APPENDIX B: PARK CULTURAL RESOURCES SPREADSHEET KEY

This Strategic Plan includes two spreadsheets distributed across a series of pages and incorporated as Appendix M at the back of this Plan : 1) a comprehensive cultural resources spreadsheet and 2) a Top 20 Priority Projects spreadsheet. The data items in these spreadsheets are defined as follows:

State Resource (Number)

This is the number assigned to the resource by the Maryland Historical Trust (MHT) and appears on the MHT Inventory Form.

Resource Name (Alternate Name)

This is typically the historic name of the property, based on its first or most prominent owner. Sometimes it is a designated resource name, like "Woodlawn." A second, alternate name may follow in parenthesis.

Resource Type

This is one of the four National Park Service (NPS) categories of resource type: building, structure, site, or object. According to the National Register, houses and barns are "buildings," but sheds, chicken houses, springhouses, corncribs, etc. are "structures."

Resource Subtype

This is an M-NCPPC-developed subtype grouping. The choices are:

- House
- Barn
- Outbuilding (any outbuilding other than a barn)
- Mill
- Community Resource
- Archaeological Site (meaning that there are no standing structures)
- Markers/Monuments
- Industrial Building

Preservation Designation

This is an M-NCPPC description as follows:

- Master Plan = listed on the *Master Plan for Historic Preservation*
- Locational Atlas = listed on the *Locational Atlas and Inventory of Historic Sites*
- Not Yet Designated = Not Yet Designated on any list or inventory

Associated Park

This is the park associated with the resource. This field correlates directly to SmartParks.

Park Region

This is either the Northern or Southern Region. This field correlates directly to SmartParks.

Facility

This is the facility that acts upon work orders generated for the park. This field correlates directly to SmartParks.

Serial Number

This is the number given to each repetitive maintenance work order generated for a historic resource. This field correlates directly to SmartParks.

Park Code

This is the code associated with each of the parks. "K" indicates a park with a historic focus. This code correlates directly to SmartParks.

Location (electronic version only)

This will be a description of the exact resource within a park, for example, "HOUSE" is the Location Code for the Woodlawn Mansion; PKLOT A is the location code for the parking lot associated with the mansion. This field and its entries correlate directly to SmartParks.

Road Intersection

This is a listing of the major roads that intersect near the resource.

Street Number

This is the street number of the resource.

Street Direction (electronic version only)

This field is used to indicate road direction, if one is stated as part of the road name (e.g., north or south).

Street Name

This is the name of the road that the building faces.

Street Type

This is the type of street, such as Ave., Dr., Rd., etc.

Description

This is a description of the resource given in whatever way makes best sense to describe the resource. For example, it may identify the form of a building ("Foursquare"), its style ("Queen Anne" house), its era ("Late Victorian house), or a combination. It may also be a general descriptive term like "log house." The term "vernacular" means that it defies an obvious stylistic label and is the term for architecture that exemplifies local tradition, rather than a "high style."

Construction Date

This is an exact or estimated construction date. It may be a specific year, a range of years, an estimated year (ca. 1890), or a time frame (mid 19th century). If the resource has more than one major period of construction, this can be shown either as a broad range of dates (Late 18th C. – Late 19th C.) or as one date separated from a second date by a semicolon.

Estimated Square Footage

The square footages were obtained from a number of sources, including a Real Property Inventory of M-NCPPC buildings prepared on August 23, 1973, the GASB Audit (2001), a Central Maintenance Inventory of Buildings and Structures, and phone calls to Property Management staff. Absent data from any of these sources, square footages were estimated based on Historic Preservation Section staff knowledge of the buildings.

In the future, square footage calculations should be calculated using the following model, which is derived from the National Trust Insurance Institute. The exterior perimeter, or footprint, should be measured, and then multiplied by finished floors, or "living area." This is a simpler means of calculating square footage than determining whether each and every space within the building should be classified as "living area" or not (the means by which square footage is determined by real estate brokers.) The three criteria for what constitutes a "living area" in the proposed model include: 1) areas that are "heated," 2) areas that can be reached via a door from another living area in the house, and 3) areas finished by means of interior construction. A finished, full basement, therefore, would count as a full floor and a finished attic would count as a half floor. An example of square footage for a 2 1/2 –story farmhouse with two full floors, an unfinished basement, and a heated attic (finished as a small bedroom) would be to take the exterior dimensions of the house (say, 30 feet by 50 feet, or 1500 feet) and multiply that by 2.5, resulting in 3,750 square feet. For agricultural structures, such as barns, the "living area" criteria would not apply. Exterior perimeter would be measured, but in order to get an accurate Estimated Value based on square footage for such large structures, a typical barn must count as two full stories.

