

HERITAGE PRESERVATION GRANT

APPLICATION GUIDE



**Economic
Development**
CITY OF AUSTIN

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Introduction

Welcome to the City of Austin's Heritage Preservation Grant Application Guide.

Historic preservation is a community-building economic tool that preserves sites, creates jobs, and strengthens local economies. The Economic Development Department's Heritage Tourism Division manages heritage tourism programs that derive community and economic benefits while honoring and preserving Austin as a place of personal heritage.

The Heritage Preservation Grant serves to preserve and promote Austin's irreplaceable historic sites and heritage tourism experiences. Our partners in preservation authentically represent inclusive stories of Austin's history through capital, planning, educational, or marketing projects that engage new audiences and tourists.

All applicants are encouraged to attend a Heritage Preservation Grant Awareness Workshop for program and application information. Awareness Workshops will be recorded and can be found at the Heritage Preservation Grant website

www.austintexas.gov/heritage-preservation-grant.

For general inquiries or assistance please contact:

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Heritage Tourism Division Manager

City of Austin Economic Development Department

www.austintexas.gov/heritage-tourism

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Additional Questions?

[Join our Heritage Tourism Virtual Open Office Hours](#)

Second and Fourth Tuesday each month

10 a.m. – 12 p.m.

(no appointment needed)

Section 1. What is the Historic Preservation Fund?

Per the current city code (Section 11-2-7), 15% of the City's 7% of the hotel occupancy tax collected by the City of Austin, is allocated to the Historic Preservation Fund to support historic preservation and restoration projects and activities that attract tourists and convention delegates to the city. This may include the preservation, restoration, or rehabilitation of historic buildings, structures, objects, monuments, sites, or districts; and programming and marketing to encourage tourists and convention delegates to visit historic sites or museums in Austin.

In accordance with state statute, any expenditure of hotel occupancy taxes must meet two criteria.

1. The expenditure must directly enhance and promote tourism and the convention and hotel industry; and.
2. It must fit into one of the state statutorily approved functions. For historic preservation and restoration projects, the project must be:
 - a. At, or in the immediate vicinity of, convention center facilities or visitor information centers; or
 - b. Located in the areas that are reasonably likely to be frequented by tourists and convention delegates.

If the project does not meet both requirements, it is not an allowable expenditure of hotel occupancy tax funds under the Historic Preservation Fund.

More information on the [State of Texas Tax Code](#).

Section 2. Who Can Get a Heritage Grant?

Heritage Preservation Grants are reimbursable grants available to government, nonprofit, and commercial entities that own, lease, or partner with historic designated properties. Project proposals must be preservation-related or history-informing while promoting heritage tourism of the historic site as its primary purpose.

The program supports an inclusive culture and heritage tourism approach that tells the multilayered history that created the City of Austin. Our goal is to connect people and preservation while supporting diverse places where residents and tourists can experience the stories and places that focus on Austin's complete history.

The Heritage Preservation Grant supports projects of historically underfunded organizations, heritage groups, and disinvested communities, especially those from under-interpreted heritage sites and histories whose work preserves historic and culturally significant sites and historic districts.

2.1 Historic properties eligible for grants

- City of Austin Historic Landmarks;
- East Austin Historic Survey Property Eligible for Designation (non-residential)
- Locally Designated Historic District (contributing historic property)
- National Historic Landmark
- National Register Historic District (contributing historic property)
- National Register of Historic Places (property individually listed)
- Recorded Texas Historic Landmark
- State Antiquities Landmark
- Properties determined to be eligible for historic designation. If the property is not designated at the time of the application, the applicant must provide a determination of eligibility from the Texas Historical Commission or National Park Service with the application. The property must be historically designated by the time the proposed project is completed and final grant funds are disbursed.

Grounds must be accessible, open, and marketed to tourists and residents for the purposes of viewing and appreciating the historic/heritage value with reasonable visiting hours to be set by the site.

2.2 Projects eligible for grants

Applicants may submit either a Capital, Planning, Educational, or Marketing project proposal per funding cycle. Only one application per applicant will be considered.

Applicants must solicit and submit two bids from outside consultants or vendors when submitting a project proposal. Use of Minority-Owned and Women-Owned businesses certified by [Austin's Small and Minority Business Resources](#) is highly encouraged, but not required.

