



HISTORIC PRESERVATION COMMISSION

Agenda

September 16, 2019

1001 11th Avenue

City Council Chambers, City Center South

4:00 p.m.

-
- I. Call to Order
 - II. Approval of Minutes
 - III. Public Input
 - IV. Historic Preservation Tax Credit project final approval

Case No.: HPFI2018-0003
Applicant: Alex Alvarez
Location: 1525 9th Avenue
Presenter: Elizabeth Kellums
 - V. Water Conservation and Landscaping Presentation by Ruth Quade
 - VI. Building Permit Fee Refund Policy Update
 - VII. Commission Member Reports
 - VIII. Staff Reports
 - IX. Adjournment to Worksession

Monroe Avenue Historic District Designation Plan Discussion

UPCOMING MEETINGS AND IMPORTANT DATES:

- September 26, 2019 12:00 p.m., History Brown Bag: Teetotalers, Stuffed Shirts and Canoe Paddlers: Union Colony Letter Writers, by Dan Perry; Greeley History Museum Community Room, 714 8th Street.
- October 7, 2019 4:00 p.m., Historic Preservation Commission, City Council Chambers, City Center, 1001 11th Avenue.
- October 21, 2019 4:00 p.m., Historic Preservation Commission, City Council Chambers, City Center, 1001 11th Avenue.
- October 24, 2019 12:00 p.m., History Brown Bag: History and artifacts of the Colorado Model Railroad Museum, by Michelle Kempema, Executive Director; Location: Colorado Model Railroad Museum, 680 10th Street; free day in conjunction with this presentation

Historic Preservation Public Hearing Procedure

1. Chair introduce public hearing item
2. Historic Preservation Staff report
3. Applicant Presentation
4. Commission questions
5. Chair opens public hearing
6. Chair closes public hearing
7. Applicant rebuttal
8. Commission discussion and vote



HISTORIC PRESERVATION COMMISSION

Proceedings

August 19, 2019

**1001 11th Avenue
City Council Chambers, City Center South
4:00 p.m.**

I. Call to Order

Chair Scott called the meeting to order at 4:00 p.m. Commissioners Anschutz, Brunswig, Bator, McLean, and DePetro were present. (Commissioner Thompson was absent.)

II. Approval of Minutes for the meeting held on July 1, 2019

Commissioner Anschutz moved to approve the minutes for July 1, 2019. Commissioner McLean seconded the motion. The motion carried 6-0. (Commissioner Thompson was absent.)

III. Public Input

Paul Richard, 1313 9th Avenue, addressed the Commission on behalf of Historic Greeley, Inc. and presented a monthly update. He reported that Historic Greeley, Inc. received word that the Bessie Smith grant request was funded by the State Historic Fund. The grant project total is \$262,000 with \$195,500 coming from the State Historic Fund and a match of \$65,500 from the Family of Christ Presbyterian Church. The Bessie Smith House was moved to the church's property across town and when rehabilitated, will become a community outreach center.

Commissioner Bator asked if Historic Greeley, Inc. had an update on the repair of the P.O.W. pillar. Commissioner Brunswig stated the mortar analysis is complete, the State Historic Fund Staff completed a site visit, and the project is ready to begin.

Commissioner Scott introduced Commissioner DePetro to the Commission.

IV. Consideration of State Historic Preservation Income Tax Credit Part 2 Application for 1127 18th Street kitchen rehabilitation

Commissioner Scott introduced the agenda item, clarified that it is not a public hearing item, and no one on the Commission expressed a conflict of interest.

Elizabeth Kellums entered the staff report into the record and provided staff analysis for 1127 18th Street kitchen rehabilitation tax credit project. Ms. Kellums explained that the applicant submitted all necessary documents for the tax credit and the tax credit review committee approved the applicant's request. Ms. Kellums pointed out the differences between the 1990 tax credit and the 2014 tax credit. The original Historic Preservation 1990 tax credit will be expiring on December 31, 2019 leaving the 2014 tax credit program.

Commissioner Bator made a motion to find that the State Historic Preservation Income Tax Credit project, utilizing the 1990 credit, of Kristin and Zachary Zasada for kitchen rehabilitation at the Shattuck House, 1127 18th Street, individually designated on the Greeley Historic Register, meets the Secretary of the Interior's Standards and approve the application for a tax credit in the amount of \$9,197.80 Commissioner Anschutz seconded the motion. The motion passed 6-0. (Commissioner Thompson was absent.)

V. Commission Member Reports

Commissioner McLean reminded the Commission he was leading a history walking tour at University of Northern Colorado's Gunter Hall & the President's House later in the evening at 6:30pm on August 19, 2019. Commissioner McLean described the tour.

Commissioner Bator mentioned that Chautauqua just ended the 20th year and a young Chautauquan spoke about Gustave Eiffel and the building of the Eiffel Tower. In the presentation he mentioned that the builders didn't think the structure would stay up and thought it was the ugliest thing in the world. Eiffel also worked with the architect of the Statue of Liberty and was the designer of the arm carrying the torch.

Commissioner McLean shared that he took a road trip to Michigan where he visited a floating national historic landmark, the SS Badger, a car ferry that went from Manitowoc, Wisconsin to Ludington, Michigan and shared his insights from that experience relevant to the Commission.

VI. Staff Reports

Ms. Kellums asked the Commission if they would be participating in Potato Day on Saturday, Sept 14 from 10 a.m. to 4 p.m. at Centennial Village Museum. The Commission discussed and decided that it was an important event for Commission participation. Commissioners Bator and DePetro volunteered to be present at the event and represent the Historic Preservation Commission.

Ms. Kellums informed the Commission that she will be moving offices. She stated she will be in the same building/floor but in a different office.

Commissioner Bator mentioned United States Postal Service currently has Trans-Continental Railroad historic stamps. Commissioner Bator asked the Commission for an update on neighborhood surveys. Commissioner Bator expressed that she will complete 14th Avenue neighborhood surveys. Ms. Kellums stated that is one of the items from the Comprehensive Plan and welcomed the Commission's assistance with the task.

Ms. Kellums also indicated that at the September 16th meeting, Ruth Quade from the City's Water Conservation Office would present about water conservation and landscaping in the historic district and the Commission will review a tax credit application.

Mike Garrott informed the Commission on Ms. Kellums' promotion to the Planner III position. He explained that she is still the Historic Preservation Specialist of the department.

VII. Adjournment

The meeting adjourned at 4:37 p.m.

Sandra Scott, Chair

Betsy Kellums, Secretary

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HISTORIC PRESERVATION COMMISSION SUMMARY

ITEM: State Income Tax Credit Part 2 Application

LOCATION: 1525 9th Avenue

APPLICANT: Alex Alvarez

HISTORIC PRESERVATION COMMISSION DATE: September 16, 2019

HISTORIC PRESERVATION COMMISSION FUNCTION:

Review the application and make the final decision, as per Section 18.36.100 of the City of Greeley Municipal Code by approving or denying the request.

PROJECT OVERVIEW AND BACKGROUND:

The Johnston House at 1525 9th Avenue is a contributing property in the Greeley Historic Register Monroe Avenue Historic District. On October 15, 2018, owner Alex Alvarez submitted Part 1 application for the 1990 state historic preservation tax credit for exterior rehabilitation and roofing with project “before” photos. The tax credit review committee completed a site visit on October 29, 2018 and determined the proposed project meets the Secretary of the Interior’s Standards for Rehabilitation. Upon completion of the project on August 5, 2019, Mr. Alvarez submitted the Part 2 1990 tax credit application with “after” photos and invoices for the completed work on August 12, 2019.

Following completion of the project, the Tax Credit Review Committee conducted a site visit and determined the project meets the Secretary of the Interior’s Standards and preliminarily approved it on August 20, 2019. Section 18.36.100 of the Greeley Municipal Code requires the Commission make the final determination on all state tax credit applications. The Colorado Revised Statute 39-22-514, which applies to the 1990 credit, requires the project meet the Secretary of the Interior’s Standards for Rehabilitation (See Attachment B), requires the project be completed within 24 months, requires the rehabilitation costs be over \$5,000, and requires the Part 2 application be submitted within 60 days of completion (See Attachment C). The applicant completed the project within 24 months. Project cost was over \$5,000, with qualified costs of \$28,859.80, and the applicant submitted the Part 2 application within 60 days of project completion, submitting Part 2 on August 12, 2019 after completion date of August 5, 2019 (See Attachment A).

The Part 2 of the tax credit application for exterior rehabilitation and boiler replacement at 1525 9th Avenue includes the final project qualified costs of \$28,859.80 for a 20% credit of \$5,771.96.

STAFF RECOMMENDATION:

Approval.

RECOMMENDED COMMISSION MOTION:

A motion to find that the State Historic Preservation Income Tax Credit project, utilizing the 1990 credit, of Alex Alvarez for exterior rehabilitation and a new boiler at the Johnston House, 1525 9th Avenue, a contributing property in the Greeley Historic Register-designated Monroe Avenue Historic District, meets the Secretary of the Interior's Standards and approve the application for a tax credit in the amount of \$5,771.96.

ATTACHMENTS:

Attachment A	1525 9 th Avenue Tax Credit Application for rehabilitation with photos
Attachment B	Secretary of the Interior's Standards for Rehabilitation
Attachment C	Colorado State Historic Preservation Income Tax Credit Information, History Colorado Publication #1322b

**APPLICATION FOR COLORADO STATE INCOME TAX CREDIT
FOR HISTORIC PROEPRTY PRESERVATION (1990 CREDIT)**

Pursuant to House Bill 90-1033 (CRS 39-22-514)

PART 1 – PRELIMINARY APPROVAL

1. PROPERTY INFORMATION

Name of Property:

Address: 1525 9th Ave

City/Town: Greeley

County: Weld

Zip: 80631

Name of Registered Historic District:

Monroe Avenue Historic District

Legal Description:

GR 3237 S45' N80° L11 BLK163 PATTON & BIGGAR SUB

2. APPLICANT INFORMATION (taxpayer claiming the credit)

Name: Alex Alvarez

Type of Entity: Individual: ☒

Partnership: General ☐ Limited ☐

Corporation: Regular ☐ Subchapter S ☐

Limited Liability Company ☐

Name of authorized company official

(if applicant is not an individual):

Business address:

City/Town:

State:

Zip:

Telephone:

Residential address:

City/Town:

State:

Zip:

Telephone:

Taxpayer Identification Number (or Social Security Number):

Applicant is: (check one) owner ☒ tenant ☐

If more than one taxpayer intends to claim the credit, include on a separate sheet the name, address and taxpayer ID number for all taxpayers intending to claim the credit.

3. OWNER INFORMATION, if applicant is other than owner (if owner is applicant, write "same")

Name:

Address:

City/Town:

State:

Zip:

Telephone:

4. PROJECT CONTACT

☐ Applicant ☒ Owner ☐ Other (specify below)

Name: Alex Alvarez

Address: 2274 Adobe Dr

City/Town: Fort Collins

State: CO

Zip: 80525

Telephone: 970 980 7417

5. PROPERTY DESCRIPTION (see instructions):

Two story Victorian residential home built in 1903.

Wood frame and wood siding, original wood floors, original hardware throughout, original wood trim on exterior and interior, original stairway in interior with original wood railing, balusters, and posts.

Main level floor plan includes kitchen, separate dining room, bathroom, living room, and 1 bedroom. 2nd level floor plan includes

3 bedrooms and 1 bathroom. Full unfinished basement.

Property backs to ditch 6.




Original Date of construction: 1903

6. PHOTOGRAPHS OF THE PROPERTY MUST BE INCLUDED (see instructions)
(if drawings are available, they should also be included)

7. DESCRIPTION OF REHABILITATION

<div data-bbox="133 251 219 351" data-label="Text"> <p>1.</p> </div> <div data-bbox="323 242 713 297" data-label="Text"> <p>Architectural Feature: <u>Roofing</u></p> </div> <div data-bbox="323 302 692 334" data-label="Text"> <p>Describe feature and its condition:</p> </div> <div data-bbox="308 351 799 553" data-label="Text"> <p>The roof has significant hail damage, as well as gutters.</p> </div> <div data-bbox="150 729 366 785" data-label="Text"> <p>Photo no. <u>1-5</u></p> </div> <div data-bbox="470 742 606 774" data-label="Text"> <p>Drawing no.</p> </div>	<div data-bbox="875 240 1234 272" data-label="Text"> <p>Describe work/impact on feature:</p> </div> <div data-bbox="849 344 1628 572" data-label="Text"> <p>The entire roof will be replaced with a new, impact-resistant, Class 4 shingle roof, as well as all new gutters.</p> </div>
<div data-bbox="133 804 219 904" data-label="Text"> <p>2.</p> </div> <div data-bbox="328 798 789 889" data-label="Text"> <p>Architectural Feature: <u>Exterior siding and trim and paint</u></p> </div> <div data-bbox="328 857 697 889" data-label="Text"> <p>Describe feature and its condition:</p> </div> <div data-bbox="150 919 826 1261" data-label="Text"> <p>The exterior paint throughout the whole property is in very bad shape. Much of it is chipped and peeling, parts are all the way to the wood trim. Some pieces of siding are rotted and chipped and need to be replaced.</p> </div> <div data-bbox="150 1295 389 1349" data-label="Text"> <p>Photo no. <u>6-33</u></p> </div> <div data-bbox="474 1308 611 1340" data-label="Text"> <p>Drawing no.</p> </div>	<div data-bbox="880 793 1239 825" data-label="Text"> <p>Describe work/impact on feature:</p> </div> <div data-bbox="839 855 1632 1364" data-label="Text"> <p>The entire exterior needs to be scraped in preparation for new paint. There is a presence of lead-based paint, so will need lead-based paint containment as part of the preparation work. The full exterior siding and trim will be freshly painted using the same colors that are currently there.</p> </div>
<div data-bbox="133 1366 219 1466" data-label="Text"> <p>3.</p> </div> <div data-bbox="337 1383 568 1412" data-label="Text"> <p>Architectural Feature:</p> </div> <div data-bbox="337 1440 703 1470" data-label="Text"> <p>Describe feature and its condition:</p> </div> <div data-bbox="153 1904 262 1936" data-label="Text"> <p>Photo no.</p> </div> <div data-bbox="436 1902 574 1936" data-label="Text"> <p>Drawing no.</p> </div>	<div data-bbox="888 1378 1247 1410" data-label="Text"> <p>Describe work/impact on feature:</p> </div>

DESCRIPTION OF REHABILITATION (continued)

	Architectural Feature: Describe feature and its condition:	Describe work/impact on feature:
Photo no.	Drawing no.	
	Architectural Feature: Describe feature and its condition:	Describe work/impact on feature:
Photo no.	Drawing no.	
	Architectural Feature: Describe feature and its condition:	Describe work/impact on feature:
Photo no.	Drawing no.	

8. COST ESTIMATE OF PROPOSED WORK

Itemized:

Roof and gutters replacement: \$9,500

Full exterior paint job: \$7,850

Estimated total qualified costs: \$17,350

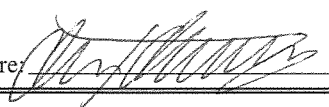
Estimated total project cost: \$17,350

9. PROJECT STARTING DATE: Between 10/25/18' and 12/01/18'

PROJECT COMPLETION DATE: By 12/31/18'

10. APPLICANT'S SIGNATURE

I hereby apply for preliminary approval to proceed with the above described work for which I intend to claim a state income tax credit for historic rehabilitation. I attest that I am the property's owner or a qualified tenant with a lease of five or more years and that the information I have provided is, to the best of my knowledge, true and correct. I hereby agree to allow representatives of the Reviewing Entity access to the property as may be necessary and reasonable for the review and approval of this application.

Signature: 

Date: 10/15/18'

CERTIFICATIONS
(for official use only)

Name of Property: Johnston House Applicant: Alex Alvarez

The Reviewing Entity certifies that this property:

- ☐ is individually listed in the State Register of Historic Properties.
- ☐ is a local landmark designated by a certified local government.
- ☒ is located in a historic district that is:
- ☐ on the State Register of Historic Properties
- ☒ locally designated by a certified local government; and
- this property ☒ contributes ☐ does not contribute to the significance of the district.
- ☐ is not listed in the State Register of Historic Properties nor is it a local landmark designated by a certified local government.

