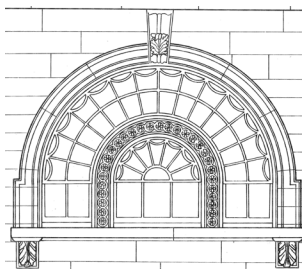
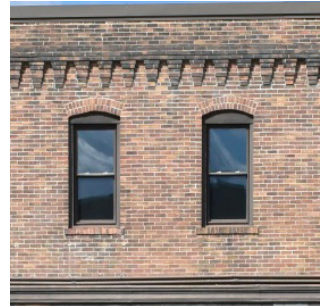


Information for Donors



**American
Easement
Foundation**



June 2025

Introduction

This Donors' Packet includes a series of documents that provide an overview of the operation of the American Easement Foundation and some important forms that is uses in establishing an easement and subsequently monitoring it. Some of these materials are also available as individual PDF fillable forms.

DONOR PACKET CONTENTS

1 About the American Easement Foundation

A brief description of the Foundation

2 The Board of Directors

Short biographies of members of the board

3 About Preservation Easements

Describing the basic concepts of an easement

4 Terms of an Easement

A listing of the basic requirements in a typical easement

5 Endowment Donations

An explanation of how cash donations support the operations of the Foundation

6 Easement Donation Time line

A recommended schedule of the steps involved in conveying a conservation easement

7 Preliminary Application for Donating an Easement

A form for property owners who are considering making an easement donation

8 Baseline Documentation Introduction

An explanation of information needed about a property prior to conveying an easement

9 Baseline Documentation Checklist

A checklist of the information that is to be included in the Baseline Document

10 Project Planning Notice

A form for property owners to provide an early notice to the Foundation of potential work

11 Work Application Form

To be used by property owners when formally seeking approval of proposed work



About the American Easement Foundation

The American Easement Foundation (AEF), is a 501(c)(3) organization registered in the Commonwealth of Virginia, and is a supporting organization to the Galveston Historical Foundation. It was formed in 2001 with the express purpose of encouraging the preservation of historic resources in perpetuity through the application of conservation easements. The Foundation works to promote awareness and respect for historic buildings and their landscapes through technical assistance and publications. AEF holds that preservation of the built environment enhances our national quality of life and has a demonstrated ability to work with donors in a quick and decisive manner when needs arise..

Foundation Objectives

- To promote preservation of cultural resources, including historic structures and sites
- To encourage responsible stewardship of historic resources
- To facilitate respectful use of historic properties

AEF strives to fully comply with Internal Revenue Service requirements for charitable gift donations as regards to conservation easements, and urges donors to follow best practices in their potential gift donations.

AEF also provides information related to best practices in preservation to potential donors, and to those who have donated easements, This may include referrals to publications addressing technical preservation procedures and identification of professionals in design, planning and land use law who may assist property owners in best stewardship of their historic resources.

AEF strongly recommends that donors consult their attorney, accountant, and tax advisor regarding the tax implications of a gift of an easement. A gift of a qualified conservation easement in perpetuity may qualify as a non-cash charitable gift, which may yield a deduction for federal income tax purposes and a credit for state income tax purposes.



The Board of Directors

AEF is guided by a Board of Directors composed of professionals in preservation-related fields, including architecture, planning, development and architectural history. Board members have extensive experience in crafting preservation regulations, building rehabilitation, development and real estate transactions involving historic properties. They have also served on the

boards of other preservation-oriented organizations. They bring a nationally recognized understanding of the interaction of technical preservation procedures with property management needs, which enables owners to make beneficial use of their properties while also accomplishing preservation goals. All board members volunteer their time to the organization. The members of the board are:

**Laura (Camayd) Bourgeois,
Director**

Architectural Projects and Historic
Properties Division
Galveston Historical Foundation
Galveston, TX

Jon Hensley, Secretary

Architect
Jon Hensley Architects PLLC
Arlington, VA

Dwayne Jones, President

Executive Director
Galveston Historical Foundation
Galveston, TX

**Friederike H. Mittner,
Vice-president**

Preservation Officer
Town of Palm Beach, FL

Bob Score, Treasurer

Architect/Preservation Consultant
Harboe Architects
Chicago, IL

John G. Williams, Director

Architect
Kailua-Kona, HI

Noré Winter, Director

Consultant in historic preservation
Winter & Company
Boulder, CO

Vitae of the Board Members

Laura (Camayd) Bourgeois

Galveston, TX

Laura (Camayd) Bourgeois holds a Masters in Preservation Studies degree from Tulane University and began her career interning for Dade Heritage Trust in Miami, Florida.