Capital Projects (Maximum award: \$250,000)

Reimbursement grants are awarded to restore, rehabilitate, and stabilize tourism-serving historic sites and structures. The project site must be historically-designated or eligible for historic designation.

Organizations proposing to do preservation projects on a site not owned by the applicant must obtain permission from the property owner *prior* to submitting an application. For projects occurring at a historic city-owned park, a [Community Activated Park Project form](#) must be reviewed and approved by the Austin Parks and Recreation Department prior to submitting a Heritage Preservation Grant application.

Capital projects may require an on-site review prior to the closeout of the contract.

Capital Projects may include:

- American Disabilities Act (ADA) Exterior Access
- Awning Restoration / Repair
- Architectural Design and Structural Analysis
- Cast Iron Restoration / Repair
- Door/Window/Screen/Trim Restoration
- Exterior Light Fixtures (must be approved by the [Historic Preservation Office](#))
- Façade Elements / Exterior Walls
- Heating, Ventilation, and Air Conditioning
- Façade Elements / Exterior Walls
- Historic Accessory Structures
- Interpretive Project or Kiosk (Outdoor)
- Masonry
- Millwork / Wooden Repair
- Paint
- Pier & Beam / Foundation Stabilization
- Roof Repair
- Signs and Installation (must comply with local standards; neon ineligible)
- Other

Heritage Capital Projects must:

- Meet [Local Historic Design Standards](#) and/or [U.S. Secretary of the Interior's Standards for the Treatment of Historic Properties](#). Proposals already reviewed by the Texas Historical Commission (THC) are encouraged to submit a THC structures report.

Planning Projects (Maximum Award: \$30,000)

Funding to secure property-specific professional planning expertise in areas such as preservation, architecture, or engineering plans; or historic research and historic designation nominations for tourism-serving historic sites or potential historic districts. The project site must have a historic designation or deemed eligible for historic designation.

Planning Projects may include:

- Historic structures Report, Preservation Plan, Cultural Landscape Preservation Plan, Heritage Tourism Assessment, Architectural Design, Structural Analysis
- Consultant for Historic Designation, Interpretive Plan, Consulting for Historic Tourism Sites

Educational Projects

Projects that actively create experiences for tourists and residents to interact with historic places, events, or activities that authentically represent the stories and people of the past and present and enhance the understanding or perspective on heritage, culture, and history. The project sites must have a historic designation or deemed eligible for a historic designation. Designation must be completed by the end of the contract term.

Educational project types may include the development and production of:

- Conferences, Workshops, or Technical Assistance Programs
- Event or Program at a Historic Site / Historic District
- Heritage and Historic Exhibitions (*for Outdoor Interpretive – See Capital Projects*)
- Historic Marker (must indicate eligibility in advance)
- Tour Development: Historic, Heritage, Legacy and Natural Resource. Historic site tours may include a partnership with tourism-serving legacy businesses.

Marketing Projects (Maximum award: \$30,000)

Projects actively connect and market heritage, particularly of underrepresented or under-interpreted histories, places, or events that encourage tourists and residents to connect and engage with stories associated with the site history and its heritage.

- Digital Marketing Projects
- Heritage & Multicultural Tourism Marketing: Destination Video & Photography, Social Media, or Marketing Campaigns
- Language Translation of Marketing Materials (Print or digital assets)
- Marketing Content, Asset Development and Distribution: Brochures, Maps, Guides, Rack Cards, Itineraries
- Website Enhancements (must be associated with site history; operational costs are ineligible)

Marketing project types must:

- Increase tourism and/or benefit tourists, hotel guests, and convention attendees;
- Include the significance of the historic place;
- Follow best practices for the applicable project type; and
- Be publicly available for 5 years.

