

## **Montana State-Owned Heritage Property Reporting Form Instructions and Definitions**

### **General**

- Complete a Heritage Property Reporting Form for each heritage property that has a property number (Smithsonian trinomial)
- For historic districts: Individual contributing buildings may be reported together on the reporting form for the district or reported individually on separate reporting forms (repeat district property number). Choose what works best.
- “Historic” generally means 50 years old or older
- “Heritage property” is a significant historic property that retains sufficient integrity to convey that significance.
- “Historic District” is a collection of contributing heritage properties with a common history (see also below, Property Count).
- “Contributing property” is a heritage property within a district that contributes to the historic significance of that district.

### **Property Number:**

- Smithsonian trinomial: 24xx####
- 24 = Montana; xx = county (2 letter designation); #### = number
- Include leading zeros (24YL0024; not 24YL24)
- Number is assigned by SHPO as indicated on list of recognized state-owned heritage properties.
- Individual contributing properties in some older recorded historic districts may lack individual property numbers; instead they are identified together by the single district property number.

### **Property Name:**

- Use property name on heritage property list; or
- Common name; or
- Historic name; or
- Modern name

### **Property Town/Vicinity of:**

- City/Town or nearest city/town

### **Property Date:**

- Historic date of origin or construction
- For Native American archaeological sites, use “Precontact”

### **State Agency:**

- Choose one (drop down menu)
- 14 Choices: Commerce/Heritage Commission; Corrections, DNRC; DOA/General Services; DPHHS; FWP/Fish & Wildlife (**NEW**); FWP/Montana State Parks (**NEW**); Historical Society; Justice; MDT; Military Affairs; University System/MSU (**NEW**); University System/UM (**NEW**); Other

### Reporting Year:

- Year in which report is due in February, per statute (reports on previous 2 years).
- i.e., 2014, 2016, 2018, ....
- For example, Reporting Year 2014, submitted in February 2014, includes information from 2012 and 2013.

### Property Type:

- Choose one (drop down menu)
- 2 Choices: Historic; Prehistoric (Precontact)

### Property Count (#)

- Enter counts (i.e., numbers) for all that apply
- For a District, also enter count (i.e., numbers) for contributing elements (buildings, structures, sites, objects) within the district
- Questions about how/what to count? Contact SHPO.
- Categories are defined by the National Register of Historic Places for counting properties, as follows:
- **District** = “A district possesses a significant concentration, linkage, or continuity of sites, buildings, structures, and/or objects united historically or aesthetically by plan or physical development” (e.g., college campus; central business district; residential neighborhood; large farms; industrial complex; large landscaped park)
- **Building** = “A building, such as a house, barn, church, hotel, or similar construction, is created principally to shelter any form of human activity. “Building” may also be used to refer to a historically and functionally related unit, such as a courthouse and jail or a house and barn” (e.g., houses, barns, stables, sheds, garages, courthouses, city halls, social halls, commercial buildings, libraries, factories, mills, train depots, hotels, theaters, schools, stores, churches)
- **Structure** = “The term structure is used to distinguish from buildings those functional constructions made usually for purposes other than creating human shelter (e.g., bridges, tunnels, fire towers, canals, power plants, roadways, grain elevators, kilns, railroad grades, gazebos, dams, carousels)
- **Site** = “A site is the location of a significant event, a prehistoric or historic occupation or activity, or a building or structure, whether standing, ruined, or vanished, where the location itself possesses historic, cultural, or archaeological value regardless of the value of any existing structure (e.g., habitation sites, rock shelters, petroglyphs, gardens, battlefields, ruins of historic buildings and structures, trails, cemeteries, designed landscape) (all precontact archaeological locations)
- **Object** = “The term object is used to distinguish from buildings and structures those constructions that are primarily artistic in nature or are relatively small in scale and simply constructed. Although it may be, by nature and design, movable, an object is associated with a specific setting or environment (e.g., sculpture, monuments, boundary markers, statuary, and fountains)

