



CITY OF  
**RIVERSIDE**

## Historic Preservation Fund Committee Memorandum

Community & Economic Development Department

Planning Division

3900 Main Street, Riverside, CA 92522 | Phone: (951) 826-5371 | [RiversideCA.gov](http://RiversideCA.gov)

**TO: Historic Preservation Fund Committee**

**MEETING DATE: July 31, 2017**

**FROM: Historic Preservation Officer**

**ITEM NO: 5**

**WARD: Citywide**

**SUBJECT: CONSIDERATION OF THE RECOMMENDATION TO ACCEPT \$69,792.86  
IN RETURNED GRANT FUNDING BACK INTO THE HISTORIC  
PRESERVATION FUND**

### **RECOMMENDATION:**

That the Historic Preservation Fund Committee (HPFC):

1. **Accept** the returned grant funding back into the Historic Preservation Fund in the amount of \$69,792.86; and
2. **Direct** staff to seek funding sources to reseed the Historic Preservation Fund and make presentation to the committee within 6 months time.

### **BACKGROUND:**

The City Council created the Historic Preservation Fund Committee (HPFC) in April 2013 by amending and adding to the preservation incentives chapter of Title 20: Cultural Resources included in Riverside Municipal Code to allow for a new type of incentive: Historic Preservation Fund Grants. The HPFC consists of 5 members who were selected by the Mayor's Nominating and Screening Committee and the Cultural Heritage Board. The HPFC met regularly to establish the application and criteria for fund disbursement, which was reviewed and approved by City Council in December of 2014.

The Historic Preservation Trust Fund (Fund) was initiated in 2013 with \$600,100 and subsequently gained interest and book sales for a total of \$630,606.08. The HPFC began awarding grant funds in April of 2015. In four grant cycles a total of forty-four grants have been awarded for a total of \$684,260.91. Through the administration of the program seven grants have been returned to the fund through cancellation for a variety of reason. Additionally, three project have unused funds that are being returned to the fund.

The projects approved vary greatly but focus mostly on preservation oriented projects of single family rehabilitations (31) in addition to a Museum, Pubic street features, a Multi-Family, apartment building, a Commercial building, and a Public Park facility will have been

rehabilitated. The projects include a variety of types including: roof replacement (10), buildings repainted (9), electrical systems repaired or replaced (3), exterior siding and stucco repaired (7), historic windows rehabilitated (5), porches will have been repaired (5), foundations stabilized (5), Wood Streets monument signs repaired (7), pergolas repaired (4), plumbing repaired (1), rain gutters installed or repaired (2), historic waterfall repaired, and 1000 Landmark Legacy books have been printed. The Reporting on the fund was covered in detail at the Grant Cycle IV meeting on October 17, 2016.

### **ANALYSIS:**

Of the forty-four grants, totaling \$684,260.91, seven grants (see Table 1) were cancelled prior to the execution of the grant agreement. This returned \$68,450 to the fund. Six of the grants were cancelled prior to the Grant Cycle IV meeting on October 17, 2016. Staff accounted for these cancelled grants (totaling \$55,950) when determining the funds available to be awarded at this meeting. However, this amount was not added into public record, and needs to be recorded at this time at the recommendation of the Finance Department fund reconciliation. Since the Grant Cycle IV meeting an additional grant (\$12,500) was cancelled and another project came under budget by \$1,257.61. This allows an additional \$13,757.61 to be returned to the fund, bringing the balance of the fund to \$16,138.03.

