic context should be defined after the conceptual basis is established. However, there may be exceptions, especially in defining prehistoric contexts where drainage systems or physiographic regions often are outlined first. The geographical boundaries for historic contexts should not be based upon contemporary political, project or other contemporary boundaries if those boundaries do not coincide with historical boundaries. For example, boundaries for prehistoric contexts will have little relationship to contemporary city, county or state boundaries.

2. Assemble the existing information about the historic context

a. Collecting information: Several kinds of information are needed to construct a preservation plan. Information about the history of the area encompassed by the historic context must be collected, including any information about historic properties that have already been identified. Existing survey or inventory entries are an important source of information about historic properties. Other sources may include literature on prehistory, history, architecture and the environment; social and environmental impact assessments; county and State land use plans; architectural and folklife studies and oral histories; ethnographic research; State historic inventories and registers; technical reports prepared for Section 106 or other assessments of historic properties; and and direct consultation with individuals and organized groups.

In addition, organizations and groups that may have important roles in defining historic contexts and values

should be identified. In most cases a range of knowledgeable professionals drawn from the preservation, planning and academic communities will be available to assist in defining contexts and in identifying sources of information. In other cases, however, development of historic contexts may occur in areas whose history or prehistory has not been extensively studied. In these situations, broad general historic contexts should be initially identified using available literature and expertise, with the expectation that the contexts will be revised and subdivided in the future as primary source research and field survey are conducted. It is also important to identify such sources of information as existing planning data, which is needed to establish goals for identification, evaluation, and treatment, and to identify factors that will affect attainment of those goals.

The same approach for obtaining information is not necessarily desirable for all historic contexts. Information should not be gathered without first considering its relative importance to the historic context, the cost and time involved, and the expertise required to obtain it. In many cases, for example, published sources may be used in writing initial definitions of historic contexts; archival research or field work may be needed for subsequent activities.

b. *Assessing information:* All information should be reviewed to identify bias in historic perspective, methodological approach, or area of coverage. For example, field surveys for archeological sites may have ignored historic archeolgical sites, or county land use plans may have emphasized only development goals.

3. Synthesize information

The information collection and analysis results in a written narrative of the historic context. This narrative provides a detailed synthesis of the data that have been collected and analyzed. The narrative covers the history of the area from the chosen perspective and identifies important patterns, events, persons or cultural values. In the process of identifying the important patterns, one should consider:

a. Trends in area settlement and development, if relevant;

b. Aesthetic and artistic values embodied in architecture, construction technology or craftsmanship;

c. Research values or problems relevant to the historic context; social and physical sciences and humanities; and cultural interests of local communities; and

d. Intangible cultural values of ethnic groups and native American peoples.

4. Define property types.

A property type is a grouping of individual properties based on shared physical or associative characteristics. Property types link the ideas incorporated in the theoretical historic context with actual historic properties that illustrate those ideas. Property types defined for each historic context should be directly related to the conceptual basis of the historic context. Property types defined for the historic context "Coal Mining in Northeastern Pennsylvania, 1860–1930" might include coal extraction and processing complexes; railroad and canal transportation systems; commercial districts; mine workers' housing; churches, social clubs and other community facilities reflecting the ethnic origins of workers; and residences and other properties associated with mine owners and other industrialists.

a. *Identify property types:* The narrative should discuss the kinds of properties expected within the geographical limits of the context and group them into those property types most useful in representing important historic trends.

Generally, property types should be defined after the historic context has been defined. Property types in common usage ("Queen Anne houses," "mill buildings," or "stratified sites") should not be adopted without first verifying their relevance to the historic contexts being used.

b. *Characterize the locational patterns of property types:* Generalizations about where particular types of properties are likely to be found can serve as a guide for identification and treatment. Generalizations about the distribution of archeological properties are frequently used. The distribution of other historic properties often can be estimated based on recognizable historical, environmental or cultural factors that determined their location. Locational patterns of property types should be based upon models that have an explicit theoretical or historical basis and can be tested in the field. The model may be the product of historical research and analysis ("Prior to widespread use of steam power, mills were located on rivers and streams able to produce water power" or "plantation houses in the Mississippi Black Belt were located on sandy clay knolls"), or it may result from sampling techniques. Often the results of statistically valid sample surveys can be used to describe the locational patterns of a representative portion of properties belonging to a particular property type. Other surveys can also provide a basis for suggesting locational patterns if a diversity of historic properties was recorded and a variety of environmental zones was inspected. It is likely that the identification of locational patterns will come from a combination of these sources. Expected or predicted locational patterns of property types should be developed with a provision made for their verification.

c. *Characterize the current condition of property types:* The expected condition of property types should be evaluated to assist in the development of identification, evaluation and treatment strategies, and to help define physical integrity thresholds for various property types. The following should be assessed for each property type:

(1) Inherent characteristics of a property type that either contribute to or detract from its physical preservation. For example, a property type commonly constructed of fragile materials is more likely to be deteriorated than a property type constructed of durable materials; structures whose historic function or design limits the potential for alternative uses (water towers) are less likely to be reused than structures whose design allows a wider variety of other uses (commercial buildings or warehouses).

(2) Aspects of the social and natural environment that may affect the preservation or visibility of the property type. For example, community values placed on certain types of properties (churches, historic cemeteries) may result in their maintenance while the need to reuse valuable materials may stimulate the disappearance of properties like abandoned houses and barns.

It may be most efficient to estimate of the condition of property types based on professional knowledge of existing properties and field test these estimates using a small sample of properties representative of each type.

5. Identify information needs

Filling gaps in information is an important element of the preservation plan designed for each historic context. Statements of the information needed should be as specific as possible, focusing on the information needed, the historic context and property types it applies to, and why the information is needed to perform identification, evaluation, or treatment activities.

Developing Goals for a Historic Context

Developing Goals

A goal is a statement of preferred preservation activities, which is

generally stated in terms of property types.

The purpose of establishing preservation goals is to set forth a "best case" version of how properties in the historic context should be identified, evaluated, registered and treated. Preservation goals should be oriented toward the greatest possible protection of properties in the historic context and should be based on the principle that properties should be preserved in place if possible, through affirmative treatments like rehabilitation, stabilization or restoration. Generally, goals will be specific to the historic context and will often be phrased in terms of property types. Some of these goals will be related to information needs previously identified for the historic context. Collectively, the goals for a historic context should be a coherent statement of program direction covering all aspects of the context.

For each goal, a statement should be prepared identifying:

1. The goal, including the context and property types to which the goal applies and the geographical area in which they are located;

2. The activities required to achieve the goal;

3. The most appropriate methods or strategies for carrying out the activities;

4. A schedule within which the activities should be completed; and

5. The amount of effort required to accomplish the goal, as well as a way to evaluate progress toward its accomplishment.

Setting priorities for goals

Once goals have been developed they need to be ranked in importance. Ranking involves examining each goal in light of a number of factors.

1. General social, economic, political and environmental conditions and trends affecting (positively and negatively) the identification, evaluation, registration and treatment of property types in the historic context.

Some property types in the historic context may be more directly threatened by deterioration, land development patterns, contemporary use patterns, or public perceptions of their value, and such property types should be given priority consideration.

2. Major cost or technical considerations affecting the identification, evaluation and treatment of property types in the historic context.

The identification or treatment of some property types may be technically possible but the cost prohibitive; or techniques may not currently perfected (for example, the identification of submerged sites or objects, or the evaluation of sites containing material for which dating techniques are still being developed).

3. Identification, evaluation, registration and treatment activities previously carried out for property types in the historic context.

If a number of properties representing one aspect of a historic context have been recorded or preserved, treatment of additional members of that property type may receive lower priority than treatment of a property type for which no examples have yet been recorded or preserved. This approach ensures that the focus of recording or preserving all elements of the historic context is retained, rather than limiting activities to preserving properties representing only some aspects of the context.

The result of considering the goals in light of these concerns will be a list of refined goals ranked in order of priority.

Integrating Individual Contexts—Creating the Preservation Plan

When historic contexts overlap geographically, competing goals and priorities must be integrated for effective preservation planning. The ranking of goals for each historic context must be reconciled to ensure that recommendations for one context do not contradict those for another. This important step results in an overall set of priorities for several historic contexts and a list of the activities to be performed to achieve the ranked goals. When applied to a specific geographical area, this is the preservation plan for that area.

It is expected that in many instances historic contexts will overlap geographically. Overlapping contexts are likely to occur in two combinations—those that were defined at the same scale (i.e., textile development in Smithtown 1850–1910 and Civil War in Smithtown 1855–1870) and those defined at different scales (i.e., Civil War in Smithtown and Civil War in the Shenandoah Valley). The contexts may share the same property types, although the shared property types will probably have different levels of importance, or they may group the same properties into different property types, reflecting either a different scale of analysis or a different historical perspective.

As previously noted, many of the goals that the formulated for a historic context will focus on the property types defined for that context. Thus it is critical that the integration of goals include the explicit consideration of the potential for shared property type membership by individual properties. For example, when the same property types are used by two contexts, reconciling the goals will require weighing the level of importance assigned to each property type. The degree to which integration of historic contexts must involve reconciling property types may be limited by the coordinated development of historic contexts used at various levels.

Integration with Management Frameworks

Preservation goals and priorities are adapted to land units through integration with other planning concerns. This integration must involve the resolution of conflicts that arise when competing resources occupy the same land base. Successful resolution of these conflicts can often be achieved through judicious combination of inventory, evaluation and treatment activities. Since historic properties are irreplaceable, these activities should be heavily weighted to discourage the destruction of significant properties and to be compatible with the primary land use.

Recommended Sources of Technical Information

Resource Protection Planning Process. State and Plans Grants Division, 1980. Washington, D.C. Available from Survey and Planning Branch, Interagency Resources Division, National Park Service, Department of the Interior, Washington, D.C. 20240. Outlines a step-by-step approach to implementing the resource protection planning process.