2.3 Eligible and Ineligible Activities and Expense

<p>Projects eligible for reimbursement grants. NOTE: Two (2) outside vendor bids are required for proposals.</p> <ul style="list-style-type: none"> Historically designated capital, planning, educational, or marketing projects at historic sites that promote tourism. For projects occurring at a historic city-owned park, a Community Activated Park Project (CAPP Review and Approval Form) must be submitted to and approved by the City of Austin Parks and Recreation Department prior to a Heritage Preservation Grant project submission. Submission of a Texas Historical Commission Structures Permit is encouraged along with the proposal, if available. A consultation with Heritage Tourism staff is required prior to submission. <i>Optional</i> 10% Project Management, not to exceed \$10,000, for capital projects only <i>Optional</i> Insurance Fee <i>Optional</i> Fiscal Sponsor Fee, not to exceed \$1000 	<p>Due to restrictions on the funding source for this program, ineligible project costs include, but are not limited to, the following:</p> <ul style="list-style-type: none"> Activities outside Austin; Acquisition of property; Archeology excavation projects (educational projects eligible); Audits (unless required by agreement); Capital projects that do not meet the Secretary of the Interior's Standards or local Historic Design Standards; Community Activated Park Projects Proposals at City-owned historic sites that have not been pre-approved; Consultants who are members of an applicant's board; Existing deficits, fines, contingencies, penalties, interest, or litigation costs; Food and beverages; Fundraising expenses; Furnishings; Historic interiors (planning projects eligible); Historic properties with fencing in front of, or near, the property that would obscure or prevent visual observation of the building from the public right-of-way; Landscaping or Cultural Landscape projects (planning projects eligible); Mass-produced commercial products; Murals; Neon Signage; New building construction or expansion; Owner-occupied properties or historic residential properties; Payments to students or interns; Preservation, heritage, and historic projects not associated with a historic site; Projects with no historic designation or are not eligible for historic designation; Property Taxes or any other tax; Purchase of gifts, awards, cash prizes, scholarships, contributions, or donations; Purchase of gasoline; Supplementing staff salaries, board, volunteer, and docent activities; Travel-related costs; Wayfinding and right-of-way signage.
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Section 3. Funding Availability and Timeline

3.1 Amount

The Heritage Preservation Grant program is a reimbursement grant ranging from \$30,000 - \$250,000 depending on the proposal type. The maximum amount of a grant award for capital projects shall not exceed \$250,000.

3.2 Reimbursement Grant

Grants are reimbursed in installments throughout the contract period. Payment of the grant will be made after the Review is approved by the City of Austin Historic Landmark Commission and a signed contract is executed.

The first eligible reimbursement of funds is up to 30% of the total award after a signed contract is executed. Awards are paid over a 24-month contract period and eligible expenses with receipts are reimbursed on a monthly basis.

A final percentage will be provided upon satisfactory project completion, with the submission of mid-year and final reports and proof all project-related obligations have been paid.

Funding awards allocated from this program may not be used toward activities funded by other City of Austin department/contract or other cultural funding programs.

Applicants may include an *optional* 10% Project Management fee, not to exceed \$10,000 (for capital projects), insurance costs, and/or an *optional* \$1,000 fiscal sponsor fee as part of the funding request.

3.3 Repayment

Applicants must repay all grant funds received if any of the following circumstances occur within the completion of the work set out in the Preservation Agreement:

- a. Applicant fails to maintain the property in accordance with the City of Austin Building Codes and tax exemption criteria (including hours available for public viewing, and documentation that the facilities are being visited by tourists and convention delegates);
- b. Historic designation is removed;
- c. The restoration or rehabilitation is not completed in accordance with the Preservation Agreement (in case of phased projects);
- d. Contractor transfers or encumbers the title without prior written approval from the City;
- e. Applicant fails to provide proof of required insurance on an annual basis.

If any of these circumstances occur, the City of Austin may file a lien against the property to secure the repayment of funds as set out in the Preservation Agreement to the extent allowed by the law. Grants for \$100,000 or more are forgivable loans, with the forgiveness occurring at a monthly prorated amount beginning from the signed contract date until the 10-year maturity date. The loan will be totally forgiven and the lien released after 10 years.

3.4 Tax Liability

The receipt of grant funds by a commercial entity may result in a tax liability in the year of benefit. It is the responsibility of the recipient to consult with a tax advisor to understand how the grant may impact taxes.

3.5 Important Dates (subject to change)

- Application Deadline: October 12, 2022 (5 p.m.)
- Application Opens: September 8, 2022
- Notification of Award: January 2023

Section 4. Who Decides What Projects Get Funded?

