



## **Resident Curator Program**

### **Program Information, Scope, and Parameters**

#### **Introduction**

The objective of the NOVA Parks Resident Curator Program (RCP) at Mt. Defiance is the rehabilitation\* and maintenance of the historic structures and landscape of the property, located at 35945 John Mosby Highway, Middleburg, Virginia. The goal is to assist in the preservation of the structures and surrounding environs. The RCP will provide a long-term lease to a qualified tenant who agrees to rehabilitate and maintain these historic resources in accordance with the Secretary of the Interior's Standards for the Treatment of Historic Properties and with guidance from the Virginia Department of Historic Resources which holds a Conservation Easement on the property.

The Resident Curator must allow reasonable public access to the property. In return, he/she pays no or reduced rent providing contractual obligations are fulfilled. The resident curator is responsible for upkeep, property maintenance and repairs as stipulated by NOVA Parks, and for payment of utilities.

#### **Determining the Length of the Curator Lease**

A gross annual fair market rental amount will be established through a third-party appraisal. The curator's annual estimated costs to maintain the property will then be deducted from the gross annual fair market rental amount, to determine the curator's net annual rental obligation. The total estimated rehabilitation/maintenance expenses will be divided by the net annual rental obligation to determine the length of the lease. It's likely the curator will accrue much of the rent obligation for the term through the costs of rehabilitation/maintenance. If the curator fulfills the rental obligations established in this paragraph and where the cost of rehabilitation/maintenance exceeds the cash rent amount, no cash rent will be collected during the base lease term, providing the curator continues to fulfill the obligations under the lease.

Once the rehabilitation/maintenance of the property is complete, the curator may remain on the property for the length of the lease terms without paying any rent, provided they are meeting their contractual obligations, including maintaining the property. The curator is responsible for the maintenance and general upkeep of the property for the lease term, and also responsible for all utilities and county property taxes.

## **Purpose of the Resident Curator Application**

The purpose of the resident curator application is to identify and select a curator who:

- Demonstrates a commitment to the maintenance of the historic property and its associated structures and surrounding landscape, where necessary in accordance with the Secretary of the Interior's Standards for the Treatment of Historic Properties
- Possesses the required resources and skills to ensure the long-term preservation of the property
- Demonstrates a sensitivity and responsiveness to the public nature and public availability of access to the property

## **Criminal Background Checks**

A criminal background check may be requested at the time of application review.

## **Credit Reports**

A credit report may be requested at the time of application review.

## **Responsibilities of NOVA Parks**

- Provide staff for Resident Curator program administration
- Develop criteria and process for evaluation rehabilitation proposals and resident curator's skills, abilities, and financial capacity to execute work plan and maintain property
- Provide authorship, monitoring and enforcement of lease agreement
- Provide current Condition Report from Virginia Department of Historic Resources
- Arrange for property appraisal to determine Fair Market Rental Value
- Maintain insurance on all structures on the property
- Monitor rehabilitation/maintenance (with terms of access determined for monitoring at time lease is signed)
- Cover costs of repairs of existing septic system as needed
- Cover costs of hazardous material abatement(s)
- Other potential obligations as agreed to in lease

## **Responsibilities of Resident Curator**

- Working with the Historic Site Manager for Mt. Defiance, submit and follow work plan for historic rehabilitation of the property, meeting all required standards as set forth by the Virginia Department of Historic Resources; no work may be undertaken without previous approval by the Historic Site Manager
- Adhere to work plan time and conduct work within agreed upon schedule
- Obtain and pay for all building permits, and any other necessary permits
- Ensure that all contractors and subcontractors are properly licensed, bonded, and insured
- Maintain records and photo documentation of all rehabilitation and repairs
- Seek approval from Historic Site Manager before undertaking any repairs or maintenance outside the original approved scope of work
- Understand and accept that the public will be accessing the property during daylight hours, including during guided tours offered by NOVA Parks; Resident Curator must expect a certain level of interaction with the public while living on the historic property.
- Within reason, continually occupy the structure, and notify the Historic Site Manager if the property will be vacant for more than 72 hours
- Agree to routine visits by the Historic Site Manager and to regular communication with that individual
- Maintain Renter's Insurance Policy and additional Liability Coverage
- Pay ongoing utilities, and hook up to new ones as needed
- Repair, maintain, and/or replace appliances
- Repair, maintain, and/or replace major systems of the property including plumbing, electrical, and HVAC
- Submit yearly accounts of all expenses associated with the rehabilitation/maintenance of the property
- Provide general grounds-keeping including mowing grass, trimming bushes, trees, etc.
- Remove snow from driveway and parking area
- Follow rule that collection and/or excavation of artifacts on property is prohibited