Resource Protection Planning Process Case Studies. Available from Survey and Planning Branch, Interagency Resources Division, National Park Service, Department of the Interior, Washington, D.C. 20240. Reports prepared by State Historic Preservation Offices and other using the planning process.

Planning Theory. Andreas Faludi, 1980. Oxford: Pergamon Press. Constructs a model of planning using concepts borrowed from general systems theory.

SECRETARY OF THE INTERIOR'S STANDARDS FOR IDENTIFICATION

Identification activities are undertaken to gather information about historic properties in an area. The scope of these activities will depend on: existing knowledge about properties; goals for survey activities developed in the planning process; and current management needs.

Standard I. Identification of Historic Properties Is Undertaken to the Degree Required To Make Decisions

Archival research and survey activities should be designed to gather the information necessary to achieve defined preservation goals. The

APPENDIX 3

MARYLAND COMPREHENSIVE STATE HISTORIC PRESERVATION PLAN:

STATEWIDE HISTORIC CONTEXTS

I. **Geographic Organization:**

1)	Eastern Shore	(all Eastern Shore counties, and Cecil County)
2)	Western Shore	Anne Arundel, Calvert, Charles, St. Mary's, and Prince George's Counties)
3)	Piedmont	(Harford, Baltimore, Carroll, Frederick, Howard, and Montgomery Counties, and Baltimore City)
4)	Western Maryland	Washington, Allegany, and Garrett Counties)

II. **Chronological/Developmental Periods:**

1)	Paleo-Indian	10000-7500 B.C.
2)	Early Archaic	7500-6000 B.C.
3)	Middle Archaic	6000-4000 B.C.
4)	Late Archaic	4000-2000 B.C.
5)	Early Woodland/Archaic	2000- 500 B.C.
6)	Middle Woodland	500 B.C.-A.D.900
7)	Late Woodland	A.D. 900-1600
8)	Contact and Settlement Period	A.D. 1570-1750
9)	Rural Agrarian Intensification	A.D. 1680-1815
10)	Agricultural-Industrial Transition	A.D. 1815-1870
11)	Industrial/Urban Dominance	A.D. 1870-1930
12)	Modern Period	A.D. 1930-Present

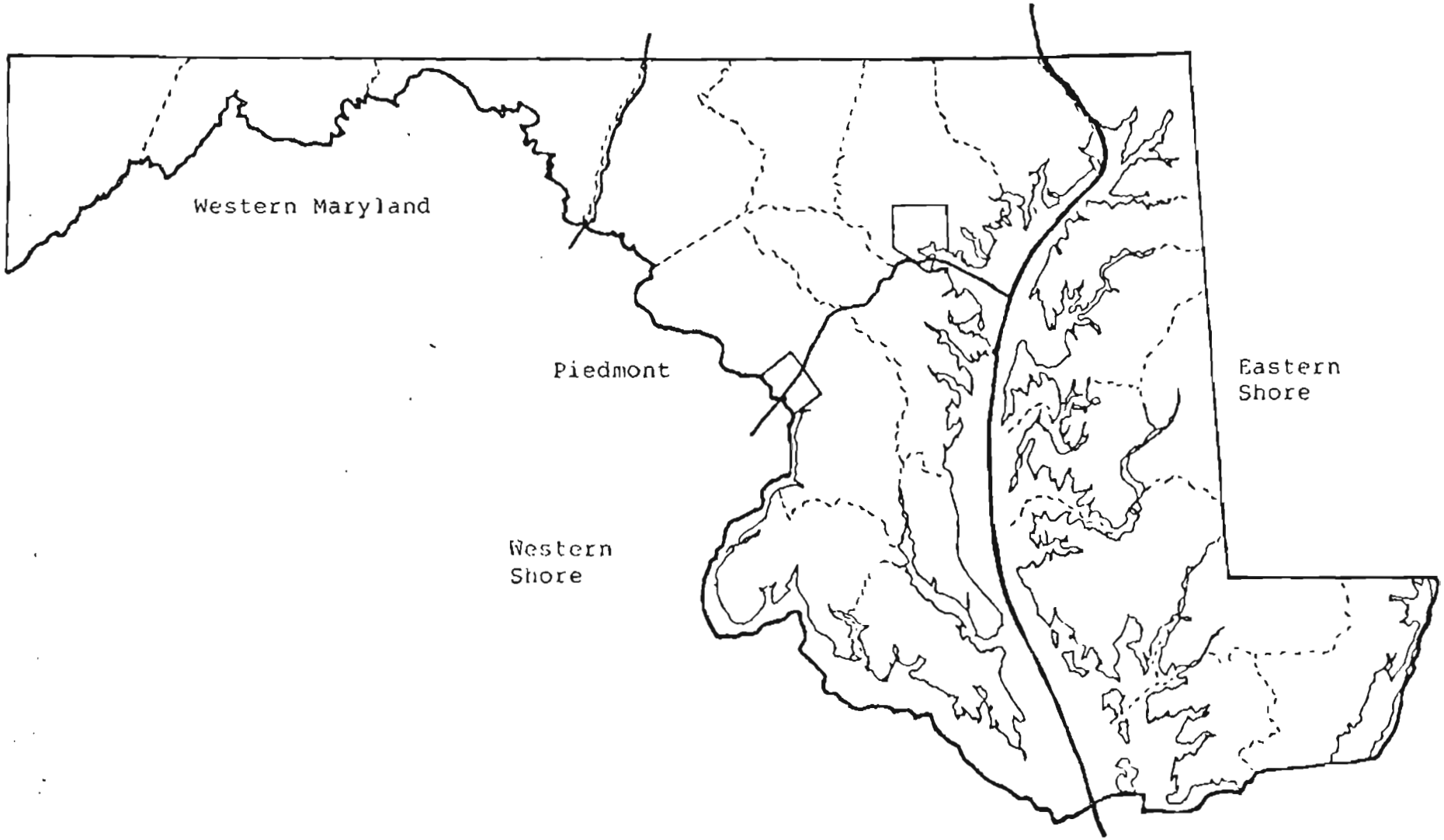
III. **Prehistoric Period Themes:**

1) Subsistence
2) Settlement
3) Political
4) Demographic
5) Religion
6) Technology
7) Environmental Adaptation

IV. **Historic Period Themes:**

1) Agriculture
2) Architecture, Landscape Architecture and Community Planning
3) Economic (Commercial and Industrial)
4) Government/Law
5) Military
6) Religion
7) Social/Education/Cultural
8) Transportation

MARYLAND HISTORIC CONTEXTS:REGIONAL DIVISIONS



HISTORIC CONTEXT ORGANIZATION

Historic Contexts in the Maryland State Comprehensive Historic Preservation Plan are organized first by geographic region, then by time/developmental period, and then by theme (field of activity or area of significance) and the types of cultural resources associated with each theme. This organizational system provides a necessary framework for the description and analysis of all known or expected cultural resource types, and the basis for evaluating the significance of those resources.

The four **geographic regions** of the state are generally recognized physiographic provinces which also have distinctive cultural histories. The four regions are as follows:

I. **EASTERN SHORE** (Eastern Shore, including Cecil County)

II. **WESTERN SHORE** (Anne Arundel, Calvert, Charles, St. Mary's, and Prince George's Counties)

III. **PIEDMONT** (Harford, Baltimore, Carroll, Frederick, Howard, Montgomery Counties and Baltimore City)

IV. **WESTERN MARYLAND** (Washington, Allegany, and Garrett Counties)

These regions are defined on the map which appears on the next page.

Each of the above geographic regions will then be divided into the following **time/developmental periods:**

A. **PALEO-INDIAN** **10000-7500 B.C.**

Evidence indicates that territoral semi-nomadic bands, dependent primarily on hunting but also utilizing a variety of other resources, exploited a much colder, late glacial environment in which big game animals such as mastodon and mammoth roamed extensive grasslands.

B. **EARLY ARCHIAC** **7500-6000 B.C.**

General social organization remained much the same as the band-level societies of the Paleo-Indian period. However, a warming climate with an attendant replacement of grassland areas and associated big game animals with boreal forests and smaller animals such as deer, resulted in gradual cultural change.

C. **MIDDLE ARCHAIC** **6000-4000 B.C.**

More modern environmental conditions led to a probable rise in population due to more available food resources. Increasing emphasis was placed on exploiting a diversity of varied resources.

D. **LATE ARCHAIC** **4000-2000 B.C.**

Increased sedentism arises by the end of this period. Although the social system is still at a band level, seasonal population aggregation is occurring at larger camps where seasonally available food resources such as nuts and fish are harvested.

E. **EARLY WOODLAND/ARCHAIC** **2000-500 B.C.**

Increasingly sedentary lifestyle. Wide-ranging trade networks established. Ceramics appear. Increasingly complex social systems.

F. **MIDDLE WOODLAND** **500 B.C. - 900 A.D.**

Continued increase in social system complexity with bands organized into hamlets. Probably first beginnings of horticulture but still main emphasis on hunting and gathering. Continued trade networks.

G. **LATE WOODLAND** **900-1600 A.D.**

Tribal level societies emerge, dependent on agriculture for main source of food. Hostility increased between groups as evidenced by fortified villages. The groups formed during this period formed the basis for the tribes encountered by Europeans when first settled.

H. **CONTACT AND SETTLEMENT PERIOD** **1570-1750 A.D.**

This phase is first characterized by contact between the native Indian tribes and the newly arrived Europeans, and includes the interplay between the two cultures and the development of trading posts, missions, forts and Indian reservations. During the period, the native tribes were gradually replaced by European settlers who established capitals at St. Mary's City and Annapolis, and established an economy based on tobacco production in the Chesapeake region. Settlement occurred first near the Chesapeake, expanding along the bay and rivers, and gradually moving into western lands as road networks were established.