1. After the application deadline, interdepartmental staff will evaluate applications to ensure that each proposed project meets state tax mandated grant eligibility and criteria and program requirements, including a successfully completed online application with preservation priorities and required attachments. Incomplete applications will not be considered.
2. Applications that meet the criteria will then be evaluated and scored by a Heritage Preservation Grant External Review Panel using a Scoring Matrix.
3. The Historic Landmark Commission must provide historic review and approval for all panel-approved capital projects prior to entering into a Preservation Agreement with the City of Austin.

The City of Austin Law Department will review to confirm documentation that the use fits within the approved uses in the statute.

Applicants and the City of Austin must execute a Preservation Agreement setting out terms and conditions of the grant prior to commencing work.

Program fund availability is subject to Council approving and appropriating funding on an annual basis.

The Economic Development Department reserves the right to fund projects at a lower amount than requested, and the right to deny applications that do not meet the Texas Tax Code or Austin City Code. Guideline changes required as a result of federal, state, or local requirements may be implemented immediately by the Economic Development Department.

This document outlines the framework of guidelines informed by Austin Strategic Direction 2023, Imagine Austin Comprehensive Plan, and policies established by the Austin City Council, within which the Heritage Grant Program operations are carried out.

Section 5. How Do I Apply?

Please ensure that all required portions are completed and required attachments included. Incomplete applications will not be considered. Bids are required. Applications are submitted online through the City of Austin's Economic Development Online Portal; there is no paper application.

Because our programs are government-managed, all application materials are public records, including applicant and application contact details such as address and phone number. In the event of a request for public information related to an application, the City will notify the applicant in accordance with the Texas Public Information Act.

For projects occurring at a historic city-owned park, a Community Activated Park Project ([CAPP Review and Approval Form](#)) must be submitted to and approved by the City of Austin Parks and Recreation Department prior to a Heritage Preservation Grant project submission.

5.1 Awareness Workshops and Videos

Awareness Workshops will be offered virtually. The sessions will be recorded and available for viewing online. You can access informational videos about this program on the Heritage Tourism website and other City funding programs at www.austintexas.gov/heritage-preservation-grant.

For questions about the application, please attend our Virtual Open Office Hours:

Virtual Open Office Hours

No appointment necessary!
Days: Second and Fourth Tuesday each month
Times: 10 a.m. to 12 p.m.

[Launch Meeting - Zoom](#)

Meeting ID: 889 7770 2574
Passcode: 030734

5.2 Scoring Criteria

Minimum requirements:

- Must promote tourism and be located at or near the convention center or in an area reasonably likely to be visited by tourists and convention delegates;
- Must be a qualifying historic preservation or restoration project or preservation and history-informing planning, educational or marketing project; and
- Applicant must be in good standing with all City contracts and past Heritage Preservation Grant Program.

SCORING CRITERIA	EXPLANATION	MAX SCORE
Tourism Impact	The applicant should explain: 1) Describe the Strategies and target audiences that will be used to promote the heritage tourism project to attract new and diverse audiences and tourists. 2) What visitor data will be collected to measure the success of the marketing strategies and how will success be measured?	32
Preservation Impact	1) Significance: Historical, architectural and/or historic cultural significance of the historic building, site, district and project as it related to Austin’s complete history. Provide a brief description of construction, historic and current use, and social importance; 2) Endangerment: Site threatened or endangered; 3) Clear description of the specific preservation-related work and use of funds; 4) Long-Range Goals (Capital /Planning Only); 5) Commitment to diversity, equity, and inclusion of historically underserved and underrepresented communities through programming, marketing, administration (Educational/Marketing Only)	32
Access and Impact	1) First-Time Applicant; 2) Community Collaborators where project reflects community voice and participation; 2) Level of access to preservation related technical services or professional development.	18
Project Budget and Bids	The applicant should: 1) Project team viability: Qualifications and experience of project team 2) Preservation funding priorities list that specifies the major and prioritized components and phases of the project with associated costs. 3) Two consultant bids.	18
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Section 6. What Happens After I Get a Grant?