She worked for an architectural firm in Bay Harbor Isle and continued her career working for the City of Miami Beach as a senior planner assigned to the Design Review Board. In that capacity she was often involved in city wide sea level rise and climate change discussions and looked at new infill guidelines for single-family homes and multi-family buildings. She conducted several research projects and code analysis for how historic buildings could be retrofitted to respond to sea level rise and solutions for how commercial and multi-family buildings address the pedestrian level.

In 2016 she began work with the Texas Historical Commission as a program specialist for the Certified Local Government program (CLG). In this capacity she worked with FEMA and local governments affected by Hurricane Harvey in 2017. She currently works for Galveston Historical Foundation where she oversees the covenant monitoring program, Preservation services, and manages architectural projects for the Foundation.

Jon Hensley

Arlington, VA

Jon Hensley is an architect with 30 years of professional experience in the Washington, DC area. The firm has won multiple design awards and its work has been featured in many publications.

Jon is a graduate of the University of Tennessee School of Architecture and is currently a registered architect in DC, Maryland, and Virginia. Prior to founding JHA in 1997, he worked with David M Schwarz Architects, Ellerbee Becket, and Shalom Baranes Architects.

Jon values the importance of creating, building, and preserving community through the arts and architecture. He served on the Arlington Commission of the Arts for six years and is currently on the Arlington Public Art Committee.

Jon has participated in a number of Historic Preservation projects in DC and the surrounding communities. Noteworthy projects include Building 33 at the Washington Navy Yard, The Penn Theatre project, 2160 California Street NW, and 1737 Church Street NW in the District, 6400 Georgetown Pike in McLean, and the Cherry-Wheelock Residence in Arlington. His designs have been approved by historic preservation review boards in Washington DC, Chevy Chase MD, and Arlington, Fairfax County, and Alexandria, VA.

Dwayne Jones

Galveston, TX

Dwayne is a graduate of Trinity University in San Antonio in history and Asian studies. He holds a master's degree in urban and regional planning and historic preservation from George Washington University in Washington, D.C. Mr. Jones is Executive Director of Galveston Historical Foundation (2006-present), one of the nation's largest local preservation non-profits.

From 2000 to 2006, he served as Executive Director of Preservation Dallas, the local non-profit preservation organization for Dallas. Dwayne is a member in the American Institute of Certified Planners (AICP) and a recipient of the Dorothy Savage Award for Outstanding Achievement in Historic Preservation from Preservation Dallas, and an Honorary Member of the Dallas Chapter of the American Institute of Architects.

Prior to his work in non-profits, he directed the National Register and Certified Local Government programs at the Texas Historical Commission where he worked for twelve years and worked in several preservation planning positions at the local level.

Friederike Mittner

Palm Beach, FL

Friederike Mittner is the Preservation Officer for the City of West Palm Beach, Florida and has held the position of City Historic Preservation Planner since 2005. Duties include managing the Historic Preservation Section of the Planning Division, as a Certified Local Government (CLG), preservation planning, design and site plan review and staff support for the Historic Preservation Board. In her role, she manages 17 historic districts with over 5,000 cultural resources. She also served as Urban Designer for the City of Lake, FL from 2001-2005. During that time she oversaw the creation of design guidelines for the City's Thoroughfares and the creation of four historic districts.

Ms. Mittner earned her Bachelor of Arts (with honors) in Sociology in 1996 and a M.S.A.S. in Historic Preservation in 1998 from the University of FL, Gainesville. She continued Graduate and Doctoral Level studies in Public Administration at Florida Atlantic University from 2001-2003. In 2022, she was elected to College of Fellows of the American Institute of Certified Planners.

