

## Sample Schedules for CLG-Funded Historical & Architectural Surveys

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In the past there was a “one-size-fits-all” approach to historical & architectural survey project schedules. A standard schedule for meetings and submissions was applied to all projects. While the schedule of required deliverables worked for some projects, it was not appropriate in all cases. In an effort to make the survey process fit the specific characteristics of individual projects, we have introduced greater flexibility.

Staff will consider the following factors related to the complexity of the project in setting the appropriate schedule:

- number of resources to be surveyed
- technical difficulty of the project
- importance of surveyed resources
- CLG contact’s previous experience administering grants and overseeing survey projects
- Consultant’s prior experience in completing similar projects and the quality of past work
- Other factors-- such as political climate or development pressures-- which may impact the project

The three attached pages represent likely schedules for historical & architectural surveys with varying levels of complexity. These samples recommend different levels of review and official communication with staff:

- Sample draft forms submitted for review range from ten percent of the total forms to none at all
- Written progress reports range from multiple reports from the CLG contact and/ or Consultant to no requirement for such formalized communication
- All projects will require an initial meeting, but subsequent meetings over the course of the project will vary
- Final draft forms may be submitted either in smaller batches or all together

However, **all** projects will feature the same schedule in terms of the draft survey report and the newly instituted CLG contact review process. The draft survey report still should be submitted at the same time as the final draft forms. All projects will require CLG contacts approve the final draft forms and draft survey report prior to staff review. Only after the products meet client expectations will they be submitted to the staff.

It is hoped the use of the new schedules will prove more responsive to the needs of the CLGs and Consultants working on diverse projects. Because there is no one standard schedule for all historical & architectural survey projects, there may be some challenges for CLG contacts completing Attachment C: Project Performance and Payment Schedule during the contracting phase. The safest approach is to include all of the steps (meetings, progress reports, sample draft form review, final forms in batches) listed in Sample Schedule 1. It is easier to remove unnecessary deliverable products than to add more requirements once all project conditions are in place. Also, keep in mind that these schedules do not include the required CLG financial and annual reports due to Dan Corson as part of all CLG projects.

If you have questions about the sample schedules or any other aspect of the historical & architectural survey process, please contact:

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**CLG Sample Schedule 1:** Lots of resources being surveyed; Tense political climate; CLG contact has no experience with survey projects; Consultant has completed no or few survey projects submitted to OAHF...

Suggested Timing	1 <sup>st</sup> month	4 <sup>th</sup> month	7 <sup>th</sup> month	8 <sup>th</sup> month	—	9 <sup>th</sup> month	10 <sup>th</sup> month	11 <sup>th</sup> month	12 <sup>th</sup> Month	13 <sup>th</sup> Month	14 <sup>th</sup> Month
<b>Project Phase</b>	After consultant chosen but before actual survey work takes place	Date given on deliverable schedule	Fieldwork complete	At least 10 percent of survey forms finished	Anytime in project— may be particularly useful for determining boundaries of potential districts, when high number of resources field eligible	Date given on deliverable schedule	Draft survey report and first batch* of final draft forms complete	CLG contact review complete	CLG contact review complete	Final revisions to all survey products in progress	Consultant makes all corrections and revisions based upon CLG contact and staff reviews/ meetings
<b>Deliverable</b>	Initial Meeting	Progress Report	Interim Meeting to discuss challenges, begin consideration of individual eligibility/ district potential	Staff Review of sample draft forms- 10% of total number of properties surveyed	Requested Staff Site Visit	Progress Report	CLG contact review† of draft survey report and first batch of final draft forms	Staff review‡ of draft survey report and first batch of final draft survey forms	Staff review‡ of second batch of final draft survey forms	Meeting with NSRH to reach concurrence on eligibility/ contributing & non-contributing status	Staff acceptance of final forms and final survey report
<b>Responsible Party</b>	Attendees: CLG contact, Consultant, CLGC, ASC, NSRH	Consultant and/ or CLG contact depending on nature of project	Attendees: Consultant, ASC, NSRH	ASC, GISSA, NSRH	Either CLG contact or Consultant can request a Site Visit	Consultant and/ or CLG contact depending on nature of project	CLG contact	ASC, NSRH	ASC, NSRH	Attendees: Consultant, NSRH, ASC	ASC, NSRH

\* The number of batches necessary and how many forms are included in each batch will depend upon the total number of resources surveyed. Consult the deliverable schedule for the project.

† CLG contact should be able to complete the review of draft survey report and final draft forms in 15 days. If the products are unacceptable and must be returned to the Consultant for correction, then time will need to be allowed for a second CLG contact review of those products prior to submission to the ASC.

‡ Staff are given at least 30 days to review products. In planning your project allow time not only for these reviews to be completed but also for any comments to be forwarded to the CLG contact and Consultant.