Table 1:

Case #	Recipient	Property Address	Meeting Date	Grant Amount	Amount Being Returned	Reason Returned
P15-0154	Mark Parish	8410 Cleveland Av	4/13/15	\$25,000	\$1,257.61	Project under budget
P15-0159	Matthew Jarrett	3628 Taft St	10/13/15	\$9,750	\$9,750	Sold house prior to contract execution
P15-0720	Ricardo Lopez-Maldonado	3701 Locust St	10/13/15	\$3,700	\$3,700	Chose not to proceed
P15-0739	Richard Peterson	12008 Raley Dr	10/13/15	\$16,000	\$16,000	Unable to obtain title report and chose not to continue
P15-0745	Charlotte Davidson	2793 Gibson St	10/13/15	\$15,000	\$15,000	Chose not to proceed
P15-0749	Helen Anda	4546 Beatty Dr	10/13/15	\$5,000	\$5,000	Chose not to proceed
P15-0128	Christopher & Kristen Grisby	5175 Myrtle Av	4/11/16	\$8,230.25	\$0.25	Excess Funds
P15-0134	Jason Fredrick	4310 Sunnyside Dr	4/11/16	\$1,585	\$85	Excess Funds
P16-0136	Lisa Morris	3269 Mulberry Dr	4/11/16	\$6,500	\$6,500	Moved and sold the house prior to contract execution
P16-0141	Christopher Rocco	3296 Redwood Dr	4/11/16	\$12,500	\$12,500	Unresponsive and appears to already completed the project
Total being returned to the fund					\$69,792.86	

In addition, as the balance of the fund is currently low and only has one source of income, book sales, it is necessary for the life of the fund, that the Historic Preservation Fund Committee seek ways to reseed the fund. According to Section 20.30.030 of the Riverside Municipal Code, "In addition to any public moneys appropriated expressly for the Fund, the Program Administrator may apply for grants, gifts, donations, or other financial support, from private sources, pursuant to City policies." This allows the Historic Preservation Fund Committee to seek other forms of income to sustain the fund. Staff will research ways of reseeding the fund and present a report to the committee within six months time.

Preparer: Scott Watson, Historic Preservation Assistant Planner

Exhibits:

1. Historic Preservation Trust Account Balance Sheet

City of Riverside  
Historic Preservation Trust Account  
June 30, 2017

Approval Date	Case Number	Recipient	Grant Awarded	Payment	Balance	Date Paid	Date Paid	Date Paid	Comments
04/13/15	P15-0163	City of Riverside - Harada House	25,000.00	25,000.00	-	10/26/16			
04/13/15	P15-0167	Riverside Art Museum - Drew Oberjuerge	25,000.00	25,000.00	-	08/11/16			
04/13/15	P15-0160	City of Riverside- Public Works	25,000.00		25,000.00				
04/13/15	P15-0154	Mark Parrish	25,000.00	23,742.39	1,257.61	04/12/17			Excess Funds returned to 721 Fund
04/13/15	P15-0168	Jennifer Mermilliod	11,520.00	11,520.00	-	10/05/16			
04/13/15	P15-0166	Jeyan Danesh	10,000.00		10,000.00				
10/15/15	P15-0743	City of Riverside - Heritage House	25,000.00	25,000.00	-	10/26/16			
10/15/15	P15-0741	Steven Kostka	12,900.00	12,900.00	-	01/12/17			
10/15/15	P15-0740	City of Riverside - Parks & Rec (St Francis)	25,000.00		25,000.00				
10/15/15	P15-0746	Jack MacPhetridge	12,500.00		12,500.00				
10/15/15	P15-0650	Randall Hansen	25,000.00	25,000.00	-	10/05/16			
10/15/15	P15-0732	Millie & Van Starks	25,000.00	25,000.00	-	12/16/16	01/12/17	02/23/17	
10/15/15	P15-0750	Michelle Hong	13,800.00		13,800.00				
10/15/15	P15-0715	John Farber	6,800.00	6,800.00	-	12/16/16			
10/15/15	P15-0733	John Moody	25,000.00	25,000.00	-	06/30/16	01/12/17		
10/15/15	P15-0736	Timothy Pietro	15,000.00	15,000.00	-	08/15/16			
04/11/16	P15-0748	Michelle Pierce	8,911.00	8,911.00	-	11/22/16			
04/11/16	P16-0123	Jean Dougherty	1,500.00		1,500.00				
04/11/16	P16-0128	Christopher & Kristen Grisby	8,230.25	8,230.00	0.25	01/12/17			Excess Funds returned to 721 Fund
04/11/16	P16-0093	Jeremy Mercer	7,312.50		7,312.50				
04/11/16	P16-0137	Melissa Harman	24,000.00		24,000.00				
04/11/16	P16-0134	Jason Fredrick	1,585.00	1,500.00	85.00		01/12/17		Excess Funds returned to 721 Fund
04/11/16	P16-0133	American Legion - Post #79	25,000.00	25,000.00	-	02/15/17			
04/11/16	P16-0145	Craig Johnston	19,400.00	19,400.00	-	01/12/17			
04/11/16	P16-0116	Jerald Rossow	14,778.00		14,778.00				
04/11/16	P16-0135	Keith Welzel	2,786.00	2,786.00	-	12/16/16			
04/11/16	P16-0110	City of Riverside - Public Works (Ed Lara)	25,000.00	25,000.00	-	12/15/16			
04/11/16	P16-0142	David Trejo	12,600.00		12,600.00				
04/11/16	P16-0122	Mark Pentecost	4,000.00	4,000.00	-	02/23/17			
04/11/16	P16-0140	Hao Duan	18,700.00		18,700.00				
09/09/16	Books	Cost - \$28,141.05 Repay GF \$3,478.55	31,619.16	31,619.16	-	09/29/16			
10/17/16	P16-0125	Gladys Brown	11,062.00		11,062.00				
10/17/16	P16-0571	Kathy Allavie	25,000.00		25,000.00				
10/17/16	P16-0583	Michele Carry	22,807.00	14,980.00	7,827.00	05/23/17			
10/17/16	P16-0577	Shwu-Ying Jong	10,000.00		10,000.00				
10/17/16	P16-0588	Stephen Gaskin	9,000.00	9,000.00	-	06/27/17			
10/17/16	P16-0575	Karen Stegmann	25,000.00		25,000.00				
			<u>615,810.91</u>	<u>370,388.55</u>	<u>245,422.36</u>				