I. **RURAL AGRARIAN INTENSIFICATION** **1680-1815 A.D.**

This period saw the lessening of frontier conditions in most parts of the state, and the establishment of a stable agricultural society, with tobacco replaced by agricultural diversity. Increased trade and shipping led to the founding of port towns and trading centers. Expansion into central and western Maryland was virtually completed, and the arrival of German settlers from Pennsylvania created a distinct cultural region. Several changes in the system of government occurred, from proprietary to provincial to state government. Religious, social, cultural, and educational institutions were established in most of the state, and small local industries began to appear.

J. **AGRICULTURAL-INDUSTRIAL TRANSITION** **1815-1870 A.D.**

During the period following the War of 1812, commerce and industry became increasingly important in the state's economy, until development in these fields was interrupted by the Civil War. The impacts of the Industrial Revolution were seen, such as the growth of manufacturing technology and radical innovations in transportation systems (canals, railroads, turnpikes). These improved transportation techniques led to the development of Western Maryland and aided in the growth of the mining industry in that region. At the same time, Baltimore City became a major port and industrial and cultural center.

K. **INDUSTRIAL/URBAN DOMINANCE** **1870-1930 A.D.**

In Maryland, the period following the Civil War saw a shift from a primarily agricultural economy to one which was dominated by industry and commerce. This trend was accompanied by the increasing dominance of towns and cities over rural areas, and the growing separation of urban and rural culture. Cities such as Baltimore, Cumberland, and Hagerstown experienced great growth, partly due to the arrival of many immigrants. The state became part of national economic and transportation networks, and with World War I, entered the international scene. Planned communities and suburban developments began to surround the major cities, which were becoming metropolitan centers.

L. **MODERN PERIOD** **1930 - Present**

The effects of the Depression, and then the prosperity and growth after World War II, were seen in Maryland, as the state was increasingly influenced by national and international events, due to rapid advances in technology and mass communications. The dominance of urban and industrial culture became clearly established, although rural agricultural areas sill comprised a large portion of the state. Baltimore and Washington, D.C. especially, were centers of commerce, industry, and culture, although later in the period these cities experienced a decline, reflecting a national trend. As many residents and businesses moved from the inner cities to the suburbs, suburban areas developed as a new center of influence in the state, with the greatest growth in the Baltimore-Washington-Annapolis area.

Within each of the above time/developmental periods, information is then organized under **themes.** These themes reflect broad areas of human activity, and can be used as areas of significance for all types of cultural resources. Each theme will then be divided by function into the **resource types** associated with the theme. The themes, and examples of the types of resources to be included under each theme, follow below. The themes used for the prehistoric time periods (A-G above) vary slightly from those used for historic time periods (H-L).

PREHISTORIC PERIOD THEMES

During the 10000 years of prehistoric Indian occupation in Maryland, a variety of cultures developed, changed, and became extinct, leaving behind but a small portion of their material remains. But through the scientific study of these remains and associated environmental data, researchers can determine the significant variables of the cultural systems which existed. These variables are interpolated so that a change in one variable causes changes in other variables. By taking a culture systems approach and developing themes which correspond to the variables of all culture systems, the state plan provides a mechanism to promote research and preservation of the variety of sites which can contribute to our understanding of past cultures.

1. **Subsistence Theme:** This theme seeks explanations of the different strategies that cultures developed to procure, process, and store food. Beyond the basic studies of site function based on the analysis of a site location, the tool types from the site, and the food remains recovered, this theme also explores the reconstruction of past habitats, study of the energy required to procure and process food, functional analysis of tools to determine what resources were being procured and processed, and the evolution of subsistence strategies over time and between different

regions of the state. Site types represent the entire range of prehistoric sites.

2. **Settlement Theme:** The settlement theme seeks explanations of different prehistoric utilization of a region in response to subsistence, political, demographic, and religious aspects of the culture system. While these studies primarily explore the subsistence-induced aspects of settlement patterns, studies of house types, village plans, and regional distributions are also combined with an analysis of the social and political aspects of settlement. Site types again reflect the entire range of sites.

3. **Political Theme:** This theme explores the inter-relationships of contemporaneous cultures and group interaction within cultures. Thus, research questions focus on the nature of the different levels of social organization, kinship systems which contribute to social integration, the intensification of production, fortification, resource redistribution, or migration in response to culture conflict or contact. The type of sites for this theme include fortified village sites, cemetery sites, and hamlet sites.

4. **Demographic Theme:** The evaluation of population trends through time as well as the factors affecting the health, mortality, and distribution of populations is the subject of this theme. Research issues include the study of adaptive responses to overpopulation or underpopulation, population composition and population control. Grave sites provide the physical anthropological data to study stress, mortality, composition, and health of prehistoric cultures while site and artifact types and interrelationships change through time. Site types include cemeteries but can also include a range of sites and chronological diagnostic artifact types.

5. **Religious Theme:** The religious theme explores the world view of various cultures and the material manifestations of spiritual beliefs. Research issues include the analysis of mortuary sites for evidence of the development of a religious elite and the study of burial practices, artifact analysis to reveal regional trends and influences in religious beliefs and study of technological aspects of religious beliefs. Site types include burial mounds, cemeteries, and sites containing features or objects associated with religious activities.

6. **Technology Theme:** Although the technological aspects of a culture form the primary basis of interpretation of all themes, this theme relates primarily to the study of mechanisms developed to transform the social and cultural environment. Research issues include the identification of changing tool type styles, the identification of different functions of tools, replication, experimental and living archeology, as well as studies of storage, transportation, and housing technologies. All sites containing artifacts or features can contribute to this theme.

7. **Environmental Adaptation Theme:** The environmental adaptation theme seeks geological and other data to reconstruct environmental changes and explores prehistoric adaptive responses to those changes. Research studies include analysis of changes in sea level, forest and animal compositions and the resultant changes in carrying capacity, the energy efficiency of various procurement and feeding strategies, and the culture processes which explain the perceived responses to the changing environmental conditions. All site types are included in this theme.

HISTORIC PERIOD THEMES

1. **Agriculture:**

The agriculture theme relates to crop and livestock production and includes the following resource types: small family farmsteads, plantations, tobacco farms, grain producing farms, livestock/dairy farms, orchards and agribusiness.

2. **Architecture, Landscape Architecture, Community Planning:**

These themes encompass the history of design and construction in architecture, landscape architecture, and the planning of towns and cities. Resource types include impermanent structures, rural vernacular, urban vernacular, great architectural landmarks, national styles, parks, gardens and landscaped cemeteries, town and village plans, urban design, planned communities and company towns.

3. **Economic (Commercial and Industrial):**

Commercial activities include trade, finance, business, and commercial services. Examples of resource types are banks, other financial areas (real estate, insurance, etc.), trading posts, stores, market buildings, restaurants, hotels, taverns, gas stations, and other services.

Industrial activities relate to the extraction, production and processing of materials, such as quarrying, mining, manufacturing, lumbering, technology, electronics, pottery, textiles, food gathering and processing, brewing and distilling, fuel, building materials, tools, transportation, seafood, and many other industries. Resource types associated with industry are quarries, mills, factories, breweries, floating vessels and shipyards, mines, forges and furnaces, kilns, laboratories, power plants, dams, tanneries, and other small industrial sites.

Many forms of communication also are included under commerce and industry, such as telegraph, telephone, radio and television.

4. **Government/Law:**

This theme studies governmental systems, political activities and events, legal systems, important political/governmental events in history (treaty signings), and political leaders. Types of resources which represent this theme are city halls, town halls, courthouses, police departments, jails, post offices, fire departments, public works projects, other types of government buildings, and sites of important governmental events or places associated with governmental leaders.

5. **Military:**

This theme includes military activity, battles, strategic locations, and events important in military history. It includes the following resource types: armories, fortifications, battlefields, camps, travel routes, military bases, military prisons, and strategic military points such as crossings and lookouts.

6. **Religion:**

This area of study examines places of worship, religious training and education, and administration of religious facilities. Churches, meeting houses, synagogues, mosques, temples, convents, monasteries, missions, shrines, and sacred places are resource types associated with this theme.

7. **Social/Educational/Cultural:**

These themes encompass social, educational, and cultural activities and institutions; human services, welfare, charitable, fraternal, and community organizations; the fine arts and performing arts (painting, sculpture, dance, drama, music); literature; social and recreational gathering facilities; entertainment and leisure activity; and broad social, cultural, or intellectual movements. Resource types include libraries, museums, schools, colleges, hospitals, orphanages, fraternal and social meeting halls, community centers, theatres and concert halls, places associated with writers, artists, performers, resorts, amusement parks, zoos, sports facilities. Landscaped gardens, parks, and cemeteries are listed under the Architecture/Landscape Architecture/Community Planning theme.

8. **Transportation:**

This theme relates to transportation networks — road, water, canal, railroad, and air -- and the various structures, vehicles, equipment, and technology associated with each mode of transport. Resource types include bridges of all types; boats and other watercraft, piers and wharves, ferries, lighthouses; roads and turnpikes, tollhouses, automobiles, streetcars, and other vehicles; canals, locks, and associated structures; railroads, stations, engine houses, trains; airports, airplanes, landing fields, space vehicles; and research facilities associated with transportation systems.

For each of the resource types listed under historic period themes, several classes of site types can then be analyzed. These site types include:

1. Archeological Sites
2. Standing Structures
3. Landscape Features
4. Town/City Plans
5. Objects
6. Intangibles

For one region (Western Maryland), the following organizational structure illustrates how one theme, within one prehistoric and one historic period, would be examined:

PREHISTORIC PERIOD EXAMPLE:

REGION: IV. WESTERN MARYLAND

PERIOD: LATE WOODLAND 900-1600 A.D.