**Abbreviations:** ASC- Architectural Survey Coordinator; CLGC- Certified Local Government Coordinator; GISSA- GIS Specialist (Architecture); NSRH- National & State Register Historian

**CLG Sample Schedule 2:** Quite a few resources being surveyed; CLG contact has some experience with survey projects; Consultant either has completed a few survey projects or had submitted products returned as unapproved on prior projects...

Suggested Timing	1 <sup>st</sup> Month	8 <sup>th</sup> Month	9 <sup>th</sup> Month	_____	11 <sup>th</sup> Month	12 <sup>th</sup> Month	13 <sup>th</sup> Month	14 <sup>th</sup> Month
<b>Project Phase</b>	After consultant chosen but before actual survey work takes place	At least 5 percent of survey forms finished	Date given on deliverable schedule	Anytime in project—may be particularly useful for determining boundaries of potential districts, when high number of resources field eligible	Draft survey report and final draft forms complete	CLG contact review complete	Final revisions to all survey products in progress	Consultant makes all corrections and revisions based upon CLG contact and staff reviews/ meetings
<b>Deliverable</b>	Initial Meeting	Staff Review of sample draft forms- 5 percent of total number of resources surveyed	Progress Report- opportunity to discuss challenges; Consultant may want to start asking questions about individual eligibility/ district potential	Requested Staff Site Visit	CLG contact review† of draft survey report and final draft forms	Staff review‡ of draft survey report and final draft survey forms	Meeting with NSRH to reach concurrence on eligibility/ contributing & non-contributing status	Staff acceptance of final forms and final survey report
<b>Responsible Party</b>	Attendees: CLG contact, Consultant, CLGC, ASC, NSRH	ASC, GISSA, NSRH	Consultant and/ or CLG contact depending on nature of project	Either CLG contact or Consultant can request a Site Visit	CLG contact	ASC, NSRH	Attendees: Consultant, NSRH, ASC	ASC, NSRH

\* The number of batches necessary and how many forms are included in each batch will depend upon the total number of resources surveyed. Consult the deliverable schedule for the project.

† CLG contact should be able to complete the review of draft survey report and final draft forms in 15 days. If the products are unacceptable and must be returned to the Consultant for correction, then time will need to be allowed for a second CLG contact review of those products prior to submission to the ASC.

‡ Staff are given at least 30 days to review products. In planning your project allow time not only for these reviews to be completed but also for any comments to be forwarded to the CLG contact and Consultant.

**Abbreviations:** ASC- Architectural Survey Coordinator; CLGC- Certified Local Government Coordinator; GISSA- GIS Specialist (Architecture); NSRH- National & State Register Historian

**CLG Sample Schedule 3:** Low number of resources surveyed; CLG contact has considerable experience with survey projects; Consultant has completed a high number of survey projects or had all products approved products on prior projects...

Suggested Timing	1 <sup>st</sup> Month	_____	11 <sup>th</sup> Month	12 <sup>th</sup> Month	13 <sup>th</sup> Month	14 <sup>th</sup> Month
<b>Project Phase</b>	After consultant chosen but before actual survey work takes place	Anytime in project— may be particularly useful for determining boundaries of potential districts, when high number of resources field eligible	Draft survey report and final draft forms complete	CLG contact review complete/ products accepted	Final revisions to all survey products in progress	Consultant makes all corrections and revisions based upon CLG contact and staff reviews/ meetings
<b>Deliverable</b>	Initial Meeting	Requested Staff Site Visit	CLG contact review† of draft survey report and all final draft forms	Staff review‡ of draft survey report and all final draft survey forms	Proof of Consultation with NSRH to reach concurrence on eligibility/ contributing & non-contributing status	Staff acceptance of final forms and final survey report
<b>Responsible Party</b>	Attendees: CLG contact, Consultant, CLGC, ASC, NSRH	Either CLG contact or Consultant can request a Site Visit	CLG contact	ASC, NSRH	Consultant, NSRH	ASC, NSRH

\* The number of batches necessary and how many forms are included in each batch will depend upon the total number of resources surveyed. Consult the deliverable schedule for the project.

†CLG contact should be able to complete the review of draft survey report and final draft forms in 15 days. If the products are unacceptable and must be returned to the Consultant for correction, then time will need to be allowed for a second CLG contact review of those products prior to submission to the ASC.

‡Staff are given at least 30 days to review products. In planning your project allow time not only for these reviews to be completed but allow for any comments to be forwarded to the CLG contact and Consultant.

**Abbreviations:** ASC- Architectural Survey Coordinator; CLGC- Certified Local Government Coordinator; GISSA- GIS Specialist (Architecture); NSRH- National & State Register Historian