

Historic Tax Credit Advocacy Toolkit

A resource for advocating for the continuation of the Historic Tax Credit



**National Trust for
Historic Preservation**
Save the past. Enrich the future.



Courtesy of the Tennessee Theatre

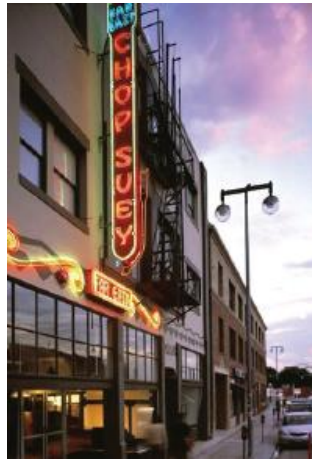
The Tennessee Theatre in Knoxville, Tenn., which originally opened in 1928, was restored with the help of the historic tax credit beginning in 2003.

Last Updated: 10/25/17

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I. Introduction to the Threat to the Federal Historic Tax Credit



Since it was permanently written into the tax code more than 30 years ago, the Historic Tax Credit has leveraged \$131 billion in private investment, created more than 2.4 million jobs and adapted 42,293 buildings for productive uses through 2016.

Despite its nationwide impact to enhance community revitalization and economic vitality, the federal HTC is threatened by the tax reform process. This toolkit is designed to serve as a resource for advocates to generate support among their legislators for the Historic Tax Credit.

The tax reform blueprint suggests the tax reform bills in the House and Senate will not include the HTC. We need everyone's help to find a way to include the HTC in tax reform legislation.

The continuation of the federal historic tax credit requires a nationwide effort over the next several weeks to raise awareness about the HTC's impact and to advocate for its protection in Congress.

We urge you to use ALL the advocacy tools in this kit to help incorporate the HTC into a reformed tax code.

Advocacy is additive so please make sure to involve all members of your community in this effort. From local business owners to bankers, to architects and commercial realtors, to historical societies to local officials—everyone who cares about the revitalization of their historic downtowns should be taking action.

Time is of the essence.

The Senate Finance Committee is drafting a tax reform bill NOW and the House bill is expected to drop its tax reform bill on November 1. Urgent advocacy is needed to ensure that the Historic Tax Credit is included in the House version of the bill.

Five Immediate Steps to Protect the Federal Historic Tax Credit

To ensure the Historic Tax Credit (HTC) is in a version of a tax reform bill, do not leave any stone unturned. Advocacy from all fronts needs to be going into these offices immediately.

1. Write and call your legislators and ask that they keep the HTC as they reform our nation's tax code. Encourage other businesses and groups to also speak up asap.

- Use script on **page #7** below; send e-alerts like draft on **page #26**
- Goal + 200 touches in these offices in next 14 days from groups such as:
- Architects
- Bankers and lenders
- Business owners
- Chambers of Commerce
- Contractors
- Commercial Realtors
- Developers
- Historic Preservation Commissions
- Main Streets
- Mayors
- Property owners
- Historical societies
- Neighborhood associations
- Preservation groups
- State legislators and officials

2. Ask campaign donors and other influencers to call, e-mail, and visit WDC and district offices. (script on page #7)

3. Request city council to pass resolution (draft below on page #8) and send to legislators' offices.

4. Invite district staff to tour HTC projects (instructions on page #11). Also, request an in-district meeting to share national sign on letter, other local letters and HTC state map/list of projects.

5. Get media for HTC and send to legislators' offices. #HistoricTaxCredit

II. Talking Points

Prosperity through Preservation

Protect and Enhance the Historic Tax Credit

- The Historic Tax Credit (HTC) **encourages private investment** in the rehabilitation of historic buildings. The credit attracts private capital—\$131 billion since inception—to revitalize often abandoned and underperforming properties that have a financing gap between what banks will lend and the total development cost of the transaction.
- The credit in turn generates new economic activity by leveraging private dollars to preserve historic buildings and create jobs; through 2016, the rehabilitation of 42,293 historic buildings has **created more than 2.4 million jobs**. The HTC can be adapted to provide targeted and timely economic help to areas with special needs. For example, the HTC was temporarily increased to 26% to help rebuild New Orleans after Hurricane Katrina through the GO-ZONE Act of 2005.
- The HTC **benefits local communities**, especially our nation’s urban core and rural areas. Over 40% of projects financed in the last fifteen years are located in communities with populations of less than 25,000.
- In addition to revitalizing communities and spurring economic growth, the HTC **returns more to the Treasury than it costs**. In fact, Treasury receives \$1.20-1.25 in tax revenue for every dollar invested. According to a study commissioned by the National Park Service, since inception, \$25.2 billion in federal tax credits have generated more than \$29.8 billion in federal tax revenue from historic rehabilitation projects
- **Tax reform aimed at growing the economy should enhance, not diminish the HTC.** Historic rehabilitation projects frequently have higher costs, greater design challenges, and weaker market locations—all of which results in lender and investor bias against investments in rehabilitation. The Historic Tax Credit Improvement Act enjoys solid bipartisan support and would enhance the HTC by directing more investment to small business transactions along older Main Street corridors. Specifically, the bill creates a 30% credit for small deals to make these transactions more attractive to outside investors who tend to favor much larger investment opportunities. In addition, the bill allows the historic tax credits in these small transactions to be transferred with lower transaction costs, as a tax certificate, making it easier for small business owners to bring outside investment into smaller transactions.

Background:

- The HTC was initially enacted in 1978 and made permanent in the tax code in 1986.
- Thirty-five states across the country, including Louisiana, Wisconsin, Texas, Ohio, Missouri, North Carolina, and Virginia, recognize the economic development potential of historic rehabilitation and have enacted individual state Historic Tax Credit programs that work in tandem with the federal program.
- As an economic activity, historic rehabilitation greatly outperforms new construction in job creation. Rehabilitation project costs are on average 60 percent labor and 40 percent materials compared to new construction, which is about 40 percent labor and 60 percent materials. In addition to hiring local labor, historic rehabilitation materials are more likely to be purchased locally. As a result, approximately 75 percent of the economic benefits of these projects remain in the communities where these buildings are located.
- The HTC is administered by the National Park Service and the Internal Revenue Service in conjunction with the State Historic Preservation Offices. It is comprised of two distinct and separate tax credits used to rehabilitate historic buildings including vacant schools, warehouses, factories, retail stores, apartments, hotels and office buildings throughout the country:
 - The 20 percent credit. The 20 percent credit applies only to certified historic structures. A certified historic building is one that is listed individually on the National Register of Historic Places, or contributes to the character of a National Register-listed Historic District. The 20 percent credit is available for any income producing property, including residential rental projects.
 - The 10 percent credit. The 10 percent credit is for the rehabilitation of non-historic, non-residential buildings built before 1936.

