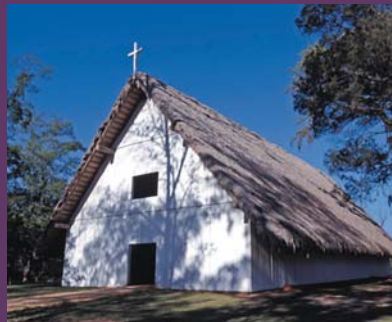


Contributions of Historic Preservation

TO THE QUALITY OF LIFE IN FLORIDA



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In the preamble to the National Historic Preservation Act, Congress found that the preservation of America's heritage **" . . . is in the public interest so that its vital legacy of cultural, educational, aesthetic, inspirational, economic and energy benefits will be maintained and enriched for future generations of Americans."** In other words, in 1966, Congress was convinced that the American public's "quality of life" would improve as an indigenous part of the preservation of its historic towns and neighborhoods. Four decades later, National Trust for Historic Preservation President Richard Moe opened the annual conference with remarks that re-confirmed that organization's concern for "quality of life" and how preservation, if properly integrated, can better our communities.

Recently, Donovan Rypkema, one of the nation's foremost preservation planners, made the observation about newly revitalized historic areas that not long ago were nearly dead: "I do not know of a single sustained success story in downtown revitalization anywhere in the US where restoration (preservation) was not a key component of the effort. That doesn't mean it isn't theoretically possible to have downtown revitalization but no restoration, *but I don't know about it, I haven't read about it, I haven't seen it.*"

Indeed, the well-being and potential for the recycling of older communities is an increasing concern in states such as Florida in all aspects of urban and regional planning. For some time, preservationists have suspected that there is a real connection with a tangible and elusive community spirit that rises from a sense of place often associated with unique neighborhoods, whether they qualify for the National Register of Historic Places, or not. It just so happens that recognized neighborhoods have one up on those that do not have that identity.

By understanding how this connection works, we can see the means to maintain the cultural and historical qualities that contribute to Florida's older neighborhoods while also meeting the needs of quality living and housing. As this study shows, quality of life is now being measured from all angles; its quantifiable qualities can in large part include standard of living, economic and housing opportunities, as well as access to goods and services. Quality of life can also encompass freedom, happiness, creativity and artistic impression, environment, and health -- qualities that are far harder to measure.

Although in the past historic preservation has too often been seen as a separate and prior activity that prepares the way for the improvement of neighborhoods, we know now that revitalization requires that historic sites be given a role in the life of the community. The point is not to place the community's historic assets under lock and key, but to integrate them safely and evenly into the fabric of everyday life. Local residents can benefit through outdoor markets, handicrafts, houses, cuisine, businesses, civic and religious centers, and interpretive components such as learning and recreational activities that complement a historic site's didactic offerings and convey a special meaning between its past, present and future. The more the community is involved, the more successful and inviting the area will become for everyone.

Because of this overlap in the relationship between better quality of life and historic preservation, when properly integrated into planning, this very much needed report exploring these conditions will help in developing an integrated approach to planning for historic and other uniquely special communities in Florida. It is a worthy companion to the previously published "Economic Impacts of Historic Preservation in Florida".

Roy Eugene Graham
FAIA, Fellow US/ICOMOS
Beinecke-Reeves Distinguished Professor
Director, College Preservation Programs
School of Architecture
College of Design, Construction and Planning
University of Florida



Contributions of Historic Preservation

TO THE QUALITY OF LIFE IN FLORIDA

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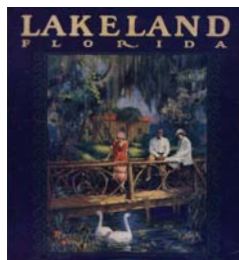
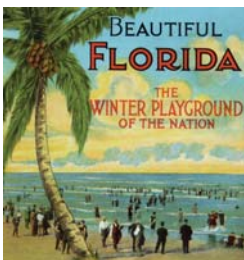
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Acknowledgments



Authors/Editors:

Timothy McLendon

Staff Attorney,
Center for Governmental
Responsibility,
University of Florida
Levin College of Law

Kristin Larsen, Ph.D., AICP

Assistant Professor
Department of Urban and
Regional Planning,
University of Florida

JoAnn Klein

Development Director,
Center for Governmental

Responsibility,
University of Florida
Levin College of Law

Rhonda Phillips, Ph.D., AICP

CEcD, Director Center
for Building Better
Communities, Associate
Professor, Urban and
Regional Planning,
Department, College of
Design, Construction and
Planning, University of Florida

Glenn Willumson, Ph.D.

Associate Professor of
Art History, Director

of the Graduate Program in
Museum Studies,
University of Florida

Lori Pennington-Gray, Ph.D.

Center for Tourism
Research and Development
College of Health and
Human Performance,
University of Florida

John Confer, Ph.D.

Center for Tourism
Research and Development
College of Health and
Human Performance,
University of Florida



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Photos: COVER (clockwise from top left) Mission San Luis, Tallahassee, winner of the 2006 "Preserve America" Presidential Award for Heritage Tourism; Miami Beach Art Deco District; Mount Dora's Historic District; and Lake Mirror Promenade, Lakeland. TABLE OF CONTENTS: (top) Cá d'Zan, Ringling Estate, Sarasota. BACK COVER: Ybor City.



Introduction & Overview

The State of Florida's heritage, whether in archaeological resources, historic structures, sites, and districts, spans the entire era of human settlement:

- Indian Mounds
- 18th century Spanish colonial resources
- Cracker structures of the 19th century
- Bungalows and chert houses of the early 20th century
- The distinctive modern style of the Sarasota School of Architecture
- Roadside structures and sites such as the early theme parks
- 1950s ranch houses that are just now becoming eligible for listing in the National Register of Historic Places and many local registers.

The heritage of our past and the productive, respectful use of such historic places in the present strengthen the quality of life for the future of our state. Identifying what is distinctive and shared about this heritage is essential to understanding how historic preservation contributes to the quality of life in Florida.

What is the relationship between historic preservation and quality of life? Historic preservation contributes to economic and cultural values in the State of Florida. Those cultural values are reflected in the quality of life found in the state's communities from small towns to large urban areas. Historic preservation contributes to quality of life due to the sense of place created by the tangible and intangible characteristics of Florida's historic places.

Florida's elected officials have directly addressed the significance of historic preservation to the quality of life in Florida, finding that:

"The rich and unique heritage of historic properties in this state, representing more than 10,000 years of human presence, is an important legacy to be valued and conserved for present and future generations. The destruction of these nonrenewable historical resources will engender a significant loss to the state's quality of life, economy, and cultural environment."

(FLA. STAT. § 267.01(1)(A))

This report, "Contributions of Historic Preservation to the Quality of Life in Florida", represents the first statewide study of how historic preservation fits into the overall quality of life in Florida. The report includes models and tools available to further historic preservation in Florida and to measure the impact of historical structures, events, and related activities on the enhancement of the quality of life in Florida. It is sponsored by the Florida Historical Commission and the

Division of Historical Resources in the Florida Department of State.

This report, a collaboration of four different colleges of the University of Florida and a non-profit organization specializing in historic preservation, is a follow-up to a 2002 report on the "Economic Impacts of Historic Preservation in Florida", with the same sponsors and some of the same research team members. The two studies differ in that the economic impacts study

was derived from a quantitative review of available data related to historic preservation. That study offered a statewide analysis of historic preservation activity in Florida. It examined direct and multiplier effects from investment in historic preservation throughout the state in such activities as historic rehabilitation of all

types of properties, heritage tourism, Main Street investment, grants programs, tax credits and museum operations.

The quality of life study, contained in this Executive Summary, while reviewing many of the same programs available in Florida in the field of historic preservation, presents a qualitative analysis. Explicit measuring that results in a definitive number or dollar amount is not easily ascertainable for quality of life. For that reason, this report is





DeFuniak Springs

“Some of the most lovingly preserved and picturesque downtowns are found in Florida’s small towns. For sheer harmony and grace, DeFuniak Springs may be the state’s most unspoiled city.”¹

DeFuniak Springs shares a great deal with many other Florida cities – it was founded in the late nineteenth century when a variety of people were attracted to the state by a stream of publications that celebrated Florida’s exotic landscape. As in many towns founded at that time, the railroad played a pivotal role; and development concentrated around the city’s spring-fed lake and reflected a mix of low density commercial, governmental, religious, and residential structures in the vernacular and late Victorian styles that typified the era.

What is distinctive about DeFuniak Springs is its sense of place reinforced by its social history – connected to the Chautauqua Institute founded in 1869 in New York State. From its first assembly in 1885 until the early 1930s, DeFuniak Springs functioned as the southernmost home of the adult education movement that endorsed learning in a pleasing natural and built environment to uplift the intellect and the spirit.

In 1902, nationally prominent architects were hired to develop a plan to make the settlement into a model town. The layout – a public park surrounding the lake with public buildings interspersed in the landscape bounded by a street from which axial roads extend – makes the lake the town’s centerpiece. Homes predominantly sit across the lakefront drive and the nearby railroad station forms the center of the town’s commercial district. This core area of the historic town was listed in the National Register of Historic Places in 1992.



1. Mormino, G.R. (2005). *Land of Sunshine, State of Dreams: A Social History of Modern Florida*. Gainesville, FL: Univ. Press of Florida, p. 40.

compiled by a collaboration of researchers, representing experts in the respective fields addressed in this study.

While measuring economic impacts can be approached from a statewide level, quality of life evaluations occur more often at the local level. Measuring quality of life occurs in people’s perceptions and enjoyment of their state and communities. It looks at the physical environment but also the cultural aspects of the community. Defining quality of life issues encompasses several components, including historic preservation. How does historic preservation impact the livability of a city or a community?

The challenge posed in this research is identifying, developing, or applying methods for assessing the impact of historic preservation on the quality of life in Florida’s communities. The value of this report is to assist individuals, neighborhoods, and communities in identifying creative methods for fostering historic preservation and for measuring its contribution to the quality of life in an area.

A 2005-2006 survey found that Florida residents are aware of their historic resources (roughly 55% of 1505 respondents had visited a historic site in the past year) and value the role that historic preservation plays in the state of Florida. Specifically, preservation is valued for what it can contribute to future generations (24%), for aesthetic reasons (17%), for educational reasons (14%), and for environmental reasons (13%) (see Russin in Technical Report to this work).