	2014	2015	2016	2017	Total
Beginning Balance	150,320.28	370,430.80	491,246.08	604,137.55	

Exhibit 1 - HPF Balance Sheet

General Fund Deposits and Landmark	216,667.00	116,667.00	116,667.00	-	450,001.00
Book Sales	-			12,741.45	12,741.45
Interest	3,443.52	4,148.28	5,954.47	3,997.08	17,543.35
Distributions			(9,730.00)	(360,658.55)	(370,388.55)
Ending Balance - 06/30	<u>370,430.80</u>	<u>491,246.08</u>	<u>604,137.55</u>	<u>260,217.53</u>	

Beginning Balance 07/01/13	150,320.28
General Fund Deposits and Landmark	450,001.00
Book Sales	12,741.45
Interest	17,543.35
Distributions	(370,388.55)
Ending Balance 06/30/17	<u>260,217.53</u>

Reconciliation:

Revenues	630,606.08
Awards	(615,810.91)
Available	<u>14,795.17</u>

Excess Funds returned:

Mark Parrish	1,257.61
Christopher & Kristen Grisby	0.25
Jason Fredrick	85.00
Available	<u>16,138.03</u>

**Grants Returned:**

Approval Date	Case Number	Recipient	Grant Awarded
04/13/15	P15-0159	Matthew Jarrett	9,750.00
10/15/15	P15-0745	Charlotte Davidson	15,000.00
10/15/15	P15-0739	Richard Peterson	16,000.00
10/15/15	P15-0749	Helen Anda	5,000.00
10/15/15	P15-0720	Ricardo Lopez-Maldonado	3,700.00
04/11/16	P16-0139	Lisa Morris	6,500.00
04/11/16	P16-0141	Christopher Rocco	12,500.00
			<u>68,450.00</u>

Contact: Erin Gettis, Historic Preservation Officer in Community Development