

PRESERVING A QUALITY OF LIFE

THE TECHNICAL REPORT OF THE GOVERNOR'S TASK FORCE ON THE PRESERVATION AND ENHANCEMENT OF MARYLAND'S HERITAGE RESOURCES

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Executive Summary

As directed by Governor Glendening under Executive Order 01.01.1998.21, the Task Force on the Preservation and Enhancement of Maryland's Heritage Resources has undertaken an energetic effort to:

1. Assess the condition of Maryland's heritage resources and current trends affecting these resources.
2. Evaluate the effectiveness of heritage resource assistance programs and taxation policies, including private, federal, state and local jurisdiction programs and areas of concern.
3. Make recommendations that will allow Maryland's citizens to benefit from the State's abundant heritage resources.

Under the enthusiastic leadership of First Lady Frances Hughes Glendening, the Task Force was committed to the inclusion of all heritage interests in its efforts. Under the Executive Order, the term "heritage resources" includes museums, districts, sites, buildings, structures, monuments, or objects significant to the prehistory, history, upland and underwater archeology, architecture, engineering and culture of Maryland. The scope of the Task Force work was inclusive of the full range of private and public interests concerned about the future of heritage resources.

The research undertaken to address the first two tasks listed above was summarized in a preliminary report to the Governor and General Assembly dated January 1, 2000. The results of that work produced findings along three main themes:

- Modest but strategic State support of local efforts can leverage major results.
- Effective preservation and enhancement of heritage resources requires the commitment of local government.
- The State of Maryland must improve stewardship of heritage resources for which it is responsible.

The recommendations contained in this report reflect these themes. Developed by committees comprised of Task Force members and invited experts, a condensed draft of this report, the "popular" report, was widely circulated at six public meetings held in Maryland communities in September, 2000, and was posted on the web site of the Maryland Historical Trust. Hundreds of Marylanders attended those meetings and provided comment in person, by fax, by mail, and by email.

There was broad consensus in the comments received that the Task Force analysis, visions, and actions are on target. In this era of Smart Growth and Neighborhood Conservation, the actions about which Marylanders all over the State spoke most loudly are the need to instill an appreciation for heritage in children; build local government commitment to heritage preservation; and expand access to comprehensive Web-based heritage information. Many wonderful suggestions for action were made and have been incorporated in this report or in the companion popular report. All of the ideas expressed have been captured in transcripts from the public meetings and the written comments submitted, and will continually be referenced as the Action Agenda is implemented over the next few years.

The Visions, Goals, Objectives, and Strategies

Using the *Managing for Results* strategic planning framework, the Task Force developed the following visions, goals, objectives, and strategies, which have been broadly informed in conversations with Marylanders all over the State. Because so many good ideas were generated, the Task Force has recorded as many as possible, while recognizing that successful implementation requires the setting of priorities. Those strategies which are **bolded and underlined** are priorities for action that **must** be undertaken over the next few years, and constitute the Action Agenda as summarized in the popular report. The **bolded** strategies are of high importance.

Appreciating Maryland's Heritage

Vision: Maryland will provide citizens and visitors with excellent opportunities to get involved and learn about diverse heritage resources.

Goal 1 To enhance the quality, access, and diversity of heritage information statewide.

Objective 1.1 By 2005, 50% of county inventories will be available on the web.

Strategy 1.1.1 **Expand the Maryland Historical Trust's web site to provide more information about Maryland's heritage resources.**

Strategy 1.1.2 **Require survey data be submitted in standardized digitized formats.**

Strategy 1.1.3 **Develop multiple interfaces to allow researchers, students, and the general public to retrieve information easily.**

Objective 1.2 By 2005, increase the dissemination of GIS based heritage resource information by 200%.

Strategy 1.2.1 **Develop and implement GIS support plan.**

Strategy 1.2.2 **Continue conversion of data from hard copy to more accessible digitized formats.**

Objective 1.3 By 2005, increase virtual access to museum collections by 40%.