QUALITY OF LIFE & HISTORIC PRESERVATION COMPONENTS

Researchers in this study examined historic preservation’s impact on Florida’s quality of life in five key areas:

Quality of Life Indicators

Community indicators allow us to explore the relationship between his-

toric preservation and quality of life, expressed in terms of explicit outcomes. Community indicators are bits of information that when combined, provide a picture of what is happening locally. Quality of life is reflective of the values that exist in a community, and indicators can be used to identify and promote a particular set of values. This chapter includes a chart of indicators to use in gauging, protecting, enhancing, and interfacing with historic preservation. The research also provides recommendations for implementing the framework through monitoring and measuring the indicators.

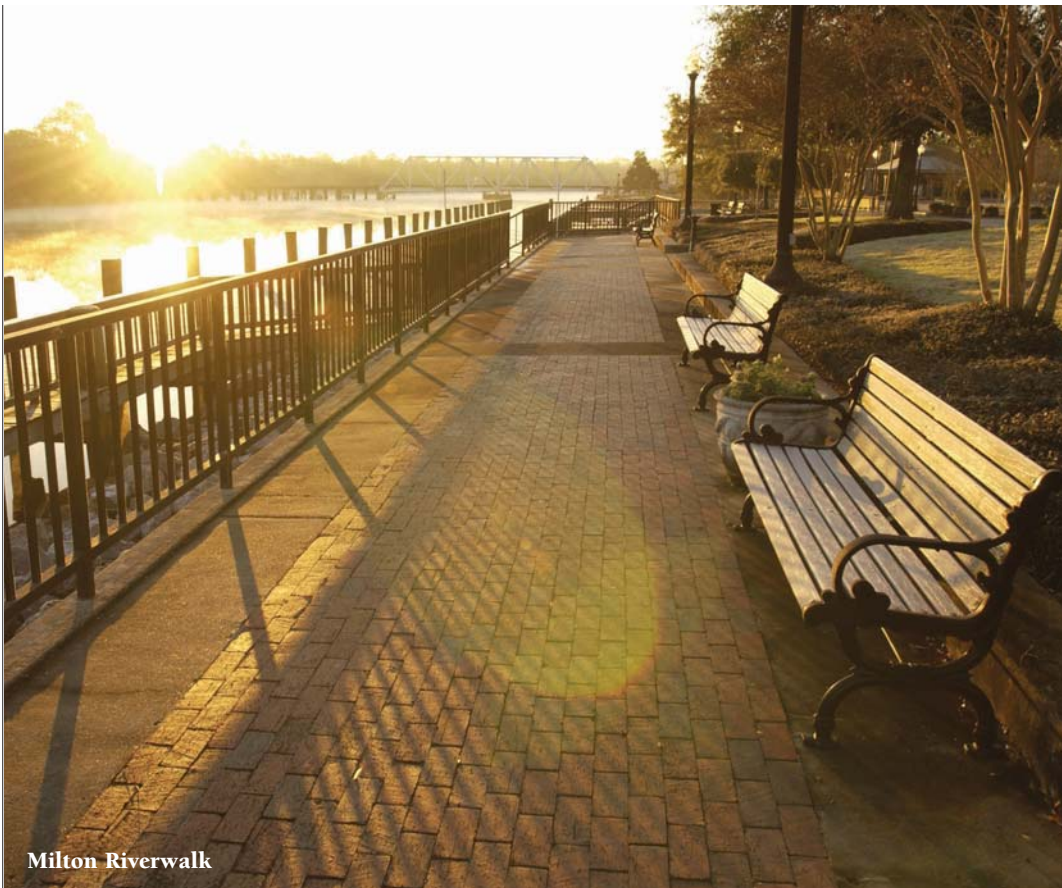
The Northeast Florida community of Fernandina Beach is offered as a case study of how economic development and historic preservation can be compatible and integrated to provide desirable outcomes while protecting a community's valuable resources.

Preservation Laws & Policies

Laws and policies reflect the priorities of a democratic society. They restrict things deemed harmful and seek to promote actions that are viewed as beneficial. Historic preservation laws reflect a decision by policy makers that our heritage, whether national or local, is significant and should be preserved for future generations.

This chapter discusses the two types of laws and policies that promote historic preservation: regulations and incentives.

Community programs that are described in this chapter include: mitigation efforts to protect historic resources in an interstate widening in Tampa; the Bridge of Lions rehabilitation in St. Augustine; adaptive reuse of an old church in Tampa Heights; Emerson Apartments reha-



Milton Riverwalk

bilitation and Pennsylvania Hotel rehabilitation, both in St. Petersburg; and projects enabled by state grants and the Florida Main Street Program.

Heritage Tourism

Historic preservation and heritage tourism support one another. Historic preservation provides the setting, the history, the persona, and the traditions for heritage tourism; heritage tourism provides the opportunity to educate, enjoy, and appreciate historic preservation.

The chapter on heritage tourism examines a county's investment in heritage tourism by evaluating the percentage of annual tourist-related tax revenue that the county allocates for activities and programs related to historic preservation. The researchers examine three case studies of use of lodging tax, including:

- Suwannee County
- Monroe County
- St. Johns County

History Museums

Arguably, the central mission of history museums is to preserve the



Palm Beach

past for local audiences that are diverse and include seniors, tourists, and school children. In fact, Florida educators and history museums work in collective partnerships to utilize this community resource as an educational tool. The chapter on history museums assesses history museums' effect on three areas of quality of life:

- Education
- Community
- Economy

Researchers, through survey and interviews, collected data from history museums located throughout the state to assess what programming and support services the museums offer in ways that positively affect the quality of life in their communities. From those findings, the researchers selected three case studies that represent a broad spectrum of Florida historic museums, including:

1. St. Augustine Lighthouse and

- Museum, a large history museum;
2. Fort Christmas Historical Park in Central Florida, a small history museum in a rural area;
3. Riley House Museum, a small history museum near Tallahassee, specializing in a particular topic.

These case studies are described in detail in the Technical Report that accompanies this Executive Summary.

Historic & Affordable Housing

Affordable housing and historic resources can mutually co-exist in neighborhoods and communities, though the rehabilitation of deteriorated houses may indeed pose challenges to affordability. The chapter on affordable housing identifies creative solutions to conflicts of gentrification, sustainability, and rehabilitation.

What tools are available to attract the private sector to undertake such rehabilitation projects? Among them are building codes that accommodate

rehabilitation, neighborhood conservation districts to complement local historic districts, community land trusts, expansion of existing revitalization programs, the historic rehabilitation tax credit combined with the low-income housing tax credit, preservation easements, revolving loan funds, property tax relief to address increased property values due to historic designation, and coordinated planning to proactively address potential challenges such as gentrification.

Specific case studies examine the use of Conservation Districts in Tampa, Sarasota and Zephyrhills, as well as an investigation of a Community Land Trust in Key West.

Within these five areas, researchers identify quality of life indicators that can be used to determine how that component contributes positively to a community. Individual case studies are selected to illustrate how to evaluate quality of life indicators.



Bridge of Lions, St. Augustine



SURVEY FINDINGS

To better gauge public perceptions of the relationship between historic preservation and quality of life, researchers commissioned a three-month-long survey of the attitudes of Floridians in regard to these topics. More than 1,500 Floridians were randomly sampled and interviewed between November, 2005 and January, 2006. The survey was conducted by the University of Florida Survey Research Center, the research and service unit of the Bureau of Economic and Business Research at the University of Florida.

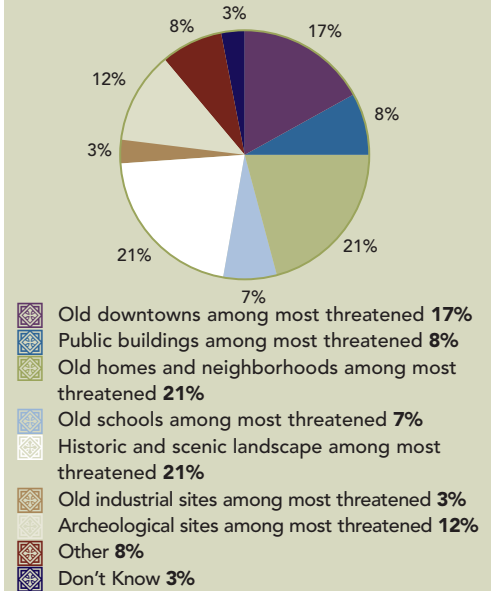
The complete findings of the survey are included in the Technical Report that accompanies this Executive Summary.

Two key findings emerged that are relevant to this project.

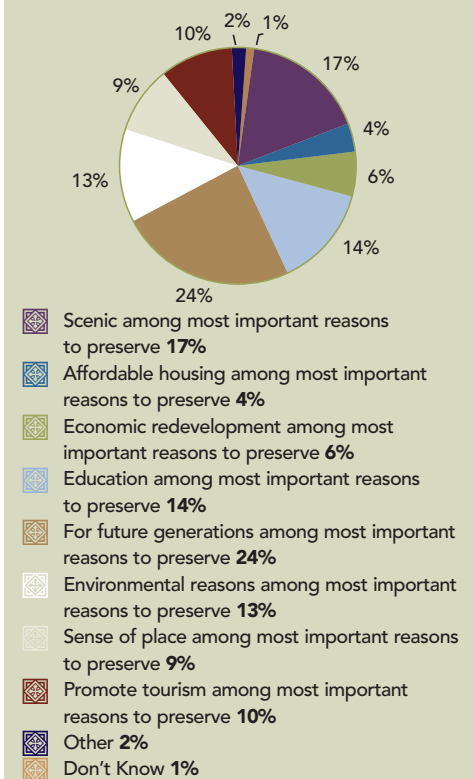
1. Respondents identified what they see as Florida's most threatened historic resources as, in order: historic and scenic landscapes (21%); old homes and neighborhoods (21%); and old downtowns (17%).
2. Respondents said the most important reasons to preserve Florida's historic resources are, in order: for future generations (24%); scenic reasons (17%); and education (14%). These findings appear to indicate that the Floridians surveyed have an appreciation for historic resources and see a need to preserve them for the future.