The Request to legislators:

“Please indicate your support for the Historic Tax Credit to the House Ways and Means Chairman Brady, the Senate Finance Committee Chair Orrin Hatch and others on the committee. Request that they keep the Historic Tax Credit that allows redevelopment of our most challenging but historically significant buildings.”

III. Hill Advocacy Resources

Script for Calling and E-mailing

- **Legislators need to know that their constituents support inclusion of the Historic Tax Credit in the House and Senate tax reform bill. Below is a script you can use to when calling the Washington office as well as the district offices of both senators and your representative.**
- Step #1 Call the United States Capitol switchboard at (202) 224-3121. A switchboard operator will connect you directly with the House or Senate office you request. Ask to speak to the staff member handling tax and use the script below to guide your conversation. If you can't speak directly to the staff member, leave the message below and ask for a return phone call.
- Step #2 Then call the other legislators that represent you from your state.
- Step #3 Then look up the district offices and call the ones closest to you. Ask to speak to the District Director and use the same script as below.
- Step #4 Finally, send an e-mail **using a variation (so they don't disregard your e-mail)** of the Subject line: Historic Tax Credit-Tax Reform. Explain that you had called and ask that they communicate your concerns to your representative and two senators.

SCRIPT

1. Introduce yourself
2. Say "I have been hearing about tax reform and I wanted to check in to see how the HTC is fairing. I am extremely concerned that it was not specifically mentioned in the tax reform framework.
3. **Explain why you value Historic Tax Credits**, and that the redevelopment of historic buildings will not get done without the HTC.
4. **Talk about recent projects and future projects** that won't happen without the HTC
5. Ask.... **"As Congress moves forward on tax reform, please ask the Member to be vocal in their support to the Senate Finance Committee Chair, Orrin Hatch, Chairman Brady of the House Ways and Means Committee and others on the committees -- to keep this important incentive that allows redevelopment of our most challenging but historically significant buildings."**
6. Invite them to tour a Historic Tax Credit project – or to see historic buildings that won't get rehabbed if HTC goes away.
7. End the call with a request for a response – something like "Would you please let me know your boss' position on the Historic Tax Credit after you've had a chance to present this information I've shared?"

Sample Local Resolution Draft Language

- **Adopting a resolution calling on legislators to include the Historic Tax Credit in their tax reform bill is a great way to get the attention of local elected officials but also of local media. Share news of the passage in social media as well as with local reporters. Share the resolution with the legislators' offices and ask that they include the HTC in the tax reform bill.**

A RESOLUTION TO URGE THE PRESIDENT OF THE UNITED STATES AND THE UNITED STATES CONGRESS TO CONTINUE THE FEDERAL HISTORIC TAX CREDIT PROGRAM, AND TO OTHERWISE PROVIDE WITH RESPECT THERETO.

WHEREAS, the federal Historic Tax Credit program (HTC) as we know it today was put in place by Congress and the Reagan Administration to attract capital to historic rehabilitation projects that help stimulate local economies; and

WHEREAS, since the inception of the HTC, it has created over 2.4 million jobs, rehabilitated more than 42,293 buildings, and leveraged \$131 billion in private investment; and

WHEREAS, recognizing the importance of this successful federal economic development program, more than 35 states have enacted complementary state historic tax credit programs to help revitalize the commercial downtowns of their cities and Main Street communities; and

WHEREAS, federal HTC projects have a 99 percent success rate, leverage four private dollars for every dollar of federal support, and are catalytic, building neighborhood confidence and generating follow-on projects for blocks around; and

WHEREAS, over the life of this program, the HTC has generated \$29.8 billion in federal tax revenues compared to \$25.2 billion in credits allocated—more than paying for itself; and

WHEREAS, the federal HTC program **[ADD INFORMATION ABOUT LOCAL IMPACT]**.

NOW THEREFORE BE IT RESOLVED by the **[GOVERNING BODY]** of the **[JURISDICTION]** in due regular and legal session convened, that the **[GOVERNING BODY]** supports the federal Historic Tax Credit program and urges the President of the United States and the United States Congress to continue the federal Historic Tax Credit program.

BE IT FURTHER RESOLVED that if any provision of this resolution or the application thereof is held invalid, such invalidity shall not affect other provisions, items or applications of this resolution which can be given effect without the invalid provisions, items, or applications and to this end the provisions of this resolution are hereby declared severable.

BE IT FURTHER RESOLVED that all resolutions or parts thereof in conflict herewith are hereby repealed.

Sample Sign-On Letter #1

- **Sending your legislators a “group sign on letter” is a great way to show depth of support for the HTC as well as breadth. For example, some “sign-on” letters are being sent by groups of mayors and Main Streets, while others are being sent by organizations and businesses within one community. Deliver to the district office (in person if possible) and e-mail and mail hard copy to the Washington, DC office. **Ideally, we hope to get 200+ emails and letters into the offices by Nov. 1.** Start with a few confirmed signers at the bottom before sharing widely so that others quickly grasp what you are asking of them. Because this is urgent get as many signers as you can but don’t hold off sending. In other words, “don’t let the perfect be the enemy of the good.”**

The Honorable Richard Burr
520 Hart Senate Office Building
United States Senate
Washington, DC 20510

The Honorable George Holding
1110 Longworth House Office Building
United States House of Representatives
Washington, DC 20515

The Honorable Thom Tillis
185 Dirksen Senate Office Building
United States Senate
Washington, DC 20510

November XX, 2017

Dear Senator Burr, Senator Tillis and Rep. Holding:

In light of Congress’ strong interest in reforming our nation’s tax code, **we would like to convey our strong support for the federal historic tax credit (HTC) which has helped preserve and revitalize our community.**

The HTC is the cornerstone of a long-standing and successful national policy of promoting the reuse of historic buildings to catalyze economic development and create jobs. Between 2002 and 2016, the HTC helped finance the rehabilitation of 653 commercial properties in North Carolina, leveraging more than \$1 billion in total investment.