THEME: POLITICAL

RESOURCE TYPE: a. Fortified villages

SITE TYPES:

1. Archeological Sites
2. Standing Structures
3. Landscape Features
4. Town, Village and City Plans
5. Objects
6. Intangibles

b. Cemeteries
1-6 as above

c. Hamlets
1-6 as above

HISTORIC PERIOD EXAMPLE:

REGION: IV. WESTERN MARYLAND

PERIOD: H. RURAL AGRARIAN INTENSIFICATION 1680-1815 A.D.

THEME: 1. AGRICULTURE

RESOURCE TYPE: a. Small family farmsteads

SITE TYPES:

1. Archeological Sites
2. Standing Structures
3. Landscape Features
4. Town, Village and City Plans
5. Objects
6. Intangibles (Folklore)

b. Plantations
1-6 as above

c. Tobacco Farms
1-6 as above

d. Grain Farms

e. Livestock/Dairy Farms

f. Fruit Production (Orchards)

g. Agribusiness

h. Other

APPENDIX 4 SAMPLE DEVELOPMENT OF MARYLAND HISTORIC CONTEXT

Introduction:

This material has been prepared to guide the development of historic contexts in Maryland, according to the steps outlined in the Secretary of the Interior's Standards and Guidelines for Preservation Planning (Appendix 2). It should be noted that the "Examples" shown under each step are very brief samples which illustrate the type of information to be included under each step. These samples are not to be considered complete examples of context development.

Step 1: Define Historic Contexts

Identify geographical, chronological, and conceptual/thematic limits. (Use statewide organizational framework included in Maryland Historical Trust's "Maryland Comprehensive Historic Preservation Plan", and adapt locally.)

Example: Region: Piedmont

Time Period/Developmental Phase: 1870-1930, Industrial/Urban Dominance

Concept/Theme: Agriculture

Step 2: Assemble Information About the Historic Context

a) Collect information on:

1. Historical development

Example:

Conduct research in primary and secondary sources on settlement patterns, development of agriculture during period.

2. Identified historic properties

Example:

Compile site survey, National Register,

compliance and Technical Preservation Services data as well as other documentation on known agricultural properties in the region and county.

3. Relevant sources and organizations/agencies

Example:

Compile listing of relevant groups, such as agricultural land preservation groups, farmers associations, rural community groups who have knowledge and interest in preservation of agricultural properties.

b) Assess the above information for completeness, data gaps, biases.

Example:

Review past research and fieldwork, and consult with historians and other experts in field; explain factors causing gaps and biases.

Step 3: Synthesize information

Write narrative describing:

a) Background history, development patterns.

Example:

During the early part of the period (1870-1900) there was a boom in agricultural activity and production, especially grain, due to demand from the Civil War, improved transportation, new farming technology. Tobacco farming became much less important. The county remained a stable agricultural society, but increasingly, urban influences were felt. After World War I, suburban development began to change the rural character of many areas, and this trend away from agriculture toward commercial and residential development has continued.

b) Aesthetic values, issues, problems in architecture, construction.

Example:

During this time, the design of farm buildings was influenced by mass production and popular design publications. Traditional and vernacular farm building forms and techniques were adapted, and new technology changed building design. The layout of farm complexes changed to accommodate different agricultural practices. Few new farms were established; instead, existing farms were expanded or incorporated into larger ones, or farm buildings remodelled or replaced.

c) Research issues, intangible cultural values.

Example:

Research questions: See Appendix 5 to the "Maryland Comprehensive Historic Preservation Plan", Research Issues for the Study of Maryland's Above-Ground Historic Resources, for possible research questions for agricultural history.

Step 4: Classify Property Types, Estimate Universe, Define Characteristic Features, Integrity Levels, and Stresses

a) Identify groups of properties which share common characteristics and are associated with the concept/theme, time period, and region.

Example:

-Family farmsteads
-Plantations/manors/estates
-Tobacco farms
-Grain producing farms
-Livestock/dairy farms
-Orchards
-Agribusiness

b) Characterize the locational patterns of property types and estimate potential numbers and location of sites.

1. Analyze patterns of site distribution, and cultural and environmental factors influencing site location.

   Example:

   Farms during the period were usually located with access to road and rail transportation and near water sources, as in previous periods. Soil quality continued to influence farm locations.

2. Create predictive models for site location and test models using samples.

   Example:

   Use Censuses of Agriculture during the period to locate farms; use Maryland Inventory of Historic Sites, National Register, and other data; use historic maps and conduct computer mapping with modern USGS 7.5 minute topographic maps.

3. Develop estimates of numbers of sites which existed during the period and survival rates, both above-ground and as archeological sites.

   Example:

   Compare past and present Censuses of Agriculture, historic maps, Landsat photographs to estimate numbers of farms which existed during the period and compare with data on farms and farm sites today to estimate survival rates. Analyze for both standing structures and archeological sites.

4. Evaluate and define relative scarcity and typicality of the property type and whether

high or low integrity levels should be required for significance.

Example:

Once the potential universe of sites is known, then we can begin to determine whether the property type has a large number of surviving examples or only a few, thus helping to make decisions on relative rarity or commonness of sites, and whether integrity levels should be low or high.

There are only 10 known examples of this property in the county, and 50 in Maryland. It is estimated that there may be 15 in the county and 75 in Maryland. Since this is a relatively scarce type, with a limited number of resources, a property of this type would not need to meet strict standards of integrity.

c) Characterize the current and expected condition of property types and define expected physical integrity levels and stresses.

1. Define the inherent characteristics, essential interior/exterior features:

   Example: (Note: Example is for a standing structure.)

CHARACTERISTIC FEATURES

Building Exterior	Define Expected Features:
Form: (e.g., size, shape, height of building, pattern of openings)	

Structural System:
(e.g., building framing members, including joists, trusses, loadbearing walls)

Finishes/Cladding:
(e.g. clapboard, brick, shingles, roofing)

Ornamentation:
(e.g., cornices, sills, lintels, doors, windows, sash, stoops)

Building Interior

Floor Plan:
(e.g., sequence of spaces, size and shape of rooms/hallways)

Finishes:
(e.g., plasterwork, floorboards, tin/wood ceilings)

Ornamentation:
(e.g., door/window trim, baseboards, decorative plaster medallions, wainscotting, stairways)

Building Setting

Topographic features (such as a gorge or the crest of a hill)

Number and density of buildings or structures around the property or relationship with parks or other open space

Driveways, walkways, paths, fencing, lighting, signs, benches

Plants and trees, berms, foundations, wells, terraces, drainage or irrigation

ditches, or archeological features

2. Define the level of integrity required for local, state, and national significance:

SIGNIFICANCE AND INTEGRITY CRITERIA

	Materials	Workmanship	Design	Setting	Location	Feeling	Associatio
National Register Standards: __% Intact							
State Inventory: __% Intact							
Local Designation: __% Intact							

The degree of integrity required for a particular resource will vary according to several factors. For example, if the resource is one of many examples of its type, then a higher degree of integrity will be required for it to be considered significant. Or, if the resource is being evaluated for its significance as part of a district, then its exterior features and setting will require more integrity then its interior features.

3. Define the environmental factors, both cultural and environmental, that either threaten the resource's survival or can assist in the preservation of the resource.

Example:

Family Farmstead:

Stresses:

-Development pressure from new land use, resulting in demolition or change to the setting.

-Changing agricultural economy forces small farms out of business, thus causing vacancy, obsolescence, and neglect.

-Arson, vandalism are problems in some areas.

Positive Assets:

-Potential for re-use as conference center

-Property affords scenic setting and view

-Local farmers group wants to save.

Step 5: Summarize information and assess future needs.

Specific information gaps relating to historic contexts and property types should be described. Explanation should be given of why this is needed to perform identification, evaluation, or treatment activities.

Conclusion:

Once the historic context is developed, then goals can be created describing preferred preservation activities for groups of property types as described further in the Secretary's Standards (see pp. 44719 - 44720 of Standards, Appendix 2).

APPENDIX 5

RESEARCH ISSUES FOR THE STUDY OF MARYLAND'S ABOVE-GROUND HISTORIC RESOURCES

Introduction:

Throughout the state, survey activity to date has of necessity focused primarily on the most significant and visible historic resources. Domestic architecture has received far more attention than commercial, industrial or agricultural resources, for example, and few studies have given equal attention to resources with primarily social significance, such as black communities, workers' housing, or domestic outbuildings.

It is essential that future survey and research activity respond to these issues and begin to address data gaps, neglected areas of research and threatened resources. Research must be directed toward analysis of resources by region, time period, theme, and related property types in order to implement the MHT's comprehensive planning efforts and improve evaluation and protection functions. In recent years, local and regional survey activity has been expanded into thematic areas to a considerable extent, and this trend must be continued and expanded. Thematic surveys have also been undertaken that are independent of local surveys. These include a survey of industrial sites, buildings and complexes in Baltimore, a survey of traditional sailing craft of the Chesapeake Bay, a survey and preservation study of the Mason-Dixon east-west boundary line project, and a comprehensive field recording project that has focused on agricultural buildings in Maryland's Tidewater region. In addition, several surveys sponsored by other state agencies have included a thematic focus. Examples are the State Highway Administration bridge survey (within the context of all M/DOT owned historic resources), an on-going survey of state-owned railroad lines for the State Railway Administration, a survey of the state's penal institutions for the Department of Public Safety and Corrections, and a survey of all National Guard armories for the Military Department.

The principal obstacle to broad thematic surveys is usually the lack of a sponsoring grant applicant and the Trust may find it necessary to commit direct staff support to particularly pressing needs when matching funds are not available. Similarly,

more narrowly defined research needs could be undertaken on an individual basis. A more coordinated effort to work with university history, folklore, geography, architecture and preservation programs could be used to link identified research needs with class projects or thesis and dissertation research. Increased research time for Trust staff would serve the dual purpose of meeting research needs and keeping staff members abreast of current scholarship.