The following chapters detail how each component of historic preservation can be measured to determine its impact on quality of life in Florida. Detailed descriptions of each of these programs are included in the Technical Report that supplements this Executive Summary.

Which historic resources in Florida are the most threatened?



What are the most important reasons to preserve Florida's historic resources?





Quality of Life Indicators

Historic preservation provides numerous benefits, including a profound and positive effect on quality of life for citizens and visitors alike.

There are numerous references to quality of life in historic preservation documents, in all types of literature – popular press, academic, and practitioner related works. Quality of life is assumed to be one of the valuable outcomes of historic preservation efforts, yet there are not many evident attempts to express this relationship explicitly. It is this implicit, assumed nature that provides the research opportunity at hand: what is the strength of this relationship, expressed in terms of explicit outcomes such as impacts?

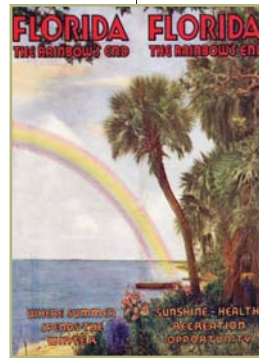
This report presents a framework for exploring the relationship between quality of life and historic preservation, using community indicators.

This chapter presents a set of indicators, based on available historic preservation programs, sites, and activities, by which community leaders can develop an evaluative number to measure their contributions to the quality of life of the area.

The measure can then be used to monitor the success of a community in contributing positively to the quality of life.

INDICATORS

What is the appeal of indicators? When used as a system, they hold much promise as an evaluation tool. What makes indicators any different from other measures of aspects of places, such as job growth, per capita income, or housing prices? The key is developing an integrative approach – one that considers the impacts of change not only in economic terms, but also the social/



Micanopy

Fernandina Beach

Fernandina Beach is located on Amelia Island, a coastal barrier island along the northeastern Florida coast. It is one of three incorporated areas in Nassau County and contains many of the area's historic properties. Its rich history includes the distinction of being the last town plotted by the Spanish before they ceded Florida to the United States in the early 1800's. As one of the oldest settlements in Florida, it offers a charming Victorian seaside setting. Fernandina Beach was named "One of a Dozen Distinctive Destinations Worth Discovering" in 2002 by the National Trust for Historic Preservation. Given its expansive historic resources, it provides an excellent case study of how economic development and historic preservation can be compatible and integrated to provide the community desirable outcomes while protecting valuable resources.

Fernandina Beach has a rich historic fabric that for decades in the early and mid-20th century did not receive development pressures like other Atlantic coastal towns in Florida. This turned out to be very fortuitous for present day outcomes – because of its relative isolation away from the rapid build-up areas, the city was able to preserve its historic fabric. By the late 1960's, some began to realize what treasures these historic resources represented and initiated efforts to revitalize and preserve them. They realized that the resources represented a basis on which to build a tourism industry and the basis for desirable economic development outcomes. Actually, Fernandina Beach "rebuilt" a tourism industry because in the late 1800's, the city was a well recognized tourist destination, promoted and renowned by many as the "Newport of the South" (referring to Newport, Rhode Island, as a popular seaport resort town).



There are two historic districts in Fernandina Beach that together contain 336 historic buildings. The districts are:

1. Old Town – This district encompasses the original settlement area for Fernandina Beach and abuts the waters of Amelia River.
2. Downtown Historic District – This district, the Fernandina Beach Historic District, is a result of development of Fernandina in its "new" location to the south of Old Town Fernandina after the mid-19th century.

The City of Fernandina Beach has benefited tremendously from its historic resources and by pursuing preservation-led strategies for economic development. Its downtown district is a major attraction for many tourists each year and offers a unique and quaint experience that is different from many coastal towns where all the same chain stores may exist and newer buildings are the standard. It is a charming Victorian era seaside town and has done a commendable job of preserving its historic resources. Fernandina Beach has garnered economic gains that are quite impressive for a small city.

Some issues have emerged that the City of Fernandina Beach and others concerned with protecting their historic resources will need to consider. One of these is that the rapid rise in market values of the properties can have some chilling effects on business activity, if property tax bills rise too high for local businesses to support. It also impacts new property tax assessments for buyers when a property is sold and may indicate that small, unique businesses could not afford to pursue new opportunities. A key to preserving the quality and character of a unique place like Fernandina Beach will be to address this and other issues to maintain balanced and sustainable preservation-based development.

This case illustrates that economic development and historic preservation are compatible and can serve as a valuable basis on which to build and enhance a local economy. By preserving historic resources and enhancing their use and appeal, development outcomes can be realized that benefit not only the economic aspects but also the social and cultural dimensions with provision of a unique and desirable community.

cultural and environmental dimensions. A community indicators system reflects *collective values*, providing a more powerful evaluative tool than simply considering the “economics” of change and growth. By integrating an indicators system into overall community or regional planning, it is easier to evaluate the impacts of changes, whether positive, negative or neutral. It is this ability of community indicators systems to be integrated as a system for gauging impacts across a full spectrum of outcomes that makes it beneficial to explore using them. Further, indicators incorporate both frameworks of performance and process outcomes, which serve to facilitate evaluation. When properly integrated, indicators may be utilized in the decision-making process as indicators of impacts and outcomes.

Just what is a community indicator? Essentially, community indicators are bits of information that when combined, provide a picture of what is happening in a local system. They provide insight into the direction of a community: improv-

ing or declining, forward or backward, increasing or decreasing. Combining indicators provides a measuring system to provide clear and honest information about past trends, current realities, and future direction, in order to aid decision-making. Community indicators can also be thought of as a report card of community well being. These systems generate much data, and the analysis of these data can be used in the decision-making and policy/program improvement process. There are numerous functions of indicators, including: description, simplification, measurement, trend identification, communication, clarification, and as catalysts for action.

Four common frameworks are used for developing and implementing community indicators systems in the U.S.:

1. Quality of Life
2. Performance Evaluation
3. Healthy Communities
4. Sustainability

The framework presented here most closely follows the quality of life format.

This chapter was prepared by Rhonda Phillips, Ph.D., AICP, CEcD, Director, Center for Building Better Communities, Associate Professor, Department of Urban and Regional Planning, College of Design, Construction and Planning, University of Florida. The “Indicators” section is excerpted in part from Community Indicators, Rhonda Phillips, American Planning Association, PAS Report No. 517, 2003.



Indicator Framework

The following table presents a list of the indicators selected to calibrate the framework. They are divided into four categories: gauging (related to type and amount); protecting (ordinances and regulations); enhancing (partnerships and incentives); and interfacing (uses).

A. Gauging

These indicators are related to the amount and type of historic resources in the community.

- Historic fabric
- Districts, structures, landmarks
- Distressed historic neighborhoods
- Rehabilitation/certified tax credits
- Assessed property value trends
- Historic district/property reinvestment

B. Protecting

These indicators are ordinances and regulations.

- Historic preservation element/plan integration
- Design guidelines
- Historic preservation commission
- Preservation ordinances
- Historic preservation survey
- Historic preservation staff
- Certificates and enforcement actions

C. Enhancing

These indicators are related to partnerships and incentives.

- Main Street program
- Certified Local Government
- Participation in other state/federal programs
- Historic preservation non-profits
- Neighborhood participation
- Civic/museum partnerships
- Tax exemptions
- Other incentive programs

D. Interfacing

These indicators are related to the uses of property.

- Housing affordability
- Business use
- Community draw factors
- Community use factors
- Heritage/cultural interactions



Preservation Laws & Policies

In a democratic society, our laws and policies ultimately reflect our priorities. Thus, we restrict things deemed harmful and seek to promote things that are viewed as beneficial. Historic preservation laws reflect a decision by policy makers that our heritage, whether national or local, is significant and should be preserved for future generations.

Historic resources have a value that can be seen as aesthetic and educational, in addition to whatever economic value they may have. There are two types of laws and policies that promote historic preservation: regulations and incentives.

How do Historic Preservation Laws contribute to Quality of Life?

Historic preservation programs can be a key piece of community revitalization, as well as an important part of maintaining the property and character of local historic neighborhoods. Historic districts typically require maintenance of property, thus preventing properties from becoming derelict. Historic tax credits and tax exemptions can foster the restoration of decayed historic buildings, whether in downtowns or residential neighborhoods. Historic districts need not be frozen in time. Sensitive infill development is

often necessary and appropriate, especially where there are numerous vacant lots. The revitalization that accompanies an ongoing historic preservation program can also contribute to increased public safety as vacant buildings become inhabited homes and businesses.

Types of Historic Preservation Laws

Regulatory historic preservation laws may mandate a specific substantive result (i.e., preservation of the historic resource). For example, local ordinances allow for the designation of certain properties or neighborhoods as historic, and then authorize restrictions on the appearance or demolition of historic properties. These local laws are the most important element

in preserving privately-owned historic properties. The 52 Florida communities recognized by the State Historic Preservation Office as Certified Local Governments each have local programs certified as meeting basic standards in the expertise of their preservation boards, the standards required for designating historic districts and landmarks, and the adoption of guidelines to protect historic properties and neighborhoods.

Regulatory laws may also control a process (e.g., obliging federal or state agencies to consider the impacts

of their undertakings on historic resources).

Thus, under Section 106 of the National Historic Preservation Act, federal agencies must consider the effects of federal or federally funded projects on historic resources. Similar procedural considerations are required by the National Environmental Policy Act and Section 4(f)

of the Transportation Act. These acts require notification of federal, state, and tribal historic preservation officers about possible impacts on historic resources and allow time to provide comments and suggestions about alternative approaches which will minimize any harm to historic resources.





ADAPTIVE REUSE OF HISTORICAL RESOURCES:

Tampa Heights Sanctuary Lofts

This former Methodist Church, located in Tampa Heights north of downtown, was originally built in 1910, and a Sunday School facility was added in 1927. When the congregation moved to another facility in 1998, the historic building was left vacant. A group of investors, led by Andrew Ham of Urban Trust, LLC, saw an opportunity to restore the building as a combination office/apartment complex. A partnership of several investors and the City of Tampa acquired the property and arranged financing. The federal rehabilitation tax credit, a 20 % tax credit for rehabilitation of historic properties, made the \$3.1 million construction project possible.