Weakening or eliminating the federal credit, as has been proposed by some in Washington, would endanger the economic feasibility of nearly all historic rehabilitation projects in North Carolina. If Congress repeals or diminishes the HTC, communities across our state will lose an important tool to counter market forces that direct investment away from our main streets and downtown areas due to the higher cost of rehabilitating historic buildings.

Research conducted for the National Park Service by Rutgers University’s Center for Urban Policy Research shows that since the historic tax credit was enacted in 1981, it has leveraged \$131 billion in investment in historic rehabilitation across the nation. It has also created 2.4 million jobs and rehabilitated over 42,293 historic buildings. For every dollar of public expenditure, investors contribute four dollars toward the rehabilitation of historic properties. Since the credits are not approved until the building is placed in service, many of the economic benefits from construction jobs, materials purchased and payroll taxes are generated before the tax credit is awarded.

The HTC is an efficient and effective use of taxpayer dollars. Over the 36 years this incentive has been in place, the federal government has allocated about \$23.1 billion in tax credits. According to the same Rutgers study, these credits, in turn, have generated \$28.1 billion in federal income taxes. So under the dynamic scoring, the Treasury would lose revenue by eliminating the HTC. Recognizing these valuable economic benefits, North Carolina invests in its own Historic Tax Credit. The state's credit amplifies the benefits of the federal credit, attracting more in-state and out-of-state investment.

Recently initiated and completed projects in North Carolina tell a great story. Significant and diverse examples in the state include:

- the White Furniture complex in Mebane has been transformed into 152 market rate apartments;
- Tompkins Hall in Charlotte, a former textile mill built in 1890s, is being renovated for office, retail and restaurant use;
- the Loray Mill complex in Gastonia is being repurposed for residential and shopping uses;
- an 1885 former drugstore in the Goldsboro Historic District, now a restaurant with two market-rate apartments upstairs; and
- in the Wilson Central Business District, the Watson Livery Stable was repurposed for a new brewery and taproom (217 Brew Works) in 2016.

Although large mill complexes in Winston-Salem, like the RJ Reynolds Tobacco Company Factories #90 and #91 (\$220M invested), the RJ Reynolds Tobacco Company Factories #60 and Bailey Power Plant (underway \$128.5M investment), the R.J. Reynolds Tobacco Company Factory #64 (\$43M invested), the P.H. Hanes Knitting Company (\$41M invested), the Reynolds Building (\$37M invested), and Chatham Manufacturing (\$31M invested) have successfully been repurposed using historic tax credits, smaller buildings in communities like **Rocky Mount, Garner and Dunn** have seen their downtowns improved with the Historic Tax Credits.

In Dunn, a five-building education complex built for the county's African American students between 1922-1956 was recently rehabilitated through a creative public-private partnership as affordable housing with community recreational, educational, and social spaces. The historic tax credit leveraged the private rehabilitation cost of \$7.87 million and helped repurpose the complex into 37 apartments as well as a new home for the Dunn Police Athletic League and the Central Carolina Community College, which leases space for its culinary arts training program.

The historic tax credit has created a chance to preserve North Carolina's history while fitting the needs of communities from Wilson to Wilmington and Edenton to Charlotte.

Eliminating the federal historic tax credit would consign historic rehabilitation projects across the state to uncertain futures and would harm the North Carolina credit by vastly diminishing the effectiveness of our state's investments. As Congress works to reform our nation's tax code, we ask that you protect and enhance this federal incentive that uses the historic assets of the past to meet the needs of North Carolina's 21st century economy.

Sincerely,

Mayor Smith, City of Bluefield

Mayor T. Price, City of Richfield

NOTE: You don't have to ask for and add copies of signatures – just list those individuals and their organizations as they want to be listed. As others sign onto the letter, share recent .pdf of letter with multiple signers and re-circulate. Others are more likely to add their name to the letter if they see multiple signers.

Sample Sign-On Letter #2

November XX, 2017

Senator Mitch McConnell
Senator Rand Paul
Representative James Comer
Representative Brett Guthrie
Representative John Yarmuth
Representative Thomas Massie
Representative Harold “Hal” Rogers
Representative Garland “Andy” Barr

Dear Kentucky Congressional Delegation:

As Main Street community leaders and advocates for preservation in Kentucky, we wish **to convey our strong support for retaining the federal Historic Tax Credit during tax reform.**

Since its inception in 1978, this proven tool creates local jobs, generates tourism and preserves Kentucky’s historic properties. Please let your colleagues on the tax writing committees know about your support of the federal historic tax credit (HTC).

As President Ronald Reagan said when he addressed a national Town Hall meeting of almost 2000 Main Street communities, *“Our historic tax credits have made preservation of our older buildings not only a matter of respect for beauty and history, but of course for economic good sense.”* Since then we have witnessed first-hand the positive impact it has had on our local economies.

In Kentucky, the tax credit has helped finance 345 commercial rehabilitation projects between 2002 and 2016 resulting in more than \$500 million in development investment and more than 9,000 construction jobs. Last year alone, the Historic Tax Credit helped to generate over \$70.5 million dollars in construction dollars invested in our state’s historic buildings. These rehabilitated buildings are generating new jobs, housing, and tourism for the state and are sparking rejuvenation of our historic commercial districts from Covington to Campton and from Paint Link to Paducah.

Rutgers University found that the rehabilitation and repurposing of the 42,293 historic buildings generated over \$131 billion in total economic activity and 2.4 million jobs – 109,000 in 2016 alone. Rutgers also found that in addition to leveraging significant private funding, the Historic Tax Credit earns a net positive return in federal revenue. Since 1978, the \$25.2 billion in credits allocated have returned an estimated \$29.8 billion in federal tax revenue.

The Historic Tax Credit helps us create more jobs and stimulate additional investment in our Main Street communities, while protecting important historic resources.

For the benefit of Kentucky’s small towns and historic commercial districts, we ask that you **protect the Historic Tax Credit in tax reform.**

Sincerely,

Main Street ABC
Main Street XYZ
Main Street Richfield
Owner, Graham Florist

Arranging a Site Visit for District Staff

Visiting a historic tax credit project provides district staff with a unique opportunity to see first-hand how the federal government is leveraging significant private investment through the reuse of our historic buildings. They also learn how many jobs are created during the construction phase, how the new use will spur broader economic activity in the surrounding neighborhood, and how the historic character of the building is preserved. District staff can then relay your interest and what they learned to the Washington, DC staff and the Member themselves.