Ms. Mittner is the immediate Past President and Trustee of the non-profit Florida Trust for Historic Preservation where she has volunteered for over 20 years. During this time she participated in the Trust's easement program, including monitoring of several easements. She also serves on the Palm Beach County Historic Resources Review Board, assists the National Alliance of Preservation Commission in training and assisting municipalities around the country and is a board member of the City of Lake Worth Beach, FL Planning and Zoning & Historic Resources Review Board

Bob Score

Chicago, IL

Bob Score is an architect with over twenty-five years of experience in historic preservation architecture. He has been with Harboe Architects since its inception in 2006 and previously worked with Gunny Harboe at McClier starting in 2000. Mr. Score also worked as an architect for Ann Beha Associates in Boston, MA between 1996 and 2000 where he worked on the restoration of historic museums and cultural properties throughout the United States. He also worked for Consigli Construction as Director of Historic Preservation.

Mr. Score earned his Bachelor of Science in Architecture from Lawrence Technological University. He earned his Master of Architecture degree from the University of Illinois, Urbana in 1994 with a specialization in Historic Preservation. Mr. Score is a licensed architect in the State of Illinois and is NCARB certified.

At Harboe Architects, Mr. Score leads projects from design through construction. He is well versed on restoration issues involving masonry, windows, cast iron, interior finishes, façade inspections, and building assessments.

Mr. Score's experience has allowed him the unique opportunity of collaborating on preservation projects both as a design lead as well as the leader of crafts people executing the work.

Mr. Score was chair of the Historic Resources Committee of the Chicago Chapter of the AIA from 2000 to 2002. Bob is also a Director of the Association for Preservation Technology. Mr. Score is the founder and Past-President of the Western Great Lakes Chapter of the Association for Preservation Technology. He speaks regularly to various professional organizations and at conferences on preservation topics.

John Williams

Kailua-Kona, HI

John Williams was the founding principal of John Williams, Architect. His firm provided design services to private clients and consultant services to the preservation community. As the Principal-In-Charge, he led project teams designing private residences, rehabilitating historically significant resources, and conducting workshops focused on preservation topics. His responsibilities included project management, coordination, and design. Mr. Williams is now retired.

Mr. Williams served on the United States Advisory Council on Historic Preservation for eight years. John was also appointed by then Governor Locke to the Washington State Advisory Council on Historic Preservation and reappointed by Governor Gregoire as its Chairman where he served for ten years.

He has served as Vice President of Preservation Action and enjoyed serving as Chairman of the National Alliance of Preservation Commissions. He was the Chair of the Pike Place Market Historical Commission, Chair of the Oysterville Design Review Board, and a past member of the King County Landmarks Commissions.

Noré Winter

Boulder, CO

Noré Winter is an urban design and planning consultant with experience nationwide in historic preservation, design review and community character management.

He has developed preservation plans and guidelines for historic and conservation districts across the country, including Houston, Salt Lake City, San Antonio, Denver and Atlanta. Smaller communities he has served include Beaufort, South Carolina, Brattleboro, Vermont, Ste. Genevieve, Missouri, Lahaina, Hawaii and Oyster-ville, Washington.

Colorado clients are the cities of Aspen, Breckenridge, Crested Butte, Durango, Steamboat Springs and Telluride. He produced citywide preservation design guidelines for Pasadena and San Jose and developed a citywide system of design review for Carmel in California. He also produced development guidelines for the San Antonio River Corridor, including the historic Riverwalk.

Mr. Winter has served as Chairman of the National Alliance of Preservation Commissions and is a past president of Historic Boulder, Inc., and a former member of the Board of Directors of Colorado Preservation, Inc.

Winter has received awards for “Contributions to the Built Environment” from the Colorado and Western Regional divisions of the American Institute of Architects and the Lifetime Achievement Award from the National Alliance of Preservation Commissions.

He holds a Bachelor’s degree in Architecture from Tulane University and a Masters in Architecture and Urban Design from UCLA, and has been guest lecturer at Harvard University, Ball State University and the University of Colorado.



About Preservation Easements

A Preservation (Conservation) Easement is a binding legal document designed to protect historically significant resources. An easement holding organization in effect “owns” that which the easement covers. The easement holder has a responsibility to require current and future owners to follow the easement provisions.