The Reviewing Entity has reviewed the application and:

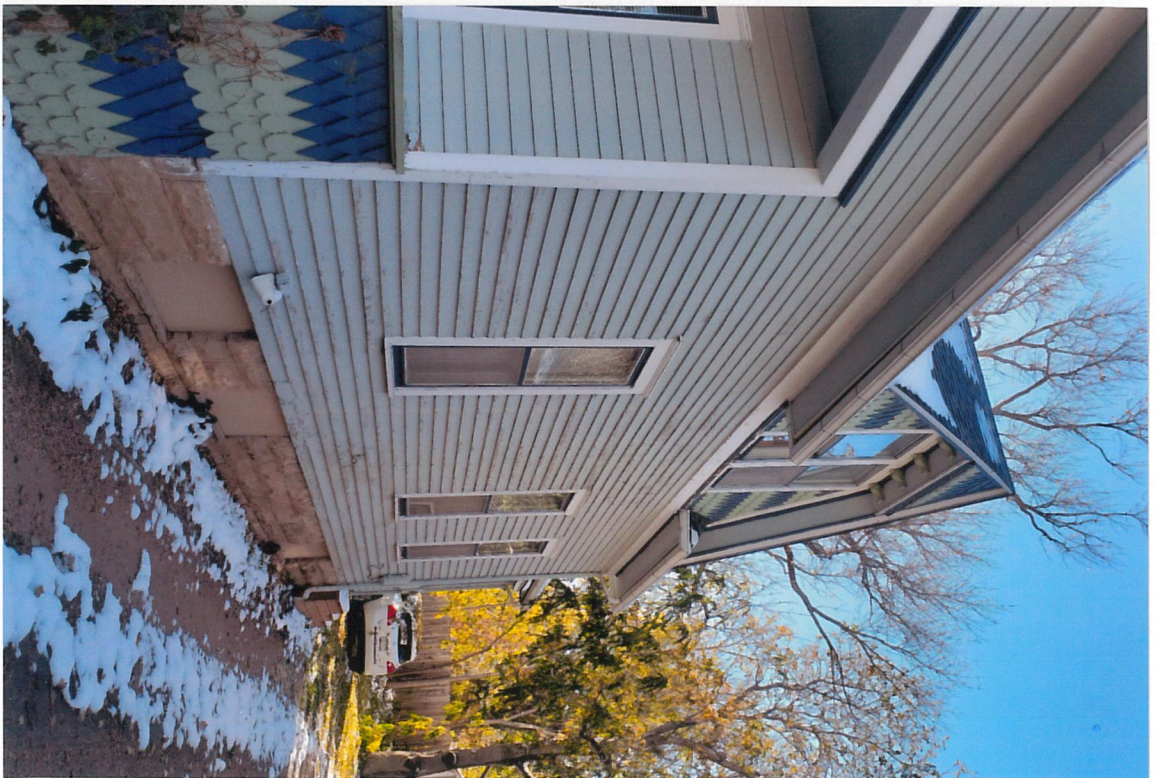
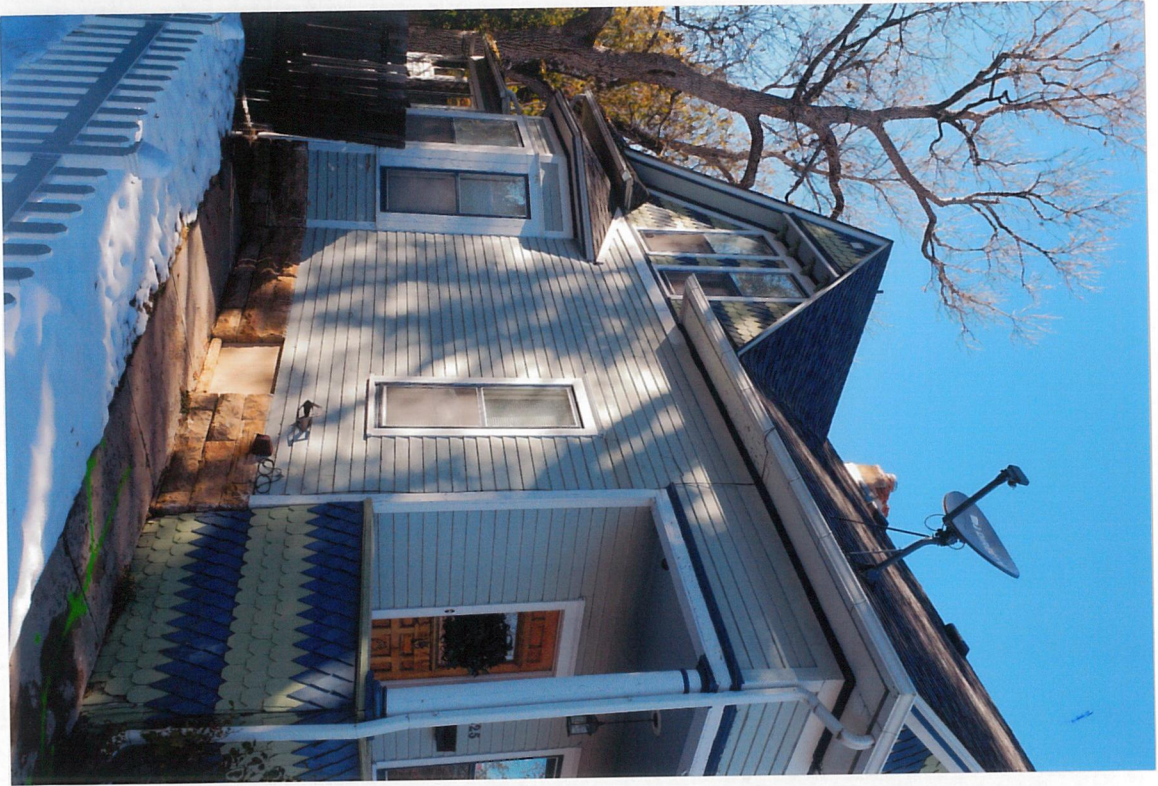
- ☒ approves the application as submitted and grants preliminary approval authorizing the owner to proceed with the proposed work.
- ☐ approves the application with the conditions stated below and grants preliminary approval authorizing the owner to proceed with the work with the understanding that these conditions shall be met.
- ☐ rejects the application for the following reason(s):
- ☐ tables the application and requests the following additional information before the application will be reconsidered:

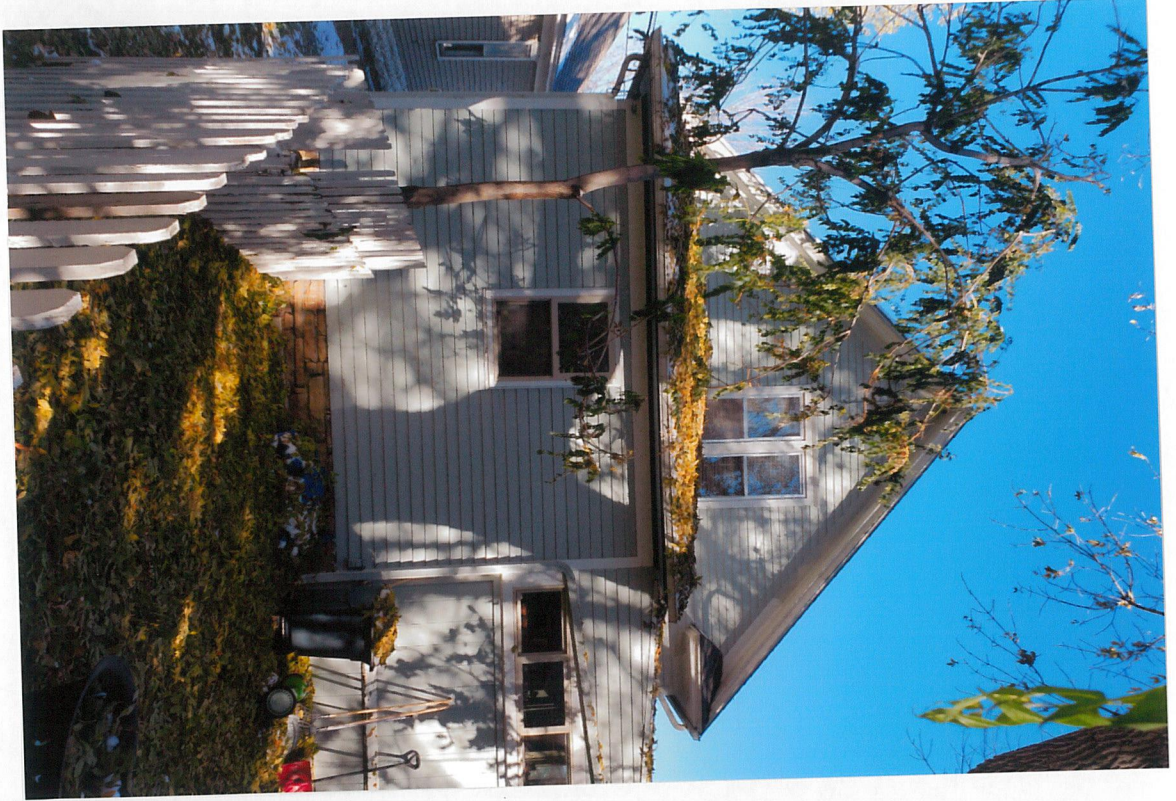
Signature: Betsy Kellens Reviewing Entity: Greeley Date: 10/30/18
(specify SHPO or name of CLG)





















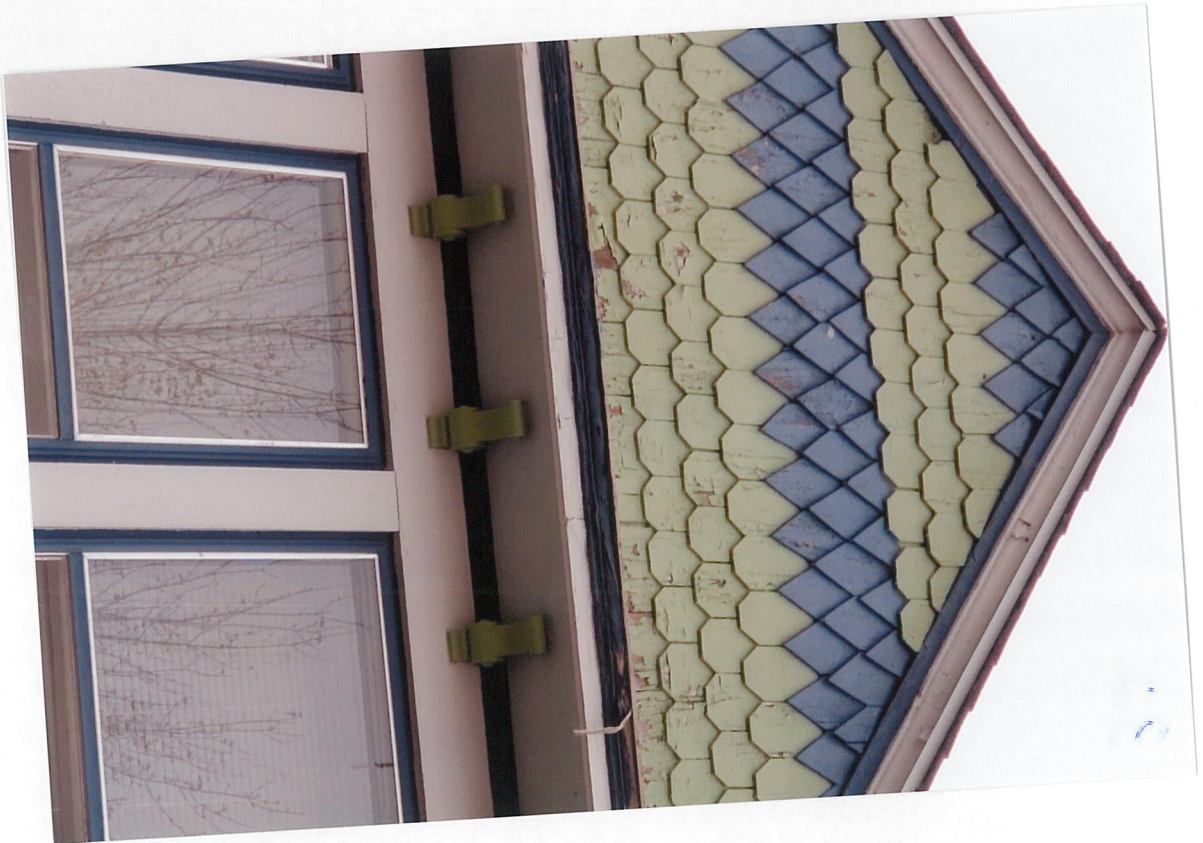














APPLICATION FOR COLORADO STATE INCOME TAX CREDIT
FOR HISTORIC PRESERVATION (1990 CREDIT)

Pursuant to House Bill 90-1033 (CRS 39-22-514)

PART 2 -- FINAL APPROVAL

GTHPO
rec'd
8/12/19

1. PROPERTY INFORMATION

Name of Property

Address 1525 9th Ave

City/Town Greeley County Weld Zip 80631

Name of Registered Historic District Monroe Avenue Historic District

Property Type: personal ☒ business ☐ investment (rental)

Use of Property: Current residential rental

After Rehabilitation residential rental

Legal Description:

GR 3237 S45' N80' L11 BLK163 PATTON & BIGGAR SUB

2. APPLICANT INFORMATION (taxpayer claiming the credit)

Name Alex Alvarez

Type of Entity: Individual

Partnership: General ☐ Limited

Corporation: Regular ☐ Subchapter S

Limited Liability Company

Name of authorized company official

(if applicant is not an individual):

Business address:

City/Town _____ State _____ Zip _____

Telephone () _____

Residential address: 2274 Adobe Dr. #2

City/Town Fort Collins State CO Zip 80525

Telephone (970) 980 7417

Taxpayer Identification Number

(or Social Security Number):

Applicant is: (check one) owner ☒ tenant

If more than one taxpayer intends to claim the credit, include on a separate sheet the name, address and taxpayer ID number for all taxpayers intending to claim the credit.

3. OWNER INFORMATION, if applicant is other than owner (if owner is applicant, write "same")

Name Same

Address

City/Town _____ State _____ Zip _____

Telephone () _____

4. PROJECT CONTACT

☒ Applicant ☒ Owner ☐ Other (specify below)

Name Alex Alvarez

Address

City/Town _____ State _____ Zip _____

Telephone (970) 980 7417

5. PROJECT STARTING DATE 02/04/2019

PROJECT COMPLETION DATE 08/05/2019

6. PHOTOGRAPHS OF THE PROPERTY MUST BE INCLUDED (see instructions)

7. PROJECT COSTS

Itemized:

- Exterior rehab and painting - See attached invoice from District Painting
- \$15,300.00
- Roof replacement with class 4 shingle - See attached invoice
from Bob Behrends Roofing
- \$8,559.80
- Boiler replacement with high-efficiency unit - See attached
invoice from Hydro Plumbing & Heating
- \$5,000.00

Total qualified costs

\$28,859.80

Total project cost

\$28,859.80

8. APPLICANT'S SIGNATURE

I hereby attest that I am the property's owner or a qualified tenant with a lease of five or more years, that all work on this project has been completed and executed according to the proposed project description as stated in Part 1 and approved by the Reviewing Entity, and that all itemized costs are allowable to claim for tax credits under CRS 39-22-514.5 (2)(k)(II). I hereby agree to allow representatives of the reviewing entity access to the property as may be necessary and reasonable for the final approval of the completed work.

Name



Date 08/13/19

34

distinctpaintingco@gmail.com
http://www.distinctpaintingco.com
pany.com



DISTINCT PAINTING Co.

BILL TO

Alex Alvarez
1525 9th Ave
Greeley, CO 80631

INVOICE # 1315**DATE 11/19/2018****DUE DATE 07/04/2019****TERMS Net 30**

RRP Supplies And Materials Tyvek suits, respirators, cartridges, gloves, tape, masking, plastic sheeting (6mil), haul off-disposal fees, duct tape, caution signs, caution tape, 5 gallon buckets, 2x4s to build containment walls etc.	1	785.00	785.00
RRP-Lead Abatement Safely and responsibly remove loose-dead lead paint, contain and haul away.	1	3,850.00	3,850.00
Oil Primer For Base Coat Oil primer	25	39.00	975.00
Masking Materials Urethane sealant, plastic masking, paper masking, tape, etc. (masking materials and sealant for once loose lead is removed and house is primed)	1	300.00	300.00
Paramount Premium Paint Diamond Vogel Satin latex Paint formulated for this region and climate	30	43.00	1,290.00
Repairs Replace and add pieces of the shake shingles to match original shingle. Add 1x2 batte boards to the bottom of some storm windows, replace trim moulding on back window, and replace tops of trim moulding on front side of house	1	300.00	300.00
Exterior House Re Paint Once house is prepped: apply two coats of paint to the body of the house, shingles at the peaks, trim and windows	1	7,500.00	7,500.00
Door finish Sand, stain, sand seal/sand, apply polyurethane	1	300.00	300.00

PAYMENT	15,300.00
BALANCE DUE	\$0.00

**Hydro Plumbing and Heating, INC**

4 Woodbine CT
Windsor, CO 80550
(970) 686-9000
www.hydroplumbingandheat.com

Invoice

BILL TO
Alex Alvarez
2274 Adobe Dr
Fort Collins, Co 80525

INVOICE 3324
DATE 05/10/2019
TERMS Due on receipt

DATE	DESCRIPTION OF WORK	QTY	RATE	AMOUNT
05/10/2019	1525 9th Ave Greeley, Co			
05/10/2019	Remove and replace existing Ray Pack boiler with new allied ENG. 180,000 BTV boiler. Existing boiler built in 1991. New Grunfos Circ pump and Caleffi air separator to be installed as well. Purge system.		5,000.00	5,000.00
	\$5,000.00 Due upon completion.			