- Decide which historic tax credit project in your area offers the greatest opportunity to highlight the benefits of the program. Offering a tour either during construction or after a property is placed in service are great ways to highlight different aspects about the value of the program.
- Try to involve multiple partners such as developers, architects, contractors, preservation & Main Street groups as they may have connections to the legislators' offices. Also, involving a variety of partners will also help you respond to a broader array of questions.
- Be prepared to be flexible on dates in order to secure a commitment.
- Call the office and ask to speak to the Director about a request to meeting. Follow up with a compelling written invitation that you send electronically. District staff members are more likely to accept an invitation if there are more constituent groups making the request. Be sure to coordinate with the team.
- If you do not receive a reply from a Congressional office after two days, follow-up by calling the office. Develop a rapport with the scheduler by being patient and persistent.
- Before the visit, meet with your team and decide who will tell which part of the tax credit story. For example, who will describe details about financing of the project, impact on the neighborhood, and historic significance of the building?
- Share the list of HTC projects and map to show how the HTC is used statewide – in large cities and small towns. A one-page document that describes the history of the building(s) and its contribution to the community can be helpful as well.
- During the visit, ask that the legislator **include the historic tax credit in the tax reform bill**.
- During the visit, questions may be asked to which you do not have an answer. It is entirely appropriate to simply state you do not have that information, but that you would be happy to follow up with the answer as soon as possible.
- In addition to the very important thank you letter, follow up with additional materials you think would be helpful and with any information specifically requested.

IV. Additional Online Resources

- How do I find my federal legislators? <https://www.govtrack.us/>
- Where can I find maps of HTC projects in my state or district?
 - [State maps](http://forum.savingplaces.org/viewdocument/historic-tax-credit) - <http://forum.savingplaces.org/viewdocument/historic-tax-credit>
 - [District](#) maps
- Where can I download national sign-on letter?
 - [National Sign on Letter](#)
- How can I learn more?
 - [Listen to last webinar.](#)
 - [Register for Nov. 2nd at 2:00 p.m. webinar.](#)
- Where can I access HTC reports and case studies?
 - The [Annual Report on the Economic Impact of the Federal Historic Tax Credit for FY 2016](#), prepared by researchers at the Edward J. Bloustein School of Planning and Public Policy at Rutgers University, in collaboration with the National Park Service, describes the HTC's economic impacts.
 - The [Catalyst for Change](#) report was produced as part of the Prosperity through Preservation campaign to project and enhance the federal HTC. The National Trust and its subsidiary, the National Trust Community Investment Corporation, retained economist Donovan Rypkema in 2014 to complete a study that quantifies the ways in which the historic tax credits serve as catalysts for economic development.
 - Reports for specific states:
 - [Texas](#), 2016
 - [Montana](#), 2016
 - [Wisconsin](#), 2015
 - [Ohio](#), 2014
- Where can I learn who co-sponsored the Historic Tax Credit Improvement Act?
 - The HTCLIA was a great way to generate awareness and support of the Historic Tax Credit. Those members who co-sponsored the bill should NOW be asked to speak out on behalf of the credit so it is not lost during tax reform.
 - House bill (H.R. 1158) [text](#) and [co-sponsors](#)
 - Senate bill (S. 425) [text](#) and [co-sponsors](#)
 - [One-pager summary](#)
- What is a one-stop-shop to find materials on the HTC (maps, webinars, blog posts, updates, etc.)?
 - Federal HTC:
<http://forum.savingplaces.org/learn/fundamentals/economics/tax-credits/federal-htc>
 - State HTC:
<http://forum.savingplaces.org/learn/fundamentals/economics/tax-credits/state-htc>

II. Historic Tax Credit in the News

Working with Local Media

Share HTC success stories through a news story, letter to the editor, contributed column or radio or TV broadcast news interview brings the impact of the historic tax credit to life.

Through stories in local newspapers, blogs and broadcast media, you can educate the broader community on how these projects are contributing to the local economy, Main Street revitalization, cultural identity and community well-being.

Examples of stories that may be of interest include a retrospective on HTC projects, an interview with a local developer, historic buildings that were saved in part by using the HTC, etc.

Media Relations: General Tips for Pitching Reporters

The following are tips on pitching a story or event to a reporter. Some of these tips are also relevant to establishing and maintaining a solid working relationship with reporters. Initiating contact with relevant reporters before, during, and after coverage will help affirm a relationship which may prove helpful when you seek to pitch a story to score media coverage.

- **Do Your Research**

Learn as much as you can about the reporter's interests before you pitch them on a story idea. Follow them on Twitter, read their recent stories and blogs and create a Google news alert with their name to keep up with their writing. Leave a comment on a relevant story, retweet it and/or email them with a comment or question when appropriate to begin cultivation of the relationship. This will help you both get to know each other.

- **Grab Their Attention**

Get to the point, and then work the details. If you are cold calling a reporter with whom you do not already have a relationship, or even if you have worked with the reporter before, it is important to get their attention quickly. You should know why the reporter might cover your story. You should be able to quickly and interestingly explain the story or event.

- **Practice Your Pitch**

Prepare your story by practicing the pitch on a co-worker to be sure your story and approach is interesting. Write down important details and outline how you plan to pitch the story.

- **Listen First**

When you call a reporter, be sure they are not on deadline. If so, the reporter may wish to speak to you at a better time. Inquire as to a better time to call and call back at that time. If you've sent an introductory email or already left a voicemail, don't assume they've already seen/heard it. Also, don't ask them if they have. Start fresh, at the beginning.

- **Be Specific**

When you talk to the reporter, be prepared with supporting facts including sources, names, and details. You need to be organized in case the reporter wants to follow up on any stories or facts you present. Be specific about your story.

- **Know the Issue**

The reporter you work with may be very knowledgeable on the details surrounding your story. You should have a clear message and story as well as in-depth knowledge on the issues.

- **Relevance**

Connect your story with a relevant current event. Maybe there is a related bill in Congress or a new study or local issue that makes sense to reference.

