



General  
Services

**RESIDENT CURATOR PROGRAM**

**PROGRAM INFORMATION,  
SCOPE AND PARAMETERS**

# Table of Contents

- Department of General Services Staff ..... 1
- Resident Curator Program Development Project Team Members ..... 1
  - Staff Work Team ..... 1
- Introduction ..... 2
  - Background ..... 2
    - Virginia Code Establishing Resident Curator Programs ..... 2
    - Loudoun County Resident Curator Program Ordinance..... 2
  - Resident Curator Program Stated Goal and Objective ..... 2
  - Summary of the Resident Curator Program ..... 2
  - Resident Curator Program Overview – Rehabilitate, Reuse and Maintain ..... 3
- Determining the Length of the Curator Lease ..... 3
- Purpose of the Curator Application ..... 4
- Criminal Background Checks..... 4
- Credit Reports ..... 4
- Restrictions on Property Access ..... 4
- Accuracy of Information ..... 4
- Freedom of Information Act ..... 5
- State and Federal Rehabilitation Tax Credits..... 5
  - Virginia Department of Historic Resources ..... 5
  - Heritage Preservation Services ..... 5
- Responsibilities of Curator and County ..... 5
  - County Responsibilities..... 5
    - Programmatic Responsibilities ..... 5
    - Property Requirements and Obligations ..... 6
  - Curator Responsibilities ..... 6
    - Rehabilitation Plan ..... 6
    - Tax Credits (if applicable)..... 7
    - Insurance..... 7
    - Ongoing Occupancy and Maintenance Obligations ..... 7

Public Benefit .....	8
Prohibitions.....	8
Either County or Curator Responsibility .....	8
Application Review and Extension Process .....	9
Application Review and Evaluation Team .....	9
Criteria for Evaluation .....	10
1. Proposed Reuse .....	10
2. Scope and Nature of Public Benefit and Public Access Element.....	10
3. Rehabilitation Plan.....	10
4. Experience and Qualifications .....	10
5. Overall Proposal Presentation and Organization .....	11
6. Public Response .....	11
Inspection Process and Accountability Measures for Curator .....	11
Work Plan with General Schedule .....	11
Monitoring the Property: Rehabilitation and Maintenance Phases.....	11
Monitoring during the Rehabilitation Phase includes the following steps: .....	11
Amending the Work Plan or General Schedule .....	12
Photo Documentation of Rehabilitation Project .....	12
Permits and Inspections.....	13
Completion of the Rehabilitation Phase.....	13
Reporting and Accounting .....	13
Monitoring the Property during the Maintenance Phase .....	14

**Loudoun County Resident Curator Program  
Program Information, Scope and Parameters**

**Department of General Services Staff**

Ernest N. Brown, Director

Andy E. Bollinger, Deputy Director

Megan Maday, Division Manager

Artie Right, Program Manager

**Resident Curator Program Development  
Project Team Members**

**Staff Work Team**

Artie Right, Program Project Manager, Department of General Services

Heidi Siebentritt, Senior Planner, Department of Planning and Zoning

Steve Torpy, Director, Department of Parks, Recreation, & Community Services

Mark Novak, Senior Planner, Department of Parks, Recreation & Community Services

Wahaj Memon, Senior Assistant County Attorney, County Attorney's Office

Glen Barbour, Public Affairs & Communications Officer, Office of the County Administrator

Alan Druga, Budget Analyst, Loudoun County Department of Finance & Budget

**Community Technical Advisory Committee**

Loudoun County Heritage Commission

Loudoun County Historic District Review Committee

# Loudoun County Resident Curator Program Program Information, Scope and Parameters

## Introduction

### Background

#### Virginia Code Establishing Resident Curator Programs

In January 2011, the General Assembly amended Virginia Code Ann. § 15.2-2306 authorizing localities to develop resident curator programs. The Code enables localities to create, by ordinance, “a resident curator program such that private entities through lease or other contract may be engaged to manage, preserve, maintain, or operate, including the option to reside in, any such historic area, property, lands, or estate owned or leased by the locality.” Additionally, the curator is required to provide reasonable public access consistent with the historic property’s nature and use.

#### Loudoun County Resident Curator Program Ordinance

The Board of Supervisors adopted an [ordinance establishing the Resident Curator Program](#) in 2021. This program, designed to preserve and maintain historic properties owned or leased by the County, will lease historic properties to individuals or businesses, requiring that resident curators maintain and improve the leased properties according to the [Secretary of the Interior’s Standards for the Treatment of Historic Properties](#), 36 CFR Part 68 (2013), as amended..