- Other potential obligations as agreed to in lease

## **Criteria for Evaluation**

At a minimum, the following criteria will be used to evaluate all proposals:

- Experience and Qualifications to undertake maintenance of the structures and the property, specialized skills in historic preservation projects, and examples of previous related work
- Overall submittal presentation and organization that meets the goals and guidelines of this Solicitation to Submit Proposal

## **Inspection Process and Accountability Measures for Resident Curator**

The resident curator proposes and agrees to complete the rehabilitation work as set out in a work plan, and to finish the project within an established timeframe.

The Historic Site Manager will monitor the property throughout the rehabilitation and on-going maintenance phases on a schedule agreed upon by the resident curator and approved by NOVA Parks. This will include routine visits by the Historic Site Manager and/or other NOVA Parks staff to ensure the following:

- Resident curator has obtained required permits
- Safety provisions are in place
- Work is being completed as specified in the work plan and is on schedule

## **Amending the Work Plan of General Schedule**

The resident curator may not commence any work unless it is done in compliance with the terms of the lease, executed on behalf of NOVA Parks. The resident curator will submit any proposed changes to the approved work plan or general schedule to the Historic Site Manager. The proposed changes will be reviewed by the Historic Site Manager in consultation with NOVA Parks staff. NOVA Parks staff has thirty days from the receipt of the proposed project change notification to review and accept, accept with conditions, or reject proposed changes, and notify the resident curator of their decision.

## **Photo Documentation of Rehabilitation Projects**

Photographic documentation of the conditions of the house and property shall be included in the negotiated lease agreement. Before and after photographic documentation shall be required for all projects and improvements completed on the property.

## **Permits and Inspections**

NOVA Parks reserves the right to inspect any and all work performed under the resident curatorship agreement. All plans must be properly permitted. Completed work where necessary must be reviewed and approved by appropriate county inspectors. The resident curator is also responsible for compliance with any and all local, state or federal regulations.

## **Completion of Rehabilitation**

The work shall be considered complete when the following are done:

- Work specified in the work plan is completed in compliance with the general schedule
- Construction debris and refuse resulting from demolition and construction of the improvements have been properly and lawfully removed and disposed of
- The Historic Site Supervisor has reviewed the above-referenced items and determined that the work plan has been completed per the terms of the lease agreement

## **Reporting and Accounting**

The Resident Curator's contribution will be in the form of both payments for materials and services purchased by him/her, and his/her time and labor, in the rehabilitation and on-going maintenance of the property. With 90 days after the end of the first year of the term, and annually thereafter, the resident curator shall submit to the Historic Site Manager an annual report, in a mutually agreed upon format, summarizing the progress and status of the Resident Curator Program at the property for the curatorship's then-ended fiscal year. The annual report shall show that the Resident Curator is rehabilitating and maintaining the property in compliance with the terms of the lease. The report must contain a financial statement accounting for all work completed to date in the work plan and the value of any maintenance expenditures above and beyond those outlined in the work plan.

## **Monitoring the Maintenance of the Property**

The resident curator shall continue to repair and maintain the property as necessary on a continuous basis during the term of the lease. Each year the Historic Site Manager and/or other NOVA Parks staff will inspect the property with the resident curator. Using the maintenance guidelines and checklist, staff will evaluate the condition of the property and the maintenance performance of the resident curator. The curator should inspect the property periodically to ensure that the maintenance guidelines are being met prior to the annual inspection. If maintenance deficiencies are found, the resident curator will be notified and given a timeline to address and rectify them.

\*Rehabilitation is defined as “the process of returning a property to a state of utility, through repair or alteration, which makes possible an efficient contemporary use while preserving those portions and features of the property which are significant to its historic, architectural, and cultural values.