- **Facts**

If you do not know the answer to a reporter's inquiry, suggest that you call them back when you have the information. Do not make up facts as they may appear on tomorrow's front page.

- **Additional Materials**

Be prepared to offer additional materials such as pictures, background information and sources which they may need to complete a story.

- **Keep Record**

Record what stories you pitch and to whom. This will provide you with a log of reporter interests and requirements that may aid in working with the reporter in the future.

- **Retry, Re-pitch**

Do not harass a reporter. However, you should consider different angles which strike different interests if one method is not working. If you come up with a new angle or development, feel free to pitch the story to the reporter again. Also, feel comfortable to ask for feedback if they aren't interested; it may help generate another hook.

- **Be a Resource**

Even if you don't have a particular story idea to pitch to your media contacts, if a story about a historic building that could be used for commercial use makes the news (demolition threat, ground breaking, ribbon-cutting, funding vote, etc.), reach out and offer to be a resource on the HTC.

Media Relations: Making Contact

Print:

Newspaper deadlines vary according to individual newspapers, but a reporter typically hits deadline around 2 pm for morning newspapers. Most print reporters, due to daily deadlines, are only free for phone conversations a few hours during the early part of the day. Email is a great way to communicate with a reporter. (see next page for [Sample News Story](#))

DO NOT call print reporters after 4 pm as they are usually filing their stories at that point.

Television:

Television stations operate primarily off media alerts, a brief one-page outline invites the media to attend an event, and press releases, an announcement written like a news story to describe compelling news your organization is making, since these are tools that allow them to look quickly at information. The correct person to send these to and to call to pitch the story will be the assignment editor or manager or the planning editor or manager.

It is always a good idea to fax or email the media alert a day or two before your event and again the morning of the event. If you email it, be sure to copy and paste into the body of the email to ensure it is delivered—emails with attachments can trigger spam filters. Call and ask for the assignment desk, which will confirm receipt of your press materials.

Television needs a visual opportunity to make a story happen. When contacting an assignment editor, be sure to include the visual elements of your story—the photo opportunities. If you already have video it is even easier to gain television coverage. Video footage that is not packaged into a complete news story is called B-roll. Having this sort of footage available gives you an advantage when you are pitching a television story, but it is sometimes expensive to create and may not help if the story is not one that has the right news hook. However, having good B-roll can often make the difference to a decision about coverage.

Television newsrooms tend to be even more pressed for time than print publications. You may have to speak to more than one assignment editor or forward your materials several different times and to several different people.

Radio:

Familiarize yourself with the station's audience and informational needs. If you are contacting a news radio station, research their different programs and determine which one would be a good match with your story. Organizations like National Public Radio like to have stories with a rich variety of sound. Think about what kind of audio your story can include, and who can be a dynamic spokesperson for your story. Offer these elements in your pitch to the producer or reporter.

Blogs:

Blogs are niche by nature, meaning they focus on a specific topic and can help get a message out to your target audience. Reaching out to bloggers is smart because there is the potential that they will take interest in your cause and write about it every day. They might also link to your Web site and/or the National Trust's site.

You can search for blogs covering your geographic area/area of interest on **Technorati** www.technorati.com, **Google** <http://blogsearch.google.com> and **Blogflux** www.blogflux.com, in addition to many other places.

To approach bloggers, look for an email address on their page. The email might be under their profile link, a “contact us button” or on the side bar. If you can’t find an email, leave a post that expresses your interest in contacting the blogger. Also look for them on Twitter and Facebook. Bloggers are vigilant by nature, and will usually respond to you as soon as they can.

III. Storytelling Outlets and Tools

Sample News Story

LANDMARKS LEADER WORRIED ABOUT LOSS OF TAX CREDITS FOR RESTORED BUILDINGS

Kokomo Tribune 4/24/17

INDIANAPOLIS -- A former furniture factory near the Indianapolis Zoo may not have been turned into 124 loft apartments if not for a federal tax credit for the rehabilitation of historic buildings.

The same might be said for more than 160 buildings throughout Indiana that have been restored through the federal Historic Tax Credit program since 2002.

The credits for rehabs of historic landmarks range from the \$2.2 million for The Ohio Building in Terre Haute to the \$29,874 in credits for the Kreuzberger House in Logansport. They include \$295,936 for Schimpff’s Confectionary in Jeffersonville and \$1.8 million for the Lincoln Hotel in Goshen.

Now, the executive director of the Indiana Landmarks preservation group is worried that the tax credit could be eliminated if Congress begins a sweeping tax reform.

“What it will clearly do is take historic preservation out of the game of being a major force for economic revitalization,” said Marsh Davis, president of Indiana Landmarks, the statewide preservation group.

He fears that some folks in Congress believe that eliminating HTC would lead to lower taxes.

“Without the HTC, so many of the rehabilitation projects that have transformed cities and towns across America would not have been possible,” Davis said.

There has been no official word about a possible funding cut as the House Ways and Means committee begins to meet in May.

In Indiana, the Historic Tax Credit program has brought back to life such structures as the West Baden Springs Hotel, the Kokomo YMCA and the Charley Creek Inn in Wabash. Perhaps best known on the list is the remodeling of Hinkle Fieldhouse at Butler University, which received \$42.2 million in qualified tax credits.

Although among a myriad of grants and funding programs available to redevelopers, the HTC has since 1976 led to the rehab of more than 41,000 historic places across America. In turn, that has created 2.3 million jobs and leveraged more than \$78 billion in private investments, according to the National Park Service, which administers the program along with the Internal Revenue Service.

The main element of the program provides a 20 percent credit for the rehabilitation of income-producing projects such as converting into loft apartments or improving Hinkle for revenue-producing activities. The credit can be applied to the individual's or the corporation's federal tax liability, essentially for rehab work of a permanent nature such as replacing windows, installing a mechanical system or other labor and materials.

Past analyses found that about two-thirds of all projects nationally were in neighborhoods at or below 80 percent of area median family income.

In Wabash, a former apartment building was renovated into the boutique-style Charley Creek Inn by philanthropist Richard E. Ford. In Indianapolis, the charter Herron High School is converting a former Naval academy on the city's west side into a campus. The downtown Indianapolis eight-story Harrison Hotel is being renovated by the Indiana Association of Realtors for office space.

All three projects were restored through RATIO Architects in Indianapolis; all used the historic tax credit.