1. Leased or owned historic properties must be visited by tourists, hotel guests, and convention attendees and must remain **open to the public** for at least five years from the time the project is complete.
2. Planning, education, and marketing materials must **remain publicly available** for at least two years from the time the project is complete.
3. Applicant shall comply with all **permitting requirements** of the Land Development Code, if applicable.
4. Projects must be completed within two years. Projects taking longer than 2 years must be granted a written extension by the department.
5. Prior to the commencement of projects, applicants and the City must execute a **Preservation Agreement** setting out the terms and conditions of the grant. The City will not execute an Agreement without an approved Historic Review (formerly Certificate of Appropriateness) by the Historic Landmark Commission for Capital Projects. [For more information visit the Historic Preservation website.](#)
6. **Notification requirements** within project completion: In all cases of transfer of title, the applicant must notify the City of Austin Economic Development Department Heritage Tourism Division. The applicant must notify the City of Austin Economic Development Department Heritage Tourism Division whenever legal action is pending which may result in foreclosure on the historic property.
7. **Changes in Use:** If use of the historic property changes from that existing or proposed at the time of funding within ten years of project completion, the applicant must notify the City of Austin Economic Development Department Heritage Tourism Division.
8. **Mid-Year, Final Report and Visitation Records:** Applicant must provide mid-year and visitation records (number of guests, including numbers of guests from outside of the Austin Metropolitan Statistical Area) to the Heritage Tourism Division as part of the Final Report following the completion of the project.
9. Work on approved projects must commence within the agreed-upon time frame outlined in the Preservation Agreement. Projects that are not completed within the agreed-upon time frame risk loss of grant funding.
10. Contingent upon the scope of the project, a preservation architect may be retained to represent the City of Austin to monitor the **progress** of the work. The need for representation will be decided on a case-by-case basis by Heritage Tourism Division staff. This cost would be incurred by the applicant separate and apart from the grant funds.
11. The City will conduct **monitoring activities** throughout the project and compliance terms as required. These activities may include a site visit to verify compliance with contract requirements.

6.1 Marketing

Awardees are required to acknowledge the City's support in all appropriate materials and media by placing the Economic Development Department's logo and Publicity Statement on all marketing materials, websites, press releases, etc. Awardees are required to provide information about the project to Visit Austin and the Economic Development Department to aid in marketing the projects to tourists and convention delegates.

Awardees will also be required to complete at least (2) two Tourism Marketing Training classes offered in partnership by the City of Austin Economic Development Department and Miles Partnership.

6.2 Reporting

A mid-year and final report will be required within each given fiscal year. The report will require demographics, job creation data, proof of tourism marketing and tourism visitation including marketing plan, status or completion of the proposed project, demonstrated proof of the use of the required Publicity Statement and logo, and/or an on-site review and adherence to the Secretary of Interior's Standards for the Treatment of Historic Properties for Capital projects. Reports must be completed online.

Grantees shall maintain complete and accurate financial records of each expenditure of hotel occupancy tax revenue for final reporting to the City and survey tourists to collect and report visitor zip codes and hotel or motel stay information. See Appendix 4 for a list of contractor deliverables.

6.3 Insurance

Heritage Preservation Grant applicants are required to carry insurance and provide the City of Austin Heritage Tourism Division with a current Certificate of Insurance prior to entering into a contract.

Insurance costs should be included in the applicant budget, and as such, should be researched prior to submitting the application. See Appendix 3 for additional Insurance Information. Specific insurance requirements will be included in the pre-contract materials if you are awarded funding.

Section 7. Required Attachments Checklist

- Historic Documentation**
Historic photograph(s) or records, if available, or other documentation as appropriate to clearly explain the project (especially where restoration, alterations, changes, and/or improvements are planned)
- Historic Designation Determination of Eligibility, if Applicable**
- Two Contractor Bids**
Two Contractor bids are required for the proposed project. If a second bid is unavailable, please explain why.
- Marketing Plan**
- Community Activated Park Project Review Form for projects on City-owned parkland**
- Proof of two years' operating experience in Austin**

Appendix 1. Historic Designation Verification Resources

The following are resources to assist with your historic research and to determine historic designation or eligibility related to your project proposal. **Residential properties are ineligible for the Heritage Preservation Grant.**