Thank you for choosing Hydro Plumbing and Heating!

PAYMENT 5,000.00
BALANCE DUE \$0.00

PAID

**VERIFICATION OF QUALIFIED NATURE
OF HISTORIC PRESERVATION EXPENDITURES – 1990 CREDIT**

(To Be Filed With Tax Return)

QUALIFIED PROPERTY

Name of Property Johnston House

Address 1525 9th Ave

City/Town Greeley County Weld

Historic District Name (if applicable) Monroe Avenue Historic District

TAXPAYER

Colorado Taxpayer ID Number (or SSN) _____

Name Alex Alvarez

Address _____ Phone () _____

City/Town _____ State _____ Zip _____

QUALIFIED COSTS AND AMOUNT OF TAX CREDIT

Total Qualified Cost For Project \$28,859.80

Maximum Tax Credit for Project \$5,771.96

Maximum Tax Credit for this Taxpayer \$5,771.96

PROJECT COMPLETION DATE: 8/5/2019

REVIEWING ENTITY

Name Greeley

Authorized Official _____

Address 1160 10th St, Ste 201 Phone 970 350-9222

City/Town Greeley State CO Zip 80631

I, the duly, authorized official of the above named Reviewing Entity, hereby verify that the above named property is a qualified property pursuant to CRS 39-22-514(12)(h) and that the completed qualified rehabilitation meets the provisions of CRS 39-22-514(3)(a)(III)(A)(B)(C).

By: _____ Date _____
(signature of official)

CERTIFICATION
(for official use only)

Name of Property Johnston House Applicant Alex Alvarez

The Reviewing Entity has reviewed this application and:

☒ Approves the completed work

☐ Does not approve the completed work

☐ Returns the application and requests additional information as stated below before the application will be reconsidered.

☐ Other

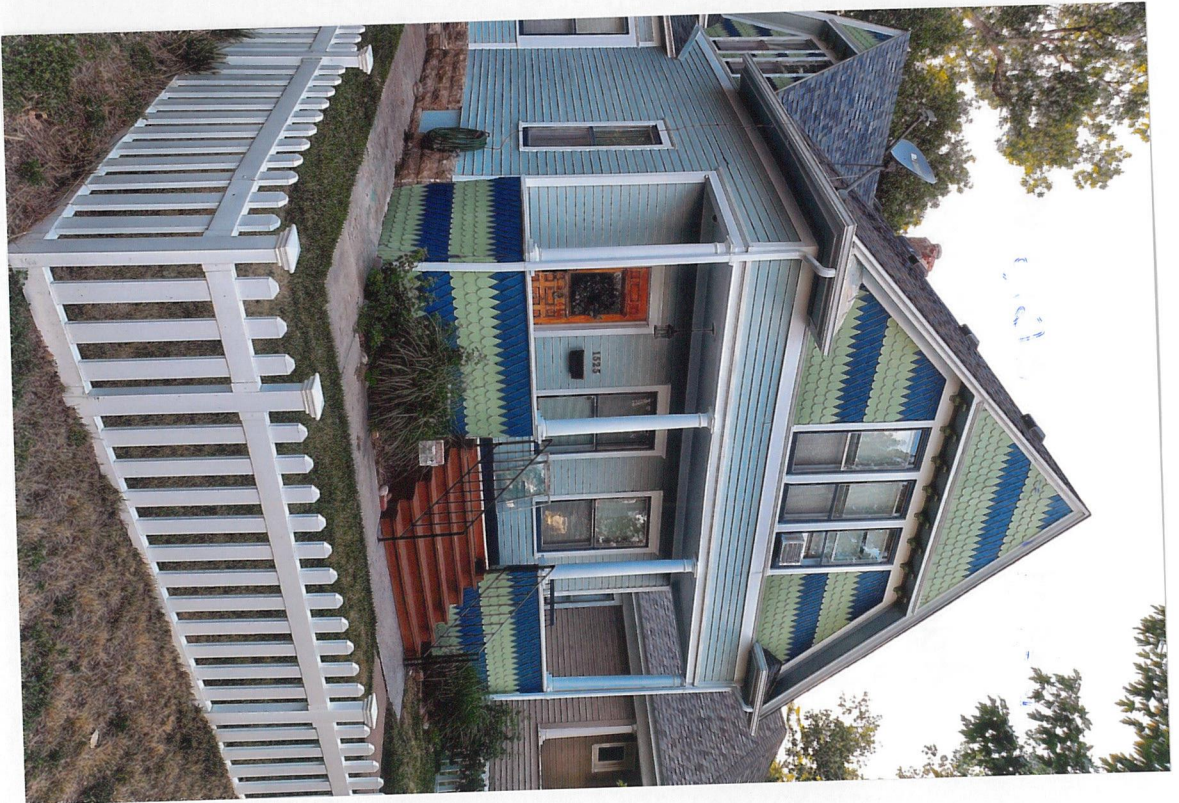
TOTAL APPROVED AMOUNT FOR REHABILITATION

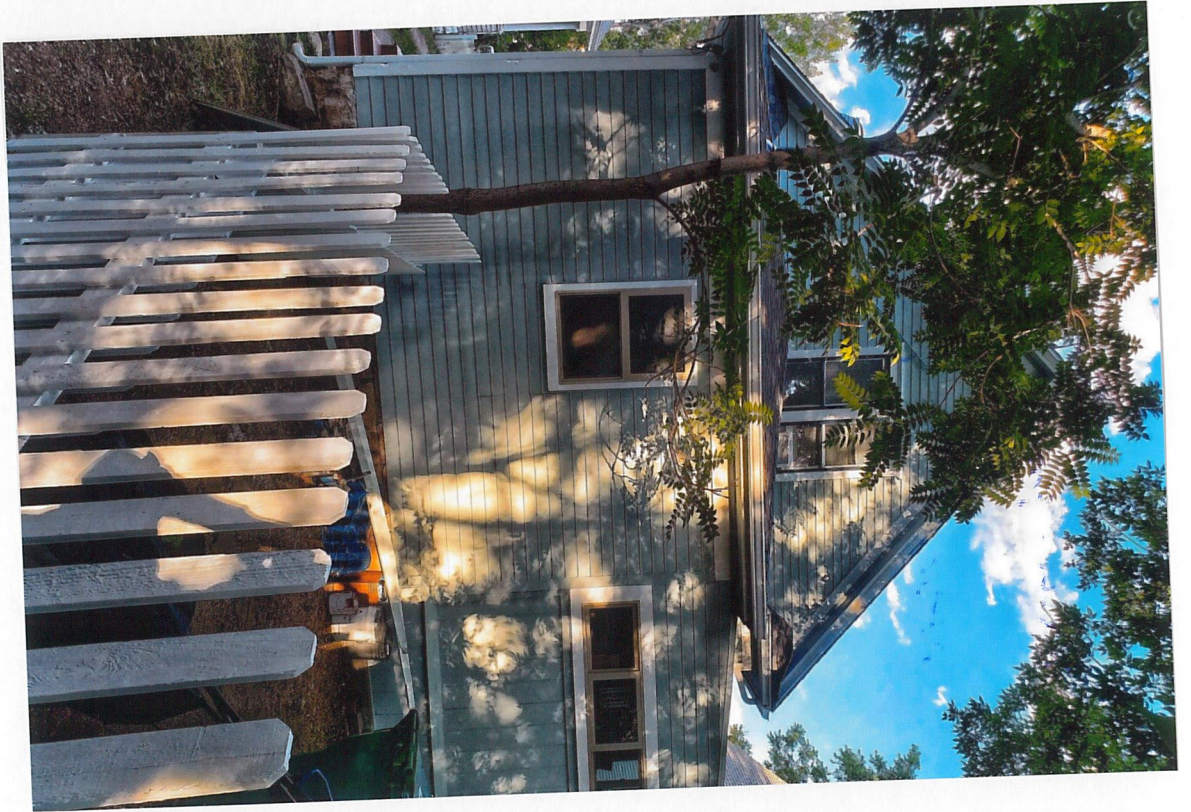
Reviewing Entity: Greeley
(specify SHPO or name of CLG town)

Date

**** NOTICE TO TAXPAYER ****

DO NOT FILE THIS FORM WITH YOUR TAX RETURN











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Secretary's Standards for Rehabilitation

Rehabilitation projects must meet the following Standards, as interpreted by the National Park Service, to qualify as “certified rehabilitations” eligible for the 20% rehabilitation tax credit. The Standards are applied to projects in a reasonable manner, taking into consideration economic and technical feasibility.

The Standards apply to historic buildings of all periods, styles, types, materials, and sizes. They apply to both the exterior and the interior of historic buildings. The Standards also encompass related landscape features and the building’s site and environment as well as attached, adjacent, or related new construction.

1. A property shall be used for its historic purpose or be placed in a new use that requires minimal change to the defining characteristics of the building and its site and environment.
2. The historic character of a property shall be retained and preserved. The removal of historic materials or alteration of features and spaces that characterize a property shall be avoided.
3. Each property shall be recognized as a physical record of its time, place, and use. Changes that create a false sense of historical development, such as adding conjectural features or architectural elements from other buildings, shall not be undertaken.
4. Most properties change over time; those changes that have acquired historic significance in their own right shall be retained and preserved.
5. Distinctive features, finishes, and construction techniques or examples of craftsmanship that characterize a historic property shall be preserved.
6. Deteriorated historic features shall be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature shall match the old in design, color, texture, and other visual qualities and, where possible, materials. Replacement of missing features shall be substantiated by documentary, physical, or pictorial evidence.
7. Chemical or physical treatments, such as sandblasting, that cause damage to historic materials shall not be used. The surface cleaning of structures, if appropriate, shall be undertaken using the gentlest means possible.

8. Significant archeological resources affected by a project shall be protected and preserved. If such resources must be disturbed, mitigation measures shall be undertaken.
9. New additions, exterior alterations, or related new construction shall not destroy historic materials that characterize the property. The new work shall be differentiated from the old and shall be compatible with the massing, size, scale, and architectural features to protect the historic integrity of the property and its environment.
10. New additions and adjacent or related new construction shall be undertaken in such a manner that if removed in the future, the essential form and integrity of the historic property and its environment would be unimpaired.

Guidelines for Rehabilitating Historic Buildings

The **Guidelines** assist in applying the Standards to rehabilitation projects in general; consequently, they are not meant to give case-specific advice or address exceptions or rare instances. For example, they cannot tell a building owner which features of an historic building are important in defining the historic character and must be preserved or which features could be altered, if necessary, for the new use. Careful case-by-case decision-making is best accomplished by seeking assistance from qualified historic preservation professionals in the planning stage of the project. Such professionals include architects, architectural historians, historians, archeologists, and others who are skilled in the preservation, rehabilitation, and restoration of the historic properties. These Guidelines are also available in **PDF format**.

The **Guidelines on Sustainability for Rehabilitating Historic Buildings** stress the inherent sustainability of historic buildings and offer specific guidance on “recommended” rehabilitation treatments and “not recommended” treatments, which could negatively impact a building’s historic character. These Guidelines are also available as an **interactive web feature**.

<http://www.nps.gov/tps/standards/rehabilitation.htm>

Colorado Historic Preservation Income Tax Credit (Updated July 2018)

AVAILABLE PROGRAMS

From July 1, 2015 through December 31, 2019, Colorado will offer taxpayers two different programs that offer income tax credit for the rehabilitation of qualified historic properties.

The Colorado Job Creation and Main Street Revitalization Act of 2014 (CRS 39-22-514.5) offers a 20 – 35 percent tax credit for the rehabilitation of a qualified commercial (income-producing) property, as well as a 20 – 30 percent credit for the rehabilitation of a qualified residential (owner-occupied) property. This law currently expires on December 31, 2029.

The Historic Preservation Tax Credit Act of 1990 (CRS 39-22-514) offers a 20 percent tax credit for the rehabilitation of any qualified historic property. This law is set to expire on December 31, 2019.

WHICH CREDIT TO USE?

Most taxpayers will want to take advantage of the Colorado Job Creation and Main Street Revitalization Act of 2014 (the 2014 credit) because it offers a higher return on expenditures (up to 35%), a higher per-project credit cap on commercial properties (up to \$1 million in tax credits as opposed to \$50,000), and greater flexibility (tax credits for income-producing properties can be sold to other taxpayers without penalty).

The 2014 credit for commercial properties has a limited availability; each year the state sets aside funding (a total of \$10 million each year from 2017 through 2029) for this credit, but when the funding is exhausted, no further credits can be given. By contrast, the old 1990 credit is available to all property owners at all times.

However, applicants claiming the 1990 credit may be unable to apply that credit to their tax returns in years where the state's revenues fail to increase by at least 6% over the previous year. By contrast, applicants claiming the 2014 credit can apply that credit to their tax returns every year, regardless of state revenue growth.

Owners of commercial properties who are unable to take advantage of the 2014 credit can still apply for the 1990 credit and receive up to \$50,000 in credits for their project.

Beginning on January 1, 2020, the 2014 credit will be the only option for taxpayers.

ELIGIBLE PROPERTIES

Under both the 2014 and 1990 credits, eligible properties must be:

- ◆ At least 50 years old, AND;
- ◆ Historically designated by being:
 - Listed on the National Register of Historic Places
 - Listed on the Colorado State Register of Historic Properties
 - Listed as a Historic Landmark by a Certified Local Government (CLG)*
 - Designated as a “contributing structure” in a historic district that is listed on the National Register, State Register, or landmarked by a CLG

*As of June 2018, Colorado has 61 Certified Local Governments. A full list of these CLGs can be found at the end of this document.

ELIGIBLE TAXPAYERS

The 1990 credit limits the program to:

- ◆ Property owners, or
- ◆ Tenants with a lease of at least five years

The 2014 credit expands the availability of the program to:

- ◆ Property owners
- ◆ Tenants of residential properties with a lease of at least 5 years
- ◆ Tenants of commercial properties with a lease of at least 5 years (rural areas) or 39.5 years (urban areas)*
- ◆ Potential buyers of a historic property who have a purchase agreement or an option to purchase

*For the definitions of “rural” and “urban” areas, refer to the section on Rural and Urban areas at the end of this document

ELIGIBLE PROJECTS

- ◆ Projects must involve physical preservation, restoration, or rehabilitation and must preserve the historic character of the property
- ◆ Projects can retain the original use of the building or adopt the building for a new use
- ◆ Projects must meet the Secretary of the Interior’s Standards for Rehabilitation

ELIGIBLE EXPENDITURES

Tax credits are calculated as 20 – 35 percent of Qualified Rehabilitation Expenditures.

- ◆ Under the 1990 credit, qualified rehabilitation expenditures include “hard costs” associated with the physical preservation of a historic property, including demolition, carpentry, sheetrock, plaster, painting, doors and windows, fire sprinkler systems, roofing and flashing, exterior repairs, tuck-pointing, etc.
- ◆ Under the 2014 credit, qualified rehabilitation expenditures for commercial properties are defined by the Internal Revenue Service (under Section 47(c)(2)(A) of the Internal Revenue Code)
- ◆ Under the 2014 credit, qualified rehabilitation expenditures for residential properties are defined by state law (under CRS 39-22-514.5(2)(k)).
- ◆ Qualified rehabilitation expenditures typically do not cover the following:
 - “Soft costs” such as: appraisals; design fees; legal, accounting, and realtor fees; building permit, use, and inspection fees; insurance; and rent loss during construction
 - Acquisition costs
 - New additions or enlargements
 - Excavation, grading, paving, and landscaping
- ◆ Some expenditures for kitchen and bathroom projects (appliances, fixtures, cabinets, etc.) qualify for the 1990 credit, but not the 2014 credit.