Construction Material

This is the main (or two main) material(s) comprising the building. In some cases, it is the structural material, especially if it is log, since log is not always evident to the eye. In most cases, however, it is what's visible to the eye, the cladding material.

Current Condition

This is the resource's current condition, divided into one of three categories: 1) Restored, 2) Stabilized, or 3) Endangered. In primary buildings, it is an indication of the threat level of the building at present. This category also includes an identifier called "Outbuilding," if applicable, for secondary structures. Taken together, these four categories (Restored, Stabilized, Endangered, or Outbuilding) are also used as multipliers for determining an overall "Estimated Value" for the resource. The Outbuilding category overrules any other current condition category in being employed as the multiplying factor. (See "Estimated Value" below.)

Acquisition Date (electronic version only)

This is the date that the building became part of the Commission portfolio. This has also been called "Date Placed in Service" in other Commission databases. Currently, this field is unpopulated, for one reason because it is difficult to extricate building acquisition history from that of surrounding land.

Purchase Cost (electronic version only)

This is the cost of the entire property (both land and improvements) based either on the state real property database (which includes assessed value and base value) or on information from the Department's Parks Property Database. Currently, this field is unpopulated, since the information was not readily available during the course of the project.

Estimated Value

This represents a value placed on a building in its current condition given its size and current condition/status; it is also the base cost used to determine annual maintenance. The Estimated Value is a model developed by the Historic Preservation Section to speed up the process of maintaining the Department's historic building stock. It is a broad-brush approach to establishing "Use Value," defined as representing the value that a property has for a specific use. In the case of Estimated Value, the use is typically framed not in specifics, but in terms of its Long-Term Use Goal coupled with its Heritage Theme (i.e., is it meant to house a park-related office or will it become an agricultural museum sponsored by a public/private partners?).

The formula is: Estimated Value = Square Footage x Multiplier Based on Current Condition/Status.

A more detailed explanation is this:
1. Determine the exterior, perimeter square footage of the building.
2. Multiply exterior square footage by the number of "living area" floors (attics counting as a half) to determine Square Footage.
3. Multiply that square footage (or estimated square footage) by one of the following factors:
    a. $300 for a Currently Restored building;
    b. $200 for a Currently Stabilized building;
    c. $150 for an Currently Endangered building; and
    d. $75 for an outbuilding **(Note: This multiplier for an outbuilding overrides that of its current condition multiplier.)**

The multipliers are based on the Historic Preservation Section's experience with the buildings. In addition, the multipliers are considered "very realistic" by the National Trust Insurance Services group (NTIS), the entity that insures all National Trust for Historic Preservation-owned properties.[11] (The NTIS representative noted that historic building multipliers can sometimes reach up to $1,000 per square foot for the most impressive historic buildings.) By way of comparison, square footage multipliers for new house construction run typically in the range of $100 per square foot, the figure indicated in the GASB Audit. Using the $100 multiplier, however, would undervalue the cost of a restored historic house (the suggested multiplier of which is $300), especially given the fact that historic buildings have proved that their lifespan outlasts that of typical new park construction, such as a restroom or a maintenance building. As for the multiplier of $150 for an endangered building, this matches the GASB cost

[11] Brian Phoebus, of the National Trust Insurance Services group, said that $200-$250 per square foot was a reasonable starting point for historic buildings that were in decent condition; namely, that had a fairly new roof and the systems of which were all in working order (electricity, plumbing, HVAC, etc.). Since most of the park structures have had little to no maintenance, a slightly higher multiplier was used for the "restored buildings" category. Mr. Phoebus agreed that the $300 multiplier for this category of park buildings was appropriate.

per square foot assigned to a nature/visitor center. The $75 multiplier for an outbuilding matches the GASB cost for a shelter/restroom.

As a final note, Estimated Value is not technically the same as Market Value, Assessed Value, Replacement Cost, or Restoration Cost. (See Glossary.). The Estimated Value can run higher than both assessed and market values. This difference is due to the fact that the value of historic buildings with specialty materials is not widely recognized in the tax assessors' market and such buildings have a greater repair/replacement value than new buildings of cheaper materials. The Estimated Value may be similar, however, to the replacement cost and/or the restoration cost of a structure that is endangered and/or dilapidated. For example, a severely endangered log slave quarter may require $20,000 to restore it and its Estimated Value, as derived by the formula below, may be $20,000 as well. The Historic Preservation Section reviewed the Estimated Value to the assessed value and/or market value of several of the properties in the County's portfolio, thus confirming the validity of the formula.