The rehabilitation of the Classical Revival building had to be certified by the National Park Service as complying with the *Secretary of the Interior's Standards for Rehabilitation*. Following these standards, developers retained the building's historic features, including the outer walls, stained glass, hardwood floors, original corridors and the interior space of the former sanctuary. The Sunday School building became 32 residential loft units with 12 foot ceilings, large windows and original architectural features. The former sanctuary was developed as 4,000 square feet of office space with a view to the dome overhead.

Sanctuary Lofts is one of the first residential loft projects undertaken in Tampa. The project benefited from a \$100,000 loan from the City to acquire the property, and from \$497,408 in rehabilitation tax credits. The result is attractive living and working space near downtown, and a model for adaptive reuse of historic buildings.



Incentives to promote Historic Preservation

Incentives, on the other hand, encourage preservation by providing some tangible benefit. These benefits may include tax relief, grants or relief from certain regulatory or procedural burdens. The benefit may be simple recognition of the historic importance of a structure or neighborhood, as is provided by the National Register of Historic Places or by the National Historic Landmark Program. Florida currently has more than 1,500 sites and districts on the National Register, and 39 National Historic Landmarks.

This recognition may entitle properties to further benefits. For example, owners and long-term lessees whose rehabilitation of income-producing historic properties is certified to be in conformity with the *Secretary of the Interior's Standards for Rehabilitation*, may receive the Federal Rehabilitation Tax Credit, a tax credit of up to 20% of the value of the rehabilitation work. Since 1986, nearly 450 Florida tax credit projects representing some \$556 million in construction have been approved by the National Park Service.

Local governments raise much of their revenues through property taxes. The willingness of counties and/or municipalities to forego some revenues in the form of tax exemptions can serve as an encouragement to property owners to invest in and rehabilitate their properties. Three types of local tax exemptions are possible in Florida. The first allows exemptions from property taxes for up to 50% of the assessed value of property that is: 1) used for commercial purposes or by a non-profit organization; 2) listed in the National Register, designated as a local landmark, or part of a National Register or local historic district; and 3) regularly open to the public.¹ The second, most common type of exemption, allows for a ten-year exemption of the value by which historic properties are improved by rehabilitation.² A final exemption allows a total property tax exemption where rehabilitated historic



Merrill House, Jacksonville

properties are used for nonprofit or governmental purposes and where the building is open to the public.³ Florida communities increasingly make use of these tax incentives: in 2005, over \$137 million worth of property was exempt from ad valorem taxes due to these three types of historic tax exemptions.⁴

Grants are another important incentive to preserve historic properties. The federal government provides grants under the Save America's Treasures program to preserve some of the most important landmarks in Florida. Under this program since 1999, thirteen Florida projects have been funded, including \$353,000 for preservation at the Ringling Estate of Cà d'Zan in Sarasota, \$795,000 for preservation work at the Biltmore Hotel in Coral Gables and \$450,000 to preserve the Singing Tower at the Bok Sanctuary in Lake Wales.⁵

INCENTIVES TO PROMOTE HISTORIC PRESERVATION:

St. Petersburg

Emerson Apartments
Restored in 2005



RESTORATION

Soft Costs	\$ 215,000
Historic Construct.	\$ 815,000
(\$72/S.F.)	\$ 1,030,000
Total Development Cost (\$92/S.F.)	\$ 1,030,000

NON RESTORATION

Soft Costs	\$215,000
Non Historic Construct.	\$675,000
(\$60/S.F.)	\$890,000
Total Development Cost (\$78/S.F.)	\$890,000

PRESERVATION INCENTIVES

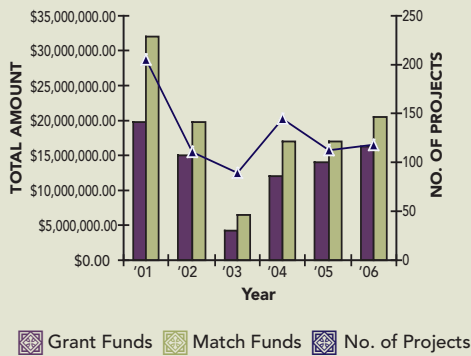
Fed Tax Credits 20%	\$ 163,000
Ad Valorem Tax Exemption (\$407,000)	\$ 815,000
Transferable Development Rights @ \$10/S.F.	\$ 150,000
Facade Easement	\$75,000
Annual Property Taxes	\$ 6,300
Net Development Cost (\$52/S.F.)	\$ 588,674

NO INCENTIVES

Fed Tax Credits 20%	\$ 0
Ad Valorem Tax Exemption (\$407,000)	\$ 0
Transferable Development Rights @ \$10/S.F.	\$ 0
Facade Easement	\$ 0
Annual Property Taxes	\$ 6,300
Net Development Cost (\$80/S.F.)	\$ 890,000

Provided by Bob Jeffrey, City of St. Petersburg

Florida Historical Grants



Recent Grant Projects

SUNKEN GARDENS, ST. PETERSBURG

\$350,000 in 2002 to the City of St. Petersburg to help restore 1926 Mediterranean Revival style building for use as children's science museum, restaurant and administrative offices for Sunken Gardens tourist attraction.

BOK TOWER GARDENS

\$600,000 in 2 grants, in 2001-02, to rehabilitate the famous Bok Tower's masonry and steel work.

PRITCHARD HOUSE, TITUSVILLE

\$350,000 grant to Brevard County to rehabilitate historic house as a museum.

OLD GYMNASIUM, ARCHER

\$320,000 grant to the City of Archer to rehabilitate a historic WPA-era gymnasium as community center.

SOPCHOPPY, WAKULLA COUNTY

\$842,000 in 4 grants, since 1998, to restore 1924 school and auditorium for use as a performing arts center.

CAPE SAN BLAS LIGHTKEEPER'S QUARTERS, GULF COUNTY

\$300,000 grant to rehabilitate the 1917 building as a museum.

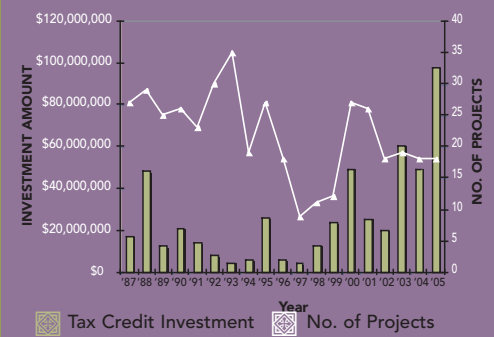


Even more significant are the grants-in-aid awarded by the Florida Division of Historical Resources. Florida has one of the nation's largest and most successful grant programs, having awarded some \$81 million support over 780 preservation projects since 2001. There are two types of historic preservation grants funded by the Division of Historical Resources: 1) Acquisition and Development Activities; and 2) Survey and Planning Activities. The former category includes such activities as restoration and rehabilitation of historic structures and the excavation of archaeological sites. Survey and Planning grants-in-aid include recording of historic and archaeological sites, and community education and relations projects which promote historic and archaeological preservation. In addition, so-called Special Category grants are major Acquisition and Development grants for projects of exceptional importance, including

public buildings such as courthouses, churches and theaters.

Some communities provide their own grants and low-interest loans to promote historic preservation. For example, Tampa's program is funded by the sale of historic residential properties rehabilitated in a joint effort by the City and the federal government as part of the mitigation associated with expansion of Interstate Highway I-4 through a his-

Federal Rehabilitation Tax Credit Investment in Florida 1987-2005



toric district in Ybor City. Miami-Dade County's new Building Better Communities program will be funded by a bond program approved by voters in November 2004.

Smaller communities are also able to provide grant and loan incentives. In Kissimmee, the Community Redevelopment Agency (CRA) and Main Street Program use the tax increment financing from the CRA to fund grants to improve historic façades and restore historic structures within the CRA.⁶ Kissimmee's CRA has awarded over \$570,000 in matching grants to businesses and homeowners within the district since 1998.⁷

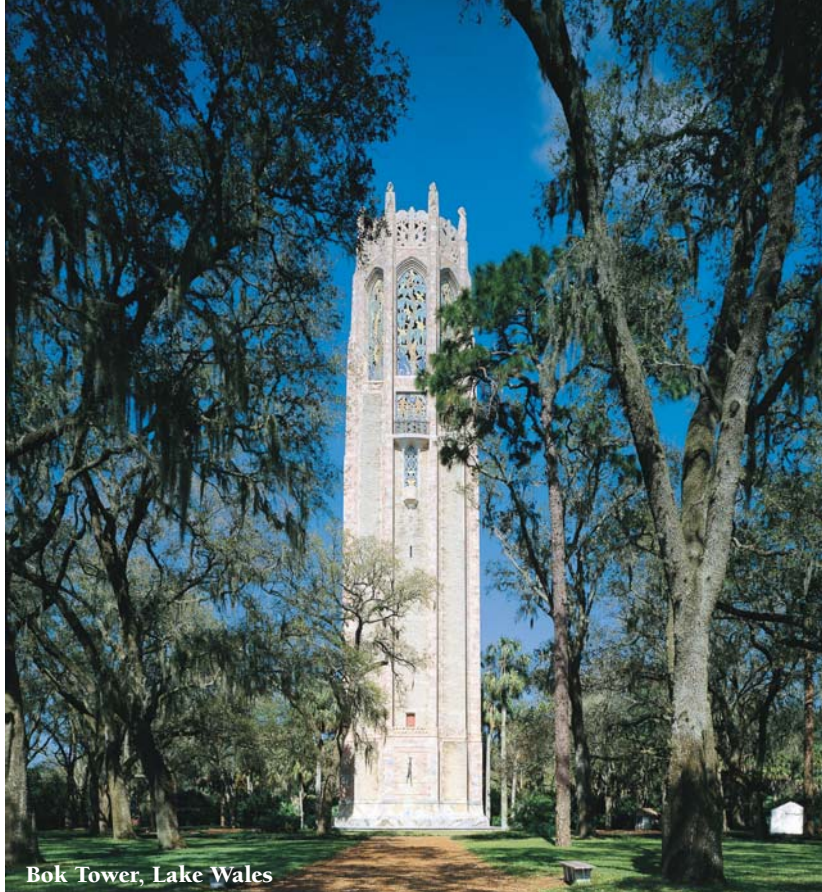
Florida Main Street Program

The Main Street Program was established by the National Trust for Historic Preservation in 1980 to help revitalize historic downtowns, especially in smaller communities. Since its founding, some 2,000 communities in forty-one states have benefited from the technical assistance provided by the Main Street Program which focuses on four key elements of revitalization: 1) Design; 2) Organization and consensus building; 3) Promotion and marketing of the Main Street; and 4) Economic restructuring.