Strategy 1.3.1 Target project grants to support non-state history museum conversion of collection inventories to

- encourage compatible and accessible digitized formats.
- Strategy 1.3.2** Convert collection inventories for state museums to digitized format and make data accessible to the public through disc and internet.
- Objective 1.4** By 2005, increase the publication and web posting of heritage resource *research*, survey, synthesis, periodical, and popular materials by 40%.
- Strategy 1.4.1** Create new partnerships between government agencies, colleges and universities, and non-profit organizations to coordinate and accelerate publication and web posting activities.
- Strategy 1.4.2** *Produce materials which educate citizens, elected officials, public agencies, and the media on heritage preservation benefits and opportunities.*
- Goal 2** To provide citizen access to community history for enhanced neighborhood conservation, quality of life, and sustainability.
- Objective 2.1** By 2005, increase the number of community history projects by 50%.
- Strategy 2.1.1** **Coordinate and enhance community history programs which result in widely available public products, such as oral histories, exhibits, surveys, and plans, useful to community planning and heritage preservation.**
- Strategy 2.1.2** *Strengthen the connection between the Maryland Historical Trust and communities.*
- Goal 3** To enhance the quality, accessibility, and diversity of heritage experiences.
- Objective 3.1** By 2005, increase visitation to Maryland's heritage attractions by 10%.
- Strategy 3.1.1** **Assist history museums and other heritage attractions to realize their potential in serving Maryland's citizens and visitors.**
- Strategy 3.1.2** Develop and implement marketing strategies with Office of Tourism Development and other public and private partners.
- Strategy 3.1.3** **Coordinate with the Office of Tourism Development to annually update and expand their publications and web-posted listings of heritage attractions and events.**

- Strategy 3.1.4** *Share best practice models through enhanced coordination of history museums and other heritage attractions.*
- Objective 3.2** By 2005, increase heritage interpretation by means of high quality exhibits, displays, and programs throughout the state by 25%.
- Strategy 3.2.1** **Improve coordination between private sector and local, state, and federal signage, display and marker programs.**
- Strategy 3.2.2** Encourage the development and maintenance of exhibits, displays, markers and interpretive programs at state and non-state sites.
- Strategy 3.2.3** **Encourage welcome and visitor information centers to develop and install interpretive displays and exhibits highlighting heritage resources.**
- Strategy 3.2.4** Collaborate with Maryland Public Television and other media outlets to program heritage resources and attractions.
- Objective 3.3** By 2005, increase the quality and number of new heritage exhibits with state and non-state heritage museums and other partners by 20%.
- Strategy 3.3.1** **Target project grants to improve quality of permanent exhibits, create new permanent exhibits, and develop travelling exhibits which reflect the diversity of Maryland's heritage resources.**
- Strategy 3.3.2** Establish State, federal, and private non-profit partnerships to fund the development of new permanent and travelling exhibits.
- Strategy 3.3.3** Establish standards for State support of new and existing heritage museums.
- Goal 4** To provide primary and secondary school students with diverse, high quality, heritage education.
- Objective 4.1** By 2005, all of Maryland's primary and secondary schools will provide a Maryland heritage curricula framework consistent with state learning standards and goals.
- Strategy 4.1.1** **Develop Maryland and local history curricula, resources, web packages and links which will help all school systems meet state learning outcomes and assessment indicators**

promulgated by the Maryland Department of Education.

Strategy 4.1.2 **Develop a network of museum, preservation, and archeology partnerships to produce compatible resource materials and in service training opportunities for teachers.**

Strategy 4.1.3 Promote development and distribution of resource materials, curricula, web sites and heritage information access on multicultural topics which highlight Maryland's diversity of cultures.

Strategy 4.1.4 Encourage development of programs to recognize and reward students for heritage resource projects.

Objective 4.2 By 2005, all counties will support the Maryland History Day Program.

Strategy 4.2.1 **Encourage Boards of Education, county social studies supervisors, and teachers to participate in and promote Maryland History Day and support the development of Maryland history projects.**

Strategy 4.2.2 Encourage partnerships between teachers and heritage organizations to develop and share resources with students.

Objective 4.3 By 2005, all counties will support the Maryland Archeology Month Program.

Strategy 4.3.1 **Encourage Boards of Education and teachers to participate in Maryland Archeology Month and support the development of Maryland Archeology Month projects.**

Goal 5 To provide high quality and diverse higher education opportunities in the heritage fields.

Objective 5.1 By 2010, the number of students enrolled in high quality heritage programs will increase by 100%.

Strategy 5.1.1 **Develop formal agreements among colleges, universities, museums, preservation offices and other heritage institutions which will result in integrated research and learning.**

Strategy 5.1.2 **Establish cooperative relationships to maximize the benefits of Maryland's proximity to national museums, federal programs, and national archives to enhance opportunities for student and professional training and enrichment.**

- Strategy 5.1.3** **Develop internship, work study, graduate assistantship and mentoring programs that encourage recruitment of, participation by, and retention of a diverse student body.**
- Strategy 5.1.4** **Implement information technology and distance learning systems for participating institutions to allow for interactive learning and to maximize the unique areas of expertise of institutions.**

Goal 6 To provide high quality and diverse opportunities for lifetime learning in the heritage fields for practicing professionals, volunteers, and interested citizens.