### Resident Curator Program Stated Goal and Objective

The objective of the Loudoun County Resident Curator Program (RCP) is the preservation of historic buildings within the county. The end goal is to rehabilitate and maintain underutilized historic properties and provide periodic public access to appreciate the historical significance of the properties. Public access requirements shall be evaluated on a case-by-case basis and should be consistent with the property’s nature and use.

The RCP is designed to preserve historic properties by offering long-term leases to qualified tenants who agree to rehabilitate and maintain these historic resources in accordance with established preservation standards. A curator can be a private citizen, a non-profit entity, or a for-profit entity.

Any proposed rehabilitation of these sites must meet the [Secretary of the Interior’s Standards for Rehabilitation](#) and the curator must provide reasonable public access to the property. In return, curators pay no rent, providing they continue to fulfill their contractual obligations. Curators are responsible for upkeep, property maintenance expenses, utilities, and county property taxes.

### Summary of the Resident Curator Program

By definition, the RCP enables an individual, a group of individuals, or an organization, to serve as the curator of a property. Loudoun County’s RCP is intended to reduce the public

## **Loudoun County Resident Curator Program Program Information, Scope and Parameters**

costs associated with the care and preservation of historic properties by enabling groups or individuals to take over those responsibilities. In addition to caring for the day-to-day management of the property, the curators are generally responsible for the rehabilitation and continued maintenance of the property. Properties that are included in the RCP have been deemed historically significant and either meet the County's established criteria of eligibility for curation and/or also may meet the National Historic Register criteria.

### **Resident Curator Program Overview – Rehabilitate, Reuse and Maintain**

The Loudoun County RCP allows the county to address underutilized publicly owned historic properties by entering a long-term lease with qualified tenants who agree to rehabilitate, maintain, and provide upkeep of the property in accordance with the Secretary of the Interior's Standards for the Treatment of Historic Properties.

The RCP arose to address historically significant structures that may be deteriorating on public land. Public/private partnerships created through RCPs in other jurisdictions have provided a successful stewardship solution for these important cultural resources.

A resident curator is a contractual agreement between Loudoun County and the curator, where the curator agrees to provide the service of rehabilitation and on-going maintenance of a property in exchange for the long-term occupation of the property. A curator can be a private citizen, a non-profit entity, or a for-profit entity. The proposed rehabilitation must meet the Secretary of the Interior's Standards for the Treatment of Historic Properties, and the Curator must provide "reasonable public access" to the property.

### **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 manage and 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 expenses will be divided by the net annual rental obligation to determine the length of the lease. In most cases, curators will accrue much of the rent obligation for the term through the costs of rehabilitation. If the curator fulfills the rental obligations established in this paragraph and where the cost of rehabilitation 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.

As part of the lease negotiations, a reduction in fair market rental value obligation may be considered during the rehabilitation phase if the property is not habitable (e.g., nonfunctional kitchen, bathroom, or utilities) until the curator is able to obtain a Residential Use Permit or Non-Residential Use Permit.

Once the rehabilitation of the property is complete, the curator can remain on the property for

## **Loudoun County Resident Curator Program Program Information, Scope and Parameters**

the length of the lease terms without paying any rent, provided that they are meeting their contractual obligations, including managing, and maintaining the property. The curators are responsible for the management, maintenance, and general upkeep of the property for the lease term. They are also responsible for all utilities and county property taxes.

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

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

- Demonstrates a commitment to the rehabilitation, management and maintenance of the historic property and its associated structures and surrounding landscape, in accordance with the Secretary of the Interior's Standards for the Treatment of Historic Properties.
- Proposes a use compatible with the historic nature of the resource, the general management plan for the property, and the mission of the Heritage Commission consistent with the County's Heritage Preservation Plan and Comprehensive Plan.
- Demonstrates 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.

### **Restrictions on Property Access**

While many of these structures are located on public property, most of the buildings are not open to the public at this time. **Do not enter the interior of these structures without authorization, and assistance from the Loudoun County Department of General Services.**

### **Accuracy of Information**

The Loudoun County Department of General Services (DGS) makes no express or implied representations or warranties as to the accuracy and/or completeness of any of the information provided. The information provided is subject to errors, omissions, change of cost, lease or conditions, additional changes in and different interpretations of laws and regulations, prior sale, lease, or financing.