EXTENT OF TAX SAVINGS

Tax credits directly reduce (dollar for dollar) the amount of income tax owned by the taxpayer in a given tax year. Available credits for all programs can be carried forward for up to ten years. Taxpayers can reduce the amount of state income tax credit they owe to zero if they have the available credits to do so.

- ◆ The 1990 credit is calculated as 20% of the Qualified Rehabilitation Expenditures, with a cap of \$50,000 in credits per property. This is a lifetime cap.
- ◆ The 2014 credit for residential properties is calculated as 20% of the Qualified Rehabilitation Expenditures, with a cap of \$50,000 in credits per property. However, this is not a lifetime cap. It resets to zero upon sale of the property to a new owner or after ten years.
- ◆ The 2014 credit for commercial properties is calculated as 25% of all Qualified Rehabilitation Expenditures under \$2 million, and 20% of all Qualified Rehabilitation Expenditures above \$2 million. For example, an owner who spends \$1,000,000 in qualified rehabilitation expenditures would receive \$250,000 in tax credits (25%), while an owner who spends \$3,000,000 would receive \$700,000 (25% on the first \$2 million and 20% on the remaining \$1 million). The commercial credit is capped at \$1 million per project, per property, per year. There is no lifetime cap.
- ◆ Residential and commercial properties under the 2014 credit can receive an additional 5% “bonus credit” if they are located in a county that has been declared a Federal or State Disaster Area.* The property owner is still limited to a maximum of \$50,000 (residential) or \$1,000,000 (commercial) in credits.
- ◆ **Starting on January 1, 2020**, residential and commercial properties under the 2014 credit can receive an additional 10% “bonus credit” if they are located in a Rural Area, as defined by state law. Again, the property owner is limited to a maximum of \$50,000 (residential) or \$1,000,000 (commercial) in credits.
- ◆ Taxpayers cannot claim both the “disaster” and “rural” bonuses described above, even if they qualify for both. They must choose one or the other.

*Note: A list of areas that are eligible for the “disaster” and “rural” bonuses can be found at the end of this document

- ◆ A 2008 provision of the 1990 credit stipulates that projects commencing on or after January 1, 2011 (and before December 31, 2019) are subject to an additional credit limitation. If the state’s general fund revenues are predicted to fall short of a certain threshold in a given year, the credit cannot be taken for that year. Taxpayers can contact History Colorado or the Colorado Department of Revenue to determine if the credits are available for the current year. This information is also available online at <https://www.colorado.gov/pacific/tax/income-tax-credits> (select “historic property preservation”)
- ◆ NOTE: the above provision applies **ONLY** to the 1990 credit. Projects completed under the new 2014 law are **NOT** subject to these budgetary limitations, and taxpayers who hold these credits may use them regardless of state revenue projections.

MINIMUM EXPENDITURES

- ◆ Under the 1990 credit, the costs associated with the rehabilitation of the property must exceed \$5,000
- ◆ Under the 2014 credit, the costs associated with the rehabilitation of a residential property must exceed \$5,000
- ◆ Under the 2014 credit, the costs associated with the rehabilitation of a commercial property must exceed 25% of the *adjusted basis* of the property. This basis is defined by state law as being “the purchase price of the qualified commercial structure less the value attributed to the land”
- ◆ For commercial projects commencing on or after January 1, 2020, the costs associated with the rehabilitation must exceed \$20,000 (the adjusted basis method will no longer be used after December 31, 2019)

EFFECTIVE DATES

- ◆ The 1990 credit came into effect on January 1, 1991, and is set to end on December 31, 2019.
- ◆ The 2014 credit came into effect on July 1, 2015, and is currently in effect through December 31, 2029.

ASSOCIATED FEES

- ◆ The 1990 credit has an initial application fee of \$250 (which may be waived by the reviewing entity for projects costing less than \$15,000). There is also an additional charge based on the cost of the project:
 - No additional charge for projects costing less than \$15,000
 - \$250 for projects costing between \$15,000 and \$49,999.99
 - \$500 for projects costing between \$50,000 and \$99,999.99
 - \$750 for projects costing \$100,000 or more
- ◆ The 2014 credit allows reviewing entities to charge a “reasonable application fee” for the review of residential projects, but does not specify a maximum or minimum fee. This fee is charged at the start of the project review period. The state of Colorado, and most local reviewing entities, charge the same fee for the 2014 credit as they do for the 1990 credit listed above (\$0 to \$1,000, depending on cost)
- ◆ The 2014 credit allows reviewing entities to charge a review fee not exceeding \$500 for the review of commercial projects
- ◆ Under the 2014 credit, commercial projects are also subject to an additional fee upon the completion of the project and the issuance of tax credits. This additional fee is 3% of the value of the credits issued. For example, a commercial project with \$1 million in qualified rehabilitation expenditures would receive a tax credit of \$250,000. This would be subject to a 3% “issuance fee” (or \$7,500)

APPLICATION PROCEDURES

- ◆ Under the 1990 credit, projects are reviewed by the Certified Local Government (CLG) or, in the absence of a participating CLG, by History Colorado
 - The applicant submits preliminary work plans, project description, and current photos to the reviewing entity and pays an application fee (if required)
 - The reviewing entity reviews the proposed scope of work and, if it meets the program requirements, notifies the applicant that the project has preliminary approval
 - Upon completion of the project, the applicant submits final paperwork, including project costs and photographs of completed work, and pays any required fees
 - The reviewing entity reviews the final paperwork to confirm that the work performed was done in accordance with the previously-approved preliminary application.
 - The reviewing entity certifies the work as completed and meeting the requirements of the program, and a tax credit is issued to the applicant
- ◆ Under the 2014 credit, the review process for residential properties is exactly the same as under the 1990 law (see above)
- ◆ Under the 2014 credit, all applications for commercial properties are reviewed by the Colorado Department of Economic Development and International Trade (OEDIT) and by History Colorado
 - The applicant submits preliminary work plans to the OEDIT through that agency’s web site (www.advancecolorado.com)

- OEDIT and History Colorado review the proposed scope of work to certify that it meets program requirements
- Upon approval, OEDIT reserves a portion of that year's available "pool" of tax credit funding to the applicant. If the "pool" of funding has been reduced to zero, the applicant will be notified and will automatically be placed in line for the next year's funding.
- Upon completion of the project, the applicant submits final paperwork, including project costs and photographs of the completed work. All project costs must be audited by a Certified Public Accountant not affiliated with the owner, and proof of this audit must be submitted to OEDIT.
- OEDIT and History Colorado review the final paperwork to ensure compliance with the program requirements
- OEDIT and History Colorado certify the project as complete. OEDIT issues a tax credit certificate to the applicant

PROJECT TIMING

- ◆ Under the 1990 credit, all projects are accepted on a rolling, year-round basis.
- ◆ Under the 2014 credit, all residential projects are also accepted on a rolling, year-round basis.
- ◆ Under the 2014 credit, commercial projects are also accepted on a rolling, year-round basis. However, the total amount of available credits for a given year is limited by the amount of money that has been set aside by the State Legislature for that year:
 - For 2017 through 2029, \$5 million for projects qualified costs of under \$2 million and \$5 million for projects with qualified costs of over \$2 million
- ◆ Because the "pool" of available money in any given year is limited, applicants are encouraged to apply for the credit as early as possible during the Calendar Year (January 1 through December 31). If the "pool" is depleted during a given year, later applicants will be notified of this fact and will be placed in line for the next year's allocation of credits.

PROJECT LENGTH

- ◆ The 1990 credit requires that all projects be completed within 24 months of starting work.
- ◆ The 2014 credit eliminates time limits for residential and commercial projects. However, applicants for the commercial credit must meet several milestones to keep their allocation of credits:
 - The project must be at least 20% complete within 18 months of approval;
 - The applicant must complete at least 10% of the total work every year
 - All updates must be submitted to OEDIT in order to keep the allocation of credits
 - Projects that do not meet these timetables may lose their credits. Lost credits are returned to the "pool" for use by other applicants.
- ◆ Because the 2014 credit currently sunsets at the end of 2029, and because the State has not yet set aside any funding for Fiscal Year 2030 for the credit, all applicants should plan on completing their projects before December 31, 2032. Projects completed after this date may not be able to claim and use credits even if a preliminary allocation of credits was obtained.

SUBMISSION DEADLINES

- ◆ For the 1990 credit, initial applicants for projects can be submitted:
 - Before the project begins
 - At any time during the project's two-year project window (this can include work that has already been completed during that two-year period)
 - Within 60 days of project completion
- ◆ For residential projects using the 2014 credit, initial applicants for projects can be submitted:
 - Before the project begins
 - In the middle of a project (this can include work that has already been completed, up to 24 months prior to submittal)
 - Within 60 days of project completion
- ◆ For commercial projects using the 2014 credit, initial applicants for projects can be submitted:
 - Before the project begins
 - In the middle of a project (this can include work that has already been completed, up to 60 days prior to submittal)
 - Within 60 days of project completion
- ◆ In all cases, applicants who wish to claim tax credits for already completed work should be prepared to provide documentation of said work ("before" and "after" photographs, project costs and timelines, etc.)

SALE OF CREDITS

The 2014 credit allows commercial property owners, non-profits, and (long-term) lease holders to sell or transfer tax credits that they have obtained to other Colorado taxpayers. Holders of tax credits can sell or transfer all or part of their credits to other Colorado taxpayers at any time. In addition, "Colorado taxpayers" refers only to taxpayers (individuals, corporations, etc.) who have a state tax liability; they do not have to be physically located or headquartered in Colorado. Buyers of tax credits may, in turn, sell or transfer them to a third party without penalty.

CERTIFIED LOCAL GOVERNMENTS (updated June 2018)

The following cities and counties are designated as Certified Local Governments. These governments have the power to designate properties as historic landmarks (and to create historic districts); under state law, these designated properties may be eligible for tax credits under both the 1990 and 2014 credit programs.

Certified Local Governments have the authority to review and approve tax credit projects under the 1990 law and residential tax credit projects under the 2014 law. Local governments can choose to review or to not review applications. In cases where the local government has chosen not to review tax credit project, and in communities that are not Certified Local Governments, History Colorado will provide the review instead.

Note: Certified Local Governments must pass separate ordinances declaring their intention to review and approve tax credits projects under the 1990 and 2014 laws. As of June 1, 2018, there are 32 Certified Local Governments that review projects under the 1990 law, and 1 (Denver) that reviews projects under the 2014 law.

Certified Local Governments:

Alamosa	Elizabeth	Longmont*
Aspen*	Erie	Louisville
Aurora*	Florence	Loveland
Berthoud*	Fort Collins*	Manitou Springs*
Black Hawk*	Fort Lupton*	New Castle
Boulder*	Georgetown*	Northglenn
Boulder County*	Gilpin County*	Otero County
Breckenridge	Glenwood Springs	Pagosa Springs*
Brighton*	Golden*	Park County*
Broomfield	Greeley*	Pueblo
Buena Vista	Gunnison County	Saguache*
Carbondale*	Idaho Springs*	Salida
Castle Rock*	Kiowa County	Starkville
Central City*	La Junta	Steamboat Springs*
Colorado Springs	La Veta	Telluride*
Cortez	Lafayette	Trinidad
Crested Butte*	Lake City*	Walsenburg
Cripple Creek*	Lakewood	Westminster*
Denver* #	Lamar	Windsor
Durango*	Leadville*	Woodland Park
	Littleton*	

(This Certified Local Government reviews applications for the 1990 historic preservation tax credits)*

(# This Certified Local Government reviews applications for the 2014 historic preservation tax credits)

FEDERAL AND STATE DISASTER AREAS (updated July 2018)

Subsections 5.5(a)(II) and 8(c)(II) of the Colorado Job Creation and Main Street Revitalization Act of 2014 (CRS 39-22-514.5) allow tax credit applicants to claim an additional 5% credit if they are located in a county that has been declared:

- ♦ A major disaster area under Section 102(2) of the Robert T. Stafford Disaster Relief and Emergency Assistance Act (42 USC 512), or;
- ♦ A disaster area under Article 7 of the Colorado Disaster Emergency Act (CRS 24-33.5-700)

An area is declared to be a major disaster area under the Stafford Act by proclamation of the President of the United States. Similarly, an area is declared to be a disaster area under the Colorado Disaster Emergency Act by proclamation of the Governor of Colorado.

Disaster areas, for the purposes of the Colorado Job Creation and Main Street Revitalization Act, are determined to be county-wide in scope. Thus, if the Governor of Colorado declares a disaster area in a portion of a given county, all properties within that county are eligible for the additional 5% credit.

NOTE: Under state law, the additional 5% credit only applies to projects that begin within six years of the date the disaster is declared.

In addition, the additional 5% credit does not allow the total allocation of tax credits to rise above the mandated project caps for projects, which are \$50,000 for residential projects and \$1,000,000 for commercial projects.

LIST OF COUNTIES

(Note: counties listed in **bold** will have their disaster provision expire in calendar year 2018)

County	Designation	Cause	Declared	Expires
Adams	Federal	Flood	9/14/2013	9/14/2019
Arapahoe	Federal	Flood	9/14/2013	9/14/2019
Baca	Federal	Severe Storms	7/15/2015	7/15/2021
Bent	State	Flood	5/26/2017	5/26/2023
Boulder	State	Severe Storms	6/23/2017	6/23/2023
Broomfield	State	Flood	9/13/2013	9/13/2019
Chaffee	State	Flood	9/13/2013	9/13/2019
Clear Creek	Federal	Flood	9/14/2013	9/14/2019
Costilla	State	Fire	7/11/2018	7/11/2024
Crowley	Federal	Flood	9/14/2013	9/14/2019
Custer	State	Flood	5/26/2017	5/26/2023
Denver	Federal	Flood	9/14/2013	9/14/2019
Elbert	Federal	Severe Storms	7/15/2015	7/15/2021
El Paso	Federal	Severe Storms	7/15/2015	7/15/2021
Fremont	State	Flood	5/26/2017	5/26/2023
Garfield	State	Fire	7/16/2018	7/16/2024
Gilpin	Federal	Flood	9/14/2013	9/14/2019
Grand	State	Fire	6/13/2013	6/13/2019
Hinsdale	State	Fire	6/26/2013	6/26/2019
Huerfano	State	Fire	7/11/2018	7/11/2024
Jefferson	State	Severe Storms	6/23/2017	6/23/2023
Lake	Federal	Flood	9/14/2013	9/14/2019
Larimer	State	Severe Storms	6/23/2017	6/23/2023
La Plata	State	Fire	6/15/2018	6/15/2024

County	Designation	Cause	Declared	Expires
Las Animas	State	Fire	6/21/2013	6/21/2019
Lincoln	Federal	Flood	9/14/2013	9/14/2019
Logan	State	Fire	3/20/2017	3/20/2023
Mineral	State	Fire	6/26/2013	6/26/2019
Moffat	State	Fire	10/20/2017	10/20/2023
Montezuma	State	Fire	10/26/2012	10/26/2018
Montrose	State	Fire	7/16/2018	7/16/2024
Morgan	Federal	Severe Storms	7/15/2015	7/15/2021
Otero	State	Flood	5/26/2017	5/26/2023
Park	State	Flood	9/13/2013	9/13/2019
Phillips	State	Fire	3/20/2017	3/20/2023
Prowers	State	Flood	9/13/2013	9/13/2019
Pueblo	State	Flood	5/26/2017	5/26/2023
Rio Blanco	State	Fire	7/16/2018	7/16/2024
Rio Grande	State	Fire	6/26/2013	6/26/2019
Routt	State	Fire	10/20/2017	10/20/2023
Saguache	Federal	Severe Storms	7/15/2015	7/15/2021
San Juan	State	Fire	6/15/2018	6/15/2024
Sedgwick	Federal	Severe Storms	7/15/2015	7/15/2021
Washington	Federal	Severe Storms	7/15/2015	7/15/2021
Weld	State	Severe Storms	6/23/2017	6/23/2023
Yuma	Federal	Severe Storms	7/15/2015	7/15/2021

RURAL AND URBAN AREAS

(updated June 2018)

Subsections 5.5(a)(II) and 8(c)(III) of the Colorado Job Creation and Main Street Revitalization Act of 2014 (CRS 39-22-514.5) allow tax credit applicants to claim an additional 10% credit if they are located within a Rural Area, as defined by Subsections 2(d.3) and 2(o.5) of the law. This additional 10% credit only applies to projects that commence on or after January 1, 2020.

Lease holders of commercial properties in Rural Areas may be eligible for tax credits if they have a leasehold interest of not less than five years, as defined by Subsection 2(i)(III.5).