The publication of county and regional architectural surveys has been an important and visible component of the Trust's Community Education and Survey and Planning programs since the early 1970s. Early publications consisted primarily of a catalogue of historic sites within a defined region. As the survey program has expanded, these publications have grown to include lengthy essays discussing local history and analyzing the architectural forms and traditions found in that region. Current inventories have been expanded to include discussion of prehistoric and historic archeological resources, as well as preservation planning issues and priorities for the future. The format and content for these publications will continue to evolve in response to the ever-increasing pool of research and fieldwork and to changing preservation needs and priorities. The county inventory series should remain the standard format for Trust publication efforts, but other types of publications are needed as well. These should include broader thematic studies developed from regional or statewide survey and research projects, and site-specific case studies.

Research Questions:

The following research questions have been developed by the Maryland Historical Trust to guide future research and survey work in Maryland. These suggested research issues have been identified to date; additional questions and topics may be defined in the future.

For all these themes and questions, research should seek to identify the character - defining features of property types in order to provide the basis for evaluation and protection decisions. Research should advance the techniques and methodologies of the field (for example, create predictive models and estimates of the universe of historic sites, and their survival rates over time.) Technical research can include case studies in special problems and development of treatment models for property types.

AGRICULTURE THEME:

Research Issues:

1. How are changes in agriculture reflected in the landscape and how do they shape the built environment?

2. What are patterns of land use and site planning in different geographic and cultural regions over time? How does the use of space vary in terms of functional relationships within individual buildings and farm complexes?

3. What rural industries are associated with agriculture? (e.g., mills)

4. What factors influence the survival rates of agricultural buildings?

ARCHITECTURE, LANDSCAPE ARCHITECTURE AND COMMUNITY PLANNING THEME:

Research Issues:

1. What can domestic architecture tell us about little documented social and economic groups (such as blacks and other ethnic groups) through analysis of form, plan, spatial relationships, outbuildings?

2. How are architectural traditions and forms transferred with migration and cultural diffusion, regionally and over time?

(Synthesize information on culture regions in the state/settlement patterns/ethnic groups.)

3. How are vernacular and/or popular and high style influences shown in the state's buildings?

4. What architects/firms have been involved in the development of the architectural profession in Maryland and how significant is their work?

5. What are the patterns and changes in building technology over time, and as used by different ethnic/cultural groups?

6. How does building technology affect "style," appearance, form? (For example, the role of mass produced building materials and design versus local sources.)

7. What are common types of natural and cultural landscapes in Maryland? What types are rare?

8. What are man-made landscape features caused by agricultural and industrial land use? How can these "cultural landscapes" be defined?

9. Designed landscapes: How important a role do they play in

the Maryland landscape? What designed landscapes were created in Maryland, and which still survive? What landscape architecture firms have been active and how significant is their work?

10. Community planning/design: How has this planning (both "professional" and vernacular/traditional shaped Maryland's landscape? What are common types/forms/patterns? (e.g., Pennsylvania towns; planned suburbs) What firms have been involved?

11. What special issues need to be considered in evaluating the significance of early 20th century historic resources in Maryland?

ECONOMIC (COMMERCIAL AND INDUSTRIAL) THEME:

Research Issues:

1. What are rural industries related to agriculture? (e.g., mills)

2. What structures and objects are associated with water-related industry and how did they change over time? What typologies can be identified?

3. How has the mining industry changed the landscape of Western Maryland and what were the social consequences (e.g., immigration)?

4. What was the relationship between the canning industry and improved transportation systems?

5. What factors led to the development of City or County "X" as an industrial center?

6. What special problems are involved in investigating industrial sites?

7. What are common typologies (form, style, function) in commercial architecture?

8. How do changes in industrial technology affect the design and construction of industrial buildings?

GOVERNMENT/LAW THEME:

Research Issues:

1. How are spatial patterns in public buildings related to function and ritual, and how do these needs change over/time?

2. How do public buildings use current architectural styles as statements of philosophy? What typologies can be identified? (For example, in post office design)

3. Where were governmental functions conducted in periods of early settlement, prior to the establishment of town centers?

MILITARY THEME:

Research Issues:

1. How has the construction and design of military institutions changed over time?

2. What character-defining characteristics are common for resource types associated with the Civil War?

3. How has Maryland been influenced by its proximity to the nation's capital, resulting in the numerous U.S. Government military installations (and institutions such as the U.S. Naval Academy) which are located in the state?

RELIGION THEME:

Research Issues:

1. Where were religious services held prior to the establishment of towns and churches?

2. What typologies can be identified in church design across the state?

3. What was the role of church-sponsored pattern books in church design?

4. What has been the significance of functional plan and organization within typical building forms?

SOCIAL/EDUCATIONAL/CULTURAL THEME:

Research Issues:

1. What have been the major developments (key legislation etc.) in education over time and how have these changes influenced the design of educational buildings and institutions?

2. What places and structures in the state are representative of its significant recreational activities?

3. What caused the increase in numbers of social institutions in the late 19th century and greater numbers of buildings of this type? (fraternal, cultural, etc.). What common types can be identified?

4. How have trends in popular culture resulted in new types of social and recreational facilities?

5. How have the health care and social welfare professions developed over time in caring for the poor, the disabled, mentally ill, and what institutions have been associated with these developments?

TRANSPORTATION THEME:

Research Issues:

1. How have changes in transportation influenced the state's development and landscape?

2. What are typologies for analyzing and understanding resource types linked to this theme?

3. What are special problems in preserving outmoded transportation facilities, such as late 19th century iron truss bridges?

4. What has been the relationship between technology and transportation, and between transportation and marketing, both urban and rural?

APPENDIX 6

RECOMMENDED RESEARCH QUESTIONS FOR THE FUTURE STUDY OF THE STATE'S ARCHEOLOGICAL RESOURCES

1. What is the role of environmental change in the process of prehistoric culture change?

   (Applicable State Comprehensive Plan Themes: Environmental Adaptation; Subsistence; Settlement; Demographic; Technology)

   * Examples of Applicable Research Topics:

     - Differential use of coastal areas through time
     - Migration and displacement of populations
     - Appearance of agriculture
     - Changes in settlement/subsistence system

2. What factors are involved in the social transformation of prehistoric populations from egalitarian, non-sedentary societies into complex, sedentary societies?

   (Applicable State Comprehensive Plan Themes: Subsistence; Settlement; Political; Demographic; Religion; Technology; Environmental Adaptation)

   * Examples of Applicable Research Topics:

     - Appearance of agriculture
     - Migration of Populations
     - Exchange Networks

3. Is some of the change and/or variability noted in the archeological record due to migration of outside populations into new areas?

   (Applicable State Comprehensive Plan Themes: Subsistence;

Settlement; Political; Demographic; Environmental Adaptation)

* Examples of Applicable Research Topics:

- The role of cultural diffusion in culture change
- The effect of environmental change on settlement/subsistence patterns
- Linguistic evidence of migration
- Trade and exchange networks
- Models of in situ culture change
- Process of adaptive radiation
- Frontier models

4. What is the relationship of historically identified Native American groups with prehistoric culture groups identified in the archeological record?

   (Applicable State Comprehensive Plan Themes: Settlement; Political; Demographic; Religious)

   * Examples of Applicable Research Topics:

   - Ethnographic documentation of Native American groups
   - Migration of prehistoric populations
   - Historic documentary evidence of Native American groups
   - Technological evidence of regional variability in material culture (e.g. ceramics, basketry)

5. In the prehistoric period, does technological change serve as a stimulus to culture change (i.e. do recognized changes in technology precede recognized culture changes) or is technological change simply a response to other internal or external factors involved in culture change?

(Applicable State Comprehensive Plan Themes: Subsistence; Settlement; Political; Demographic; Technology; Environmental Adaptation)

* Examples of Applicable Research Topics:

- Emergence of agriculture
- The appearance of polished stone axes in the archeological record
- The appearance of ceramics in the archeological record
- Change from the almost sole reliance on fine-grained cryptocrystalline lithic raw materials to the use of more widely available local raw material such as quartz and quartzite after the Paleo-Indian period

6. Are existing archeological predictive models of prehistoric site distribution and content accurate and a true reflection of the total remaining prehistoric archeological record?

(Applicable State Comprehensive Plan Themes: Subsistence; Settlement; Political; Demographic; Religious; Environmental Adaptation)

* Example of Applicable Research Topics:

- Regional variation in settlement /subsistence patterns
- Occurrence of sites in areas predicted by existing models to have a low to moderate probability for sites
- Settlement hierarchy and pattern

7. Why did indigenous Native American populations largely disappear from Maryland after European settlement began?

(Applicable State Comprehensive Plan Themes: Subsistence; Settlement; Political; Demographic; Religious; Technology; Environmental Adaptation)

* Examples of Applicable Research Topics:

- Diseases of post-European settlement Native American populations

- Differential acceptance of European goods and culture by various Native American groups

- Documentary evidence regarding European /Native American relations

8. To what extent did European goods and culture supplant traditional goods and culture in Native America populations during the Contact period?