**Loudoun County Resident Curator Program  
Program Information, Scope and Parameters**

## **Freedom of Information Act**

The Virginia Freedom of Information Act (FOIA) provides that, with some specific exemptions and exceptions, all public records are open for public inspection. All public records are presumed open unless an exemption is properly invoked. Once submitted, the information an applicant or interested party gives to the Resident Curator Program becomes a public record and is therefore subject to FOIA. For more details about FOIA, visit

<https://www.loudoun.gov/973/Your-Rights-Loudouns-Responsibilities> or  
<https://law.lis.virginia.gov/vacodepopularnames/virginia-freedom-of-information-act/>.

## **State and Federal Rehabilitation Tax Credits**

Curators seeking rehabilitation tax credits should do so as early in the process as possible. The applicant is asked to advise the county and DGS of any tax credit application or any anticipated application to better understand the context of a particular proposal(s).

Information on State and Federal tax credits can be obtained from:

### **Virginia Department of Historic Resources**

2801 Kensington Ave.  
Richmond, VA 23221  
Telephone: 804.367.2323  
[www.dhr.virginia.gov/](http://www.dhr.virginia.gov/)

### **Heritage Preservation Services**

National Park Service  
1201 "Eye" Street, NW (2255)  
Washington, DC 20005  
Telephone: 202.513.7270  
[www.cr.nps.gov/hps/tps/tax/NPS\\_HPS-info@nps.gov](http://www.cr.nps.gov/hps/tps/tax/NPS_HPS-info@nps.gov)

## **Responsibilities of Curator and County**

### **County Responsibilities**

#### **Programmatic Responsibilities**

- Staff for program administration - including Project Launch Manager and Project Launch Work Team and permanent Program Manager and Program Selection/Work Team.
- Identification of properties which meet the criteria for the RCP.
- Prepare Determination of Eligibility form for County inventory for Historic Sites and /or Heritage Register.
- Coordinate marketing the RCP and individual properties.

## **Loudoun County Resident Curator Program Program Information, Scope and Parameters**

- Determination of minimum investment requirement if Condition Assessment/Treatment Plan is not used (as defined below in next section).
- Determination of acceptable proposed uses.
- Coordination with the Commissioner of Revenue for determining Property Tax Assessment.
- Develop criteria and process for evaluating rehabilitation proposals and curator's skills, ability, and proposers' financial capacity to execute work plan and maintain property.
- Provide authorship, monitoring and enforcement of lease agreements.

### **Property Requirements and Obligations**

- Historic Structure Report - to be completed for the properties which are selected to be advertised for proposal. This includes but not limited to:
  - Building Conditions Assessment.
  - Treatment Plan for rehabilitation to determine minimal mandatory improvements as well as basis for curator's estimated potential financial investment.
- Property appraisals to determine Fair Market Rental Value.
- Survey and delineate boundaries.
- Maintaining property insurance on the structure.
- Monitoring of rehabilitation project – Terms of access for monitoring both rehab project and property will be spelled out in lease.
- On-going monitoring and annual inspection of property conditions once rehabilitation is complete.
- Other potential obligations as agreed to in lease.

### **Curator Responsibilities**

#### **Rehabilitation Plan**

- Submit and follow work plan for historic rehabilitation of property which meets the Secretary of the Interior's Standards for the Treatment of Historic Properties.
- Submit plans for Historic District Review Committee (HDRC), and/or the Heritage Commission, as required by the County's zoning ordinance.
- Meet minimum investment requirements as determined by Treatment Plan or other method of determination.
- Adhere to work plan timeline and conduct work within the agreed upon schedule.

## **Loudoun County Resident Curator Program Program Information, Scope and Parameters**

- Obtain and pay for any, and all building permits, and any other necessary permits and bonds.
- Ensure that all contractors and subcontractors be properly licensed, bonded, and insured.
- Maintain records and photo documentation throughout the rehabilitation of the property.

### **Tax Credits (if applicable)**

- Prepare Historic Certification Application to qualify for Historic Tax Credits for those properties not already individually listed on the state or federal historic registers.
- Fulfill State requirements of documentation and submittals if seeking Historic Rehabilitation Tax Credits.

### **Insurance**

- Maintain Renter's Insurance Policy and additional Liability Coverage.
- All contractors engaged by the curator must be licensed to do the work, obtain appropriate permits and carry:
  - Builder's Risk Insurance for the full value of the project for work which will require the structure be vacated during the project (or)
  - Installation Floater for the full value of the project for work which will not require the structure be vacated during the project.