Objective 6.1 By 2005, increase by 25% the number of enrichment and training opportunities for heritage resource professionals.

Strategy 6.1.1 **Develop partnerships with colleges, universities, history museums, preservation offices, lead heritage organizations, federal programs, and national archives to enhance opportunities for professional enrichment and training.**

Objective 6.2 By 2005, increase by 25% the number of enrichment and leadership training opportunities for heritage resource volunteers and interested citizens.

Strategy 6.2.1 **Create and disseminate a resource list for volunteer opportunities relating to archeology, historic preservation, history museums, and related resources.**

Strategy 6.2.2 **Create partnerships among *community colleges and* heritage organizations to coordinate *educational, enrichment, and certification programs, and symposia, field sessions, leadership training, and celebratory activities.***

Preserving a Quality of Life

Vision: **Maryland will provide citizens with the right tools to identify, evaluate, protect, and preserve heritage resources to enhance sense of place and quality of life.**

Goal 7 To ensure all heritage resources of known or potential value are inventoried and evaluated.

- Objective 7.1** By 2005, expand inventory and evaluation of heritage resources by 20%.
- Strategy 7.1.1** Provide incentives, such as State funding and technical support, to encourage local preservation programs to implement survey, evaluation, and preservation plans that are comprehensive and incorporate Smart Growth principles.
 - Strategy 7.1.2** Create a system of funding to support State agency survey and evaluation efforts of State-owned heritage resources including State submerged lands.
 - Strategy 7.1.3** Assist federal agency survey and evaluation efforts of federal properties.
 - Strategy 7.1.4** Develop partnerships with private non-profit organizations, such as land trusts, preservation organizations, universities, colleges, and museums to survey and evaluate heritage resources.

Objective 7.2 By 2010, 50% of Maryland’s history museums will have completed comprehensive conservation assessments, collection management plans, and conversion of inventory data to computer systems.

- Strategy 7.2.1** Provide financial support to history museums for conservation assessments, collection management plans, and upgrades and computerization of collection inventories.
- Strategy 7.2.2** Use computerized collections data system to define gaps in collections and develop strategy for ensuring that future collection efforts fill these gaps.

Goal 8 To ensure valuable heritage resources are protected and preserved.

Objective 8.1 By 2010, State agencies will complete treatments to stabilize and preserve heritage resources in their charge.

- Strategy 8.1.1** Enhance funding to support State agency stabilization and preservation of State-owned heritage resources.
- Strategy 8.1.2** Complete an Historic Structure Report and archeological survey for the State House.
- Strategy 8.1.3** Require State agencies to stabilize or otherwise provide for the appropriate disposition of newly acquired heritage resources as a condition of acquisition funding authorization.

- Strategy 8.1.4** **Expand the curatorship program after the successful DNR model.**
- Objective 8.2** By 2005, improve State agency compliance with State 106 requirements.
- Strategy 8.2.1** **Implement State 106 regulations.**
- Strategy 8.2.2** **Permit State units to include the costs of historic resource studies and surveys as eligible capital project costs for any capital undertaking of the unit or any undertaking with financial assistance provided by the unit.**
- Objective 8.3** By 2010, increase the number of donated historic preservation easements by 30%.
- Strategy 8.3.1** **Enhance tax incentives for the donation of historic preservation easements.**
- Objective 8.4** By 2010, increase the preservation of significant heritage resources by 10%.
- Strategy 8.4.1** **Improve access to and delivery of emergency grant assistance to support stabilization, documentation, and archeological data recovery at endangered sites.**
- Strategy 8.4.2** **Provide tax incentives for qualified archeological data recovery on private lands.**
- Strategy 8.4.3** Create partnerships between land preservation organizations at all levels to include heritage resources in land preservation mechanisms.
- Strategy 8.4.4** **Include funding eligibility for heritage resources in natural disasters emergency relief legislation.**
- Objective 8.5** By 2010, all Maryland counties and Baltimore City will establish Local Preservation Offices to assist in the protection and preservation of heritage resources.
- Strategy 8.5.1** **Condition Trust grant assistance upon the existence of a countywide local preservation program.**
- Strategy 8.5.2** Develop models and technical assistance to counties in partnership with local and statewide heritage organizations.
- Strategy 8.5.3** **Target project grants and create other incentives to promote and encourage local designation of historic properties.**
- Objective 8.6** By 2010, increase National Register listings by 30%.