Annual Maintenance

The Formula is: Annual Maintenance = 1.5 % of Estimated Value

This formula represents a very simplified version of a Yale University Facilities Planning formula developed to determine annual maintenance costs for its buildings, the majority of which are historic. Because of Montgomery County's budget limitations, this Plan has adopted the lower number of Yale's percentage range, 1.5%, as our annual maintenance multiplier. This Plan also has determined that in lieu of conducting as thorough a conceptual cost model as Yale, the Department should use this multiplier in conjunction with an Estimated Value, which is described above.

The Historic Preservation Section conducted several checks on this proposed maintenance formula. The first check involved looking at the known costs associated with restoring/rehabilitating several buildings in the County's portfolio of park buildings (Woodlawn structures, the Waters House, the Joseph White House, etc.). A second check was done by adding up the actual costs -- per a detailed review of invoices -- that a homeowner incurred annually for maintenance of a property at least 50 years old. This property was in reasonable, but not excellent condition; and not designated on any historic inventory. The third check involved looking at the costs undertaken by a private homeowner in possession of a Federal-era main house and its associated 19th-century outbuildings (corncrib, barn, log meat house, etc.). The Maryland Historical Trust holds an easement on this last property and it is listed on the *Master Plan for Historic Preservation.* An analysis of a year's worth of investment in maintaining that private property via a detailed review of invoices confirmed that the formulas for determining both Annual Maintenance Cost and Estimated Value were reasonable and therefore valid for budget appropriation purposes.

CIP (Capital Improvement Program)

This field contains the amount of CIP funds earmarked for the property between the fiscal years 2006 (including FY06 funds plus those from prior years but still not disbursed) up through 2012. The exact fiscal year of the CIP distribution follows in parenthesis in this data cell. If the

cell is blank, that means that the resource has not had any CIP funds associated with between 2006-2012. Note that Special Revenue Funds are not included in the CIP column in the spreadsheet, since this is a separate account.

Special Revenue Fund

This is a monetary fund that primarily results from periodic annual surpluses in the Commission's Property Management Program. The Planning Board has directed that these surpluses should be used for the maintenance and restoration of M-NCPPC-owned historic properties.

Responsible Party-Inspection

This is the division within the Department that should take the lead on inspecting properties in the Parks. These assignments reflect the party that is already doing inspection in the parks. Sometimes the Responsible Party is a single division while other times it makes the most sense that the responsibility is shared across divisions. Properties with structures should be inspected on an as-visited basis to the parks, or at least once every six months. Archaeological sites should be inspected at least once a year. The following are the codes:

CM	Central Maintenance
E	Enterprise
HOC	Housing Opportunity Commission
HP	Historic Preservation Section
PM	Park Manager
PPP	Public/Private Partnership
Pr Mgt	Property Management

Responsible Party-Funding

This is the division within the Department that should take the lead on capital improvement projects and annual maintenance funding/implementation. Sometimes the Responsible Party is a single division while other times it makes the most sense that the responsibility is shared across divisions. The codes are:

CM	Central Maintenance
E	Enterprise
HOC	Housing Opportunity Commission
HP	Historic Preservation Section
PM	Park Manager
PPP	Public/Private Partnership
Pr Mgt	Property Management

Heritage Theme

This is one of the three categories used to cluster buildings by historical themes for purposes of heritage tourism. The three clusters come from the Montgomery County Heritage Area Management Plan (November 2002) and are: Quaker/Underground Railroad Cluster

("Quaker-Underground RR"), Farming Cluster ("Farming"), and Technological Innovation Cluster ("Technology.")

Long-Term Use Goal

This is the broad goal for a property in the long run; it represents the Strategic Plan vision for each of the buildings the Department owns. The uses fall into the following categories:

A. Open For Public Interpretation ("Open to the Public")
B. Public/Private Partnership ("Public/Private Partnership")
C. Park-Related Function ("Park-Related Function")
D. M-NCPPC Housing ("M-NCPPC Housing")
E. Trail or Park Interpretive Element ("Trail Element")

IBCFUO

This acronym stands for the *International Building Code* Future Use and Occupancy classification that each resource has been given as a starting point for deliberating architectural and engineering programming. The letter codes are as follows:

A = Assembly Group
B = Business Group
E = Educational Group
F = Factory Group
H = High-Hazard Group
I = Institutional Group
M = Mercantile Group
R = Residential Group
S = Storage Group
U = Utility and Miscellaneous Group