"If the credit were eliminated all together, I think it would have a very negative impact on the rehabilitation of historic buildings," said David Kroll, principal and director of preservation at RATIO Architects.

"The credit was originally created to level the playing field as far as expenditures since sometimes it could be more expensive to rehabilitate a current building than construct a new one and the credit was created to help offset that. So if you no longer have any credits available for some of these projects, these buildings may just continue to sit or maybe demolished," he said.

Near the Indianapolis Zoo, the Harding Street Lofts are a complex of four buildings constructed in the late 1800s. German furniture maker Henry Lauter opened his shop there and it operated until the Great Depression. In 1937, the site was sold to a grocery warehouse operator and a paper recycling firm. Both had left by 2010.

In 2011, Core Redevelopment -- whose website motto advertises "We transform history into your next home" -- purchased the U-shaped complex and converted it into 124 units. The size of the project required historic tax credits, said Eric Seal of Core Redevelopment.

"At 125 units it was a fairly large project so the historic tax credit provided a gap where, if we didn't have it, the building would have been done differently and not by us," Seal said.

Seal also works in other states where HTC and other rehab-related credits are offered.

If Congress takes the historic tax credit, those state credits would probably lapse, too," Seal said.

Sample request for an editorial board meeting

- A meeting with the local newspaper's editorial board is a terrific way to help get media coverage for the HTC. A sample e-mail is provided below.

[Date]

To: [Insert Publication Name] Editorial Board

From: [Your name, title, and organization]

Re: Editorial Board Meeting Request on threat to the federal Historic Tax Credit

The next few weeks are critical to the fate of the federal Historic Tax Credit as Congress moves forward on efforts to reform the nation's tax code.

I would like to request an opportunity to meet with the editorial board to discuss the local and statewide impact of the federal historic tax credit. [Add name of developer, mayor, local business community leader] will join me to share with you the program's successful track record of historic preservation and economic revitalization in our community.

Please contact me as soon as possible to schedule a convenient time. I can be reached at [phone and email].

Background on the Federal Historic Tax Credit

The HTC is the most significant federal investment in historic preservation, and the credit has returned dividends to the American taxpayer. Over the life of the program, the HTC has created more than 2.4 million jobs and adapted 42,293 historic buildings to new and economically productive uses. Moreover, this tax credit is an investment that generates revenue for the Department of Treasury. Since the program's inception in 1978, \$25.2 billion in credits have resulted in a return of \$29.8 billion in tax revenue directly linked to the rehabilitation of historic buildings. Roughly translated, this means that for every \$1.00 in credits allocated by the federal government, \$1.25 in new federal tax revenue is generated. Overall, the federal historic tax credit has generated \$131 billion in total development activity.

Sample Op-Ed

An op-ed is a column that is generally 600-800 words and should adhere to the guidelines of the specific website or newspaper in which it will be published. The purpose of an op-ed is to help educate and influence public opinion on an issue. Op-eds are published in one print publication exclusively in accordance with the media outlet's editorial policy and often have a call to action related to the issue.

Protect the Federal Historic Tax Credit

As Congress and the administration begin serious negotiations on comprehensive tax reform, it is vital they recognize the critical importance of capital investments in our nation's communities. In particular, the Federal Historic Preservation Tax Incentives Program is an incentive that should be strengthened, not diminished, by any tax proposal put forward by the Congress or the White House. ***[Your opening should make the topic clear and grab the reader's attention].***

Commonly referred to as the Federal Historic Tax Credit (HTC), it was initially implemented in 1976 to encourage private investment in projects to rehabilitate historic buildings including vacant schools, warehouses, factories, retail stores, apartments, hotels, and office buildings throughout the country. The HTC provides a 20 percent credit for the rehabilitation of historical buildings and a 10 percent credit for non-historic buildings placed in service before 1936.

Through 2016, the HTC [has resulted](#) in the rehabilitation of more than 42,000 historic buildings and has created more than 2.4 million jobs nationwide. The rehabilitation and development of such valued national landmarks as The Humble Oil Building in Houston, Texas, the Mitchell Lewis Motor Company Building in Racine, Wisconsin, and the Tribune Building in Salt Lake City, Utah, were made possible through the use of the HTC. All of these projects have helped strengthen those communities both in terms of providing needed economic development and revitalizing valued historical buildings.

[Add additional paragraphs that support your main point. Use clear, concise examples and anecdotes].

In my home state of Oklahoma alone, from 2002–2016, more than 100 rehabilitation projects were performed via the HTC program, representing more than \$600 million in investment and creating more than 12,500 jobs for the state, according to [figures provided](#) by the National Park Service. Without the incentives created by this program, important historic rehabilitation projects would have never occurred due to higher costs, design challenges, and weaker market locations, which result in lenders and investors being unwilling to provide the capital investments necessary for their rehabilitation.

In addition to creating jobs, fostering economic growth, and revitalizing communities in need, the HTC actually returns more in revenue to the government than the tax credits themselves cost. In fact, the government receives \$1.20–\$1.25 in [tax revenue](#) for every dollar invested. [According to a study](#) commissioned by the National Park Service, 23.1 billion in federal tax credits have generated more than \$28.1 billion in federal tax revenue from historic rehabilitation projects. Even in the context of budgetary limitations, there is no economic justification for ending or weakening the HTC. ***[Including compelling numbers strengthens the column's impact]***

Some critics of the program will argue that the HTC is unnecessary, as the projects that are developed using the HTC would have been performed even without those tax incentives. As someone who has spent his own time and financial resources on such historic rehabilitation projects, I can assure you that the HTC is an essential financial component in determining where investment dollars are driven. There is no doubt that without the HTC, many restoration projects of older, historic buildings — from Maine to California — would not be economically feasible. Eliminating the HTC would only serve to slow the economic growth of many of America's communities.

Thankfully, there are leaders in Congress who understand the critical importance of the HTC. This year, the [Historic Tax Credit Improvement Act](#) was introduced. This bill would serve to strengthen the HTC by increasing the credit from 20 to 30 percent for projects with rehabilitation expenses of less than \$2.5 million, simplifying the application process for small developers and creating greater flexibility for non-profit organizations to partner with developers in redevelopment projects. [Support for this legislation](#) even crosses party lines. In the House, 38 Republicans and 35 Democrats signed on as cosponsors; in the Senate, 9 Democrats and 4 Republicans have signed on. In both chambers, many of the cosponsors sit on the tax-writing committees.