(Applicable State Comprehensive Plan Themes: Subsistence; Settlement; Political; Demographic; Religious; Technology)

* Examples of Applicable Research Topics:

- Differential acceptance of European goods in different aspects of Native American culture (e.g. ceremonial goods vs. utilitarian goods; male-related goods vs. female-related goods)

- Acceptance of Christianity by Native American populations

9. How has the maritime/riverine physiography of Maryland affected its prehistoric and historic development?

(Applicable State Comprehensive Plan Themes: Subsistence; Settlement; Political; Demographic; Technology; Environmental Adaptation; Agriculture; Economic; Military; Social, Educational, Cultural; Transportation)

* Examples of Applicable Research Topics:

- Sea level rise and its effects on settlement/subsistence patterns

- Seasonal exploitation of marine/riverine food resources

- Town development
- Shipbuilding
- Seafood industry

10. Did a recognizable American culture, distinct from European/British culture, develop by the 18th century?

    (Applicable State Comprehensive Plan Themes: Architecture Landscape Architecture, Community Planning; Economic; Government, Law; Religion; Social, Education, Cultural)

    * Examples of Applicable Research Topics:

    - Extent to which Euro-American culture was affected by contact with Native American culture
    - Frontier Architecture
    - The manorial system in 17th century Maryland
    - Social class differences in 18th century Maryland
    - Slavery and its effects on Euro-American culture

11. How are changes in European/British culture reflected in American culture?

    (Applicable State Comprehensive Plan Themes: Agriculture; Architecture, Landscape Architecture; Community Planning; Economic; Government, Law; Military; Religion; Social, Education Cultural; Transportation)

    * Examples of Applicable Research Topics:

    - British Georgian culture and its effects on American culture
    - Spread of Methodism

- Effect of English Civil War (Puritan Revolution/Oliver Cromwell) on the Maryland Colony

12. How did the lifestyle of free blacks differ from that of whites of the same general economic status in the period prior to the end of the Civil War?

    (Applicable State Comprehensive Plan Themes: Agriculture; Architecture, Community Planning; Economic; Government, Law; Military; Religion; Social, Educational Cultural)

    * Examples of Applicable Research Topics:

        - Archeological makeup of rural and urban free black sites. (What are the distinguishing characteristics?)

        - Differences in the use of space on rural sites compared to the white population

        - Archeological evidence of the survival of African building techniques

13. Did the lifestyle of slaves and the institution of slavery differ significantly in Maryland from that documented in the American Deep South and the Caribbean?

    (Applicable State Comprehensive Plan Themes: Agriculture; Architecture; Economic; Government, Law; Religion; Social, Education, Cultural)

    * Examples of Applicable Research Topics:

        - Diet

        - Participation in crafts

        - Diseases and Longevity

        - Housing

14. How does the culture of distinct non-Anglo American ethnic and cultural groups differ from that of the Anglo-American population, as seen in the archeological record?

(Applicable State Comprehensive Plan Themes: Agriculture; Architecture, Landscape Architecture; Economic; Government, Law; Religion; Social, Education, Cultural)

* Examples of Applicable Research Topics:

- German-derived populations
- 19th century southern European immigrants to urban areas

15. How did the growth and development of industrialism affect the lifestyle of rural and urban populations?

(Applicable State Comprehensive Plan Themes: Agriculture; Architecture, Landscape Architecture, Community Planning; Economic; Government, Law; Military; Social, Education, Cultural; Transportation)

* Examples of Applicable Research Topics:

- Growth of the railroads
- Effect of the availability of mass produced goods on social structure
- Coal mining and lumbering industries in Western Maryland
- Development of Baltimore as a center of industry

APPENDIX 7

METHODOLOGY FOR ESTIMATING NUMBERS OF PRE-1940 STRUCTURES IN MARYLAND

Introduction:

In order to assess the Maryland Historical Trust's progress in identification, evaluation, and protection of Maryland's above-ground historic resources, it is necessary to compare the number of historic properties currently identified within the Maryland Inventory of Historic Sites against the expected universe of all potential (pre-1940) historic standing structures in the State. To date, there has been no model available within the preservation field which could be used to predict this estimated universe. To meet this need, research and analysis on this issue was conducted by the MHT's preservation planner as part of the preparation of the Maryland Comprehensive Historic Preservation Plan.

Since there is no central census or other record of the total number of buildings in the nation or state and their date of construction, the best source of data for estimating numbers of potential historic structures is the U.S. Census of Housing. (Housing structures also comprise the majority of historic structures, estimated at perhaps 80% in Maryland). Current census data for most other types of buildings does not appear to exist, although some statistics are available for building types such as industrial establishments, farms, post offices, or airports. Unfortunately, however, there is no breakdown of these types of buildings by date of construction. Past censuses of agriculture and industry provide numbers of manufacturing establishments and farms at any given time in history, but there is currently no method for estimating the number of these properties which survive today.

Summary of Results:

Since residential structures are estimated to comprise the majority of historic resources in Maryland (probably an average of 80%, based on sample surveys), the Census of Housing can be used as a good basis for projecting the total number of historic structures of all types within each jurisdiction in the State.

According to the Maryland Historical Trust's best estimates, based on U.S. Census of Housing data for 1940 and 1980, there are approximately 287,604 residential structures in the State today which date from before 1940. When compared against the number of residential structures actually identified in the 1940 census (414,544) there is an estimated loss statewide of 31%, which represents 126,940 structures. This percentage of loss is much higher in some counties, as seen in Table II-1, where losses of more than 40% of pre-1940 housing units have occurred in several counties. The 287,604 pre-1940 structures existing in 1980 will, if they survive until 1990, be eligible for the Trust's statewide Inventory at the end of the decade.

Based on samples of several areas of the State which have been comprehensively surveyed for historic standing structures, the Trust estimates that residential structures usually comprise about 80% of all surveyed historic structures. (This percentage varies in different parts of the state.) When this estimate of residential structures is used as a base figure and another 20% is added for all other types of buildings in Maryland, the total estimate of all pre-1940 buildings in the State today is approximately 345,125.

This "ballpark" estimate can be used as a yardstick with which to measure the progress of the Trust's survey program to date. Currently (as of May 1986), approximately 49,118 above-ground historic resources are listed in the Trust's Inventory, including both individual properties and contributing resources to historic districts. This number then represents approximately 14% of the estimated total number of structures to be identified and evaluated for inclusion in the statewide Inventory. Comparison of censuses from 1940 to 1980 is also valuable for data on rates of loss over time and rate of vacancy and occupancy, which are useful indicators of stresses of historic buildings, as discussed in more detail in Chapter II of this document.

Two different methods were used to convert the numbers of housing units in the census to estimated numbers of structures. Using two methods provides more accuracy to our estimates and a realistic range of numbers of expected structures. Relevant data from the U.S. censuses of 1940 and 1980 and the resulting estimates of numbers of expected sites and % surveyed by the two different methods are shown in Tables II-2 and II-3.

Methodology:

The estimates of numbers of pre-1940 structures still existing in 1980 are based on data for Maryland from the U.S. Censuses of Housing for 1940 and 1980. The various characteristics recorded by the census today include the number of housing units by period of construction (recorded since 1940 only). In 1940, numbers of structures were also recorded; the 1980 census, however, does not identify numbers of structures. The earliest time period for date of construction used in the 1980 census is pre-1939, and figures for this group are used as the basis for our comparison with the actual data from the 1940 census to provide our estimated figures.

Since the 1980 census only records numbers of housing units (apartments, single family homes, and other units as defined by the census bureau) and not structures, the major problem with the 1980 data involved the conversion of number of units into numbers of structures. In order to convert these figures, two methods were used to crosscheck for accuracy. The first method calculated the percentage distribution of all 1980 housing units by type of structure (one unit structure, two unit structure, etc.). These same ratios were then applied to the group of pre-1939 housing units identified in the 1980 census in order to estimate the same percentage distribution of each type of structure in the pre-1939 group. Then the numbers of each type of structure were added together to arrive at an estimated total number. This same technique was used for the state as a whole and for the 23 jurisdictions, as seen in Table II-3.

Since this technique, however, is based upon the relative distribution of the various types of single and multi-family units in 1980, it is expected that in some counties, such as Montgomery and Prince George's, where large numbers of multi-unit structures have been built since 1940 (such as apartment and condominium complexes) that the percentages will not apply as accurately to the group of pre-1939 units in those counties. For example, in 1940, 84% of all the housing units statewide were located in one unit structures, and only 0.6% were in five or more unit structures. By 1980, only 69% of all units were in one unit structures, and 23% were in five or more unit structures.

In order to correct for this margin of error, a second technique was also used which may be more accurate in terms of predicting numbers of structures. Since the 1940 census does provide both numbers of units and numbers of structures, the

ratio of units to structures would be calculated; statewide for example, the number of residential structures equalled 83% of the number of housing units. This proportional ratio was then applied to the group of pre-1939 units identified in the 1980 census to arrive at an estimate of surviving structures (Table II-2). There is also some margin of error possible through use of this approach, since it is assumed that there is the same proportion of units to structures as in 1940. However, it does appear to provide a slightly more accurate reflection of the distribution of pre-1940 units and structures existing today.

From the tables, it can be seen that in most counties the two different estimates of numbers of structures are actually quite close, especially in rural, less recently developed counties of the state which have fewer large unit structures. In those counties with most post-1940 construction of multi-unit buildings, the estimates are further apart, as would be expected. Taken together, however, the two sets of estimates provide a good range of expected numbers of pre-1940 housing structures.

Since the second method appears to be more accurate, estimates for housing structures using this technique are used as the base figure to which is added another 20% for all other types of buildings. The 20% figure was obtained by comparing several comprehensive surveys of urban and rural areas to determine the percent breakdown of various building types (residential, commercial, industrial, educational, etc.). In many rural areas especially, the percentage of houses and farmhouses will be higher than 80%. The Trust-Bureau of Mines comprehensive historic standing structures survey of the Coal Basin region of Garrett and western Allegany counties, for example, found that houses and farms comprised 87% of all pre-1930 buildings surveyed. In other urban district surveys, however, it was found that approximately 75% of the structures were residential. On the statewide level, 80% was chosen as an average in order to balance rural and urban areas.