### **Ongoing Occupancy and Maintenance Obligations**

- Pay ongoing utilities, such as gas, water, electric, etc.
- Repair, maintenance and replacement of all appliances and major systems of the property including plumbing, electrical, and HVAC.
- Conduct all future maintenance and repairs to the property in accordance with the Secretary of the Interior's Standards for the Treatment of Historic Properties.
- Seek approval from Program Manager before undertaking repairs or maintenance outside the original approved scope of work.
- Submit yearly accounts of all expenses associate with the rehabilitation and ongoing maintenance of the property.
- Pay County Real Estate taxes (pro-rated based on term of lease).
- General grounds-keeping including mowing grass, trimming bushes and trees, etc.
- Snow removal.
- Curator must continually occupy the structure once rehabilitation is complete and

## **Loudoun County Resident Curator Program Program Information, Scope and Parameters**

notify Program Manager if property is going to be vacant for more than 72 hours.

- Other potential duties as agreed to in lease.

### **Public Benefit**

- Provide “reasonable public access consistent with the historic property’s nature and use”.
- Curator must expect a certain level of interaction with the public while living in a county property. However, DGS understands the need to balance the rights of public to access and the rights of the curator to privacy.

### **Prohibitions**

- Curator may not dig on the property for any reason without seeking authorization and receiving approval from DGS.
- Curator is prohibited from the surface collection of artifacts and/or excavation of artifacts on property.
- Curator is bound by all laws protecting against the exhumation of human remains, and the collection of artifacts on historic properties.

### **Either County or Curator Responsibility**

(To be negotiated with curator on a case-by-case basis)

- If applicable, Curator will be responsible for fees associated with applications for rezoning, special exception, or special permits necessary to modify the permitted use of the property.
- Evaluation of existing septic system where sewer is unavailable.
- Costs associated with the installation of, or repairs to, septic system.
- Evaluation of well water condition if public water is unavailable.
- Capping off old wells, where necessary.
- Drilling of new well, if necessary.
- Hook up to utilities: public water or well; sewer or septic; electric; and gas.
- HAZMAT Report.
- Hazardous material abatement(s).
- Preparation of County Inventory of Historic Sites nomination if not already completed.
- National Register Nomination, Cultural Landscape Report, or other professional report that would add to the knowledge and/or recognition of the structure, its history, and surroundings.
- Improved road access, if necessitated by proposed use.

## **Loudoun County Resident Curator Program Program Information, Scope and Parameters**

- Archaeological study, when necessary.

### **Application Review and Extension Process**

All applications shall be due 60 calendar days from the time the application package is posted to the Resident Curator Program web page. Review of applications will begin upon expiration of the due date. Therefore, applicants are strongly advised to submit their applications on time to ensure consideration by the County and DGS.

If no applications are received by the due date, the application deadline will be extended in 30 calendar day increments and the property may be re-advertised through established channels.

All applications will undergo an initial administrative review for completeness. If, upon expiration of the due date, DGS has received one or more incomplete applications, those applicant/s will be contacted to assess the cause and nature for the delay. DGS will determine a reasonable length of time for the applicant to furnish the missing information. If, the applicant fails to complete the application in the allotted timeframe, the selection process, or the re- advertisement process (whichever is appropriate) will proceed.

If at the time of the expiration of the due date DGS has received an application, the application will be reviewed for completeness. If the application is found to be complete, the financial review process will commence, independent of other applications received.

### **Application Review and Evaluation Team**

DGS will convene an Evaluation Team composed of staff and members of existing County commissions, boards or authorities, whose expertise qualifies them to provide advice to the County Administrator or his designee. This Evaluation Team will review all proposals and make recommendations to the County Administrator or his designee about which proposals to accept. The composition of the Evaluation Team will vary, depending on the characteristics of the property under consideration and the nature of the proposals received.

The Evaluation Team may be composed of the following participants, their successors, or designees:

1. DGS Resident Curator Program Manager (Evaluation Team Lead)
2. A representative from the Office of the Loudoun County Commissioner of Revenue.
3. A representative from Loudoun County Department of Planning and Zoning
4. A historical architect or person with historic architectural knowledge
5. A representative from relevant County Historic District Review Committee (HDRC), and/or Heritage Commission.