Florida has had an active Main Street Program since 1985, working in over 80 Florida communities to date. During that period, Florida Main Street has generated some \$1.37 billion in public and private investment in both rehabilitation and new construction, witnessing the start of over 3,700 new businesses and over 11,600 new jobs.⁸

Examples of Main Street Programs:

This chapter was prepared by Timothy McLendon, Staff Attorney, Center for Governmental Responsibility, University of Florida Levin College of Law.



Bok Tower, Lake Wales

- **Milton (Santa Rosa County)** – Streetscaping and restoration of the historic Imogene Theater, damaged by Hurricane Dennis in 2005.

- **Melbourne (Brevard County)** – Master plan for old downtown, adopted together with city and chamber of commerce.



- **Vilano Beach (St. Johns County)** – New town center and beach pavilions.

The Waterfronts Florida Partnership, administered by the Department of Community Affairs, offers similar support to smaller waterfront towns, focusing on small grants, planning and technical assistance to help maintain water-dependent uses and traditional waterfronts. Though not primarily a historic preservation program, several partner communities, including towns like Cortez, St. Andrews and Crystal River, have used Waterfronts Florida support to address historical and cultural resources.

1. These tax exemptions are authorized by FLA. STAT. § 196.1961.
2. These tax exemptions are authorized by FLA. STAT. § 196.1997.
3. These tax exemptions are authorized by FLA. STAT. § 196.1998.
4. See 2005 FLORIDA DEPT. OF REVENUE, FLORIDA PROPERTY VALUATIONS & TAX DATA Table 44 (May 2006).
5. Florida awards under Save America's Treasures since 1999 total \$4,741,318. See National Park Service, *Save America's Treasures, Funded Projects*, available online at: <http://grants.cr.nps.gov/treasures/treasures.cfm>.
6. Tax increment financing (TIF) makes use of increases in property tax revenues in designated geographic area to fund certain activities. Once a tax increment district is established, it sets a base year in which the aggregate tax value of the district is set. As property tax revenues increase over the established aggregate value, the amount of excess is the tax increment. A CRA or other entity entitled to receive the tax increment may then use them for designated purposes. See Sam Casella, *What is TIF in Tax Increment Financing* 9 (Planning Advisory Svc. Rep. No. 389, APA 1984). In Florida, TIF under the Community Redevelopment Act has provided a mechanism for successfully funding downtown revitalization, including historic preservation activities. See FLA. STAT. ch. 163, pt. III.
7. Information about Kissimmee's CRA and Main Street program is available at: <http://www.kissimmeeccra.com>.
8. See "Florida Main Street Communities Quarterly Report Data Base," information supplied by Angela Tomlinson, Florida Main Street Program Assistant, Florida Department of State (June 19, 2006). Further information about Florida Main Street is available online at: <http://www.flheritage.com/preservation/architecture/mainstreet/>, and information about the National Trust Main Street Center is available at: <http://www.mainstreet.org/>.



Heritage Tourism

“Heritage tourism affords a solid foundation that sustains the resource as well as offering a social and economic impact.” - Cheryl Hargrove, First Director of the National Trust’s Heritage Tourism Program

Historic preservation, at the local level, involves more than rehabilitating historic structures and sites that are significant to the architecturally-oriented preservationist. It also can encompass the events that take place in and around these structures, the traditions associated with an area and its structures, the perpetuation of arts and crafts that reflect a threatened way of life within an area, or the festivals celebrating the history of the people and the distinctive aspects of the locale. This broader concept of historic preservation creates the component parts of heritage tourism.

Heritage tourism is an increasingly important part of Florida’s tourism industry. The nearly 80 million tourists Florida hosted in 2004 brought more than \$57 billion to the Florida economy (VISIT FLORIDA, 2005). Some 9.2% of these visitors identified visiting historic sites and museums as the primary purpose for their visit, with another 3% identifying cultural events and festivals as their major activities (VISIT FLORIDA, 2005). Floridians also increasingly enjoy the historic sites and heritage festivals in their state. Over 80% of Floridians note that they take visiting friends or relatives to nearby natural, historic or cultural sites or events. Heritage tourism thus has a significant impact on Florida’s economy, contributing over 100,000 jobs and adding \$3.7 billion to the Florida economy in 2000 (VISIT FLORIDA, 2005).

The information cited above assigns value to heritage tourism in an economic way, but assigning value in a qualitative manner is more difficult. In an effort to determine the quality of heritage tourism within a county, this study proposes that the percentage of annual tourism-related tax revenues (“bed tax”) allocated for historic preservation-related activities is one indicator of a county’s investment in the quality of heritage tourism and of heritage tourism’s contribution to funding those investments. Bed tax revenues suggest there is a return of investment of tax dollars allocated to historic preservation.

As of November 30, 2004, fifty-three Florida counties levied a lodging tax, according to the 2005 Report on *Florida’s Tourist-Related Taxes*. Based on the report, each county’s tourist-related tax revenue expenditures were examined, and comparisons were made of allocations that include historic preservation-related activities among the expenditures. The second part of the study involved an open-ended survey of the 53 Florida counties reporting collection of tourist-relat-

ed taxes in 2003-2004. The participants in the survey were county representatives of either the convention and visitor bureau or the tourist development council.



FINDINGS:

❖ Many survey respondents were: 1) unclear about which expenditures included items that could be classified as historic preservation/heritage tourism, and 2) unaware that these lodging tax revenues could be used for purposes related to historic preservation.

❖ A majority of the 53 Florida counties that collect this tax support historic preservation-related activities

using bed tax revenue.

Top Florida Counties in Percentage of Bed Tax Revenue Allocated for Historic Preservation-Related Activities¹

COUNTY	%
Suwannee	60.00
Monroe	31.70
Hendry	30.00
Highlands	29.00
Alachua	28.00
Indian River	26.00
Taylor	24.00
Martin	15.00
Putnam	10.00
Washington	8.60

1. Based on open-ended survey of convention and visitor bureau or tourist development council representatives.



Edison-Ford Estates, Ft. Myers

❖ Capitalizing on their assets, rural counties allocate a higher percentage of bed tax revenue to historic preservation-related activities than do urban counties. Eight of the top ten counties for percentage of bed tax revenue allocation are considered rural by the State of Florida: Suwannee, Monroe, Putnam, Highlands, Hendry, Taylor, and Washington.

❖ Historic preservation is viewed as an investment in the community. Where history and nature are an area's main attractions, historic preservation can generate bed tax revenue.

❖ Many counties indirectly support historic preservation-related activities through secondary spending. While their expenditure categories are not exclusively identified as historic preservation, many include components that contribute to historic preservation. For example:

1. Profits realized from the Creekside Festival in Flagler County are directed to the actual preservation of Princess Place Preserve.



Suwannee County Historical Museum is housed in Old Train Depot. Recipient of multiple preservation grants from the State of Florida, this museum receives lodging tax revenue funding from the Suwannee County Tourist Development Council.

Photo courtesy Suwannee Tourism Development Council

2. In Fort Myers, the Edison-Ford Estates benefits from Lee County's bed tax-funded marketing efforts that increase tourism.

3. Hillsborough County uses a historic building for a visitor information center. The county has used bed tax dollars to rehabilitate the building.

SUWANNEE COUNTY

"Historically-oriented events are putting heads in beds, so the Tourist Development Council is willing to give more grants. The Tourist Development Council, [a nine member council appointed by the County Commission to oversee tourism], is very interested in historic preservation," according to Greg D'Angio, Marketing Director, Suwannee County Tourist Development Council. A perfect example of the way this county attempts to capitalize on heritage, cultural and historic events is through the planning of cultural events, such as festivals.

Suwannee County, with a 2% bed tax, or \$77,161, reported allocating 60%, or \$46,297, of its short-term lodging revenue to tourism promotion. The decision to count the 60% as involving historic preservation under our broad definition was based upon the corresponding specific projects for this revenue, which included historic museum, concerts, renaissance festivals, a Cinco de Mayo festival, and other community events.

This 60% allocation of revenue for tourist promotion has remained relatively constant since 1995. One item of note for Suwannee County is that

an additional 30% of tourist-related tax revenue is earmarked for tourism development and promotion of specific projects such as annual cultural events, community events, festivals, and concerts. Many of these events fall under the umbrella of "artifacts and activities that authentically represent stories and people of the past", thus suggesting that all but 10% of Suwannee County's 2003-2004 tourism-related tax revenue goes to historic preservation and heritage-related activities.



The Key West Heritage House Museum and Robert Frost Cottage, home of the Annual Robert Frost Poetry Festival, funded by the Monroe County TDC, promotes cultural heritage and historic architectural preservation.

Photo courtesy of Monroe County TDC.

MONROE COUNTY

Monroe County, in southern Florida, had a 4% bed tax in 2003-2004 generating \$13,840,916 in revenues. The county allocated 31.70%, or \$4,387,570, toward historic preservation based upon the Bricks and Mortar revenue specifically earmarked for museum preservation and maintenance. Based on allocation of the funds, policy makers admit that the total 31.70% cannot all be considered related to heritage tourism. Since 1995, Monroe County has allocated between 7% and 31.8% to the Bricks and Mortar category, and, according to Monroe County Tourism and Development Director, Harold Wheeler, "every year we fund a museum preservation and maintenance project." The revenue disbursement for these capital projects can be through direct allocations or on a request for proposal basis, and may be used for historic preservation or cultural projects. Wheeler states that for



Satellite Visitor Information Center housed in the last Spanish-owned structure in St. Augustine, is partially funded by the St. Johns County TDC using lodging tax revenue.

this county, cultural projects can include environment, architecture, archaeology, arts, and natural environment.