## Historic Significance and Property Description (NEW)

- Briefly describe the heritage property and its historical significance (in Comment)

## Historic Integrity (NEW)

- Choose one (drop down menu)
- 4 choices: Excellent; Good; Fair; Unknown
- Note: “Historic integrity” is defined by the National Park Service as the ability of a historic property to convey its historic identity and significance. It does not necessarily equate with condition, negligence, or whether a property is up to code. Questions to ask are: How much of the important qualities of the property have changed and how much are still present? Would people of the period recognize the property? The NPS further recognizes seven aspects of integrity (location; design; setting; materials; workmanship; feeling; and association) which combined define the degree of integrity. Those interested in learning more, see <http://www.nps.gov/nr/publications/bulletins/nrb15/>
- If building, indicate (in Comment) which conspicuous historic architectural components are removed, covered, or replaced with non-historically appropriate counterpoints.
- **Excellent** = For Architecture, the historic building fabric is unaltered. It retains its historic identity through its unmodified historic form and defining architectural features. The building is without non-historic additions, and it retains its historic windows, exterior cladding, entries, interior finishes, etc. For Archaeology, sites will have undiminished quality of materials and association: 1) artifacts, environmental data, features or activity areas deposited during a particular time period and in a particular configuration are intact, and 2) the association of those potential data sets to important research questions is easily demonstrated. For sites which may be significant for purposes other than research, the site will have excellent integrity if a person or important cultural entity that used the location would recognize it today based on the extant design, setting, feeling and location.
- **Good** = For Architecture, the historic building fabric is minimally altered. It retains much of its historic identity through minimal modification to its historic form and defining architectural features. It may have non-historic additions that are compatible with the building’s historic character, or are not conspicuous. Historic features such as windows, exterior cladding, entries, interior finishes, etc. might be modified or replaced. However, a majority of extant features are in character with the building’s architecture. For Archaeology, sites are minimally altered, though they may be diminished by taphonomic and site formation processes and modern development. Sites will have good integrity as long as a majority of qualities and cultural manifestations are recognizable and/or the sites maintain information potential.
- **Fair** = For Architecture, historic building fabric is more significantly altered. The building’s identity is impacted through non-sympathetic additions, modifications to its form, or loss of character defining features. For Archaeology, sites will have only fair integrity if it is demonstrated that natural or cultural processes have disturbed deposits and materials or other cultural manifestations in a majority of aspects. Such aspects would include a site’s location, design, setting, materials, workmanship, feeling, and association.

## Use (NEW)

### Historic Use

- Property's historical function (e.g., office; house; warehouse; store, etc.)

### Current use

- Property's current function (e.g., office; storage; state park; agricultural field (archaeological site); vacant (building); etc.
- If vacant building, also indicate how many years vacant.

### Comment

- Describe issues in agency need for and use of the property

## Status

- Choose one (drop down menu)
- 7 Choices: Endangered; Threatened; Watch; Satisfactory; Improving (**NEW**); Mitigated (**NEW**); Unknown
- Status is relative to the potential for change in the historic integrity of the heritage property – i.e., is the property's historic integrity likely to worsen, stay the same, or get better? A property's integrity usually changes due to 1) work that removes or significantly modifies a property's historic features; 2) through neglect combined with natural forces that results in the loss of historic features; or 3) from catastrophic events.
- **Endangered** = serious negative impacts to the property's historic integrity are occurring, or have occurred, and resource condition is worsening.
- **Threatened** = serious negative impacts to property historic integrity have not occurred, but are likely or impending.
- **Watch** = negative impacts to historic integrity have the potential to occur
- **Satisfactory** = negative impacts to historic integrity are unlikely to occur; property is stable
- **(NEW) Improving** = actions taken or underway to improve historic integrity, in consultation with State Historic Preservation Office.
- **(NEW) Mitigated** = Planned/impending loss of historic integrity has been addressed in consultation with State Historic Preservation Office and loss taken into account through agreed upon measures or mitigation.
- **Unknown** = no or inadequate current information

## Condition

- Choose one (drop down menu)
- 6 choices: Excellent; Good; Fair; Poor; Failed; Unknown
- Condition refers to how sound or maintainable a property is. It is different from historic integrity.
- **Excellent** = Well preserved; routinely maintained and monitored. If building or structure: meets current codes and use needs, while preserving historic integrity.
- **Good** = Stable; generally maintained and/or monitored. If building or structure: minimally meets current codes and basic use needs, while preserving historic integrity.