- Strategy 8.6.1** **Create grant pool with contributions by the Trust, Preservation Maryland, and the Abell Foundation to promote and encourage historic district listings.**
- Strategy 8.6.2** **Ensure that National Register nominations are developed by local preservation programs.**
- Strategy 8.6.3** **Assess State inventoried properties for National Register eligibility and nominate eligible properties.**

- Objective 8.7** **By 2010, improve collection storage and management at 50% of Maryland’s history museums.**
 - Strategy 8.7.1** **Target project and property grants for upgrading collection storage.**
 - Strategy 8.7.2** **Construct new collection facility for African American Museum Corporation and Commission on African American History and Culture collections.**

- Objective 8.8** **By 2010, Maryland state archeology museums will convert paper inventory records to computer format, complete a comprehensive conservation assessment, and conserve 20% of their highest priority artifacts.**
 - Strategy 8.8.1** **Establish a State, federal and private non-profit partnership to fund collection assessments, computer inventories and high priority conservation treatments.**
 - Strategy 8.8.2** **Establish academic undergraduate and graduate programs with participating colleges and universities to assist the assessment, management, upgrade and study of collections.**

Sustaining the Inheritance

Vision: **Maryland will provide citizens with excellent resources to enhance and sustain heritage resources.**

Goal 9 **To ensure that investment to enhance and sustain heritage resources is leveraged through easily accessible incentives.**

Objective 9.1 **By 2005, increase local government support of heritage preservation by 100%.**

- Strategy 9.1.1** **Provide incentives, such as State funding and technical support, to leverage local government investment in heritage preservation.**
- Objective 9.2** By 2005, expand services at Maryland’s non-state history museums by 10%.
- Strategy 9.2.1** **Provide grants to support the operations of history museums and other heritage organizations through the Maryland History Investment Fund.**
- Objective 9.3** By 2005, increase the number of donations of archeological collections to the Maryland Archeological Conservation Laboratory by 20%.
- Strategy 9.3.1** Implement a system of state income tax incentives to encourage donations.
- Objective 9.4** By 2005, increase the use of the State rehabilitation tax credit by 100%.
- Strategy 9.4.1** **Permit transferability of the State rehabilitation tax credit.**
- Strategy 9.4.2** **Implement program outreach and marketing, particularly to low and moderate-income homeowners.**
- Objective 9.5** By 2005, increase economic activity in Heritage Area Target Investment Zones by 100%.
- Strategy 9.5.1** **Designate and invest in Target Investment Zones through the Maryland Heritage Areas Program.**
- Goal 10** To provide opportunities for Marylanders and others to make donations to heritage resource enhancement and sustainability.
- Objective 10.1** By 2005, increase volunteer hours contributed to history museums by 10%.
- Strategy 10.1.1** **Incentivize volunteer *and* service organization contributions through strategic recruitment, training and recognition.**
- Strategy 10.1.2** Offer history museum service as an option to fulfill required Maryland high school student service.
- Objective 10.2** By 2005, increase private sector financial contributions to heritage enhancement by 25%.
- Strategy 10.2.1** Explore creation and promotion of a “Heritage United Fund.”

Strategy 10.2.2 **Assist the heritage community to increase endowments, bequests, and planned giving.**

Goal 11 To eliminate disincentives to the enhancement and sustainability of heritage resources.

Objective 11.1 By 2005, 75% of Maryland's local jurisdictions will adopt a building rehabilitation code.

Strategy 11.1.1 *Assist the creation of a model rehabilitation code.*

Strategy 11.1.2 **Incentivize the adoption of the model code.**

Objective 11.2 By 2005, no Marylander will be forced to dispose of inherited heritage resources.

Strategy 11.2.1 Promote state inheritance tax laws which encourage preservation of heritage resources.

Implementation and State Budget Implications

The following table provides an "at a glance" summary of the estimated **cumulative net increases** in the State budget which would be required to implement all of the top priority Action Agenda strategies of the Task Force over the next five-year period, from State FY 2002 to 2006:

<u>INITIATIVE</u>	<u>FY 2002</u>	<u>FY 2004</u>	<u>FY 2006</u>
MARYLAND HISTORY INVESTMENT FUND	2,500,000	6,000,000	9,500,000
STATE UNIT PRESERVATION PROGRAM	3,000,000	3,000,000	3,000,000
PUBLIC INVOLVEMENT AND EDUCATION INITIATIVES	597,406	1,017,225	1,017,225
HIGHER EDUCATION INITIATIVES	1,164,900	2,442,400	2,442,400
TOTAL	7,262,306	12,459,625	15,959,625

A summary description of the initiatives follows:

Maryland History Investment Fund (Action Agenda strategies 2.1.1, 3.1.1, 7.1.1, 7.2.1, 8.4.1, 9.1.1, 9.2.1)