ST. JOHNS COUNTY

St. Johns County, home of Florida's premier heritage tourism destination, St. Augustine, allocated 15% (\$662,360) of its total 2003-2004 3% tourism-related tax revenues of \$4,415,735, for arts and cultural events. St. Augustine receives more than three million visitors annually, and collects \$100,000 in lodging tax revenues, using these for Visitor

This summary was prepared by Lori Pennington-Gray, Ph.D. and John Confer, Ph.D., of the Center for Tourism Research and Development, University of Florida College of Health & Human Performance.

Information services housed in historic properties. The Tourist Development Council also uses lodging tax revenue to fund grants for arts and cultural events.

In 2002-2003, the same percentage was allocated for arts and culture. For the past three years, funds were allocated from capital projects to fund the National African-American Museum and Archives. The St. Johns County Tourist Development Council was also the premier sponsor of the 2006 Annual Conference of the Florida Trust for Historic Preservation, held in St. Augustine in May 2006.

- Hargrove, C. M. (2002). *Heritage Tourism. Cultural Resource Management* (25), 1. Retrieved March 22, 2006, from <http://crm.cr.nps.gov/archive/25-01/25-01-4.pdf>
- Interview with Harold Wheeler, Marketing Developer, Monroe County Tourist Development Council (January 9, 2006)
- Interview with Greg D'Angio, Marketing Director, Suwannee County Tourist Development Council (November 30, 2005)
- FLA. STAT. § 381.0406. Rural means an area with a population density of less than 100 individuals per square mile or an area defined by the most recent United States census as rural.

Historic Preservation Study: State of Florida

In 2005 and 2006, the Center for Tourism Research and Development conducted this research as one of the principals of a multi-faceted, multi-departmental study through the University of Florida Center for Government Responsibility titled "Contributions of Historic Preservation to the Quality of Life in Florida". The study was coordinated by Drs. John Confer and Dr. Lori Pennington-Gray, and conducted by master's student Catherine Culver. The study examined each of Florida's 67 counties' reported tourist-related tax revenue and expenditures for 2003/04 as published in the Florida Tourism Committee's 2005 Report on Florida's Tourist-Related Taxes.

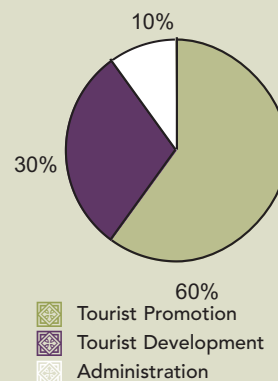
Additionally, personal interviews were conducted of Convention and

Visitor Bureaus Directors of each of the 53 Florida counties which collected tourist-related taxes in 2003/04. Specifically, the study sought to address the following areas:

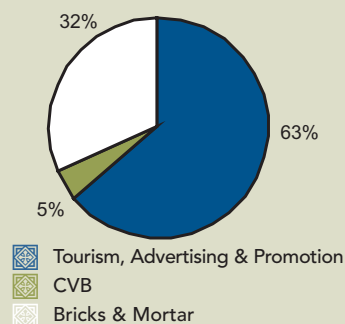
1. Demonstrate the direct relationship of Florida Tourist-Related Tax expenditures for Historic Preservation and quality Heritage Tourism.
2. The higher the percentage of annual tourist-related tax revenue allocated to historic preservation, the higher the quality of heritage tourism enjoyed by the county.
3. In Florida, the percentage of tourist-related lodging tax revenue expenditures allocated to historic preservation will indicate the quality of heritage tourism in Florida by county.

Use of Revenue by Category

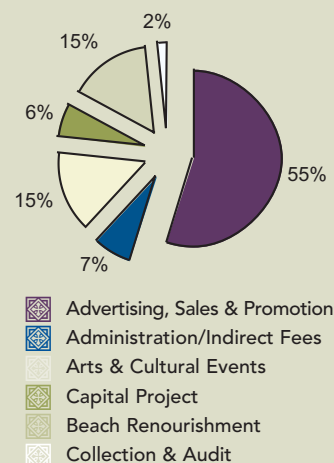
Suwannee County
\$84,126 Annual Revenue



Monroe County
\$13,840,916 Annual Revenue



St. Johns County
\$4,415,725 Annual Revenue





History Museums

Two hundred and fifty-eight institutions identify themselves as “history museums” in the state of Florida. They are as diverse as the state itself.

History museums may celebrate local, regional, or national places and events; or they may range in focus from the display of a collective past to the representation of a single episode. Some museums contain primarily objects of historic interest and importance, while others also preserve books, papers, and ephemera relating to Florida’s past. Many, but certainly not all, history museums are housed in historically significant buildings. Despite these and many other differences, the one thing shared by state history museums is a dedication to serve Florida’s citizens and to enrich the quality of their lives.

COMMUNITY

History museums make their communities better places to live in a variety of ways. Many, like the Ah-Tah-Thi-Ki Museum on the Seminole Tribe’s Big Cypress Reservation or the Fort Christmas Historic Park in Orange County, organize special cultural events and family festivals for local residents. Others work with local government to increase public awareness of

issues such as preservation and conservation. They often initiate special hours, staying open at night, so that the museum is available to all segments of the regional population. Many museums are free or make only nominal charges to offset expenses. Books, photographs, and papers relevant to regional and local history are preserved by museums such as the St. Augustine Lighthouse and Museum or the John Riley House in Tallahassee. These materials are preserved for the public and made available at the museum or historical society.

Many history museums have focused their attention on local and regional identity. To that end, museums like the Indian River Citrus and Heritage Museum train high school students to do oral interviews. Other institutions, such as the Fort Christmas Historical Park, sponsor individuals who

demonstrate local crafts, storytelling, industries, and agriculture. These efforts preserve historical memory and traditions and pass them along to a new generation. Recently the state has witnessed the growth of museums that have emerged to address previously underrepresented constituencies. Holocaust museums and museums devoted to African-American or immigrant experience, for example, contribute to our understanding of the rich diversity of Florida’s cultural history.

Florida citizens demonstrate their support for museums, and the central role museums play in their lives, in a variety of ways. They join membership groups and museum friends’ groups, donate objects to enhance museum collections, and volunteer countless hours. Citizens also serve on museum boards. Almost all museum boards in the state are composed of a majority of members from the local and regional communities. These individuals offer their services and raise funds to maintain the museums and, at



the same time, assure that the museum adheres to its mission and represents the interests of the community. Without the support and assistance of the citizens in their communities, history museums would not be able to play such a vital role in our communities. The effects of museums take a variety of forms. In response to the deprivation of citizens after a hurricane, the La Belle Heritage Museum in Hendry County produced a “storm gourmet” cookbook of recipes that did not require cooking or heating. The Baker Block Museum in Baker, a small agricultural community in Okaloosa County, provides traveling exhibitions to daycare centers, nursing homes, and adult education centers.

EDUCATION

The most obvious impact of history museums on the citizens of Florida, however, is the effect they have on the education of the state’s children. History museums and the collections they so carefully preserve, make the history studied from the flat pages of a book pop into three-dimensional reality. Seeing a place, standing in a location, viewing an object, or performing a task — students see and feel the local and state history that surrounds them. Over half of Florida’s history museums provide special programming tied to the Sunshine State Standards. Most supply programming for teachers who are charged with teaching Florida history to fourth grade students. This effort,

however, is just the tip of the iceberg of educational outreach. Museums like the Eustis History Museum in Lake County host essay contests that are used to prepare students for the writing portion of the Florida Comprehensive Assessment Test, known as the FCAT. The St. Petersburg Holocaust Museum offers free training for local teachers and invites visiting classes to decorate a tile that is exhibited on the third floor of the museum. Almost 20% of history museums have materials from their collections that they bring directly into the classroom for those students who cannot visit the museum. For those who are fortunate enough to be able to make the trip, museums offer hands-on workshops where students can experience the thrill of an archaeological dig or the pleasure of learning a traditional handicraft. Museums like the Morikami Museum and Japanese Garden in Delray Beach, Palm Beach County, work with at-risk children and young adults, reconnecting them to the community. For those students who are interested, museums provide internships that prepare future leaders of the museum community.

ECONOMY

History museums also contribute to the economies of their communities. Most obviously, they bring in tourist dollars by offering special events and festivals. They advertise widely and build elaborate websites that give directions to and highlight the museum and the cities and towns in which they are located. People visit museums for a variety of reasons. Some come to see a particular exhibition. For others, the historical importance of archival holdings



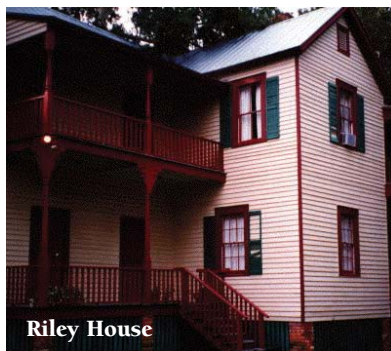
Mission San Luis, Tallahassee



Ft. Christmas



Cape San Blas



Riley House



Vizcaya Museum and Gardens

of history museums supports genealogical research. Research has shown that museums are a stimulus to the economic activity of the immediate area. Especially in urban areas, restaurants, historic preservation districts, and gift shops surround museum locations. Museums affect the economic health of the region by participating in local civic organizations such as the Better Business Bureau or the Chamber of Commerce, by form-

ing strategic partnerships with local businesses, and by allowing community groups to use their facilities for meetings and/or social gatherings. For example, the Historical Smallwood Store Museum in Chokoloskee, Collier County, partners with local businesses for advertising and packages tourist services such as trolley and airboat rides.

This summary was prepared by Glenn Willumson, Ph.D., Associate Professor of Art History, Director of the Graduate Program in Museum Studies, University of Florida.

Businesses recognize museums as a critical element in the social fabric and show their support by partnering with museums to offer discounts to museum visitors, sponsoring exhibitions and special events, and joining museum friends groups.

1. The Florida Association of Museums allows member institutions to self define their focus. Categories of museums are: history, science, art, and natural history.



Historic and Affordable Housing

Florida's historic residential neighborhoods offer a range of housing types, configurations, and features to accommodate the state's diverse populations based on income, stage of life, and household size.

Further, as sustainable development becomes an increasingly significant strategy to address growth pressures, the proximity of historic neighborhoods to the central business district and other amenities conveys additional benefits. Such housing may also be among the last units affordable to lower- and moderate-income working families, especially in the hot housing markets of Florida where the gap between median income and median home value is rapidly increasing. Traditional tools, such as tax credits, and innovative approaches, such as community land trusts, are offering creative solutions to safeguard affordability, to accommodate the state's increasingly diverse population, and to realize sustainability goals.