- **Fair** = Stable, but largely unmaintained; needs or will soon need treatment. If building or structure: does not meet all current codes or basic use needs.
- **Poor** = Unstable; unmaintained; in need of treatment. If building or structure: does not meet current codes, health or safety standards or does not meet use needs.
- **Failed** = Demolished; destroyed; resource is gone or lost its heritage values and historic integrity. Probably no longer a heritage property.
- **Unknown** = No data.

#### Heritage Stewardship Effort/Cost (past 2 years)

- Enter all that apply
- Enter costs/estimated costs (dollars) for all activities undertaken in the period of reporting (2 years).
- If activity occurred, but no cost/estimated cost is available, enter “+”
- If no activity, enter “0” or leave blank
- Report costs only once – pick best choices ; do not duplicate
- Report only heritage stewardship costs. Do not report cost of activities that have adverse impacts to historic integrity of properties (e.g., non-sensitive window replacements; demolition)
- Report only property-specific costs. May include labor/materials, but do not include general program administrative costs that are not specific and dedicated to individual property (these costs can be discussed in agency narrative report, if desired).
- 11 choices, including Other.
- **(NEW) Heritage Property Administration/Operations:** property-specific staffing and operating costs
- **Heritage Restoration/Rehabilitation/Repair project activity:** generally associated with buildings or structures. Activity meets Secretary of the Interior’s Standards and must not be adverse impact to historic integrity of property in consultation with SHPO.
- **(NEW) Heritage Preservation/Protection project activity:** preservation project other than above. Including impact mitigation not reported elsewhere.
- **Heritage Research/Documentation project activity:** e.g., library research; recording, National Register nomination; archaeological testing or excavation
- **Heritage Interpretation/Education/Awareness project activity:** e.g., signage, interpretive brochure; curriculum
- **Heritage Promotion/Tourism/Marketing project activity:** e.g., heritage advertising, website promotion; heritage tourism planning
- **Heritage Preservation/Conservation Plan Development:** e.g., historic structures report with recommendations; preservation plan
- **Regular/routine maintenance:** may include labor/materials for general maintenance and cleaning activities that do not have adverse effect on historic integrity of property.
- **Monitoring:** must produce permanent record/report of monitoring of status and or condition of heritage property; may include labor/travel costs
- **Project designed/redesigned to avoid adverse effect:** may include increased or additional cost to implement project in manner that will preserve historic integrity and heritage values (in consultation with SHPO), if greater than original project cost and if not reported elsewhere.
- **Other heritage stewardship effort/activity:** explain in Comment section.

### **Prioritized Maintenance & Stewardship Needs**

- Consider and report only needs that will facilitate or accommodate historic preservation and stewardship. Do not report on needs and options that will result in adverse effects to historic integrity. (May explain in Comments)
- Consider if you had limited funds, how/where would you prioritize this funding?
- Consider heritage property significance, integrity, status and condition in prioritizing.
- Two part question/answer:
  - **Part 1:** Rank property from 1 (highest; top 20%) to 5 (lowest; bottom 20%) on scale of agency priority for addressing preservation needs of this property among all agency heritage properties.
  - **Part 2:** List (in Comments) general preservation maintenance and stewardship needs for this property in priority order (1, 2, 3, etc). May include cost-estimates if desired.

### **Reported by**

- Name (First, Last)

### **Date**

- MM/DD/YYYY (use leading zeros)