“Population” is defined as the population of the town, city, or county as of the most recent United States Census. As of June 2018, the most recent U.S. Census was conducted in 2010.

Under Subsections 2(d.3) and 2(o.5) of the law, a Rural Area is defined as:

- ◆ A property that is located in a municipality that has a population of under 50,000 residents and is not located within the Denver Metropolitan Area, or;
- ◆ A property that is located in an unincorporated area of a county that has a total countywide population of under 50,000 residents and is not located within the Denver Metropolitan Area;
- ◆ The “Denver Metropolitan Area” is defined as the following counties: Adams, Arapahoe, Boulder, Broomfield, Denver, Jefferson, and Douglas, with the exception of the towns of Castle Rock and Larkspur.

In general, this means that taxpayers cannot take this bonus 10% credit if:

- ◆ Their property is located within the boundaries of Adams, Arapahoe, Boulder, Denver, or Jefferson Counties (these counties are part of the Denver Metropolitan Area).
- ◆ Their property is located in an unincorporated area of Eagle, El Paso, Garfield, La Plata, Mesa, or Weld Counties (these counties exceed 50,000 in population);
- ◆ Their property is located within the city/town limits of: Colorado Springs, Fort Collins, Grand Junction, Greeley, Longmont, Loveland, Pueblo, or Thornton (these cities exceed 50,000 in population).
- ◆ Their property is located in Douglas County, but is outside of the town limits of Castle Rock and Larkspur (Douglas County, with the exception of Castle Rock and Larkspur, is part of the Denver Metropolitan Area).

Taxpayers who are eligible for both the 5% bonus for being located in a “disaster county” and the 10% bonus for being located in a “rural area” cannot claim both bonuses. They must choose one or the other.

In addition, the additional 10% credit does not allow the total allocation of tax credits to rise above the mandated project caps for projects, which are \$50,000 for residential projects and \$1,000,000 for commercial projects.

Community Development Department MEMORANDUM

TO: Historic Preservation Commission
RE: Update to Building Permit Fee Refund Program Guidelines
FROM: Elizabeth Kellums, Planner III – Historic Preservation
DATE: September 16, 2019

The Historic Preservation Commission adopted the current Building Permit Fee Refund program guidelines in September 2010, and a few minor changes need to be made due to the recent Historic Preservation Code changes. The Code reference in the guidelines needs to be updated with the new section, 18.36.100, and the definitions of alterations, major alterations, minor alterations, and maintenance need to be updated with the definitions in Chapter 18.36 of the Greeley Municipal Code. These minor changes require Historic Preservation Commission approval to adopt the updated version of the guidelines. Staff also recommends eliminating the requirement that the applicant for the building permit provide a notice of intent to apply for the refund. In practice this has not been done, and doesn't provide a significant benefit to require that notice of intent.

ATTACHMENT A – Proposed Updated Version Building Permit Fee Refund Guidelines
ATTACHMENT B – Existing 2010 Building Permit Fee Refund Guidelines

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Building Permit Fee Refund Policies
Historic Preservation Commission
(Adopted 9/13/2010)
Updated:

Building Permit refunds for historical properties are offered by the City of Greeley as an incentive to owners in the maintenance, upkeep and improvement of historic properties. The following policies apply to historically designated properties or contributing properties in an historic district and provide a refund option as described in **Section 18.36.100** of the Greeley Municipal Code.

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Historic Preservation Certificates of Approval are required before work is commenced on a designated historic structure, except as it relates to qualifying interior or maintenance projects (see below).

Eligible Applicants

- Eligible applicants include owners and/or contractors of residential, investment, commercial or industrial properties, as well as non-profit organizations or governmental entities.
- The refund is non-transferable. The only eligible applicant for the refund is the property owner/contractor who applied for the permit. No refund is available if the property is sold or transferred before the project is completed and prior to a final inspection and /or a Certificate of Completion is issued.
- Refunds are for the building permit only; applicants must pay other applicable fees and sales taxes.

Eligible Projects

- Construction is limited to a locally designated historic structure that is designated as of the date of permit application or one that is in the process of applying for such designation.
- Work must require a building permit.
- Projects must fall within the definitions of restoration, preservation and rehabilitation, as defined by the U.S. Secretary of the Interior (see below).
- Work can be for the following: routine maintenance and repair (water heater, plumbing, electrical); life safety projects, and those bringing building systems into compliance with current building and/or zoning codes; rehabilitation and restoration projects (major repair, flatwork, items that preserve historic character that require a permit).
 - Qualifying interior project examples (where no Certificate of Approval is required)
 - Electrical

- Mechanical
- Plumbing
- Interior rehab projects according to U.S. Secretary of the Interior's Standards
- ⊖ Basement finishes
- Qualifying exterior project examples (where Certificate of Approval is required)
 - Re-roofing
 - Rehab/repair of existing historic detached garages
 - Rehab/repair of existing historic carports
 - Rehab/repair of existing historic sheds
 - Rehab/repair of existing historic porches
 - Rehab/repair of existing historic retaining walls that have significance
 - Siding repair and replacement (if historically appropriate materials are used and in accordance with the Secretary of the Interior's Standards)
- New construction is eligible if the work is undertaken to keep the property viable and does not exceed 10% of the building footprint's square footage.
 - Example: an addition to a house for accessibility
- Projects which exceed 10% of the footprint must first receive Historic Preservation Commission approval.

List of Ineligible Projects

- Projects that do not meet the U.S. Secretary of the Interior's Standards
- Those projects paid for by insurance (such as a replacement roof) or a Greeley Urban Renewal Authority rehabilitation loan.
- New construction or improvement of new accessory structures, such as sheds and garages.
- New construction that is not for the purpose of keeping the property viable or adequately maintained
- **Projects commenced without proper City of Greeley or Historic Preservation Commission or Staff approval (e.g., without a building permit or a Historic Commission-Preservation Certificate of Approval, if required)**

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Procedures (See flow chart)

- Applications will be reviewed and determined by Historic Preservation Staff, unless review is required by the Commission.
 - Staff decisions may be appealed to the Historic Preservation Commission within 10 calendar days of the Staff decision.
 - Decisions of the Commission will be considered final on all refund applications unless appealed to Council within 30 calendar days of the Commission decision.
 - Decisions will be based on the Secretary of the Interior's Standards and will be in accord with the definitions of restoration, preservation, and rehabilitation as established by the Secretary of the Interior, included below.
- Exterior work: Applicants must submit a notice of intent to apply for the refund at the time they request Historic Preservation Certificate of Approval (for exterior projects generally).
- Interior work: For those projects not requiring a Historic Preservation Certificate of Approval, applicants must provide notice of intent to apply for the refund to the Historic Preservation Office at the time of building permit application.
- All applications must include a copy of the permit receipt showing a breakdown of the permit cost.

- Application must be made to the Historic Preservation Office for the refund within 60 calendar days after the final inspection and/or Certificate of Occupancy (Certificate of Completion) is issued, whichever is earlier.

U.S. Secretary of the Interior Definitions

RESTORATION: the act or process of accurately depicting the form, features, and character of a property as it appeared at a particular period of time by means of the removal of features from other periods in its history and reconstruction of missing features from the restoration period. The limited and sensitive upgrading of mechanical, electrical, and plumbing systems and other code-required work to make properties functional is appropriate within a restoration project.

PRESERVATION: the act or process of applying measures necessary to sustain the existing form, integrity, and materials of an historic property. Work, including preliminary measures to protect and stabilize the property, generally focuses upon the ongoing maintenance and repair of historic materials and features rather than extensive replacement and new construction. New exterior additions are not within the scope of this treatment; however, the limited and sensitive upgrading of mechanical, electrical, and plumbing systems and other code-required work to make properties functional is appropriate within a preservation project.

REHABILITATION: the act or process of making possible a compatible use for a property through repair, alterations, and additions while preserving those portions or features which convey its historical, cultural, or architectural values.

Definitions (Section 18.36.030)

Alteration means any act or process requiring a building permit, moving permit, demolition permit or sign permit for the reconstruction, moving, improvement or demolition of any designated property or district; or any other action in which a review by either the Historic Preservation Commission or the Historic Preservation Specialist is necessary under this Chapter and/or the district designation plan and in accordance with the definitions of major and minor alterations, for the purposes of this Chapter.

Maintenance, as used in this Chapter, means measures to protect and stabilize a property, including ongoing upkeep, protection and repair of historic materials and features. Maintenance shall include the limited and responsive upgrading of mechanical, electrical and plumbing systems and other Code-required work to make a property safe and functional.

Major alteration, for the purposes of this Chapter, means a modification to a structure that has potential to significantly alter the character of the property and includes, but is not limited to, window replacement; building addition; porch enclosure; reconstruction of a portion of the primary building; addition of dormers or other alteration to the roofline; reconstruction of features on a building; material replacement with a different material (e.g., siding); alteration or replacement of a character-defining feature; demolition; relocation; and new construction. Major alteration includes any modification that is not considered maintenance or a minor alteration.

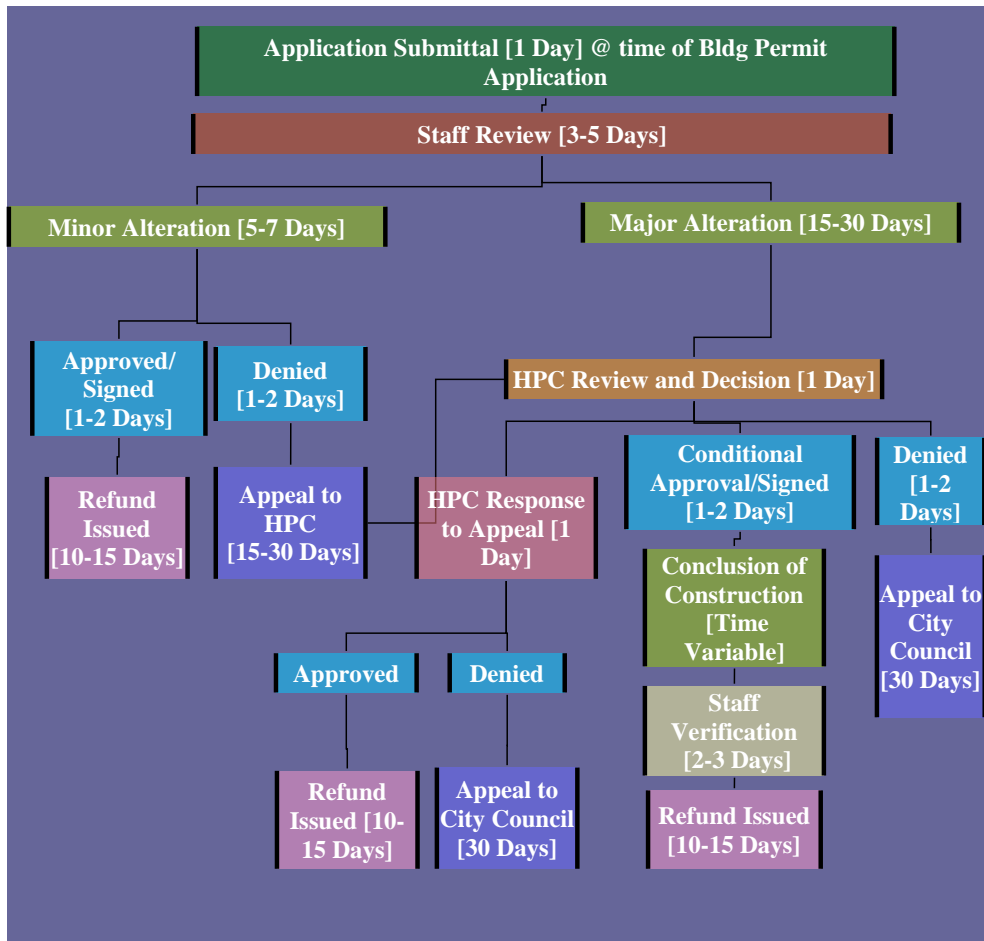
Minor alteration, for the purposes of this Chapter, means a modification to a structure that does not significantly alter the character of the property and includes, but is not limited to, replacement of roof; installation and repair or replacement of gutters if exterior trim elements are not altered;

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reconstruction and/or repair of portions of secondary structures; addition or replacement of storm windows and doors to existing windows and doors; repair or replacement of architectural elements with the same material, design, size, color and texture; replacement of less than fifty percent (50%) of a porch railing; replacement of original material with the same material (e.g., replacing a portion of wood siding with wood siding of the same size, profile and type); removal of nonoriginal material, such as vinyl, aluminum, etc.; adding awnings; repainting masonry; and signs requiring a permit.

Building Permit Fee Refund Process Flow Chart



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Building Permit Fee Refund Policies

Historic Preservation Commission

(Adopted 9/13/2010)

Building Permit refunds for historical properties are offered by the City of Greeley as an incentive to owners in the maintenance, upkeep and improvement of historic properties. The following policies apply to historically designated properties or contributing properties in an historic district and provide a refund option as described in Section 16.60.090 of the Greeley Municipal Code.

Historic Preservation Certificates of Approval are required before work is commenced on a designated historic structure, except as it relates to qualifying interior or maintenance projects (see below).

Eligible Applicants

- Eligible applicants include owners and/or contractors of residential, investment, commercial or industrial properties, as well as non-profit organizations or governmental entities.
- The refund is non-transferable. The only eligible applicant for the refund is the property owner/contractor who applied for the permit. No refund is available if the property is sold or transferred before the project is completed and prior to a final inspection and /or a Certificate of Completion is issued.
- Refunds are for the building permit only; applicants must pay other applicable fees and sales taxes.

Eligible Projects

- Construction is limited to a locally designated historic structure that is designated as of the date of permit application or one that is in the process of applying for such designation.
- Work must require a building permit.
- Projects must fall within the definitions of restoration, preservation and rehabilitation, as defined by the U.S. Secretary of the Interior (see below).
- Work can be for the following: routine maintenance and repair (water heater, plumbing, electrical); life safety projects, and those bringing building systems into compliance with current building and/or zoning codes; rehabilitation and restoration projects (major repair, flatwork, items that preserve historic character that require a permit).
 - Qualifying interior project examples (where no Certificate of Approval is required)
 - Electrical
 - Mechanical
 - Plumbing
 - Interior rehab projects according to U.S. Secretary of the Interior's Standards

- ⊖ Basement finishes
- Qualifying exterior project examples (where Certificate of Approval is required)
 - Re-roofing
 - Rehab/repair of existing historic detached garages
 - Rehab/repair of existing historic carports
 - Rehab/repair of existing historic sheds
 - Rehab/repair of existing historic porches
 - Rehab/repair of existing historic retaining walls that have significance
 - Siding repair and replacement (if historically appropriate materials are used and in accordance with the Secretary of the Interior's Standards)
- New construction is eligible if the work is undertaken to keep the property viable and does not exceed 10% of the building footprint's square footage.
 - Example: an addition to a house for accessibility
- Projects which exceed 10% of the footprint must first receive Historic Preservation Commission approval.

List of Ineligible Projects

- Projects that do not meet the U.S. Secretary of the Interior's Standards
- Those projects paid for by insurance (such as a replacement roof) or a Greeley Urban Renewal Authority rehabilitation loan.
- New construction or improvement of new accessory structures, such as sheds and garages.
- New construction that is not for the purpose of keeping the property viable or adequately maintained
- Projects commenced without proper City of Greeley or Historic Preservation Commission approval (e.g., without a building permit or a Historic Commission Certificate of Approval)

Procedures (See flow chart)

- Applications will be reviewed and determined by Historic Preservation Staff, unless review is required by the Commission.
 - Staff decisions may be appealed to the Historic Preservation Commission within 10 calendar days of the Staff decision.
 - Decisions of the Commission will be considered final on all refund applications unless appealed to Council within 30 calendar days of the Commission decision.
 - Decisions will be based on the Secretary of the Interior's Standards and will be in accord with the definitions of restoration, preservation, and rehabilitation as established by the Secretary of the Interior, included below.
- Exterior work: Applicants must submit a notice of intent to apply for the refund at the time they request Historic Preservation Certificate of Approval (for exterior projects generally).
- Interior work: For those projects not requiring a Historic Preservation Certificate of Approval, applicants must provide notice of intent to apply for the refund to the Historic Preservation Office at the time of building permit application.
- All applications must include a copy of the permit receipt showing a breakdown of the permit cost.
- Application must be made to the Historic Preservation Office for the refund within 60 calendar days after the final inspection and/or Certificate of Occupancy (Certificate of Completion) is issued, whichever is earlier.