In addition, the Evaluation Team may consult with subject matter experts, whose professional knowledge and expertise will enhance the selection process, as determined by

## **Loudoun County Resident Curator Program Program Information, Scope and Parameters**

the individual property's unique qualities and characteristics. Subject matter experts may include:

- DGS Site Project Manager, where applicable
- Loudoun County Historic Preservation Planner
- Loudoun County Archaeologist
- Office of the County Attorney
- Loudoun County Department of Finance and Budget
- Loudoun County Historic District Review Committee (HRDC) Board
- DGS Division of Public Works and Environmental Standards
- DGS Facilities Maintenance Division Manager or representative
- Virginia Department of Historic Resources

### **Criteria for Evaluation**

At a minimum, the following criteria will be used in evaluating all proposals:

#### **1. Proposed Reuse**

- Provides for long term preservation of the property.
- Compatible with DPZ and Heritage Commission's mission and general management plan for the property.
- Compatible with the surrounding neighborhoods.
- Compatible with the historic value of the property.
- Compatible with the preservation of the surrounding environment.

#### **2. Scope and Nature of Public Benefit and Public Access Element**

- Quality of projects / programs / services that offer a benefit to the property and its users.

#### **3. Rehabilitation Plan**

- Feasibility of rehabilitation plan goals and timetables.
- Compatibility of rehabilitation plan with treatment plan.
- Proposed lease term consistent with proposed reuse and rehabilitation plan.
- Consideration of environmentally sustainable building technology and practices.
- Consideration of accessibility issues (if applicable).

#### **4. Experience and Qualifications**

- Experience and qualifications to undertake, implement and manage the rehabilitation, reuse, and maintenance of the property.

**Loudoun County Resident Curator Program  
Program Information, Scope and Parameters**

- Specialized skills in historic preservation projects.
- Examples of pertinent previous work.

**5. Overall Proposal Presentation and Organization**

- Meets goals and guidelines of the *Solicitation to Submit Proposal* in a clear and well-organized manner.

**6. Public Response**

- Public input on proposal(s)

**Inspection Process and Accountability Measures for Curator**

**Work Plan with General Schedule**

The curator proposes and agrees to complete the rehabilitation work as set out in the work plan, and to finish the project within the established timeframe, targeting five (5) years from the commencement of initializing the rehabilitation phase to completion, in accordance with and as determined by the work plan and general schedule submitted by the curator and approved by DGS.

**Monitoring the Property: Rehabilitation and Maintenance Phases**

The Program Manager will monitor the property throughout the rehabilitation phase on a schedule correlating to the general schedule submitted by the curator and approved by Loudoun County DGS, and/or Loudoun County Department of Parks, Recreation, and Community Services. Once the rehabilitation phase is complete, the maintenance phase will begin and the program manager will transition to no less than annual inspections, thereafter. The program manager will determine necessary frequency of inspections for each property during the rehabilitation phase.

**Monitoring during the Rehabilitation Phase includes the following steps:**

1. Routine site visits by the Program Manager and/or other Loudoun County representatives from the Departments of, General Services (DGS), Parks, Recreation & Community Services (PRCS) Planning & Zoning, or Building and Development to ensure that:
  - curator obtained the required permits.
  - safety provisions and signage are in place.
  - work is being completed as specified in the work plan submitted by the curator and approved by DGS, and/or PRCS.
  - work is meeting the approved schedule as outlined in the general schedule submitted by curator and approved by DGS.

## **Loudoun County Resident Curator Program Program Information, Scope and Parameters**

2. Regular communication (via telephone and/or email) between curator and program manager.
3. Review of modifications to the general schedule if necessary (with an understanding that unforeseen conditions arise).

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

The curator may not commence any work unless said work is done in compliance with the terms of the governing lease, executed on behalf of the Loudoun County Board of Supervisors in consultation with Loudoun County General Services, and/or Parks Recreation and Community Services.

The curator will submit any proposed changes to the approved work plan or general schedule to the program manager. The proposed changes will be reviewed by the program manager in consultation with pertinent DGS or county staff. DGS has thirty days from the receipt of the proposed project alteration notification to review and accept, accept with conditions, or reject proposed changes, and notify the curator of their decision.

### **Photo Documentation of Rehabilitation Project**

Photo documentation is required throughout the rehabilitation phase. If the curator is applying for Virginia or Federal Rehabilitation Tax Credits, they should consult with Virginia Department of Historic Resources for specific State and Federal requirements for photo documentation of rehabilitation.

