

NEW YORK STATE REHABILITATION
TAX CREDITS
HOMEOWNER CASE STUDY



STERTZ RESIDENCE

The Blanche Robinson House
NY State Route 23, Hillsdale
Columbia County

Rehabilitation Project:
New furnace provides zoned heating in
historic home.

Qualified Rehab Expenditure:
\$10,952

Homeowner Tax Credit:
20% New York State: \$2,190

THE HOUSE STORY

Revolutionary War patriot, Parla Foster, originally owned the land where the hamlet of Hillsdale is located. The Craftsman style house was built in 1917 for Miss Blanche Robinson who lived in the house until her death in 1938. From 1973 – 2003 the house served as the Methodist Church Parsonage. It has a poured concrete foundation with stucco finish, wood shingled walls, and a slate roof.

THE TAX CREDIT STORY

To be eligible for the tax-credit program, the owner-occupied property needed to be listed on the NYS or National Register of Historic Places. To that end, Historic Hillsdale, a government committee of the Town of Hillsdale, secured grants from the Preservation League of New York State and The Berkshire Taconic Foundation for an extensive survey of the Hillsdale Hamlet. This culminated in the designation of the 2010 Hillsdale Hamlet Historic District which includes 128 contributing buildings.

The Blanche Robinson House was eligible to use the New York State Historic Homeownership Rehabilitation Tax Credit due to its inclusion on the State- and National Register-listed Hillsdale Hamlet Historic District and to its location in a census tract at or below 100% State Median Family Income (SMFI). Census tracts covering all, or part, of twelve Columbia County municipalities are eligible for this program.

Once Hillsdale neighbors and municipal officials became aware of the Homeowner Rehabilitation Tax Credit Program, word-of-mouth advertising alerted many residents in the district to program availability. Homeowner, Michael Stertz, suggested stronger outreach by state agencies and preservation partners would assure increased program use.

Michael found the Homeowner Rehabilitation Tax Credit Program very easy to utilize. “It’s just a matter of doing the paperwork” which he found straight-forward and easy to get through.

NEW YORK STATE REHABILITATION
TAX CREDITS
HOMEOWNER CASE STUDY



THE REHABILITATION STORY

The 2010 energy efficiency improvements to the Blanche Robinson House included the removal of a 35-year-old, single-zone furnace and related piping, and subsequent installation of a new, six-zone, furnace boiler and piping. This allows the heat to be supplied to specific areas of the house on an as-needed basis rather than heating the entire building. Michael Stertz has seen a 25% reduction in his energy usage over two winters so far, and he attributes that to using a much more efficient system as well as having the ability to heat particular zones instead of heating the whole house.

All work complied with the Secretary of the Interior's Standards for Rehabilitation.

INFORMATION ON THE HISTORIC HOMEOWNERSHIP REHABILITATION TAX CREDIT PROGRAM

The homeowner rehabilitation tax credit program that Michael Stertz utilized has been administered since 2009 by New York State's Office of Parks, Recreation, and Historic Preservation as a method of fostering the rehabilitation of historic buildings. Under the initiative, owners of qualified historic homes could qualify for tax credits on home improvement expenditures including repairs to doors, windows, roofs and plumbing, heating, and electrical systems.

The program requires that historic homes are listed either individually in the State or National Register of Historic Places, or as a contributing building in a historic district. Additionally, the building must be located in an eligible census tract area falling below the state family median income level. The New York State Historic Homeowner Tax Credit Program will cover 20% of qualified rehabilitation costs of owner-occupied historic houses, up to a credit value of \$50,000.

For more information, please contact:

- New York State Historic Preservation Office . <http://nysparks.com/shpo/tax-credit-programs> . (518) 237-8643
- The Preservation League of New York State . www.preservenys.org . (518) 462-5658