The easement is a private legal contract recorded with the property deed for the purpose of protecting a property’s historic value. It is one of the most effective legal tools available for historic preservation because it provides assurance to the owner that their property’s intrinsic values will be preserved with all successive ownerships.

The term “preservation easement” is used commonly when referring to easements for historic properties, but the term “conservation easement” is the formal term used by the Internal Revenue Service to cover a range of easements, including those for historic resources. According to the Internal Revenue Service, “a conservation easement may be used to protect land for recreation, the natural environment, open space, or land that has an historic, architectural, or archeological significance.”

The details of each easement are created specifically for each property, however they all share the same objective to protect against changes that are inconsistent with the preservation of the property. This can include the construction of incompatible additions or new construction, demolition and inappropriate alterations. Conveying an easement to AEF also requires that appropriate levels of maintenance and providing for safe conditions be upheld.

An easement gives AEF the legal authority and responsibility to enforce its terms. This includes the right to inspect the property and to require that owners comply with the easement conditions. Changes to the features subject to the easement may occur only with the Foundation’s approval. Restrictions on subdividing and development of the property are also common. The easement conveyance documents will specify the historic and character defining features of the property that are subject to the easement. If upon inspection AEF finds that the terms of the easement have not been upheld, the owner will be responsible for covering the costs of reversing any unacceptable treatment or they may face other penalties.

Design Standards Applied

AEF must approve any work that affects the features defined in the easement. In determining what changes are appropriate for each easement property, AEF consults the Secretary of the Interior’s Standards for the Treatment of Historic Properties (36 CFR Part 68), published by the National Park Service. They serve as philosophical underpinning for AEF decisions. The Standards are intended to preserve those elements that will contribute to a building’s historic character and require that new additions or exterior alterations (if permitted) be compatible in mass, size, scale, and design with the historical structure.

AEF also draws upon the *Preservation Briefs* series, published by the National Park Service to provide guidance on preserving, rehabilitating, and restoring historic buildings. These NPS Publications help historic building owners recognize and resolve common problems prior to initiating work.



Easement Terms in General

Typical Easement Terms:

1. The easement is in perpetuity.
2. Reasonable public access is provided.
3. Affirmative maintenance is required.
4. Any alterations, repairs or improvements must be approved by AEF prior to initiating work.
5. Demolition of the property is prohibited.
6. All features named in the easement will be accessible to AEF representatives for annual inspection.
7. AEF must be notified if ownership of the property is conveyed to another party
8. Modification of the terms of the easement that would lessen restrictions is not permitted.

An easement typically applies to the entire exterior of a building and may include surrounding grounds. Limitations on potential development rights and portions of a building interior also may be a part of the easement. Note that these terms serve as a starting point, and that specific conditions will be tailored to each property. These typically exceed those set forth in local historic preservation ordinances.

Public Access Requirement

In the interest of assuring that the preservation easement is of benefit to the public, AEF may require that the owner provide access to areas of the property for which a donation is granted. This may include exterior walls that are not normally visible from the public way, as well as interiors or other features that may be included in the easement.

The degree of access is tailored according to the historic resource under protection and in consideration of the owner's use of the property. When

a historic structure is not visible from a public way, certain steps must be taken to ensure that the public has the opportunity to view the property preserved by the easement to the extent consistent with the nature and condition of the property. AEF will assist the owner in finding a balance between protecting the owner's privacy and providing a public benefit.

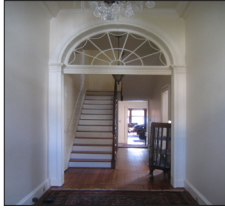
Standards for Review

As part of its obligations, the American Easement Foundation reviews proposed work, including maintenance and alterations related to the features affected by the easement donation. The scope of review is focused on those features described in the act of donation and the associated baseline documentation.

The review of any proposed work is based upon the Secretary of the Interior's Standards and Guidelines for the treatment of historic properties. These include:

- Standards for Preservation
- Standards for Rehabilitation
- Guidelines for Treatment of Historic Properties
- Guidelines for Rehabilitating Historic Buildings
- Guidelines for the Treatment of Cultural Landscapes
- Guidelines for Sustainability

In addition, the Foundation may also refer to the series of *Preservation Briefs* published by the Secretary of the Interior. Approval of the proposed work indicates the foundation's interpretation that the project complies with the relevant Standards and Guidelines.