U.S. Secretary of the Interior Definitions

RESTORATION: the act or process of accurately depicting the form, features, and character of a property as it appeared at a particular period of time by means of the removal of features from other periods in its history and reconstruction of missing features from the restoration period. The limited and sensitive upgrading of mechanical, electrical, and plumbing systems and other code-required work to make properties functional is appropriate within a restoration project.

PRESERVATION: the act or process of applying measures necessary to sustain the existing form, integrity, and materials of an historic property. Work, including preliminary measures to protect and stabilize the property, generally focuses upon the ongoing maintenance and repair of historic materials and features rather than extensive replacement and new construction. New exterior additions are not within the scope of this treatment; however, the limited and sensitive upgrading of mechanical, electrical, and plumbing systems and other code-required work to make properties functional is appropriate within a preservation project.

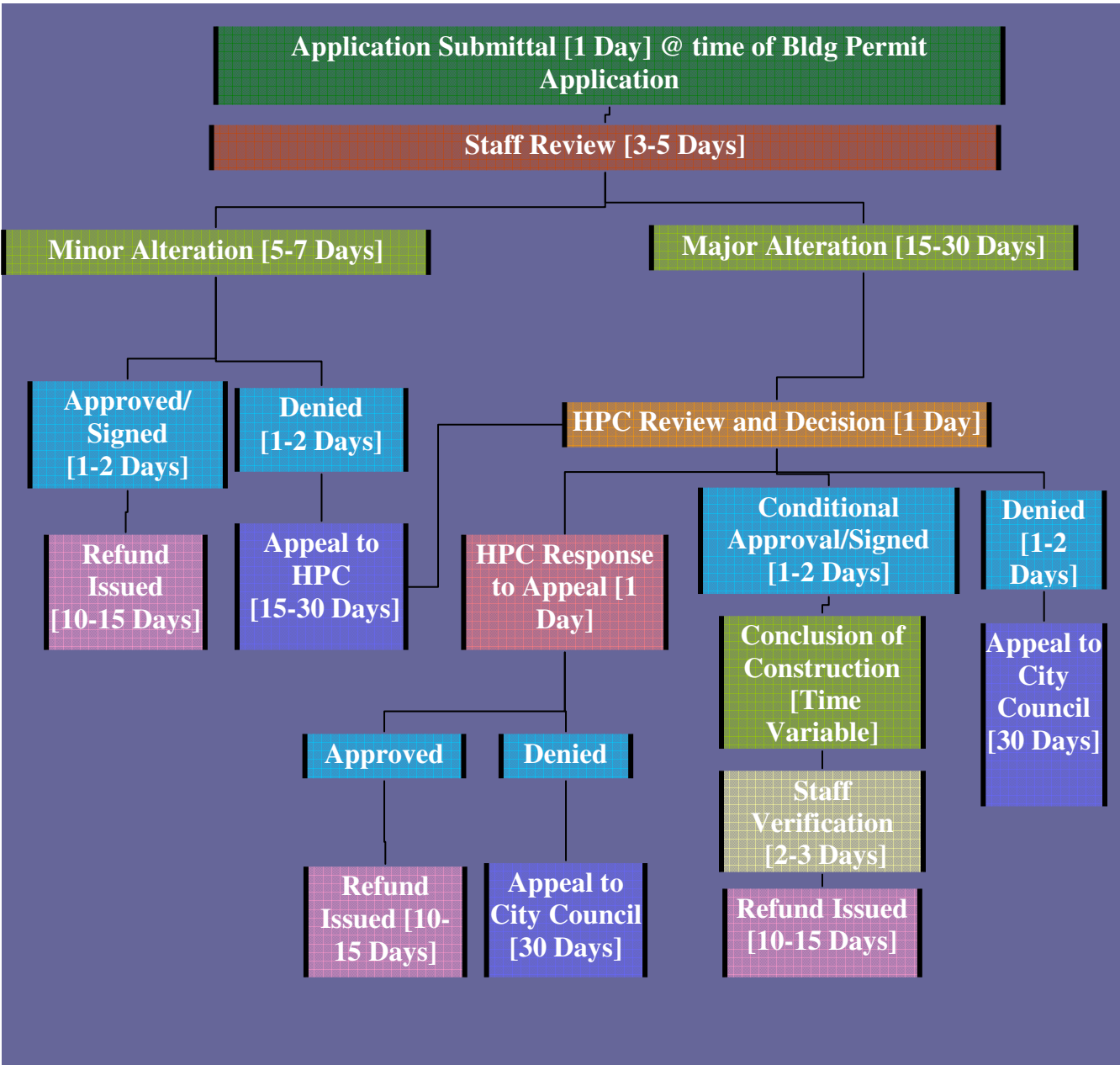
REHABILITATION: the act or process of making possible a compatible use for a property through repair, alterations, and additions while preserving those portions or features which convey its historical, cultural, or architectural values.

Proposed Definitions

Alteration, Major means a modification to a structure that has potential to significantly alter the character of the property and includes, but is not limited to, window replacement; building addition; porch enclosure; reconstruction of a portion of the building; addition of dormers; reconstruction of features on a building; material replacement with a different material (eg. siding, roof, etc); demolition; relocation, and new construction. Major alterations include any modification that is not considered maintenance or a minor alteration. Major alterations are determined by the Historic Preservation Commission.

Alteration, Minor means a modification to a structure that does not significantly alter the character of the property and includes, but is not limited to, replacement of roof with the same material; installation and repair/replacement of gutters if exterior trim elements are not altered; addition or replacement of storm windows and doors to existing windows and doors; repair or replacement of architectural elements with the same material, design, size, color and texture; replacement of less than fifty percent (50%) of a porch railing; replacement of original material with the same material (e.g. replacing a portion of wood siding with wood siding of same size, profile, type); removal of non-original material, such as vinyl, aluminum, etc; adding awnings; repointing masonry; and signs requiring a permit. Minor alterations are reviewed administratively.

Building Permit Fee Refund Process Flow Chart



Community Development Department MEMORANDUM

TO: Historic Preservation Commission
RE: District Designation Plan for the Monroe Avenue Historic District
FROM: Elizabeth Kellums, Planner III – Historic Preservation
DATE: September 16, 2019

The District Designation Plan for the Monroe Avenue Historic District is the design guidelines document which guides alteration projects for all properties within this Greeley Historic Register-designated historic district. Designated by the Commission in December 1999 and upheld by Council on an appeal in February 2000, the district has 48 properties, including 34 contributing and 14 non-contributing, including a non-contributing parking lot that previously held the contributing Allen House/St. Peter's Convent at 827 12th Street, razed in 2008. Please see District Properties List, Attachment A.

The design guidelines have not been changed since the district was designated in late 1999, but several aspects of the guidelines have been loosely interpreted, such as the sign guidelines and landscaping in the tree lawns (also known as parkways). Because signage and treelawn landscaping applications have been brought to the Commission in the last few years and the Commission has given loose interpretations of the guidelines, staff would like to discuss the idea of reviewing and updating the guidelines establish clarity for future interpretation. The District Designation Plan is attachment B.

The Commission has interpreted the sign material guideline to relate only to contributing properties. Wood signs are generally not compatible with the non-contributing properties, which include modern apartment buildings, modern bank buildings, and Mander Automotive (formerly Bennett's Cleaners). The Commission has routinely approved signs of other materials, including metal and plastic, for non-contributing properties. Currently no wood signs are in the historic district, but a significant amount of metal and plastic signs are located in the district.

The Site Features section of the guidelines include the sign guidelines, which specify that signs within the historic district will be only wood and paint, include minimal lighting, use design and colors in keeping with the structure and the historic period of the district, and set a maximum of 32 square feet of supports and signage. Several of the non-contributing buildings have significant amount of signage in excess of 32 square feet and are of metal and plastic materials. The Commission has reviewed and approved several commercial signs in the district; the most recent approved signs were metal signs for Mander Automotive. The approved metal signs met the Sign Code and were compatible with the building, but were not wood and exceeded the 32 square feet in total. Staff requests direction regarding the practice of loosely interpreting the guidelines or consider revisions to the requirements. Such revisions would be discussed by a committee to be comprised of staff and interested property owners.

The Site Features section also generally addresses landscaping, including calling out treelawns as significant character-defining elements. The Fences, Walls, and Landscaping section includes specific details about tree lawn landscaping. The guideline indicates that traditional plant materials, as appropriate for the period of the district, should be used in front yards and tree lawns. Traditional landscaping can include more than grass, as other Victorian-era plants could be used. A significant number of property owners/residents do not water the tree lawns because the sprinkler systems often do not extend under the sidewalk to the tree lawn. Alternative low-water appropriate plantings would provide options that would reduce dirt, weeds, and rocks in the tree lawns. Please see attachment B.

The main purpose of the District Designation Plan is to guide Commission decisions to preserve the historic district and the landscape within the historic district. The attached Preservation Brief #36 Protecting Cultural Landscapes addresses preserving landscapes, including districts with sidewalks, lawns and trees, and treelawns, which help define the character of the historic district, in contrast to other areas of town with different streetscapes. Please see attachment C.

The Historic Preservation Chapter of the Greeley Municipal Code establishes the procedure for revisions to a district designation plan. Section 18.36.070(5)(c) “Modification of a district designation plan will follow the same rules and procedures as for the nomination of a historic district, except no moratorium shall be placed on district properties. Property owners within the district or the Commission may propose to modify a district designation plan. Proposals to modify a district designation plan shall be reviewed by the Commission for recommendation to the City Council.”

There is no requirement to update the design guidelines. These two topics have come up recently and the guidelines have allowed some flexibility. Staff brings this to the Commission for awareness and discussion and regarding the formation of a committee to propose revisions.

Other areas of potential discussion for the design guidelines: solar technology, telecommunications facilities, and substitute materials. These topics are not currently in

the design guidelines, but are likely to be aspects of projects brought to the Commission in the future. If the Commission requests staff form a committee to discuss updating the guidelines, these are other topics that the committee could address.

ATTACHMENT A – District Properties List

ATTACHMENT B – District Designation Plan for the Monroe Avenue Historic District

ATTACHMENT C – Preservation Brief #36 – Protecting Cultural Landscapes

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Monroe Avenue Historic District Properties**1103 9th Avenue - the Southard House, American Foursquare, 1908 (C)*****1112 9th Avenue - St. Peter's School, 1926 (C)***810 12th Street - Hickman House, Foursquare, 1910 (C)811 12th Street - Mayher House, Queen Anne, 1886-1896 (C)818 12th Street - Sterling House, Queen Anne, 1887 (C)824-828 12th Street - Apartments, 1972 (N)825 12th Street - Arthur Strong House, Prairie Style, 1903-1906 (C)827 12th Street - Allen House, St. Peter's Convent, Queen Anne, 1906 (C)**razed Feb/March 2008, approved by HPC 9/24/07**915 12th Street - St. Peter's Catholic Church, Gothic Revival, 1909 (C)***1203 9th Avenue - Lemmon House, Queen Anne, ca. 1886 (C)1210 9th Avenue - Charles A. Fagerberg House, Craftsman, 1920-1922 (C)1214 9th Avenue - Bennett Cleaners, 1956 (N)1217 9th Avenue - John T. Watkins House, Craftsman, 1922 (C)1220 9th Avenue - Norbel Credit Union, 1980 (N)**1221 9th Avenue - Sodbuster Inn, 1996-1997 (N); as of 2016: Currier Inn, with Currier Carriage House designated individually (GHR)***1300 9th Avenue - Apartments, 1993 (N)**1303 9th Avenue - Nettleton-Mead House, Italianate, 1871 (C)*****1308 9th Avenue - Oran O. Russell House, Foursquare, 1909 (C)*****1309 9th Avenue - Joseph C. Ewing House, Foursquare, 1906 (C)*****1312 9th Avenue - John C. Mosher House, Foursquare, 1909 (C)*****1313 9th Avenue - Harvey D. Parker House, Foursquare, 1906 (C)***1321 9th Avenue - First United Presbyterian Church, Tudor Revival, 1920 (C)**1324 9th Avenue - Meeker Home Museum, vernacular Italianate, 1870 (C)***822 14th Street - Key Bank, 1973 (N)1405 9th Avenue - commercial building, 1969 (N)1411 9th Avenue - Miller House, Queen Anne, 1898-1901 (C)1419 9th Avenue - D.R. McArthur House, Queen Anne, 1901-1906 (C)1427 9th Avenue - W.R. Adams House, Foursquare, 1902 (N)914 15th Street - Hill House, Prairie, 1924-1925 (C)1502 9th Avenue - George D. Statler House, Queen Anne, 1896-1898 (C)1503 9th Avenue - Vectra Bank, 1978 (N)1508 9th Avenue - Apartments, 1973 (N)1509 9th Avenue - Edmonds-Norcross House, Queen Anne, 1895-1901 (C)**1513 9th Avenue - Pitts Smith House, Foursquare, 1907-1908 (C)***1514 9th Avenue - Normal Haven, Colonial Revival, 1901-1902(C)**1515 9th Avenue - Mosier House, Queen Anne, 1895 (C)* (Designated as Hays House)**1516-1518 9th Avenue - Hatch Apartments, Craftsman, 1930 (N)1521 9th Avenue - Oberg-McAfee House, Queen Anne, 1901 (C)1522 9th Avenue - Cornell House, Queen Anne, ca. 1890 (N)1523 9th Avenue - Waddell House, Neoclassic Cottage, 1902-1906 (C)1525 9th Avenue - G.B. Johnston House, Queen Anne, ca. 1906 (C)1526 9th Avenue - Swanson-Burns House, Queen Anne, 1893-1898 (C)1528 9th Avenue - Ward House, Queen Anne, 1898-1901 (C)**1531 9th Avenue - George Evans House, Queen Anne, ca. 1909 (C)***1532 9th Avenue - T.P. Rhiner House, Queen Anne, ca. 1906-1909 (C)1533 9th Avenue - Croll House, Queen Anne, ca. 1878-1901 (N)1540 9th Avenue - Charles Stephens House, Queen Anne, 1902-1903 (C)**No. 3 Ditch - 1870 (C)**

Key: bolded properties with * - designated on the local register; C - contributing; N - non-contributing

Address – historic property name, architectural style, year built

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District Designation Plan
Monroe Avenue Historic District

Greeley, Colorado
October 1, 1999

Acknowledgments

Property owners in the Monroe Avenue Historic District would like to express their appreciation to the Denver Landmark Preservation Commission for its generous contribution of ideas and content used in this document. The *Denver Design Guidelines for Landmark Structures and Districts* as well as the *Design Guidelines for the Country Club Historic District* served as professional and concise models for the guidelines contained herein. We would also like to express our gratitude to the City of Columbus, Ohio, Historic Preservation Office for its contribution of ideas and content from the *Columbus Register of Historic Properties Architectural Guidelines for Design, Maintenance and New Construction*.

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INTRODUCTION

These guidelines are intended to provide guidance to owners and applicants seeking approval for proposed alterations and/or new construction in the Monroe Avenue Historic District. Additionally, this document is intended to guide the Historic Preservation Commission's decisions to approve or deny proposals to alter existing structures or build new structures in the Monroe Avenue Historic District. The Monroe Avenue Historic District Design Review Guidelines are meant to complement the Historic Preservation Ordinance, and are not meant to replace or revise any other municipal ordinances. All alterations must comply with current zoning, building, and development codes.

The Monroe Avenue Historic District runs along what is currently 9th Avenue from 11th Street to 16th Street. It was developed primarily between the 1870s and 1920s by upper middle class professionals who were political, economic and social leaders in early Greeley, Colorado.

Pursuant to 16.60.020 of the Historic Preservation Ordinance, the Monroe Avenue Historic District is nominated (October, 1999) as an historic district because it is:

- (1) An area which exemplifies or reflects the particular cultural, political, economic or social history of the community,
- (2) An area identified with historic personages, groups or which represents important events in national, state or local history,
- (3) An area which embodies distinguishing characteristics of an architectural type or style inherently valuable for the study of a period, method of construction or of indigenous materials of craftsmanship,
- (4) An area which, due to its unique location or singular characteristics, represent established and familiar visual features of the neighborhood, community or city, and
- (5) An area which is representative of the notable work of a master builder, designer, or architect whose individual ability has been recognized.

The Monroe Avenue Historic District reflects a period of significance from 1870 through 1926. This period is characterized by several architectural styles. Examples include Queen Anne, American Foursquare, Italianate, Classical Revival, and Bungalow.

Design review is intended to protect the physical characteristics of the district's structures so that the historical, architectural and geographical attributes of a property can continue to be recognized and valued by Greeley's residents and visitors.

As stated in the City of Greeley Historic Preservation Ordinance, the Historic Preservation Commission shall review all major exterior alterations and additions to properties within designated historic districts. Construction of new buildings and demolition of structures within an historic district are also reviewed by the Commission.