Eliminating the HTC will hamper the rehabilitation of our nation's historic buildings and slow the economic growth of many of our communities in need. This is why I hope that in reforming the nation's tax code, Congress and the administration will keep or even strengthen the HTC.

➤ ***[Conclude with your name, title, organization and any other pertinent identifying information]***

Sample Letter to the Editor

- A letter to the editor is typically less than 200 words and is written in response to an article, editorial or news published in a newspaper or website. The letter should be written and submitted within days of the original article's publication. The purpose of the letter is not simply to praise or denounce an article, but instead to raise additional questions, make an expanded point or clarify part of the original article.

Tax Credit Spur Development

The Baton Rouge Advocate

As the lead developer behind the upcoming redevelopment of the historic St. Rose de Lima Church and School in New Orleans, I share in the excitement around creating a new future for the campus on Bayou Road ("Southern Rep Theatre, Waldorf School to move to vacant Bayou Road church complex," Arts, Jan. 27). Our company has rehabilitated several historic properties in New Orleans and beyond, such as the Myrtle Banks Building in Central City, and we have seen the tremendous impact of bringing new uses to a landmark building while maintaining its historic character: namely generating jobs, addressing blight and vacancy, and creating new neighborhood amenities. ***[Highlight the impact of the HTC in the first paragraph]***

These projects typically require multiple private and public sector partners, and one of the key pieces in making the St. Rose redevelopment feasible is the federal historic tax credit, a program that for 30 years has provided developers with a tax credit in exchange for retaining a historic building's distinctive character. Examples from New Orleans range from the Saenger Theater to small apartment buildings. Particularly when coupled with the Louisiana state credit, the federal historic tax credit is a critical tool for covering the additional costs that come with the careful preservation and reuse of New Orleans' invaluable, but too often neglected, historic schools, theaters, religious buildings, office buildings and more.

New Orleans neighborhoods need robust federal and state historic tax credits to preserve more than their bricks and mortar; these programs are critical to advancing community and economic development. As our elected officials in Washington, D.C. debate tax reform, we should urge them to support the federal historic tax credit as a permanent part of the federal tax code.

[Your name, title, and organization]

Sample Press Release

- The press release should be one to one and a half pages, include at least one quote from your organization's spokesperson and conclude with a boilerplate, which is a brief description of your organization and its mission. The purpose of a press release is to share timely news with media and the public and compel reporters to cover your story.

New Research Shows Federal Historic Tax Credit Achieved a Record Increase in Use and Economic Impacts in 2016

[Your contact name, phone and email]

[Date, city]: Recently released research shows that a federal tax incentive that is in danger of elimination as part of the Congressional tax reform process has a profound and positive impact on our nation's economy and quality of life while more than paying for itself. Produced by the National Park Service and Rutgers University, the **Annual Report on the Economic Impact of the Federal Historic Tax Credit for FY 2016** revealed that use of the federal historic tax credit (HTC) reached an all-time high in fiscal year 2016 (FY 16). Rehabilitation of 1,039 historic buildings was made possible by \$1.2 billion in tax credits, generating 109,000 jobs and \$1.7 billion in federal state and local taxes—which more than cover the cost of the program. FY 16's annual activity level is an increase of nearly one third (32 percent) over last fiscal year, representing the largest year-over-year increase since 1986. ***[The opening paragraph should present the most important part of your news and why it matters]***

"The federal HTC program has preserved and rehabilitated thousands of historic buildings while promoting economic revitalization in cities and towns across the country," said Merrill Hoopengardner, president of NTCIC, a subsidiary of the National Trust for Historic Preservation. "As this research shows, more than 40 percent of HTC projects over the last 15 years were located in communities with populations of less than 25,000, proving that this tool is vital to our Main Streets and rural areas too. At the end of the day, we are focused on creating positive, transformational, and lasting change in disinvested communities nationwide. The HTC is a unique and creative way to obtain those results." ***[Include quotes from leaders whose credibility adds impact to the announcement]***

The recent uptick in development can be attributed in large part to the real estate market shift that has occurred over the last 10 years, wherein many in the millennial and baby boomer generations want to live, work, and play in authentic downtown historic residential and commercial spaces. These market trends can be seen in nearly every major American city from New Orleans, Memphis and Mobile in the South, to Cleveland, Toledo and Detroit in the Midwest, and Dallas, Tulsa and Los Angeles in the West. Without the HTC, developers say they would not have the financing tools to meet this demand.

The report also found that, since its inception in 1978, the federal HTC has attracted \$131 billion in private investment to the rehabilitation of 42,293 historic buildings,

creating over 2.4 million jobs and serving as a net-revenue generator for the U.S. Treasury: the \$29.8 billion in federal taxes generated by HTC projects exceeds the \$25.2 billion in credits allocated.

This research demonstrates the significant and cost-effective economic benefit of reusing vacant hotels, schools, factories and other forgotten historic resources and affirms the need for the HTC. Developers repeatedly state that these rehabilitation projects simply would not be financially feasible without the incentive provided by the HTC. Lenders and investors typically favor new construction over riskier rehabilitation projects; historic rehabilitation projects frequently have higher costs, greater design challenges, and weaker market locations.

Despite the HTC's winning combination of results and cost-effectiveness, House Republican leaders have vowed sweeping reform of the tax code, and that no tax incentive is safe. The National Trust for Historic Preservation and NTCIC have joined with their industry partner, the Historic Tax Credit Coalition, and other national, state, and local preservation groups to help raise awareness of the importance of the HTC to America's economy and quality of life.

The full report text and more information about efforts to protect and enhance the HTC may be found at www.savehistoriccredit.org.