Easement Donation Costs

The American Easement Foundation relies upon cash donations to cover its ongoing operating costs, including donations made at the time of conveying an easement. Expenses associated with an easement donation include:

Initiation Costs

Some basic costs occur at the beginning of an easement donation. These costs include our attorney's fees and potentially travel costs for a Board member(s) if an on-site inspection is needed to confirm the eligibility of the property. In some cases, AEF will prepare base-line documentation (although this is normally the donor's responsibility to provide this information) for which costs also are to be reimbursed. These potential costs are discussed with the owner ahead of time.

Legal fees

Legal fees are incurred during the negotiation of the easement terms and are billed hourly. The total fees are influenced by the extent of negotiations that are involved.

Administrative costs

Although the members of the Board of Directors do not receive payment for their services as board members some administrative staff time and special professional services may be incurred in preparing the easement documentation and thus are to be reimbursed.

Endowment support

The Foundation maintains an endowment, which is used to cover annual easement monitoring costs, general administration and related expenses. These include costs for annual inspection and reporting and potential legal actions. This endowment is supported by gifts from

easement donors. The amount is guided using a formula to estimate annual expenses extended over time and is influenced by the size and complexity of the property and also the scope of the easement.

Calculating donation requests

At a minimum one full-scale on-site inspection is planned every 12 to 18 months, which is conducted by AEF board members but also may include preservation consultants, architects and engineers. In addition, interim, more specific monitoring may be arranged; this may be conducted in cooperation with local preservation organizations or consultants in the field. The level of inspection is determined by the scale of the property, the general character of the materials and features that are involved and the complexity of the building systems themselves.

Monitoring includes observations to assure that no unauthorized alterations have occurred and also that appropriate maintenance measures are being undertaken to preserve the property. The focus is on the features specifically named in the easement donation but in a complex building this may include inspections of building systems that are associated with water protection, heating and ventilating, and other mechanical and electrical systems that can affect the integrity of the historically significant features. Structural concerns as well as seismic treatments that may affect preservation of the easement portions may also be included.

The monitoring includes on-site documentation, development of summary reports, a comparison with base line data and previous years' inspections and communications with the owner of the property. An annual update of the inspection is delivered to the owner.



Easement Donation Timeline

The donation of a conservation (preservation) easement requires careful scheduling to assure that all steps are properly executed. Typically, a property owner seeks to convey the easement by the end of a calendar year. Waiting until late in the year to initiate the process can jeopardize meeting that goal. The American Easement Foundation (AEF) recommends that the conveyance process be completed by early to mid-December and suggests the steps described below be followed in conveying an easement. They are presented in a sequence that is generally chronological, but it is understood that some actions may occur concurrently.

By August 15:

1. The owner contacts AEF to initiate discussions.

At the outset, an informal conversation establishes a general understanding of the property and AEF's potential participation in receiving an easement.

By September 1:

2. AEF provides the owner with a donation packet.

This includes information about the Foundation and the general parameters for donating an easement. It also contains a statement of reimbursable expenses expected to be incurred to negotiate the easement and suggestions for a gift to the Foundation to support its monitoring and enforcement responsibilities.

By September 15:

3. The owner formally notifies AEF of the intent to donate an easement.

This may be a letter of intent or a formal application (which is available from AEF). This does not bind the donor to completing a donation but indicates serious interest. This initiates services of AEF's attorney and may also include expenses for board members to inspect the property in addition to incidental administrative costs. A retainer for these reimbursable expenses is conveyed at this time.

By October 1:

4. The owner confirms the eligibility of the property as a historic resource with the National Park Service.

The IRS requires that a property be confirmed as being "eligible," in terms of historic significance, prior to filing the tax forms claiming the deduction. Once the owner receives confirmation, this information is provided to AEF in a baseline document.

By October 15:

5. AEF develops an outline of easement conditions.

This draws upon discussions with the owner about their general intent for the easement. This will include a description of those rights that are to be granted in the easement, as well as the amount of a gift to the Foundation to help cover monitoring and administrative costs.