Among the benefits associated with preserving older and historic neighborhoods are the higher percentage of affordable units as compared to new developments and the proximity to work, school, shopping, and public transit.¹ Yet historic preservation in older working

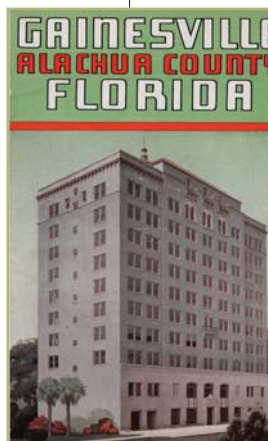
class neighborhoods can be a sign of gentrification, a process resulting in increased property values and the displacement of lower income households with ones of much higher income. With a livable community as a central goal, historic preservation can safeguard these features while addressing affordable housing needs. Recently the Census Bureau found that almost 80% of those sampled living in central cities rated their neighborhoods as 6 or better on a scale from 1 to 10 where 1 represented the worst conditions.² While not all of these units were historic (50 years old or older), generally, central city neighborhoods contain a higher percentage of historic structures as compared to the overall metropolitan area. Given the number of historic housing units that provide

shelter for lower income persons, affordable housing should be a central consideration in historic preservation policies and programs.

The Florida State Plan specifically identifies historic preservation as a significant revitalization tool. Further, the state proposes to increase the supply of affordable housing in part by "recycling older houses and redeveloping residential neighborhoods" FLA. STAT. § 187.201(4)(b)3. Florida's lower income households have a demonstrated housing need and the state's growth management legislation outlines how local governments

can integrate historic preservation and affordable housing goals.

What tools are available to meet these goals, specifically to attract the private sector to undertake such rehabilitation projects? Among them are building codes that accommodate rehabilitation, neighborhood conservation districts to complement local historic districts, community land trusts, expansion of existing revitalization programs such as Front Porch





Tampa

Conservation Districts

TAMPA, SARASOTA, AND ZEPHYRHILLS

While a relatively new tool in Florida, conservation districts offer a means for local governments to address historic fabric flexibly in order to encourage protection, rehabilitation, and revitalization that is sensitive to a neighborhood's distinctive culture and character. The cities of Tampa and Sarasota currently use this approach.

In Tampa, the Old Seminole Heights Neighborhood Association advocated establishment of a Neighborhood Conservation District (NCD) to complement the two historic districts – the Seminole Heights Historic District and the Hampton Terrace Historic District – by ensuring compatible residential infill design consistent with the “historic character” in these adjacent neighborhoods. Adopted in 2001, the Seminole Heights Residential Overlay District Development Standards apply only to residential properties.

Similarly, the City of Sarasota recently adopted conservation districts to com-



Zephyrhills

plement its historic districts.¹ As defined in the Historic Preservation Chapter of the city plan, 50% of the structures must be 40 years old or older. Further, the area is qualified to be a conservation district when it has “a distinctive cultural, historic, architectural or archaeological identity, but does not have the cultural, historic, architectural or archaeological significance to meet the criteria for designation”² Zephyrhills likewise has recently adopted an ordinance permitting designation of urban conservation districts as an economic revitalization tool and to encourage rehabilitation.

1. City of Sarasota. (2002) Sarasota City Plan, The Historic Preservation Chapter. Adopted March 18, 2002, Objective 3, Action Strategy 3.2.

2. Ibid. Support Document, pg. HP-66.

Florida, the historic rehabilitation tax credit combined with the low-income housing tax credit, preservation easements, revolving loan funds, property tax relief to address increased property values due to historic designation, and coordinated planning to proactively address potential challenges such as gentrification. Two of these tools, conservation districts and community land trusts, are discussed in greater detail below. For a more in-depth discussion of all of these tools, see the Technical Report.

Neighborhood conservation districts as local regulatory tools

When local historic districts are created, typically a conventional zoning district or an overlay district is adopted to establish specific regulations associated with the historic designation. Overlay districts function in concert with the underlying zoning. Requirements and incentives can be tailored to address land uses and development characteristics distinctive to an area – such as historic urban fabric. Typically historic overlay districts require conformance with design guidelines and can alter the underlying setback, height, and use requirements, not just for additions or changes to existing structures but also for new infill development.

Neighborhoods might contain historic homes that are not eligible for historic designation due to lack of integrity or significance, or they may lack a sufficient concentration of these homes to constitute a historic district. Other neighborhoods may have homes nearing the 50-year mark that do not yet qualify for historic designation. Neighborhood conservation districts (NCD) assist in safeguarding neighborhood character, particularly in areas proximate to high growth centers. Residents and local officials are turning to this regulatory tool to complement historic overlay districts. NCD requirements tend to be less extensive, focusing more on character and

less on detailed design guidelines to protect historic fabric. Like historic overlay districts, NCD's can be tailored to address the unique characteristics of the community. As this approach becomes increasingly popular, questions arise concerning how NCD's really differ from local historic districts and, more critically, whether it is appropriate to "designate a residential neighborhood as a conservation district when it meets the criteria for designation as a historic district."³

Community land trusts

Community land trusts (CLT's) offer a means for non-profits to create opportunities for longer-term affordability, particularly in lower valued areas when housing prices begin to increase. This long term affordability is secured by the non-profit's ownership of the land in trust with the household purchasing the home with certain constraints on its resale value. Originally begun in the Northeast – Burlington, Vermont has one of the largest inventories of such properties – this strategy to ensure long-term affordability has just recently been adopted in Florida. In addition to maintaining housing affordability, community land trusts can also safeguard historic structures by retaining them in the housing inventory and assisting in their rehabilitation. The Bahama Conch Community Land Trust in Key West, the first such non-profit in Florida, is the only community land trust in the state that specifically addresses the twin goals of affordability and historic preservation. In addition to addressing gentrification, a key goal in forming the non-profit was the preservation of the historic African-American community. As such, the community land trust offers a means to maintain the cultural and historical qualities that



contribute to Florida neighborhoods while also meeting affordable housing goals.

Neighborhood Revitalization – A Caution

Neighborhood revitalization through safeguarding and enhancing existing historic and cultural resources is a central goal of many local historic preservation programs. In addition, aesthetics, culture, and history are often essential factors in creating an economic development strategy. A city will be better able to address any resulting gentrification if the city drafts "a unified vision and plan" based on an understanding of the context, controls property to better direct redevelopment, and communicates with and empowers the residents and property owners to ensure social equity, and all members of the community benefit from revitalization.⁴

Indicators to Assist in Targeting Combined Historic Preservation and Affordable Housing Goals

Affordability and historic preservation can reinforce each other, contributing to the quality of life in Florida. Clearly, Florida's growth

management legislation, with the embedded commitment to consistency and concurrency, creates a structure for coordinated comprehensive planning. In addition, tools such as conservation districts, community land trusts, coordinated tax credit projects, and the Front Porch program offer means to creatively engage the private sector while safeguarding significant resources and expanding affordability options. Employing these indicators as a means to establish, monitor, and adjust integrated plans and strategies will result in a greater connection between historic resources and the availability of housing for lower income persons. Indicators that assess historic preservation in combination with affordable housing include:

- ❖ Distressed historic neighborhoods: The presence of such neighborhoods signal a potential resource that, given the appropriate public sector programs, can contribute to historic preservation opportunities that increase the supply of decent, affordable housing.
- ❖ Neighborhood conservation districts: NCD's offer a means for



Community Land Trusts

KEY WEST

In the hot housing market of Key West, the Bahama Conch Community Land Trust seeks to prevent the gradual loss of the neighborhood to gentrification and the physical deterioration of the housing stock by purchasing historic properties, renovating and rehabilitating them as needed, and then selling or leasing the homes to income-qualified individuals. The goal of the land trust, as N.J. Sawyer-Atanda, executive director of the BCCLT says, is to help "the community become the beneficiary of change, rather than the victim." To date, the BCCLT has managed to preserve seven historic homes for single-family use and two additional multi-family buildings, located in the Key West Old Town Historic District. These homes, all constructed prior to 1950, house 31 low- to moderate-income residents, combining the sometimes competing goals of historic preservation and affordable housing.

BCCLT also assists potential buyers in securing financing for properties. The organization has been able to foster a sense of community by becoming deeply involved in local activities and affordable housing efforts, the African-American cultural community, the environmental community and the historic preservation community.



local governments to introduce some controls to protect such areas without requiring the age, integrity, or concentration of significant structures requisite for a locally or nationally recognized historic district.

- ❖ Historic Rehabilitation Tax Credits (HRTC's) and Low Income Housing Tax Credits (LIHTC's): Combined use of these credits is a popular approach to rehabilitating income-producing residential properties. Using LIHTC's competitive application process to privilege, rather than punish, developers who do so ensures that these projects are more likely to be financially viable. Further, adjusting the rehabilitation guidelines to more flexibly respond to the significance of the historic structure can accommodate greater responsiveness to affordability concerns without compromising historic fabric.
- ❖ Assessed property value trends: Evaluating these data offers a means to gauge whether a neighborhood is distressed and thus a candidate for certain interventions.
- ❖ Historic district/property reinvestment: Community reinvestment decisions that integrate historic preservation and affordability goals through coordinated efforts, such as layering relevant programs, are preferable to those that simply support historic preservation reinvestment.
- ❖ Historic preservation element/plan integration: An integrated approach results in better allocation of scarce resources. Design guidelines, preservation ordinances, and disaster preparation and response that implement such plans will reflect a greater sensitivity to lower income households while maintaining historic preservation goals.
- ❖ Participation in other state/federal programs and other incentive programs: Participation in programs such



Madison

as Front Porch or community land trusts offers opportunities to integrate historic preservation in tandem with affordable housing strategies and represents a positive indicator for evaluating approaches that enhance the quality of life in Florida.