- [City of Austin Historic Landmarks Data Portal](#): An open data portal of Historical landmarks of the City of Austin and landmarks in the National Registry created by the City of Austin Housing and Planning Department Historic Preservation Division.
- [Historic Property Viewer](#): An ArcGIS viewer of historic designated properties and historic districts maintained by the City of Austin Housing and Planning Department Historic Preservation Division.
- [Historic Resource Surveys and Determinations of Eligibility](#): Historic surveys and determinations of eligibility conducted by the Housing & Planning Department Historic Preservation Division. Completed surveys include East Austin (2016), Old West Neighborhood Association, and North Central Austin: West Campus, North University, Heritage, Bryker Woods, and North Hyde Park.
- [Austin History Center Digital Collections Site](#): Browse digitized items (photo collections, maps, databases and reference tools) from the Austin History Center archival collections.
- [Austin History Center Research Request Form](#): Fill out the form below to place an order with the Austin History Center for in-depth research services.
- [Historic Austin Parks](#): See a list of historic and cultural resources of Austin's park system. An approved Parks and Recreation Department Community Activated Park Project (CAPP) Form must accompany proposals seeking to initiate projects or improvements on parkland.
- [Texas Historical Commission ATLAS](#): The Atlas features over 300,000 site records, including data on Official Texas Historical Markers and National Register of Historic Places properties in Texas.
- [National Register Database and Research](#): The National Park Service's National Register of Historic Places is part of a national program to coordinate and support public and private efforts to identify, evaluate, and protect America's historic and archeological resources.

Additional Housing & Planning Department Historic Preservation Division Resources:

- [Historic Districts](#)
- [Sign Guidelines for Historic Districts and Landmarks](#)
- [City of Austin Historic District Application](#)
- [City of Austin Historic District Application Guide](#)
- [Tax Abatement for Historic Districts](#)
- [Individual Landmark Application](#)

Appendix 2. Definitions

The following are resources to assist with design standards related to your capital project.

- Historic landmarks, historic districts **designated after March 2021**, and National Register districts should use the [Historic Design Standards \(PDF\)](#) when planning projects.
- Historic districts designated before March 2021 should use the [design standards](#) developed during the application process. For more information visit the [Historic Preservation website](#).
- [Secretary of Interior's Standards for the Treatment of Historic Properties](#): Resource links developed by the National Park Service U.S. Department of the Interior.

Appendix 3. Insurance Requirements

The contractor shall carry insurance in one or all of the following types and amounts if designated as a requirement by the Risk Management Department of the City of Austin for the duration of the contract and furnish certificates of insurance along with copies of all policy endorsements as evidence thereof:

The cost of insurance should be researched prior to the submission of the application and included in the budgetary monetary figures.

Section 1 Contractor, during the term of the Agreement, shall carry insurance in the following types and amounts:

- 1.1 Commercial General Liability Insurance with a minimum combined single limit of \$500,000 per occurrence for Coverage's A (bodily injury and property damage) & B (personal and advertising injury). The policy shall contain the following provisions and endorsements in favor of the City:
 - 1.1.1 Blanket contractual and coverage for liability assumed under this contract;
 - 1.1.2 Products and completed operations coverage;
 - 1.1.3 Independent contractors coverage;
 - 1.1.4 Additional Insured endorsement (Form CG 2010), or equivalent coverage;
 - 1.1.5 Waiver of Subrogation endorsement (Form CG 2404), or equivalent coverage; and
 - 1.1.6 30-Day Notice of Cancellation endorsement (Form CG 0205), or equivalent coverage.

Section 2 Contractor shall cause any contractor or subcontractor, constructing improvements to the Premises, from the Date until issuance of the Completion Notice by the City of Austin with respect to the Premises, to carry insurance in the following types and amounts:

- 2.1 Employers Liability and Workers' Compensation Insurance. Minimum policy limits for Employers' Liability shall be \$100,000 bodily injury each accident, \$500,000 bodily injury by disease policy limit and \$100,000 bodily injury by disease each employee. Workers' Compensation coverage shall be consistent with statutory benefits described in the Texas Workers' Compensation Act, section 401. Coverage shall apply to the State of Texas. The policy shall contain the following endorsements in favor of the City:
 - 2.1.1 Waiver of Subrogation (Form WC 420304), or equivalent coverage, and;
 - 2.1.2 30-Day Notice of Cancellation endorsement (Form WC 420601), or equivalent coverage.
- 2.2 Commercial General Liability Coverage with a minimum bodily injury and property damage per occurrence limit of \$500,000 for coverages A & B. The policy shall contain the following provisions and endorsements in favor of the City:
 - 2.2.1 Blanket Contractual liability coverage for liability assumed under this contract;
 - 2.2.2 Products and completed operations coverage;
 - 2.2.3 Independent contractors coverage;
 - 2.2.4 Personal and Advertising injury coverage;
 - 2.2.5 Additional Insured endorsement (Form CG 2010), or equivalent coverage;
 - 2.2.6 Waiver of Subrogation endorsement (Form CG 2404), or equivalent coverage; and
 - 2.2.7 30-Day Notice of Cancellation endorsement (Form CG 0205), or equivalent coverage.
- 2.3 Business Automobile Liability Insurance for all owned, non-owned and hired vehicles with a limit of \$500,000 per occurrence for bodily injury and property damage liability. The policy shall contain the following endorsements in favor of the City:
 - 2.3.1 Additional Insured endorsement (Form CA 2048), or equivalent coverage;
 - 2.3.2 Waiver of Subrogation endorsement (Form CA 0444), or equivalent coverage; and
 - 2.3.3 30-Day Notice of Cancellation endorsement (Form CA 0244), or equivalent coverage.
- 2.4 Builders' Risk Insurance on an all risk physical loss form in the amount of the maximum contractor amount for any improvements made to the Premises. Coverage shall commence upon the date any work with respect to such improvements begins and shall continue until the work is complete and a Completion Notice is issued with respect to the improvements. The City shall be a mortgagee/loss payee on the policy. If off-site storage is permitted with respect to the work, coverage shall include transit and storage in an amount sufficient to protect any property being transported or stored.

- 2.5 In the event the contractor will serve liquor to individuals for entertainment purposes, the Contractor shall carry **Host Liquor Liability Coverage** of \$500,000 per claim. In the event the Contractor will sell liquor, the Contractor shall carry **Liquor Liability or Dram Shop Act Liability Coverage** of \$500,000 per claim.

NOTE: More specific insurance requirements will be included in the pre-contract materials if you are awarded funding.

Appendix 4. Required Contractor Deliverables

- Registered City of Austin Vendor
- Create an Economic Development Department Profile in Portal
- Preservation Grant Agreement Finalized
- Historic Landmark Commission Project Review and Approval (capital projects only)
- Insurance Requirement
- Visit Austin Promotions Requirement
- Tourism Marketing Training Requirement
- Marketing: Acknowledgment of City Support
- Grant Awardee Organization Reporting
- Tourism Reporting
- Financial Reporting
- Mid-Year and Final Report
- Completion of EDD Survey
- On-Site Review, as needed

Appendix 5. Additional Recommendations for Meeting Heritage Tourism Requirements

The following suggestions are examples of ways in which you can advance your project's reach while also strengthening the impact of heritage tourism to Austin:

- Completing Tourism Marketing Training through Visit Austin.
- Promote your events, resources, and projects on the Visit Austin website, and other travel and tourism-related outlets.
- Plan for effective marketing and social media strategies for diverse heritage tourism audience development.
- Create and collaborate on joint historic and cultural activities and attractions with nearby entities and venues and cross-market these events to encourage multi-site tourism visitation.
- Promote your event or project to other preservation groups like the County Historical Commission, regional city preservation offices and non-profits, Preservation Austin, Preservation Texas, and the National Trust's Houston Field Office.
- Promote your project and events through local, regional and statewide diverse media and tourism outlets.
- Promote your event or project to nearby hotel and lodging facilities through promotional materials and/or website. Many hotels have rack card displays to promote attractions to tourists and other customers.
- Partner with an area hotel for a block of rooms or negotiated rate for out-of-town attendees. Promote the discounted overnight rate to visitors, online, and in marketing materials.
- Invite front-line hospitality staff to attend an event as a guest and encourage them to become a spokesperson for your organization or project.
- Drop program/project collateral materials to local hotels, local businesses, restaurants, Austin Visitor Center, Austin History Center, and/or to travel centers, coordinate collective marketing efforts with similar or comparable organizations or projects-by advertising in a regional, statewide, national or international publication.
- Become a member of Travel Industry Association of America (TIA).

Appendix 6. Background

Until late 2018, Visit Austin contracted with the City of Austin to market the historical assets of the City through administering the Heritage Grants Program. Effective FY 2020, the City of Austin Economic Development Department Heritage Tourism Division now administers the Heritage Grant Program.