As a test of accuracy of the census estimates, the estimated figures for Garrett County were compared against the numbers of known sites of significance identified during the Coal Basin survey, completed in 1983. This project inventoried 1,878 pre-1930 housing structures and a total of 2,230 pre-1930 structures of all types. As of 1986, there are 2,796 known historic properties of all types in Garrett County. This compares favorably with the census projections of 2,781 pre-1940 residential buildings and the estimated total of 3,337. The

larger estimated number is to be expected since it includes all residential buildings built before 1940, while the actual survey identified only those buildings which appeared to date prior to 1930. According to the 1940 census, 954 additional dwelling units (an estimated 897 residential structures, and thus, at 20%, 1076 structures of all types) were built in the county between 1930 and 1940, thus accounting for the larger estimated number for pre-1940 buildings.

Garrett County:

	Residential Structures	Total Structures (all types)
Known sites, pre-1930	1,878	2,230
Known sites, pre-1940	--	2,796
Estimate of pre-1939 sites from 1980 census	2,781	3,337
1940 census figures	5,090	6,108 (estimated projection)
Built between 1930-1939 (from 1940 census)	897	1,076

Note: Tables II-1, II-2, and II-3 are located in Chapter II of this document.

FOOTNOTES

PREFACE - Footnotes

1. The Johns Hopkins University, Center for Metropolitan Planning and Research, Robert W. Hearn, author, Towards A Preservation Partnership: Developing a Blueprint for Action, Baltimore, 1985.

CHAPTER I - Footnotes

1. U.S. Department of Commerce, Bureau of the Census, 1980 Census of Housing. Figures for housing units, by date built, converted by MHT to estimates of residential structures and other types of buildings. (Methodology described in Appendix 7).

2. George Santayana, Life of Reasons, quoted in the Report to the President and Congress 1984, U.S. Advisory Council on Historic Preservation, Washington, D.C., p. 66.

3. California Heritage Task Force, A Report to the Legislature and People of California, 1984, pp. 23-24.

4. U.S. Advisory Council on Historic Preservation, Report to the President and Congress, 1983, Washington, D.C., p. iii.

5. U.S. Conference of Mayors' Special Committee on Historic Preservation, With Heritage So Rich, New York, 1966, p. 207.

6. American Folklife Center, Library of Congress, Cultural Conservation, The Protection of Cultural Heritage in the United States, Washington, D. C., 1983.

7. The Gallup Organization, Inc., A Gallup Study of Public Attitudes Toward Issues Facing Urban America, conducted for the Urban Land Institute, Princeton, N.J., April 1986.

8. Edmund Bacon, in With Heritage So Rich, op. cit., pp. 9-10.

9. Lyndon B. Johnson, in White House Conference on Natural Beauty, Report, and The President's Response, Washington, D. C., 1965, pp. 41-43.

10. With Heritage So Rich, op. cit., p. 207.

11. National Trust for Historic Preservation, Preservation: Toward an Ethic in the 1980's, Washington, D. C., 1980, p. 16.

12. Ronald R. Reagan, quoted in Advisory Council Report, 1984, op. cit., p. ii.

13. State Archives of Maryland, Maryland Manual, 1985-86, Annapolis 1985, p. 167.

14. Christopher Tunnard, in With Heritage So Rich, op. cit. p. 30.

15. Remember the Neighborhoods: Conserving Neighborhoods through Historic Preservation Techniques, U.S. Advisory Council on Historic Preservation, Urban Policy Group, 1981, p. 3.

16. Preservation: Toward an Ethic in the 1980's, op. cit., pp. 16-17.

17. U.S. Advisory Council 1983 Report, op. cit., p. 38, citing Sweet's Renovation: Blue Print for the Future.

18. Betsy Chittenden, National Trust for Historic Preservation, Older and Historic Buildings and the Preservation Industry, Washington, D. C., October 1983, p. 3. Information based on U.S. Department of Energy estimates. These structures contain 25% of the nation's building space.

19. National Trust for Historic Preservation, Fact Sheet on Preservation and Housing, 1983, citing U.S. Department of Housing and Urban Development report.

20. U.S. Department of Commerce, Bureau of the Census, 1980 Census of Housing, op. cit.

21. MHT estimates based on U. S. Census of Housing data, op. cit. (See methodology in Appendix 7).

22. U.S. Advisory Council, Report, 1984, op. cit., Walt Whitman quote, p. 66.

23. Ibid.

24. Chittenden, op. cit., p. 13.

25. Ibid.

26. Thomas Bever, The Economic Benefits of Historic Preservation, May 1978.

27. Chittenden, op. cit., p. 13: "For residential structures,

the least energy-efficient buildings are also those built between 1940 and 1959. Buildings constructed before 1940 are more efficient. Newer buildings are the most energy efficient of any age group." However, the study points out that "Older residential buildings often use more energy because they lack energy-saving features, most of which could be easily added." For example, only ". . . 61 percent of all pre-1940 houses have attic insulation, compared to 90 percent of all houses built during the 1970s."

28. Governor Harry Hughes, Executive Order 01.01.1982.08 "Policies to Guide State Actions for the Physical and Economic Development of Maryland."

29. Sweet's Division, McGraw Hill Information Systems Co., Special Report "White Paper," 1982, and Addendum Renovation: Blue Print for the Future reflect the growing importance of the renovation industry. The business community is well aware of the advantages of rehabilitation:

> Forecaster Ezra D. Ehrenkrantz, President of The Ehrekrantz Group, attributes rapid growth in rehabilitation to the aging stock of buildings in the United States, the improved image and appeal of renovated structures, the prime location of older buildings, the advantages of infrastructure already in place, the speed of completing renovation over new construction, and Federal tax incentives." (U.S. Advisory Council 1983 Report to the President and Congress, p. 37.)

AIA President Robert Broshar noted that the choice of a preservation theme for the American Institute of Architects 1983 Conference was "...partly a concession to economics, predicting that about half of the development projects in the next 20 years will involve existing buildings." (Ibid.)

30. The estimate that half of the residential construction business involves renovation is from Chittenden, op. cit., p.7. Michael Sumichrast, of the National Association of Home Builders, quoted in Sweet's White Paper, op. cit., estimates that "....for every dollar going to new construction, $1.10 to $1.20 is being spent on residential remodeling." Charles

P. Giersch, of Arthur D. Little, Inc., is quoted from Sweet's White Paper, op. cit., regarding non-residential renovation.

31. This total is based on the following figures: Residential renovations totalled $46.1 billion in 1981, according to the U.S. Census Bureau, and commercial renovations totalled $58.7 billion annually. The total renovation estimate is thus $105 billion. Since historic structures comprise about 27% of all buildings in the U.S., 27% of this total represents an investment of about $28 billion.

32. National Conference of State Historic Preservation Officers, Status Report on Historic Preservation Fund, FY 1983-84 Emergency Jobs Act Projects, February 1984.

33. National Trust for Historic Preservation, Staff Report, March 1986, update on PRIME database by the Research Division.

34. Information Update: Tax Incentives for Rehabilitating Historic Buildings, National Park Service Preservation Assistance Division.

35. Interaction newsletter, National Register programs, National Park Service South East Regional Office, March 1984, Vol. 2, #1. In FY 1983, for example, over $2 billion in rehabilitation activity was generated by ERTA while only $170 million in tax revenue was lost to the U. S. Treasury.

36. For example, in FY 1983 (the first full year of the ERTA program) Maryland ranked number 2 in the nation in the number of projects certified.

37. Under Article 81 Section 12G-12 of the Annotated Code of Maryland, local jurisdictions may enact ordinances to provide property tax credits in locally designated historic districts, based on the amount expended by private property owners for restoration and preservation of historic structures (up to 10% of expenses) and the construction of architecturally compatible new structures (up to 5% of expenses). Ordinances are now in place in the City of Laurel and in Montgomery and Prince George's counties, respectively.

38. Sweet's White Paper, op. cit.

39. Chittenden, op. cit. p. 9.

40. See Bever, op. cit., on renovation's lower costs and shorter construction time, citing Advisory Council on Historic Preservation report on adaptive reuse. For data on Center Stage, see Bever; Urban Land Institute study, p. 186; and Advisory Council 1976 report, p. 19).

41. Enterprise Foundation, Rehab Work Group, Cost Cuts Newsletters, issues of September - October 1985 and August 1986.

42. Many commercial projects described in Business and Preservation illustrate these benefits.

43. Sweet's White Paper, op. cit.

44. Chittenden, op. cit., p. 8:

> On the average, the owners of older buildings pay about the same or less for heating, cooling, maintenance, repairs, replacing mechanical systems and insurance, in comparison with the owners of new buildings. For some types of expenses (for example real estate taxes on a commercial building), the average old building is far less expensive to own than the average new building.

45. Bever, op. cit., citing 1977 Department of the Interior study. The Advisory Council also estimates that renovation projects create 109 jobs per million dollars expended, while new construction generates only 70 jobs for the same amount of money (Bever). Studies of UDAG projects show that preservation projects create 35% more jobs than non-preservation projects (Chittenden, op. cit., p. 11).

46. Chittenden, op. cit., p. 11.

47. Bever, op. cit.

48. George McMillan, "Staying Home in Savannah," Historic Preservation, Vol. 32, No. 2, March/April 1980, pp. 10-17.

49. U.S. Advisory Council Report, 1983, p. 39.

50. Swift, Deborah, "An Evaluation of the Local Use of Historic

Districts to Stimulate Housing Rehabilitation," Urban Institute Working paper #1130.05, Washington, D.C., Urban Institute, 1979, quoted in Chittenden, p. 12.

51. Business and Preservation, op. cit., p. 6.

52. Virginia Historic Landmarks Commission, Managing a Resource: the Public's Investment in the Preservation and Development of Virginia's Historic Landmarks, June 1982. The average annual increases in property values in the Virginia districts studied generally were between 20% and 50% annually (p. 9.).

    In Frederick City, Maryland, the average annual increase within the city's historic district was 31%, compared to 10% in other areas of the City, and 9.1% in Frederick County. (Richard C. Brady, of Fredericktowne Realty, cited in Frederick County Business Review, July 3, 1982, p. 4.