- ❖ Historic preservation non-profits: Non-profits, such as CLT's that address both affordability and preservation goals, should be weighted as a stronger quality of life indicator.
- ❖ Neighborhood participation: Neighborhood participation in recognizing and fostering distinctive cultural and historical characteristics is particularly difficult in lower income communities where such goals are considered secondary to more pressing economic needs. Yet this participation is essential to an integrated strategy of revitalizing and sustaining such places.⁵

❖ Tax exemptions: Tax exemptions are available to all owners of eligible historic properties in Florida communities that have officially adopted this strategy. They contribute to housing affordability by making the tax on improvements a relatively less expensive proposition for as long as ten years.

❖ Housing affordability: When the indicators listed above are actively employed, this indicator will reflect "the community's commitment to providing affordable housing while at the same time enhancing its historic resources."⁶

By using indicators to identify opportunities and challenges and by adopting tools that safeguard these resources while encouraging private sector participation, revital-

ization of working class homes and neighborhoods is possible. As population pressures continue to mount and housing prices continue to escalate, realizing historic preservation and affordability goals will ensure an enhanced quality of life in the state.

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This summary was prepared by Kristin Larsen, Ph.D., AICP, Assistant Professor, Department of Urban and Regional Planning, University of Florida



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Dr. Paul D. Zwick, Chair, Department of Urban and Regional Planning; Associate Dean, College of Design, Construction and Planning; Emily Bergeron and Teresa Russin, Masters Candidates.

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Catherine Culver, Masters Candidate, Fall 2006, Marketing and Events Coordinator, Department of Heritage Tourism, City of St. Augustine.

Florida Trust for Historic Preservation:

Carolyn Tharpe Weiss, Executive Director
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Angela Tomlinson, Florida Main Street Program
Philip Wisley, Architect, Architectural Preservation Services Section
Dave Ferro, Architect Supervisor, Architectural Preservation Services Section
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Lauren Van Lierop, Communications Office, Mission San Luis



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Malinda Horton, Executive Director

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Jennifer Carver

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John McShaffrey

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Rob Skrob

Alachua County:

Susan Swires, Office of the Alachua County Property Appraiser
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Baker County:

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Mary B. Craven, Citrus County Convention & Visitors Bureau

Clay County:

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Coral Gables:

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Duval County:

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Escambia County:

Ed Schroeder, Pensacola Bay Area Convention & Visitors Bureau
Information Center

Fernandina Beach:

Catherine Hartley, City of Fernandina Beach

Flagler County:

Christina Laundrie, Flagler County Palm Coast Chamber of Commerce

Ft. Christmas Museum:

Trudy Trask, Historic Site Supervisor
Joseph Adams, Educational Coordinator
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Gadsden County:

Stuart Johnson, Gadsden County Tourist Development Council

Gainesville:

Darlene Henrichs, City of Gainesville

Gulf County:

Paul Ramsey Pickett, Gulf County Tourist Development Council

Hamilton County:

Nancy Oliver, Hamilton County Tourist Development Council

Hendry County:

Jeff Barwick, Hendry County Tourist Development Council

Hernando County:

Susan Rupe, Hernando County Tourist Development Council

Highlands County:

Jim Brantley, Convention & Visitors Bureau of Highlands County

Hillsborough County:

Steve Hayes, Tampa Bay Convention & Visitors Bureau

Indian River County:

Lori Burns, Indian River Chamber of Commerce – Tourism Division

Jackson County:

Art Kimbrough, Jackson County Tourist Development Council

Jacksonville:

Joel McEachin, City of Jacksonville
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Kissimmee:

Jessica Newman, Kissimmee Main Street

Lake County:

Greg Mihalic, Lake County Dept. of Economic Development & Tourism

Lee County:

Nancy Hamilton, Lee County Convention & Visitors Bureau

Leon County:

Kay Strong-Hogan, Leon County Tourist Development Council

Levy County:

Michael Jones, Levy County Tourist Development Council

Madison County:

Paul Arnold, Madison County Tourist Development Council

Manatee County:

Monica Luff, Bradenton Area Convention & Visitors Bureau

Martin County:

Cheryl Bass, Martin County Tourist Development Council

Melbourne:

Laird Gann, Melbourne Main Street

Miami-Dade County:

Thomas Logue, Miami-Dade County
Attorney's Office
Rick Ferrer, Miami-Dade County
Historic Preservation Board
Ivan Rodriguez, Miami-Dade County
Historic Preservation Board
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Convention & Visitors Bureau

Milton:

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Monroe County:

Harold Wheeler, Monroe County
Tourist Development Council

Nassau County:

Carolyn Haney, Amelia Island
Tourist Development Council
Tammy Stiles, Office of the
Nassau County Property Appraiser

Okaloosa County:

Darrel C. Jones, Emerald Coast
Convention & Visitors Bureau

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Kathy Scott, Okeechobee County Tourist
Development Council

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William C. Peeper, Orlando/Orange County
Convention & Visitors Bureau, Inc.

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Tim Hemphill, Kissimmee/St. Cloud
Convention & Visitors Bureau

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W.E. McLaughlin, Palm Beach County
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Diane Jones, Pasco County
Tourist Development Council

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Lee Daniel, St. Petersburg/Clearwater Area
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Mark Johnson, Central Florida
Visitors & Convention Bureau

Putnam County:

W.D. Larson, III, Putnam County
Chamber of Commerce

Riley House Museum:

Althamese Barnes, Founder and
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Geraldine Johnson-Johnson, former Educator
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Kathy A. Fleming, Executive Director
Paul Wenglowsky, Director of
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St. Lucie County:

Larry Daum, St. Lucie Tourist
Development Council

St. Petersburg:

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Santa Rosa County:

Kathy Newby, Santa Rosa County Tourist
Development Council

Sarasota County:

Virginia Haley, Sarasota Convention &
Visitors Bureau

Seminole County:

Suzan Bunn, Seminole County Suzan Bunn,
Seminole County Convention & Visitors
Bureau

Suwannee County:

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Development Council

Tampa:

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Taylor County:

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Tourist Development Council

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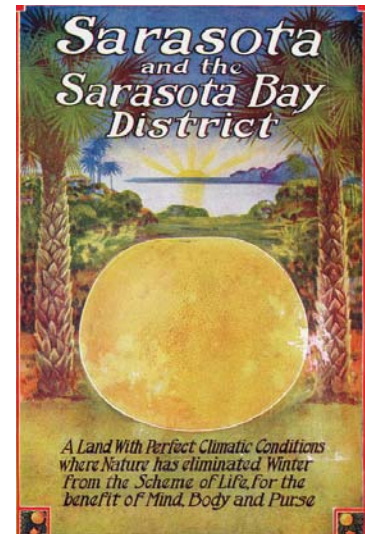
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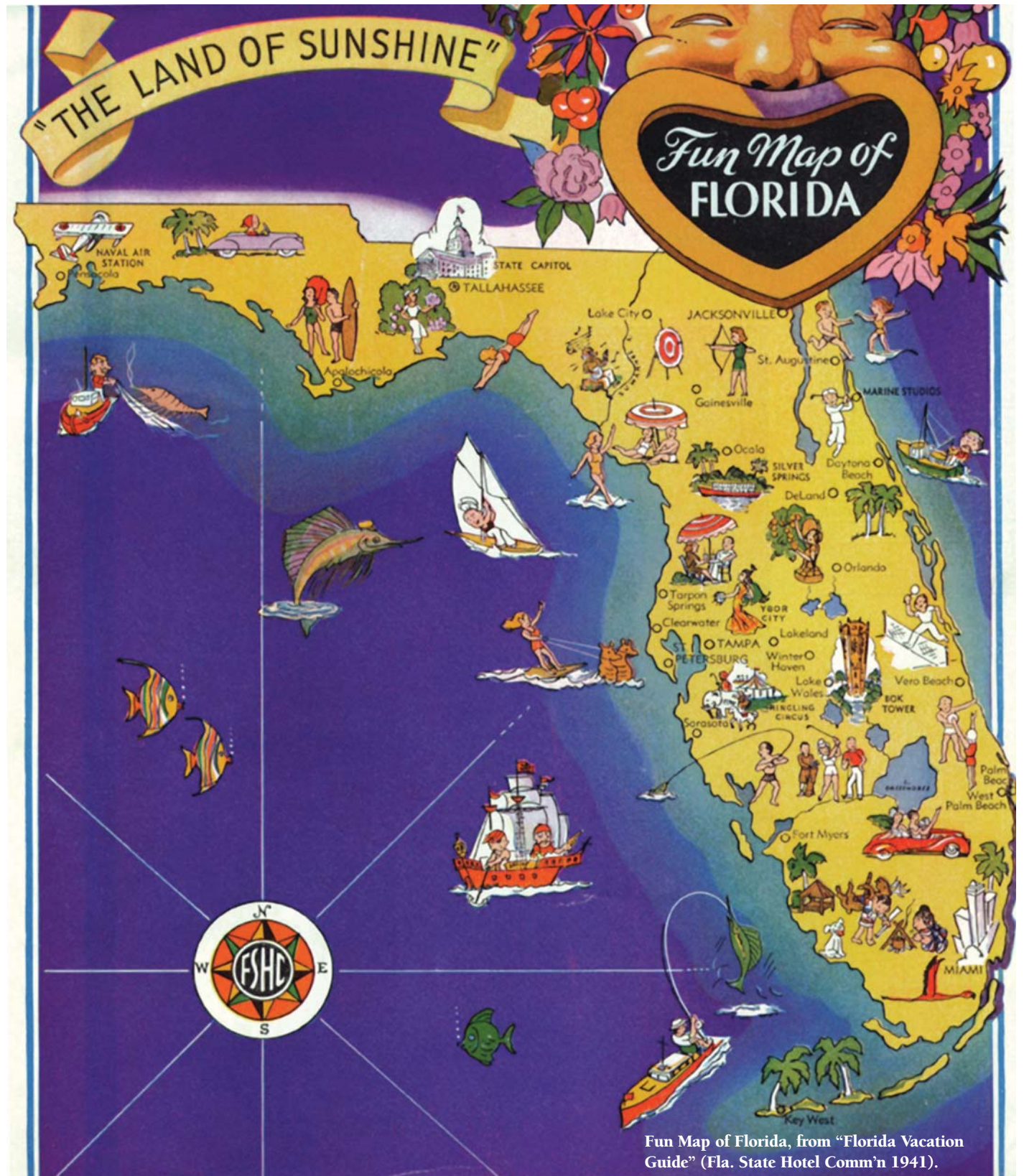
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