The Maryland History Investment Fund would be the new name for pooled funds from a number of restructured Maryland Historical Trust financial assistance programs, which were funded in FY 2001 at an all time high of \$3,000,000. The Fund would provide strategic grants, in conformance with the guidelines of the local preservation program, to leverage and assist non-state investments in preserving Maryland's heritage resources. Grants would assist **operations**, to build and sustain heritage organizations; **projects**, including heritage research, survey, plans, publications, exhibits, outreach, and collection conservation; and **properties**, for acquisition and development activities. Optimum funding for these activities is as follows:

	OPERATIONS	PROJECTS	PROPERTIES	TOTAL
FY 2002	2,000,000	2,500,000	1,000,000	5,500,000
FY 2006	4,000,000	3,500,000	5,000,000	12,500,000

These estimates do not include operating costs to carry out the Maryland History Investment Fund initiative. The Trust Board, with the advice and input of the history museum, archeology, and historic preservation communities, would administer the Fund.

State Unit Preservation Program (Action Agenda strategies 7.1.2, 8.1.1, 8.2.1)

The State Unit Preservation Program would be a new initiative in which the State of Maryland would lead by example in setting a new level of stewardship for the heritage resources which it owns. Projecting even funding over the first five-year period, the State Unit Preservation Program would provide \$1,000,000 for state units to undertake heritage resource survey, evaluation, and planning efforts. An additional \$2,000,000 annually would be a supplement to Department of General Services managed facility maintenance funds which would be reserved for the stabilization and preservation of identified heritage resources.

	SURVEY AND EVALUATION	PRESERVATION	TOTAL
FY 2002	1,000,000	2,000,000	3,000,000
FY 2006	1,000,000	2,000,000	3,000,000

These estimates do not include operating costs to carry out the initiative.

Public Involvement and Education Initiatives (Action Agenda strategies 1.1.1, 2.1.1, 4.1.1)

The Public Involvement and Education Initiatives include a wide range of activities described in Goals 1, 2, 3, 4, and 6 of the report (see Attachment A for greater detail).

GOAL 1	TO ENHANCE THE QUALITY, ACCESS, AND DIVERSITY OF HERITAGE INFORMATION STATEWIDE.			
	WEB/GIS	COLLECTIONS DATABASE	HUMANITIES COUNCIL	TOTAL
FY 2002	143,241		30,000	173,241
FY 2004	188,241	47,533	60,000	295,774
GOAL 2	TO PROVIDE CITITZEN ACCESS TO COMMUNITY HISTORY FOR ENHANCED NEIGHBORHOOD CONSERVATION, QUALITY OF LIFE, AND SUSTAINABILITY.			
			HUMANITIES COUNCIL	TOTAL
FY 2002			0	0
FY 2004			200,000	200,000
GOAL 3	TO ENHANCE THE QUALITY, ACCESSIBILITY, AND DIVERSITY OF HERITAGE EXPERIENCES.			
	SIGNAGE INITIATIVE			TOTAL
FY 2002	200,000			200,000
FY 2004	0			0
GOAL 4	TO PROVIDE PRIMARY AND SECONDARY SCHOOL STUDENTS WITH DIVERSE, HIGH QUALITY, HERITAGE EDUCATION.			
	EDUCATION CHIEF	JPPM EDUCATORS	HUMANITIES COUNCIL	TOTAL
FY 2002	54,165		150,000	204,165
FY 2004	54,165	132,758	200,000	386,923
GOAL 6	TO PROVIDE HIGH QUALITY AND DIVERSE OPPORTUNITIES FOR LIFETIME LEARNING IN THE HERITAGE FIELDS FOR PRACTICING PROFESSIONALS, VOLUNTEERS, AND INTERESTED CITIZENS.			
	ARCHEOLOGY OUTREACH		HUMANITIES COUNCIL	TOTAL
FY 2002			20,000	20,000
FY 2004	44,528		90,000	134,528

Higher Education Initiatives (Action Agenda strategy 5.1.1)

IMPART (Institute for Museum, Preservation, and Archeology Research and Training) would develop formal cooperative agreements between 10 partner institutions to allow inter-institutional educational opportunities, providing expanded undergraduate and graduate programs in the heritage disciplines (see Attachment B for greater detail).

GOAL 5	TO PROVIDE HIGH QUALITY AND DIVERSE HIGHER EDUCATION OPPORTUNITIES IN THE HERITAGE FIELDS.	
	IMPART	TOTAL
FY 2002	1,164,400	1,164,400
FY 2004	2,442,400	2,442,400