On June 30, 2017, the Visitor Impact Task Force Final Report to Austin City Council provided recommendations relevant to Resolution No. 20160118-075 to study the impact of tourism, review of State and National Best Practices for tourism, and Review of Texas Tax Code Chapter 351 and allowable uses of Hotel Occupancy Taxes under the Tax Code.

On August 31, 2017, Council approved Resolution 20170831-060 directing the City Manager to take necessary actions to allocate hotel occupancy taxes and other revenues to projects that promote tourism and the convention industry, in accordance with council directives.

On September 13, 2017, Council approved Ordinance 20170913-001, including an allocation of Hotel Occupancy Tax revenue from the Hotel Occupancy Tax Fund, to the newly established Historic Preservation Fund.

On December 14, 2017, Council approved Ordinance 20171214-005 amending Section 11-2-7 of the City Code to establish the allocation of Hotel Occupancy Tax for historic preservation as directed by Council during the City's budget adoption process.

On June 6, 2018, the Heritage Grant Working Group developed a report with recommendations to Austin City Council for the Heritage Grant Program and the newly established Historical Preservation Fund. In addition to the parameters outlined in Chapter 351, the group considered relevant priorities from Austin Strategic Direction 2023, Imagine Austin Comprehensive Plan and the Visit Austin Marketing Plan.

On October 4, 2018, Council adopted Resolution 20181004-033 to allocate 15% of the hotel occupancy taxes to fund operations / maintenance of City of Austin historic facilities and sites in accordance with Texas Tax Code Section 351 and fund other allowable capital and acquisition costs for historical restoration and preservation projects and activities. Council also directed the City Manager to initiate the following recommendations of the Visitor Impact Task Force and the Heritage Grant Working Group related to the HPF: 1) Expand the eligible applicants for heritage grants per the recommendations of the Visitor Impact Task Force and the Heritage Grant Working Group; 2) Expand eligible projects for heritage grants to include capital projects and planning, educational, and marketing projects; 3) Increase the \$59,000 cap on individual heritage grants awards to \$250,000, with staff discretion to recommend to City Council grant requests above this threshold.

In FY 2019, the Economic Development Department was authorized to create a Heritage Tourism Division that would administer the Heritage Grant Fund promoting tourism and the convention industry through preservation, restoration, and rehabilitation of historic properties, buildings, structures, objects, monuments, sites or districts.

Appendix 7. Definitions

Heritage tourism: The National Trust for Historic Preservation defines heritage tourists as those who travel to experience the places, artifacts and activities that authentically represent the stories and people of the past and present.

Marketing: All costs for marketing, publicity, and/or promotion specifically identified with the activity. Include costs directly related to promotion, publicity, or advertising.

Match: Revenue that is donated, such as grants and donor contributions.

MBE/WBE: Minority Owned Business Enterprise & Women-Owned Business Enterprise

New applicant: An organization or entity that has not received funding through the Heritage Preservation Grant program within the last 3 years. This is intended to encourage broader distribution of grant funds. It will not prevent an applicant from receiving another grant within 3 years.

Non-profit organization: An organization with tax-exempt status that is certified by the Internal Revenue Service (IRS) as a 501(c)(3) which ensures no part of net earnings benefits a private individual.

Preservation: Focuses on the maintenance and repair of existing historic materials and retention of a property's form as it has evolved over time.

Rehabilitation: Acknowledges the need to alter or add to a historic property to meet continuing or changing uses while retaining the property's historic character.

Reconstruction: Re-creates vanished or non-surviving portions of a property for interpretive purposes.

Restoration: Depicts a property at a particular period of time in its history, while removing evidence of other periods.

Sponsored project: The individual or group that is under the umbrella of the 501(c)(3).

The Secretary of the Interior's Standards for the Treatment of Historic Properties: Guidelines for preserving, rehabilitating, restoring and reconstructing historic buildings. For more information visit the [Treatment of Historic Properties guidelines](#).

Tourist: An individual who travels from the individual's residence to a different municipality, country, state, or country for pleasure, recreation, education or culture (Texas State Tax Code Chapter 352, p. 1).

Visitor: An individual traveler that stays overnight away from home in paid or unpaid accommodations, or a day visitor that travels at least fifty miles one-way from home on a non-routine trip