DESIGN GUIDELINES FOR MONROE AVENUE HISTORIC DISTRICT GREELEY, COLORADO

The guidelines in this section apply to all projects requiring design review by the Historic Preservation Commission. This review is conducted for exterior alterations and additions to individual Greeley Historic Register properties, contributing properties in the district, non-contributing properties in the district, as well as to new construction.

Modifications to non-contributing structures will be reviewed by the Greeley Historic Preservation Commission to ensure the changes will not detract from the essential character of the historic district.

Appropriateness of Use

While the Commission does not review use, selecting a use similar to that for which a building was designed minimizes the need for substantial modification.

1. Seek uses that are compatible with the historic character of the building. In many cases, the historic use will be allowed by current zoning. Always check for allowable uses under current zoning codes. Additionally, retaining the current use provides greater flexibility in meeting building and safety codes.
2. Select new uses that require minimal change to the existing structure.
 - a. When a more radical change in use is necessary to keep the building in active service, then those uses that require the least alteration to significant elements are preferred.
 - b. Radical alteration for a new use must be carefully evaluated because the adaptation may prove to be too costly or destroy too many significant features. Experience has shown, however, that in most cases designs can be developed that respect the historic integrity of the building while also accommodating new functions.

Preservation of Original Features

Original materials and features, as well as the distinctive form, scale, and siting of a structure, contribute to its character and should be respected and preserved whenever feasible. The distinguishing qualities and characteristics of the structure and its site should be preserved using the simplest means possible. It is important that the property retain a high percentage of original features to retain its integrity. This is especially true for individually designated properties.

3. Respect the historic design character of the building.

Do not try to change its style or make it look older or more ornate than it really is. An honest approach enhances the significance of the structure.

4. Protect and maintain significant features and stylistic elements. Distinctive stylistic features or examples of skilled craftsmanship should be treated with sensitivity. The best preservation procedure is to maintain original features from the outset so that repair or replacement is not required.
5. Preserve an existing original site features or original building materials and features.
 - a. Preserve original wall and roof materials.
 - b. Preserve original doors, windows, porches, and other architectural features.
 - c. Preserve original site features such as set-back, steps, walls, fences, landscaping, and walkways.
 - d. Avoid removing or altering original materials and features.
 - e. If weatherization is necessary to maintain energy efficiency, do not remove original doors or windows. Select storm windows and doors that do not diminish the integrity of the original doors and windows.
6. Repair deteriorated historic features to the extent possible, and replace only those elements that cannot be repaired.
 - a. Patch, piece-in, splice, consolidate, or otherwise upgrade the existing material, using recognized preservation methods whenever possible, rather than remove the element.
 - b. If disassembly of an original element is necessary for its repair or restoration, use methods that minimize damage to the original materials and replace the disassembled components in their original configuration.

Doors and Entrances

Front doors and primary entrances are among the most important elements of historic buildings. The original size and proportion of a front door, the details of design of the door itself and the detail around it, and the placement of the door and entrance contribute to the character.

7. Preserve the functional, proportional, and decorative features including the door and its frame, sill, head, jamb, moldings, and any flanking windows.
 - a. Avoid changing the position and function of original front doors and primary entrances.
 - b. If necessary, replace original doors with designs and finishes

similar to those found historically.

Porches

Porches are a uniquely residential feature. A porch is often one of the most important character-defining elements of the primary facade of a historic house. While preservation of all existing original porches is recommended, it is particularly important that front porches be preserved.

8. Preserve the original porch where feasible.
 - a. Replace missing posts and railings when necessary.
 - b. Match the original proportions and spacing patterns of balusters.
 - c. Avoid using wrought iron, metal pipe posts and railings, or unpainted lumber to replace historic features, unless it is historically appropriate.
 - d. Although locating an addition to the rear is often a preferred alternative, it may involve the demolition of an original rear porch, which contributes to the character of the property. Consider other options, if feasible.
9. Reconstruct a replacement porch to match the original in form and detail, if documentary evidence exists and if reconstruction is necessary.
 - a. Use materials similar to the original wherever feasible.
 - b. Replace a porch only if documentary evidence exists.
10. Preserve the open character of a porch.

Avoid enclosing historic porches that were not originally enclosed.

Windows

Windows, the elements that surround them, and their relationship to one another are among the most important character-defining elements of a historic structure. The basic elements of windows are their operation, proportions, number of divisions, and the dimensions of the frame. Historic windows should be preserved wherever feasible; this is especially important for individually designated properties.

11. Preserve the functional and decorative features of original windows.
 - a. Features important to the character of windows include frames, sash, muntins, mullions, glazing, sills, heads, jambs, moldings, operation, and groupings of windows.
 - b. Stained and leaded glass are often found in windows and doors of historic buildings and houses, and special care should be taken to preserve and protect these windows.
 - c. Typically, houses feature a front window or grouping of windows. The proportions, type, relationship, decorative glass, and

- d. Repair frames and sash by patching, splicing or reinforcing, rather than replacing.
 - e. If replacement of any original window is necessary, match it as closely as possible.
 - f. Metal, vinyl, or fiberglass awnings, hoods, or shutters that are not historically accurate should not be used.
- 12. Retain the position, type, number and groupings of windows, especially on significant facades.
- 13. Maintain original window proportions.
 - a. Preserve the vertical emphasis typical of historic windows.
 - b. Do not reduce an original opening to accommodate a smaller window. Likewise, do not enlarge an opening to accommodate a larger window. If enlargement is necessary for emergency egress, do so on a minor elevation (rear or side).
- 14. Use materials that appear similar to the original when replacement is necessary.
Replacing a wood window with another wood window is preferred; however other materials may be considered if the operation, dimension, profile and finish are similar.
- 15. Consider storm windows as an alternative to window replacement.
 - a. Install storm windows on the interior whenever feasible.
 - b. Match the sash of the original windows, if storm windows are installed on the exterior.
 - c. Metal storm windows may be appropriate if the frames match the proportions and profile of the original windows and if the frames are anodized or painted so that raw metal is not visible.

General Exterior

Original materials should be repaired rather than replaced. Wood is a common material for historic buildings in Greeley; however, stone, brick, concrete, and other materials were also used. Greater flexibility in materials may be considered for additions and new construction within the Monroe Avenue Historic District.

- 16. Use the gentlest possible procedures for cleaning, refinishing, and repairing original materials.
 - a. Perform a test patch. Many procedures can actually have an unanticipated negative effect upon building materials and result in accelerated deterioration or a loss of character. For example, harsh paint removal methods can damage the protective finish of

- the material.
 - b. Obtain product literature and information on appropriate techniques and new technologies.
- 17. Remove later covering materials that have not achieved historic significance; examples include vinyl, aluminum, asbestos, or asphalt siding, stucco, or permastone.
 - a. Once the siding is removed, the original material should be repaired.
 - b. Removal of other materials such as stucco or permastone must be tested to assure that the original material will not be damaged.
- 18. Use materials that appear similar in character to those used historically, if replacement is necessary.
 - a. Materials similar to those employed historically are preferred.
 - b. Substitute materials may be used for replacing individual building elements, but not the primary building material.
 - c. Application of sidings such as vinyl, aluminum, and plastic may not be used.
- 19. Preserve the appearance of original materials.
 - a. Avoid covering original materials with new materials. If such covering is necessary, install in such a way as to avoid damaging original materials when the covering is removed.
 - b. Aluminum or vinyl siding may not be used. Such materials can cause the original siding to deteriorate more rapidly.
 - c. Original materials should not be covered with stucco, permastone, or other masonry-like materials.

Paint Color

Paint colors for buildings are not specified or reviewed, however, the selection of color schemes and maintenance of painted surfaces has much to do with how the property is perceived.

- 20. Develop a color scheme that coordinates all the building elements.
 - a. Muted colors are preferred for the background color of most buildings.
 - b. Use bright colors for accents such as ornamental details, window sashes, and entrances.
 - c. Retain the intrinsic color of unpainted surfaces, such as masonry walls.

Wood Exterior

Wood siding is an exterior wall covering consisting of wood boards fastened to the structural frame of a building. Because excessive moisture damages the paint bond, areas where paint is blistering, cracking, flaking, and peeling usually indicate water penetration, moisture saturation, and potential deterioration. Failure of the paint, however, is not a sign that the wood is in poor condition and therefore not able to be repainted. Wood beneath peeling paint is frequently in sound physical condition.

21. Preserve the original wood siding.
 - a. Repair all sources of moisture problems as soon as possible.
 - b. Replace individual warped and split boards or shingles with new boards or shingles of the same size and shape and material.
 - c. Keep wood siding stained or painted. Bare, weathered wood siding deteriorates and is not historically accurate.
22. Restore the building's original wood siding after removing non-original wood shakes or asphalt or asbestos shingles, that were not part of the original siding.
 - a. Match the existing original siding in material, size and appearance when repeating, splicing in or replacing wood siding.
 - b. Do not use diagonal or vertical siding unless historical documentation shows it was original to the structure.
23. Do not use any type of artificial siding to cover original siding.

Masonry

Masonry is a common material for historic buildings in Greeley. Houses may be constructed of brick with wood detail and trim, while commercial and institutional buildings are constructed of either brick or stone with stone, terra cotta, or other trim. The character of a historic masonry wall is a combination of the material itself, the size and proportion of the modular units, the finish of the material, the pattern with which the material may be laid, and the character of the mortar that binds the units together. All of these features should be preserved when feasible. Ancillary buildings and site features constructed of masonry should be treated in the same way.

24. Preserve the original masonry when feasible.
 - a. Avoid painting masonry, unless this is needed to provide a weather-protective coating to soft material. Painting changes the character of the building. If painting is necessary, select a color as close to the original masonry as possible.
 - b. Paint may be removed from masonry if the procedure will not damage the original finish. Repainting in the original color of the masonry is an alternative to stripping the paint.

- c. If masonry has a stucco finish, removing the covering may be difficult, since original brick finishes were sometimes chipped to provide a connection for the stucco application. If removing stucco is to be considered, first remove the material from a test patch to determine the condition of the underlying masonry.
 - d. Covering masonry with other materials is inappropriate.
- 25. Preserve original mortar characteristics, including composition, profile, and color.
In most cases, matching the composition of the original mortar mix may be essential to the presentation of the masonry itself. In order to avoid deterioration of the masonry, the mortar must be softer or more permeable than the masonry units. Matching the original mortar will also prevent moisture from being trapped inside the walls.
- 26. Match the size, proportions, finish, and color of the original, if portions of masonry walls must be replaced. Horizontal surfaces such as chimneys, sills, and parapet copings are likely to show the most deterioration.

Roofs

Typical roof shapes for historic buildings in Greeley are gables, and hipped, as well as flat for commercial buildings and Modernist houses. In some cases, roofs are complex and may include several of these roof types plus dormers. Most historic roofs broadly overhang, creating deep shadows. These broad eaves are also a location for important detailing such as brackets, cornices, and bargeboards.

- 27. Preserve the original roof form.
 - a. Avoid altering the angle of the roof.
 - b. Maintain the perceived line and orientation of the roof from the street.
 - c. Retain and repair roof detailing such as brackets, cornices, parapets, bargeboards, and gable-end shingles.
 - d. New skylights should not be installed on front portions of a roof. Flat skylights mounted flush with the roof may be considered on other, less visible sides. Bubbled or domed skylights are not appropriate.
- 28. Preserve original roof materials when feasible.
If replacement is necessary, carefully select new materials. Some historic materials are very durable and may not need replacement.
 - a. Avoid removing roof material that is in good condition.
 - b. Where replacement is necessary, use materials similar to the original. Low profile asphalt shingles, for example, are appropriate replacements for wood shingles.

- c. Maintain a similar color. Gray and brown are typical of many historic roof materials. Some historic houses featured more colorful roofs through the use of clay tiles. Also consider the neighborhood context for color.
- d. Specialty materials such as tile or slate should be replaced with a matching material whenever feasible.

Site Features

Existing original site features include building setbacks, walkways, fences, retaining walls, landscaping, gardens, and tree-lawns. These features are important elements that create a context and setting for a historic building and often contribute to its significance. In a designated historic district, site features can be significant character-defining elements.

- 29. Preserve original landscape features, such as walkways, fences, site walls, street trees, special plantings and other ornamental site features, when feasible. Respect original site features in planning other alterations.
- 30. Repair deteriorated site features; if necessary, replace them with similar features.
 - a. Select replacement or new materials and features that are compatible with the historic character of the site.
 - b. Maintain the location and proportion of features that must be replaced.
- 31. Maintain the historic relationship of the structure to its site and street when adding new building elements or landscape features.
 - a. New site features should be compatible with historic site features in material and design. In a district, site features may be based upon those of other similar structures.
 - b. Avoid destroying the perception and definition of public and private space, such as a landscaped tree-lawn, front yard edge, and front yard.
- 32. Through use of landscaping and/or fencing, off-street parking for any more than two vehicles must be screened from view from 9th Avenue. Recreational vehicles, trash receptacles, and service areas must also be screened from view from 9th Avenue.
- 33. Advertisement signs should add to the historic nature of the district.
 - a. Signs within the historic district will consist only of wood and paint.
 - b. Minimal lighting, so signs can be viewed at night, is allowable.
 - c. Placement of advertisement signs should not obscure the view of the building.

- d. Design and colors used should be in keeping with the primary structure as well as the historic period of the district.
 - e. A maximum of no more than 32 square feet of supports and signage is allowable.
34. Minimize the visual impacts of site lighting.
- a. Site lighting should be shielded, to avoid glare onto adjacent properties.
 - b. Focus lights on walks and entries. Avoid lighting focused up at architectural elements of building walls.
 - c. Style of fixtures should be in character with the structure.

Fences, Walls, and Landscaping

Traditionally, front yards were open to the street. Few houses had walls or fences, so the effect of the broad front and side yards was enhanced. Over the years, fences and walls have been introduced to define property line, provide security, or add decoration. Those walls and fences that do not detract from the district have several characteristics: they allow for views into the yard, have a landscape strip between the fence or wall and the sidewalk, and they are relatively low. In all cases, they are appropriate because they maintain a sense of openness in front yards. Historically, tree lawns, the band of grass between the street and sidewalk, were planted with grass and street trees, which established a rhythm along the block and a sense of visual continuity. These tree lawns are distinctive features that reflect the historic platting plan for these portions of the neighborhood and should be preserved.

35. Landscaping of properties will be consistent with neighboring properties and appropriate for the historical period of the district.
- a. Use traditional plant materials in front yards and in tree lawn.
 - b. Use traditional locations for plant bed, hedges, shrubs and trees.
 - c. A minimum of 85% of front yard landscaping must be in live plantings.
 - d. Selectively remove trees and shrubs that are overgrown, old, or out of character, and replace as appropriate.
36. Preserve the historic character of tree lawns where they exist.
- a. Maintain the soft, planted nature of the tree lawn. Limit the use of paving materials in this area to stepping stones that may lead from the curb to the sidewalk.
 - b. Where street trees are a traditional feature, maintain them in good condition. When a tree must be removed, replace it with a similar species in a size that is sufficient to have a visual impact in its early years after planting.
37. Preserve and repair original fences and walls, replacing only those

portions that are deteriorated with identical or similar materials.

38. Low walls, fences or hedges may be used to define front yards.
 - a. A maximum height of 42 inches is recommended.
 - b. Taller fences and walls may be used at the rear of the property.
39. If a fence is to be used in the front yard, it should be designed to allow views into the yard.
 - a. A low fence or wall that allows views over it, or a fence that allows views through it, is appropriate in the front yard. Tall fences or walls, those in excess of 42 inches, are inappropriate in front yards.
 - b. Chain link is not an appropriate fencing material for the front yard.
 - c. When feasible, set a fence back from the public sidewalk and provide plantings in front to soften the visual impact of the fence.

Mechanical Equipment

Introducing a new heating, ventilating, air-conditioning and other systems into a historic building should be planned such that original materials are not damaged or obscured. These systems also should not alter the perceived character of a historic building or its site.

40. Minimize the visual impacts of new mechanical systems and service equipment.
 - a. Visually screen service equipment, including transformers, solar collectors and satellite dishes, or locate them out of public view (out of view of the streets and sidewalks). Use screen designs that are in character with the property.
 - b. Avoid placing mechanical, electrical, telecommunications equipment, and solar panels on the exterior of primary, character defining facades.
 - c. Do not damage original materials when installing new mechanical, electrical, and safety systems.

Secondary Structures

Secondary structures, including carriage houses, garages, and sheds, are important elements of residential sites. They help establish a sense of scale and define yards. Their presence helps interpret how an entire site was used historically.