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About NTCIC

National Trust Community Investment Corporation (NTCIC) enables tax credit equity investments that support sustainable communities nationwide. NTCIC is a wholly owned for-profit subsidiary of the National Trust for Historic Preservation. ntcic.com | [@ntcic](https://twitter.com/ntcic)

About the Historic Tax Credit Coalition

The Historic Tax Credit Coalition (HTCC) is a national nonprofit organization comprised of a variety of stakeholders that recognize the importance of the federal Historic Tax Credit, including architects, developers, preservation consultants, syndicators, investors, lawyers and accountants. In addition to ensuring the future of the federal Historic Tax Credit, coalition members advocate for important improvements that would make the credit a more efficient and effective means of financing the rehabilitation of historic and older buildings. Historiccredit.com | [@historiccredit](https://twitter.com/historiccredit)

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The National Trust for Historic Preservation, a privately funded nonprofit organization, works to save America's historic places. SavingPlaces.org | [@savingplaces](https://twitter.com/savingplaces)

Sample Press Statement

MEDIA CONTACT: ANDY GRABEL, 202.588.6025, AGRABEL@SAVINGPLACES.ORG

NATIONAL TRUST: NEW LEGISLATION WOULD INCREASE INVESTMENT IN HISTORIC MAIN STREETS AND PROPERTIES

Statement by Stephanie K. Meeks, president of the National Trust for Historic Preservation

Washington (February 17, 2017) – Sen. Susan Collins (R-ME), Sen. Ben Cardin (D-MD), Rep. Mike Kelly (R-PA) and Rep. Earl Blumenauer (D-OR) introduced the Historic Tax Credit Improvement Act (S. 425, H.R. 1158) yesterday. This new legislation would increase the number of historic buildings across the country that can benefit from historic tax credits and thus enable more rehabilitation projects. The following is a statement from Stephanie K. Meeks, president and CEO of the National Trust for Historic Preservation:

“The federal historic tax credit is the driving force behind rehabilitation projects that have given new life to historic buildings, created millions of jobs and attracted billions in private investment. We commend Sens. Collins and Cardin and Reps. Kelly and Blumenauer for their leadership in proposing sound improvements to the federal historic tax credit. Now, more libraries, theaters, town halls and other buildings can be restored to serve their communities in new ways. Tax reform aimed at growing the economy should enhance the historic tax credit.”

BACKGROUND ON THE HISTORIC TAX CREDIT IMPROVEMENT ACT of 2017

The Historic Tax Credit Improvement Act of 2017 makes long overdue changes to the federal Historic Tax Credit to further encourage reuse and redevelopment in small, midsize and rural communities. Main Streets across America will have a stronger tool to help breathe new life into their historic buildings. The bill will increase the credit from 20 to 30 percent for projects with rehabilitation expenses of less than \$2.5 million, which will help inject new private investment into smaller and more rural communities. Other improvements include simplifying the process for the transfer of historic tax credits to investors for projects under \$2.5 million. The bill provisions would be the first major changes to the federal Historic Tax Credit since the 1986 tax bill.

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Sample E-Alert

PROTECT THE HISTORIC TAX CREDIT!

Republican Tax Reform Framework Released—Historic Tax Credit Not Identified as Worth Keeping!

Dear recipient,

As anticipated, Republican leadership released a tax reform outline intended to guide House and Senate tax writing committees in their drafting of tax reform legislation.

The framework does not explicitly preserve the historic tax credit and envisions that most business tax credits will be repealed. The federal historic tax credit is the government's primary way of responding to the failure of the market to preserve historic income-producing buildings. Without a federal historic tax credit, the historic fabric of our urban centers, Main Street commercial districts, and small towns nationwide face a much greater risk of economic obsolescence or demolition. **If you care about the future of historic preservation, now is the time to act.**

[Urge your Congressional delegation to contact members of the House Ways and Means and Senate Finance Committees with the message that repealing the historic tax credit is bad policy.](#) The need for tax reform is clear, but it must not come at the expense of a program that more than pays for itself and has a proven track record of creating jobs, saving historic buildings, and revitalizing neighborhoods.

Now is the time to speak up for the historic tax credit. Join us in letting Washington know that historic preservation advocates need their voices heard. Our history is too important.

Thank you.

name
title, organization

Sharing Your Story Online

Twitter and Facebook are the best social media for issue advocacy. Use them to post:

- Links to HTC press articles and video
- Photos of HTC advocacy meetings with lawmakers
- HTC ribbon cuttings and site tours
- "Before" and "after" photos of HTC projects

The search engine to find HTC is **#HistoricTaxCredit**. Don't forget to add this hashtag to all your posts so that they will be easily accessible.

National Trust Channels

About our online resources

There are several National Trust channels to consider for spreading the word about historic tax credit projects in your state. These include our organizational online resources, publications, e-newsletters and social media platforms.

The National Trust manages two blogs. Our **Preservation Leadership Forum** blog is geared toward helping professional preservationists stay on top of the latest research, tools, resources and trends. The other is the National Trust website savingplaces.org, which features less-technical treatments of stories of people saving places that would appeal to a national audience.

The Trust is very active on social media, especially Facebook and Twitter.

Types of content to submit

Our editorial team would be interested in:

- recent op-eds, editorials, letters to the editor or media stories that reference the HTC—or that didn't, but should have.
- upcoming ribbon cuttings or ground-breakings of HTC projects
- HTC projects that have helped transform a district or neighborhood
- iconic buildings that have been revived with the HTC
- particularly innovative or creative adaptive use projects, especially those that blend sustainability technology with historic preservation
- historic tax credit projects that have a strong community benefit component, and if possible, leads on individuals who have directly benefited
- compelling before and after photos of a HTC project
- events that relate to raising awareness of the HTC
- blogs from your statewide or local preservation organization

How to submit content

To submit your story idea to be shared in National Trust print or online publications and social media channels, contact editorial@savingplaces.org. To submit your story idea to Preservation Leadership Forum, email forumonline@savingplaces.org. In either case, please reach out to ask any questions that could help frame your story idea or research before submitting content.

IV. We're Here to Help

National Trust Contacts

National Trust for Historic Preservation
2600 Virginia Avenue, NW, Suite 1100
Washington, DC 20037
P 202-588-6000

Renee Kuhlman
Director, Special Projects, Government Relations and Policy
P 202.588.6234
P 540.951.1661
E rkuhlman@savingplaces.org

Mike Phillips
Manager of Policy, National Trust Community Investment Corporation
P 202.588.6049
E mphilips@ntcic.com

Andy Grabel
Associate Director, Public Affairs, National Trust for Historic Preservation
P 202.588.6025
E agrabel@savingplaces.org

Shaw Sprague
Senior Director, Government Relations and Policy, National Trust for Historic Preservation
P 202.588.6339
E ssprague@savingplaces.org