By November 1:

6. The owner provides AEF with the baseline documentation of the property.

This describes the historic significance of the property and documents its condition at the time of conveying the easement. Some of this information will be incorporated into the body of the easement agreement also. The baseline document itself becomes an appendix to the easement agreement. Both parties must sign the baseline documentation prior to conveying the easement.

Date to be determined by owner:

7. The owner secures an appraisal of the value of the donation.

The donor secures the services of a qualified appraiser. This appraisal should be prepared by a professional in the field with qualifications acceptable to the IRS.

By November 15:

8. AEF develops the draft easement agreement (Act of Donation of Perpetual Real Rights).

The draft easement agreement will be based on the preliminary outline of easement conditions. It is submitted to the donor for review and comment. Revisions may occur at this time.

By December 1:

9. The owner delivers the gift donation to AEF.

This occurs prior to or concurrent with the signing of the easement agreement.

By December 1:

10. The easement agreement is finalized.

Both parties sign the easement agreement.

By December 15:

11. The owner files the Act of Donation of Perpetual Real Rights.

This is with the State Registrar of Deeds or County Clerk. A notarized copy is provided to AEF

Timing typically early in the following year:

12. AEF signs IRS Form 8283.

This form documents the charitable donation of the conservation easement. AEF will sign the form after the conservation easement is recorded. AEF will deliver the signed form to the donor.

Timing at the owner's discretion:

13. The owner files their income tax form.

Note that the IRS requires a filing fee for most deductions.



Preliminary Application for an Easement Donation

The American Easement Foundation receives and monitors easements for the preservation and conservation of properties with cultural, environmental and historic significance. In order to assist the Foundation in its consideration of receiving a donation please provide the following information, to the extent feasible. A checklist of the required documents is listed at the bottom of this application. These will provide a baseline of information, which defines the existing condition of the property. Many of

these documents may already be in your possession and others can be found at the relevant State Historic Preservation Office. If some information is not available at the time of initial inquiry, it will need to be provided before the easement donation is accepted. Specific requirements will be determined on a case-by-case basis. These records, in combination with an annual site visit, are necessary for the Foundation to monitor the condition of the building.

General Information

Building Name: _____

Address: _____

Tax ID#: _____

Owner: _____

Phone/E-mail: _____

Owner Address: _____

Contact:

Name: _____

Phone/E-mail: _____

Address: _____

Preliminary description of the scope of the easement you intend to donate:

Building Exterior: _____

Building Interior: _____

Site Features: _____

Are there other encumbrances on the property that might affect the value of the easement? If so, explain.

_____Yes _____No

What is the zoning for the property? _____

When do you estimate making the donation? _____

Preliminary estimate of value of donation: _____

Do you have an appraiser for this donation? _____Yes _____No

If so, who is the appraiser? Name: _____

Address: _____

Building Information

Building Type: _____ Commercial
 _____ Residential (Single-Family)
 _____ Residential (Multi-Family)
 _____ Industrial
 _____ Institutional
 _____ Other

Use of Property: Current: _____

Historic:

Date of Construction:

Confirmed Estimated

Number of Stories:

Gross Floor Area:

Building Significance

Register Listings (check all that apply):

____ Individual National Register Listing Date_____

____ Listed as Part of National Historic District Date _____

Name of District: _____

_____ Contributing _____ Non-contributing

_____ State Designation _____ Date_____

_____ Listed as a Local Landmark Date _____

____ Listed as a Contributor in a Local Historic District Date _____

Name of District: _____

Documentation Checklist

Please indicate which of the following documents is available. Check all that apply.