The Resident Curator Program requirements for photo documentation are:

- Photographs must be 35 mm, or digital with an image resolution of at least 300 dpi or higher.
- Photographs must be submitted individually, sized at 4x6 inches, and printed on photo stock paper, glossy or matte (digital photos may be submitted in an agreed upon form of electronic media at the required resolution)
- Photographs should not be mounted, sleeved, or bound in any fashion.
- Photographs should clearly show areas or features being documented. Do not submit blurry, out of focus, over or under exposed photographs.
- Pre-rehabilitation photographs should provide enough information to give a visual representation of the building and its elements and character defining features prior to work commencing, including, but not limited to:
  - All exposed building elevations
  - Two photos per room, oriented corner to corner from opposite corners
  - Features being impacted by the rehabilitation work such as masonry, plaster, windows, doors, trim and other millwork, stairs, ceiling, fireplaces, and flooring, etc.
- Photographs must be keyed to a floor plan, the photo number must be labeled on the floor plan drawing, and the photographs themselves must be labeled respectively with

## **Loudoun County Resident Curator Program Program Information, Scope and Parameters**

the corresponding information on their back, or in a photo log if submitting digitally.

- Post-rehabilitation photographs should be of and from the same locations for comparative purposes.
- Photographs throughout the rehabilitation phase could be used for public outreach and program promotional purposes.

### **Permits and Inspections**

DGS and/or PRCS reserves the right to inspect any, and all work performed under the curatorship agreement. All plans must be submitted to Loudoun County Department of Building and Development as well as Loudoun County Department of General Services and be properly permitted. Completed work must be reviewed and approved by appropriate county inspectors, including Division of Public Works; Department of Health (for wells and septic fields); Loudoun Water (for public water taps, if applicable); and the Fire Marshal. The curator is also responsible for compliance with any and all state, local or federal regulations. Curator properties are subject to the Loudoun County [Zoning Ordinance](#), and some properties may be located within [Historic Districts](#).

### **Completion of the Rehabilitation Phase**

The work shall be considered complete when:

- Work specified in work plan is completed in compliance with the general schedule, including complete installation of all structural and mechanical elements, fixtures, life safety systems, decorations, and landscaping (subject to climactic conditions).
- Construction debris and refuse resulting from demolition and construction of the Improvements have been properly and lawfully removed and disposed of.
- All permits, certificates, inspections, and approvals, necessary for the lawful use and occupancy of the property, such as a Residential Use Permit, have been satisfactorily obtained; and
- The County's Program Manager has reviewed above-referenced items and determined that the work plan has been completed, per the terms of the lease agreement.

### **Reporting and Accounting**

The curator's contribution will be in the form of both payment for materials and services purchased by him or her, and his or her time and labor, or "sweat equity," in the rehabilitation and on-going maintenance of the property. Within ninety (90) days after the end of the first year of the term, and annually thereafter, the curator shall submit to the program manager an annual report, in a mutually agreed upon format, summarizing:

- a. The progress and status of the DGS Resident Curator Program at the property for the curatorship's then-ended fiscal year.
- b. The annual report shall demonstrate to the program manager reasonable satisfaction

## **Loudoun County Resident Curator Program Program Information, Scope and Parameters**

that curator is rehabilitating, reusing, and maintaining the property in compliance with the Enabling Legislation and the terms of the lease.

- c. Such annual report shall also note the nature and dates for any public and community activities at the property, and the approximate number of visitors participating in each event.
- d. Each annual report must contain a financial statement accounting for all work completed in the work plan to date, the value of any maintenance expenditures above and beyond those outlined in the work plan, as well as operating and management expenditures for the year.

The program manager shall forward to the curator written confirmation of the receipt of curator's annual report. All reports, financial statements, analyses, and other documentation provided by curator shall be subject to verification and audit by DGS and/or any other agency of the county or a contractor of DGS for review and comment.

### **Monitoring the Property during the Maintenance Phase**

- Upon completion of the rehabilitation phase, the curator shall continue to repair and maintain the property, including the curatorship structures and grounds, as necessary on a continuous basis during the term of the lease. These services will be provided by the curator and will be performed continuously while the lease is in effect.
- Each year the program manager and/or other DGS or PRCS representatives will inspect the property with the curator. Using the maintenance guidelines and checklist, the Program Manager and/or other PRCS representative will evaluate the condition of the property and the maintenance performance of the curator. The curator should inspect the property periodically to ensure that the maintenance guidelines are being met prior to the annual inspection.

The curator will be given a copy of the completed Maintenance Guidelines and Checklist. If the program manager finds maintenance deficiencies, the curator will be notified and given a timeline to address and rectify the deficiencies found.