    In the Annapolis Historic District, a study by Myers and Binder for the Conservation Foundation (1977), found that property values had risen dramatically. In spite of some displacement problems however, the total assessed value of property in the historic area grew from $18 million in 1961 to $38 million in 1977 (p. 93).

    In Baltimore, a 1979 study by the City's Department of Housing and Community Development (Impact of the Proposed Eutaw Place/Madison Avenue Historic Districts in Reservoir Hill) concludes that historic district designation alone does not necessarily increase property assessments and raise taxes (p. 19 and Table 7, p. 20). The report states that "Whether an increase in assessed value of properties in the proposed historic districts will occur cannot be stated with any degree of certainty" (p. 19). The study notes that by state law, there are limits to the percent of annual assessed increase (15%), and that age and income are used to adjust for property taxes (p. 18), thus helping to minimize potential displacement problems. The report suggests that historic designation and preservation programs "...might be an added incentive to landlords to repair and continue upgrading their properties."

53. By Maryland State Law, there are limits to the percent of annual assessed increase (15%), and age and income are used to adjust property taxes. (Baltimore City Department of Housing and Community Development, Reservoir Hill Study cited

in preceding footnote.)

54. Maryland Department of Economic and Community Development, Office of Tourist Development, study on The Economic Impact of Travel on Maryland Counties 1985, by the U.S. Travel Data Center, June 1986.

55. A Special Analysis of the Tourist Market for Maryland, Visitor Survey Economic Impact Analysis, Report to the Maryland Office of Tourism Development by Pannell, Kerr, Forster, August 1983. See page II-2 on the need for greater promotion of historic sites; other tables rank historic sites and other types of visitor attractions.

56. National Travel Survey for 1977. Out of a total of 3,448,000 total household trips to the region, the largest number (4,240,000) engaged in "Visiting Scenic Areas and National Parks," while the second largest group (3,968,000) visited "Historical Areas."

57. Statistical Abstract of the U.S., 1980, p. 242. More people visited these areas than "National Parks" and "National Recreation Areas."

58. Attendance figures for National Park Service areas in Maryland, Maryland State Parks and other State-operated attractions, and privately operated historic sites have been compiled and are on file at the Maryland Historical Trust.

59. California Heritage Task Force, study on Cultural and Historical Resources and Tourism in California, 1984. Quoted from material enclosed with letter to J. Rodney Little, MHT Director, of February 6, 1984, requesting information on similar tourism studies in other states. For example, the City of Sacramento estimates that 80% of its promotional efforts revolve around historical and cultural themes.

60. Ibid., citing 1978 study by the Historical Preservation Center at the University of South Dakota, and 1982 survey by Oregon Economic Development Department.

61. Published by Maryland's Office of Tourist Development; in Allegany County, for example, 13 out of 14 of the listed attractions are historic properties.

CHAPTER II - Footnotes

1. Kevin Lynch, What Time is This Place?, Cambridge, Mass, 1972, p. 3.

2. MHT estimates, using U.S. Census of Housing data from 1940 and 1980. (See Appendix 7 for Methodology)

3. To advance our ability to estimate potential numbers of archeological sites and predict possible site locations, a number of Maryland archeologists have developed new methodologies and created predictive models. During the past few years, for example, several MHT archeological regional management plans and compliance studies have developed models to predict site location within their respective regions, to plan for expected stresses on these sites.

   For example, Richard Hughes, in the Cultural Resources Assessment Study for the Selection of Power Plant Siting Areas in Western Maryland (Hughes and Weissman, 1982, for the MHT and DNR) developed a model for predicting prehistoric site location in the region. This model, when tested, could eventually lead to developing approximate numbers of expected sites. Robert D. Wall, for the Maryland Historical Trust, has also developed a proposed approach which goes beyond prediction of site location to the evaluation of the contents, characteristic features and level of significance of expected sites. (A Proposal for the Development of a Comprehensive Archeological Resource Management System for the Western Maryland Coal Region, for the Maryland Bureau of Mines.)

   Important new techniques which can be used in both urban and rural areas across the entire state have been developed by Thomas E. Davidson and K.-Peter Lade at the Lower Delmarva Regional Center at Salisbury State College, under partial MHT-NPS funding. Davidson and Lade have pioneered in using Landsat satellite data to predict site location and possible numbers and types of sites based on environmental features such as land forms. Davidson has also created a new method for computer-correcting historic maps to predict the location of potential historic period sites on modern maps. Davidson's work is described in "Computer-Correcting Historic Maps for Archeological Use," Historical Archeology, Vol. 2,

1986. Lade has worked with environmental agencies and has described the use of Landsat data in several papers.

For urban waterfront areas, Ethel R. Eaton's work in Baltimore's Fells Point section has created a model for predicting historic period site location and expected site types, and for evaluating site significance. This study, funded by the MHT and the NPS, has also been a pioneering project in its field and led to expansion of the Fells Point National Register Historic District.

Other archeological work has also been conducted in an attempt to estimate the potential universe of archeological sites in the state. The 1982 study by A. H. Luckenbach and Wayne E. Clark of the MHT for MDOT, Prediction and Evaluation of Archeological Resources on Maryland Department of Transportation Property, estimated that archeological site occurrence along Maryland roads is .5 sites per mile. Recent work by staff archeologists of the Maryland Geological Survey, however, based on MGS highway compliance surveys, has indicated a varying rate of predicted site occurrence in the different regions of the state; there is usually a substantially higher rate of occurrence west of the Chesapeake Bay.

4. Steve Wilke and Gail Thompson, Prehistoric Archeological Resources in the Maryland Coastal Zone: A Management Overview, Maryland Department of Natural Resources, 1977, p. 7.

5. See footnote 2.

6. See especially, Custer, Upper Delmarva Region; Davidson, Lower Delmarva; Pogue and Smolek, Southern Maryland; Steponaitis, Lower Patuxent Drainage; Wilke and Thompson, Maryland Coastal Zone.

7. U.S. Army Corps of Engineers Baltimore District, Chesapeake Bay Study, Draft Summary Report, March 1984, p. 42.

8. Ibid., p. 42.

9. Thomas E. Davidson, A Cultural Resources Management Plan for the Lower Delmarva Region of Maryland, 1981, p. 45.

10. U.S. Army Corps of Engineers, Baltimore and Norfolk

Districts, Chesapeake Bay Shoreline Erosion Study, Progress Report No. 2, June 85, p. III - 29, citing MGS study.

11. U.S. Army Corps of Engineers, Chesapeake Bay Study Progress Report, op. cit., pp. IV-1 through IV-5.

12. U.S. Army Corps of Engineers, Chesapeake Bay Study, Draft Summary Report, op. cit. p. 118.

13. A recent (April 1986) Gallup Poll survey sponsored by the Urban Land Institute on attitudes toward urban America included questions on some historic preservation issues. Highlights of the survey are described in Chapter I of this document. While the responses generally indicated support for history and historic preservation, the questions in the survey were limited to only a few specific issues and were not able to fully address many of the conflicts in public attitudes towards historic preservation.

14. Robert D. Wall, A Cultural Resource Management Plan for Western Maryland, MHT - Frostburg State College sponsored Western Maryland Regional Preservation Center, draft, June 1985. Donna M. Ware, et. al., Final Report of the Coal Region Historic Sites Survey, study by MHT for the Maryland Bureau of Mines, Annapolis, 1984.

15. Maryland Department of State Planning, Agriculture and Forest Land Preservation in Maryland, unreleased study, 1985.

16. Maryland Department of State Planning, State Development Profile, Baltimore, 1984.

17. Maryland Department of State Planning, Division of Comprehensive Policy Planning staff consultations, and above-referenced studies.

18. Maryland Department of State Planning, Population Projections for Maryland Subdivisions, Baltimore 1985, and Employment projections from Employment and Labor Force in Maryland, Trends and Projections, 1967-2005, January 1986, Maryland Department of State Planning.

19. Maryland Department of State Planning, Employment in Maryland, 1967-2000, 1982, p. xli, p. 4.

CHAPTER III - Footnotes

1. State Archives of Maryland, Maryland Manual, 1985-86, Annapolis, 1985, p. 303.

2. Information gathered from a survey of federal agencies regarding their historic preservation activities is presented in the following publication by the United States General Accounting Office: Fact Sheet for the Chairman, Subcommittee on Public Lands, Committee on Interior and Insular Affairs, House of Representatives, Cultural Resources, Results of Questionnaire on Federal Agency Historic Preservation Activities, Washington, D.C., December 1985.

3. Deputy SHPO Mark R. Edwards now serves on the Board of Directors of the NCSHPO. SHPO J. Rodney Little served as President of the NCSHPO from 1981-1985, and is past Chairman of the Legislation Subcommittee of the Conference which is involved with the reauthorization of the NHPA in 1987.

4. See: Preface, Footnote 1.

CHAPTER IV - Footnotes

1. This conceptual arrangement and specific geographic regions, time periods, and themes were endorsed by all Trust staff involved in the preparation of the Maryland Comprehensive Historic Preservation Plan, and was approved by National Park Service staff in October 1982. This material was distributed for comment to Maryland historians, archeologists, and others in a general mailing of information on the state plan in 1982-1983 and presented at a series of 1983 comprehensive preservation planning regional meetings.

   For special assistance in creating these divisions for the historic period the MHT staff acknowledges the valuable 1979 study by Robert D. Mitchell and Edward K. Muller "Interpreting Maryland's Past: Praxis and Desiderata." (Appearing in Geographical Perspectives on Maryland's Past, edited by Mitchell and Muller and published by the University of Maryland, Department of Geography).

   In addition, work by the Council on Maryland Archeology during 1979-80 helped establish prehistoric archeological chronological divisions.

   Work by Wayne E. Clark of the MHT staff during the late 1970s helped establish a system of regional management units for studying the state's archeological resources.

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