Historical Background Information about the Property and Its Setting

- ☐ early sketches or photographs of the property
- ☐ written descriptions of the property and its history
- ☐ historical maps including the property
- ☐ descriptions in books
- ☐ Chain of Title records
- ☐ original architectural drawings
- ☐ tax assessment records
- ☐ city index records

Designation as a Historic Resource

- ☐ National Register nominations
- ☐ state register nominations
- ☐ local register nominations
- ☐ survey forms
- ☐ official notification of designation from a governmental agency

Records of Actions about the Property

- ☐ Certificates of Appropriateness issued by the local preservation authority
- ☐ minutes of meetings of local preservation commission involving this property
- ☐ notifications from the National Park Service about Tax Credit eligibility
- ☐ notifications by a state agency about state tax credit eligibility
- ☐ other easements, covenants, or restrictions on the property

Documentation of Changes

- ☐ drawings of alterations
- ☐ photographs of alterations
- ☐ drawings of alterations
- ☐ as-built drawings

Descriptions of Ongoing Management and Maintenance Policies

- ☐ any maintenance procedures and cyclical repair schedules that may affect the exterior of the property

Management Information

After the easement is conveyed:

Will there be a property management company?

_____ Yes _____ No

Will there be a tenant or property owners' association?

_____ Yes _____ No

Will portions of the property be rented?

_____ Yes _____ No

Will portions of the property be owner-occupied?

_____ Yes _____ No

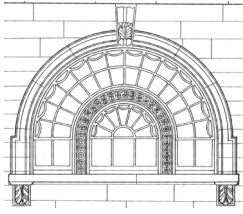
Current Work on the Property

Is construction work under way or anticipated before conveyance of the easement? If so, explain.

_____ Yes _____ No

Are construction drawings and specifications available for the work?

_____ Yes _____ No



Baseline Documentation

Prior to conveying an easement, the donor provides AEF a base line of information that documents the historic significance of the property and its existing condition at the time of the donation. In some cases AEF can assist the donor in assembling this information.

Historic Significance

Historical research, including resource surveys and nominations serve as a basis for confirming historical significance. Historical photographs also can help establish the relationship of existing conditions to the character of the property during its period of historic significance. A formal acknowledgement of historic significance obtained from the National Park Service also is a key element in this regard. This may be a formal listing in the National Register of Historic Places or a *Part 1* form used by the Park Service for rehabilitation investment tax credits.

Significant Features

An important component of baseline documentation is a description of those key character-

defining features that are to be protected under terms of the easement.

Existing Conditions

As-built drawing and contemporary photographs are included in this database. This provides both parties an objective starting point for documenting the historic significance of the property, for defining those features that are to be included in the easement and for monitoring conditions over time.

General Information

The baseline document also includes maps locating the property and its legal description. Proof of ownership and appropriate insurance coverage also are provided.

A checklist follows which identifies some documents that may be included in the baseline documentation. Note that other background information may be requested depending upon the special conditions of the property.



The American Easement Foundation Document Checklist

Historical Background Information about the Property and Its Setting

- ☐ Early photographs
- ☐ Written descriptions of history
- ☐ Historical maps, etc.
- ☐ Descriptions in books and newspapers
- ☐ Chain of title
- ☐ Maps or survey plats

Designation as a Historic Resource

- ☐ National, state, or local register nominations
- ☐ Survey forms
- ☐ Official notification of designation from governmental agency

Records of Actions about the Property

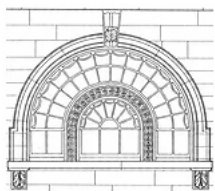
- ☐ Certificates of Appropriateness
- ☐ Minutes of meetings of local preservation commission
- ☐ Notifications from NPS regarding tax credits, etc.
- ☐ Easements, covenants, or restrictions on the property

Documentation of Changes

- ☐ Drawings of alterations
- ☐ Building permits and permit application forms

Descriptions of Ongoing Management/Maintenance Policies

- ☐ Maintenance procedures/cyclical repairs that may affect the exterior of the Property
- ☐ Engineering reports on condition of façade



**American
Easement
Foundation**

Project Planning Notice

As the holder of an easement on your property, the American Easement Foundation (AEF) reviews and approves projects that involve work in areas covered by the easement. We recognize that this may include periodic maintenance and repair as well as major rehabilitation efforts. We ask that you provide us with a notice of any work, regardless of scale, at an early planning stage to facilitate expeditious review. This form is intended to establish an understanding in general terms of the work anticipated and to set forth a clear communication system. We understand that in an early stage of planning not all details will be known, but please provide as much information as you may have. At a later stage, you will provide more detailed information in a separate form.

Part 1: Property Location and Contact Information

Please confirm this information.

Property name: _____

Property address: _____

Owner's name: _____

Owner's address: _____

Owner's phone: _____

Owner's email: _____

Project manager: _____

Project manager's address: _____

Project manager's phone: _____

Project manager's email: _____

Part 2: Project Description

Please describe, in general terms, the work planned, the features of the property involved, and your anticipated schedule:

Part 3: Project Team

Who are other members of your project team? Please provide contact information for relevant team members. We understand that at early stages of project planning some of these may not be known.

Building maintenance staff: _____

Specialty subcontractors or trades: _____

Design professionals: _____

General contractor: _____

Part 4: Other design review requirements

Some properties are also subject to design review approval by a local, state, or federal preservation office. For example, the property may be a local landmark or contributor to a locally-designated historic district and therefore subject to review by a local historical commission. If the project is to seek state or federal incentives, then those agencies may be involved. We understand that some work that is subject to review by AEF may not be subject to these agencies. Please indicate any of these that will be involved:

Local historical commission: _____

State preservation office: _____

National Park Service: _____

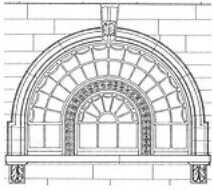
Other: _____

Thank you! We appreciate your conscientious stewardship of your historic resource and look forward to working with you in planning the project.

Please return this form to the designated AEF board member, with a copy to:

Dwayne Jones, President
American Easement Foundation
c/o Galveston Historical Foundation
P.O. Box 149
Galveston, TX 77553

Email address: Dwayne.jones@galvestonhistory.org



**American
Easement
Foundation**

Application for approval of work

The American Easement Foundation (AEF) holds preservation easements on properties throughout the nation. Any work affecting an easement must be approved by AEF, prior to commencing. In order to expedite that review, AEF requires sufficient information that describes the work proposed. Please complete the following form and submit it, along with the appropriate documentation.

This application must be approved by AEF prior to any local reviews.

Part 1: Contact information:

Property name: _____

Property address: _____

Owner's name: _____

Owner's address: _____

Owner's phone: _____

Owner's email: _____

Project manager: _____

Project manager's address: _____

Project manager's phone: _____

Project manager's email: _____

Part 2: General Description of Proposed Work:

Please describe the work proposed on those portions of the property that are a part of the easement. You may also attach a separate description if you prefer.

Part 3: Summary of Work Categories:

Please indicate which of these categories of work will be involved in the project and provide a brief description:

___ Maintenance and repair of existing features _____
(no change to the existing features)

___ Replacing a deteriorated feature in-kind _____
(same material and design)

___ Tenant improvements _____
(e.g. adding an awning)

___ Signage _____
(adding or replacing a sign)

___ Exterior alteration _____

___ Interior alteration (if part of the easement) _____

___ Addition to the property _____

___ Site work _____
(e.g. paving, planting, retaining wall)

Other

Part 4: Documentation of Proposed Work:

AEF requires drawings and specifications that clearly document the proposed work. This may include construction drawings, product information, and photographs of existing conditions related to the areas of work. A potential checklist:

A. Construction drawings

- ☐ Site plans
- ☐ Floor plans
- ☐ Exterior elevations
- ☐ Building sections
- ☐ Interior elevations (if a part of the easement)
- ☐ Construction details
- ☐ Schedules (e.g. window schedule)

B. Specified systems or materials

- ☐ Specification section(s)
- ☐ Manufacturer's cut sheet
- ☐ Schedule of components
- ☐ Materials list
- ☐ Other _____

C. Existing conditions

- ☐ Photographs of existing conditions (including key features)
- ☐ Drawings of existing conditions

Part 5: Additional information

Please provide any other information that explains the proposed project.

Contacting AEF

AEF very much appreciates your stewardship of the property, and we look forward to working with you to assure that any work is planned to preserve its historic significance. Please contact us if you have any questions about your easement or completion of this form.

Email or mail this form to the designated board member contact, with a copy to:

Dwayne Jones, President
American Easement Foundation
c/o Galveston Historical Foundation
P.O. Box 149
Galveston, TX 77553

Email: Dwayne.jones@galvestonhistory.org
Phone: 409-765-3422

Applicant's signature: _____

Date: _____