41. Preserve original secondary structures when feasible.
Use the same guidelines as for primary structures.
42. Locate new secondary structures to reinforce historical development patterns.

- a. Place a garage or other secondary structure at the rear of the property.
- b. Reinforce historical patterns by using an alley to access a garage.
- c. Avoid making new curb cuts for driveways.

Existing Alterations on Historic Buildings

Many alterations and additions to buildings that have taken place in the course of time are themselves evidence of the history of the building and its neighborhood and therefore may merit preservation along with the original structure. More recent alterations and additions may be removed. As a rule of thumb, those alterations that are more than 30 years old may have gained significance. Alterations need not be removed if they are in good condition and do not obscure original materials and features; however, removing such alterations from individually designated properties is encouraged.

- 43. Preserve alterations that have achieved historic significance in their own right. These alterations should be treated in the same manner as original materials and features.
- 44. Consider removing recent alterations that are not historically significant. Minimize and repair damage to original features and materials in the process of removing alterations.

Replacement or Substitution of Original Features

In the event replacement is necessary, the new feature should match the original in size, shape, color, texture, and other visual qualities. Original features often include siding porches, wood frame windows, decorative detailing, etc.

- 45. Replace missing original features with accurate replications where feasible.
 - a. Replace only those portions that are beyond repair.
 - b. Use the same kind of material as the original when feasible. A substitute material is acceptable if the form and design of the substitute itself conveys the visual appearance of the original material. For example, a metal windows frame may be considered if it accurately conveys the dimension and profile of the original wood window.
 - c. A high percentage of the materials and features of the property must be original in order to retain historic integrity. While no exact percentage should be used, the building must be able to convey a sense of its period of significance.
- 46. Replace missing architectural elements using accurate information about

original features.

- a. The design should be substantiated by physical or pictorial evidence to avoid misrepresentation of the building's genuine heritage.
 - b. Historic photographs of buildings and neighborhoods may document the historic appearance of a particular structure. The City of Greeley Municipal Archives, James A. Michener Library, Western History Department of the Denver Public Library and the Colorado Historical Society Library are the major repositories for historical photographs.
47. Develop a new design that is a simplified interpretation of a similar feature when the original is missing and cannot be documented.
- a. The new element should relate to comparable features in general size, shape, scale and finish.
 - b. A replacement should be identifiable as being new, so it will not create a false historical impression, but it should be compatible with the overall architecture of the structure. This may be accomplished by using a simplified design of similar design elements of the same period. Avoid exact replication of features or elements.
 - c. Use materials similar to those employed historically, where feasible.
 - d. Methods to make it compatible and/or identify it as new include:
 - 1. Install a date plaque on the speculative design to provide information to future researchers about changes that have occurred to the property.
 - 2. Use nominal dimension lumber instead of full dimension lumber.
 - 3. Use a different foundation material.
 - 4. Use different siding.
 - 5. Offset the addition so it is obvious where it starts.

New Alterations and Additions

When planning new alterations and additions, consider the effect on significant historic materials and features of the property. Loss of historic building fabric should be minimized. The addition should not affect the ability to perceive the historic character of the building, especially from public ways, such as streets, alleys, and parks. Contemporary interpretation of the original structure is an appropriate alternative to a more replicative design. It needs to be compatible with the overall architecture but simplified in style and detailing and must appear newer.

48. Minimize negative effects on original materials and features when planning additions and alterations to a historic building. Avoid obscuring or removing significant features to accommodate new additions and alterations.

49. Minimize negative technical effects upon original features.
 - a. Consider the technical impacts of new construction on a historic structure. For example, a construction process may cause vibration that results in cracks in a historic masonry wall.
 - b. New alterations should be accomplished in such a way that they can be removed without destroying original materials or features.
50. Design additions to historic buildings so that original materials or features will not be destroyed or obscured.
51. Roof-top (pop-top) additions are not acceptable.
52. Place additions at the rear of the building or set them back from the front to minimize the visual impact on the historic structure and to allow the original proportions and character to remain prominent.
 - a. Alternatively, an addition can be set apart from the original building and connected with a small, simple link. Zoning code requires a 20% point of attachment and architectural compatibility.
 - b. Locating an addition at the front of the structure is inappropriate.
53. Design additions and alterations to be compatible in size, scale, and appearance with the main building.
 - a. An addition or alterations should be visually subordinate to the main building.
 - b. An addition or alteration should be simpler than the original structure. For example, incorporate simplified versions of character defining elements of the original structure.
 - c. Use roof forms that are compatible with the original structure. The shape, pitch, and material should be similar to the original structure.
 - d. Maintain the solid-to-void (wall to opening) ratio of the original structure.
54. Use materials that are compatible with the primary structure.
In a district, materials similar to those of adjacent structures may also be considered.
55. Design additions and alterations to be recognized as products of their own time. Avoid new additions and alterations that hinder the ability to interpret the historic character of the building.
 - a. An addition or alteration should be both compatible in appearance with the original building and distinguishable as dating to a different time.
 - b. A change in setback of the addition from the main building, a subtle change in material, or a date plaque are all techniques that may be

- considered to help differentiate old and new construction.
 - c. Use of nominal dimension lumber instead of full dimension lumber would be acceptable and appropriate for structures predating the use of nominal dimension lumber.
 - d. An addition or alteration that creates an appearance inconsistent with the historic character of the building is inappropriate.
 - e. An addition or alteration that implies an earlier period or more ornate style than that of the original building is inappropriate.
56. Respect historic alignments when planning additions or alterations to buildings.
Avoid placing an addition in a location where relationships of a structure to its site or adjacent structures is altered or obscured. For example, some roof lines and porch eaves may align at approximately the same height and an addition should not hinder the ability to perceive this alignment.
57. Respect traditional entrance patterns when planning additions to buildings.
- a. Retain the appearance of primary entrances when planning new additions or entrances.
 - b. Avoid obscuring original entrances.
58. Preserve original site features.
Avoid destroying original site features when planning new construction or landscaping.
59. Consider retaining original open space at the sides and rear of the structure.
Large additions that eliminate existing open space are discouraged.
60. Design handicap access so as to minimize its visual impact on the building.
- a. Handicap access should be designed in such a way that it does not destroy the essential character of the building.
 - b. Use removable or portable ramps to provide access whenever possible.
61. Design fire escapes on the rear or side of the building so as to minimize their visual impact.

New Construction

New construction should be harmonious with the rest of the district in such elements as architectural design, set backs, roof lines, height, mass, porch proportions, and site features. While new construction can not contribute to the history of the district, it

should perpetuate the historic character of the area. Through signage, authenticity can be noted. All other design guidelines apply to new construction.

62. Select architectural styles for newly constructed buildings from those often used during the historic period of the district (1870-1926). Develop a simplified interpretation of the architectural style so not to create a false historical impression.
63. Place new buildings on properties consistent with the majority of other contributing properties within the block. The setback should not be less than 50 feet from the curb or should match the foot print of a prior structure built during the period of significance.
64. New buildings should appear similar in mass and scale to other contributing structures in the district.
65. Maintain the tradition lot coverage ratio of the neighborhood.
66. Clearly define the primary entrance to the house.
 - a. Orient the primary entrance of a building toward the street.
 - b. Houses built on corner lots may orient the primary entrance toward the corner.
67. Use building materials that appear similar to those used historically.
68. Driveways should be visually subordinate in the site design.
 - a. Provide auto access from an alley, when feasible.
 - b. Where a driveway is needed, minimize the visual impact of a curb cut. Only one curb cut per property should be allowed and any curb cut should be as narrow as possible.
 - c. Minimize the amount of hard-surfaced driveway that is seen in the front yard.
69. Provide a walk to the building entry from the public sidewalk.
 - a. The sidewalk should be distinct from a driveway.
 - b. Concrete is the dominant material; however, other material, including brick, stone, or modular pavers also are appropriate.
70. Design handicap access so as to minimize its visual impact on the building. Handicap access should be designed in such a way that it does not destroy the essential character of the building.
71. Design fire escapes on the rear or side of the building so as to minimize their visual impact.

72. Garages and other secondary structures should remain subordinate to the primary structure.
- a. Locating a secondary structure in the rear of the property is preferred.
 - b. A detached structure is also preferred. Whether attached or detached, a garage should be clearly subordinate to the primary structure and set back from the primary facade of the house.

36 PRESERVATION BRIEFS

Protecting Cultural Landscapes: Planning, Treatment and Management of Historic Landscapes

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U.S. Department of the Interior
National Park Service
Cultural Resources
Preservation Assistance



Cultural landscapes can range from thousands of acres of rural tracts of land to a small homestead with a front yard of less than one acre. Like historic buildings and districts, these special places reveal aspects of our country's origins and development through their form and features and the ways they were used. Cultural landscapes also reveal much about our evolving relationship with the natural world.

A *cultural landscape* is defined as "a geographic area, including both cultural and natural resources and the wildlife or domestic animals therein, associated with a historic event, activity, or person or exhibiting other cultural or aesthetic values." There are four general types of cultural landscapes, not mutually exclusive: *historic sites*, *historic designed landscapes*,

historic vernacular landscapes, and *ethnographic landscapes*. These are defined on the Table on page 2.¹

Historic landscapes include residential gardens and community parks, scenic highways, rural communities, institutional grounds, cemeteries, battlefields and zoological gardens. They are composed of a number of character-defining features which individually or collectively contribute to the landscape's physical appearance as they have evolved over time. In addition to vegetation and topography, cultural landscapes may include water features such as ponds, streams, and fountains; circulation features such as roads, paths, steps, and walls; buildings; and furnishings, including fences, benches, lights and sculptural objects.



Figure 1: The New York Peace Monument atop Lookout Mountain in the 8,100 acre Chickamauga and Chattanooga National Military Park, Chattanooga, Tennessee, commemorates the reconciliation of the Civil War between the North and South. The strategic high point provides panoramic views to the City of Chattanooga and the Moccasin Bend. Today, it is recognized for its cultural and natural resource value. The memorial, which was added in 1910 is part of this landscape's historic continuum. (courtesy Sam Abell and National Geographic).

DEFINITIONS

Historic Designed Landscape - a landscape that was consciously designed or laid out by a landscape architect, master gardener, architect, or horticulturist according to design principles, or an amateur gardener working in a recognized style or tradition. The landscape may be associated with a significant person(s), trend, or event in landscape architecture; or illustrate an important development in the theory and practice of landscape architecture. Aesthetic values play a significant role in designed landscapes. Examples include parks, campuses, and estates.

Historic Vernacular Landscape - a landscape that evolved through use by the people whose activities or occupancy shaped that landscape. Through social or cultural attitudes of an individual, family or a community, the landscape reflects the physical, biological, and cultural character of those everyday lives. Function plays a significant role in vernacular landscapes. They can be a single property such as a farm or a collection of properties such as a district of historic farms along a river valley. Examples include rural villages, industrial complexes, and agricultural landscapes.

Historic Site - a landscape significant for its association with a historic event, activity, or person. Examples include battlefields and president's house properties.

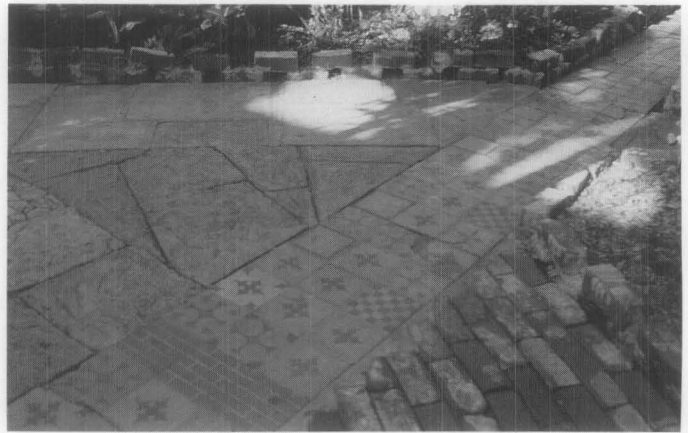
Ethnographic Landscape - a landscape containing a variety of natural and cultural resources that associated people define as heritage resources. Examples are contemporary settlements, religious sacred sites and massive geological structures. Small plant communities, animals, subsistence and ceremonial grounds are often components.

Most historic properties have a cultural landscape component that is integral to the significance of the resource. Imagine a residential district without sidewalks, lawns and trees or a plantation with buildings but no adjacent lands. A historic property consists of all its cultural resources — landscapes, buildings, archeological sites and collections. In some cultural landscapes, there may be a total absence of buildings.

This Preservation Brief provides preservation professionals, cultural resource managers, and historic property owners a step-by-step process for preserving historic designed and vernacular landscapes, two types of cultural landscapes. While this process is ideally applied to an entire landscape, it can address a single feature such as a perennial garden, family burial plot, or a sentinel oak in an open meadow. This Brief provides a framework and guidance for undertaking projects to ensure a successful balance between historic preservation and change.

Developing a Strategy and Seeking Assistance

Nearly all designed and vernacular landscapes evolve from, or are often dependent on, natural resources. It is these interconnected systems of land, air and water,



Figures 2-4: Character-defining landscape features (top to bottom): "Boot Fence" near D. H. Lawrence Ranch, Questa, New Mexico, 1991 (courtesy Cheryl Wagner); paving detail at Ernest Hemingway House National Historic Site, Key West, Florida, 1994 (courtesy author); and, tree planting detail for Jefferson Memorial Park, St. Louis, Missouri (courtesy Office of Dan Kiley)

vegetation and wildlife which have dynamic qualities that differentiate cultural landscapes from other cultural resources, such as historic structures. Thus, their documentation, treatment, and ongoing management require a comprehensive, multi-disciplinary approach.

Today, those involved in preservation planning and management for cultural landscapes represent a broad array of academic backgrounds, training, and related

project experience. Professionals may have expertise in landscape architecture, history, landscape archeology, forestry, agriculture, horticulture, pomology, pollen analysis, planning, architecture, engineering (civil, structural, mechanical, traffic), cultural geography, wildlife, ecology, ethnography, interpretation, material and object conservation, landscape maintenance and management. Historians and historic preservation professionals can bring expertise in the history of the landscape, architecture, art, industry, agriculture, society and other subjects. Landscape preservation teams, including on-site management teams and independent consultants, are often directed by a landscape architect with specific expertise in landscape preservation. It is highly recommended that disciplines relevant to the landscapes' inherent features be represented as well.

Additional guidance may be obtained from State Historic Preservation Offices, local preservation commissions, the National Park Service, local and state park agencies, national and state chapters of the American Society of Landscape Architects, the Alliance for Historic Landscape Preservation, the National Association of Olmsted Parks, and the Catalog of Landscape Records in the United States at Wave Hill among others.²

A range of issues may need to be addressed when considering how a particular cultural landscape should be treated. This may include the in-kind replacement of declining vegetation, reproduction of furnishings, rehabilitation of structures, accessibility provisions for people with disabilities, or the treatment of industrial properties that are rehabilitated for new uses.

Preservation Planning for Cultural Landscapes

Careful planning prior to undertaking work can help prevent irrevocable damage to a cultural landscape. Professional techniques for identifying, documenting, evaluating and preserving cultural landscapes have advanced during the past 25 years and are continually being refined. Preservation planning generally involves the following steps: historical research; inventory and documentation of existing conditions; site analysis and evaluation of integrity and significance; development of a cultural landscape preservation approach and treatment plan; development of a cultural landscape management plan and management philosophy; the development of a strategy for ongoing maintenance; and preparation of a record of treatment and future research recommendations.

The steps in this process are not independent of each other, nor are they always sequential. In fact, information gathered in one step may lead to a re-examination or refinement of previous steps. For example, field inventory and historical research are likely to occur simultaneously, and may reveal unnoticed cultural resources that should be protected.

The treatment and management of cultural landscape should also be considered in concert with the management of an entire historic property. As a result, many other studies may be relevant. They include management plans, interpretive plans, exhibit design, historic structures reports, and other.

CULTURAL LANDSCAPE REPORTS

A Cultural Landscape Report (CLR) is the primary report that documents the history, significance and treatment of a cultural landscape. A CLR evaluates the history and integrity of the landscape including any changes to its geographical context, features, materials, and use.

CLR's are often prepared when a change (e.g. a new visitor's center or parking area to a landscape) is proposed. In such instances, a CLR can be a useful tool to protect the landscape's character-defining features from undue wear, alteration or loss. A CLR can provide managers, curators and others with information needed to make management decisions.

A CLR will often yield new information about a landscape's historic significance and integrity, even for those already listed on the National Register. Where appropriate, National Register files should be amended to reflect the new findings.

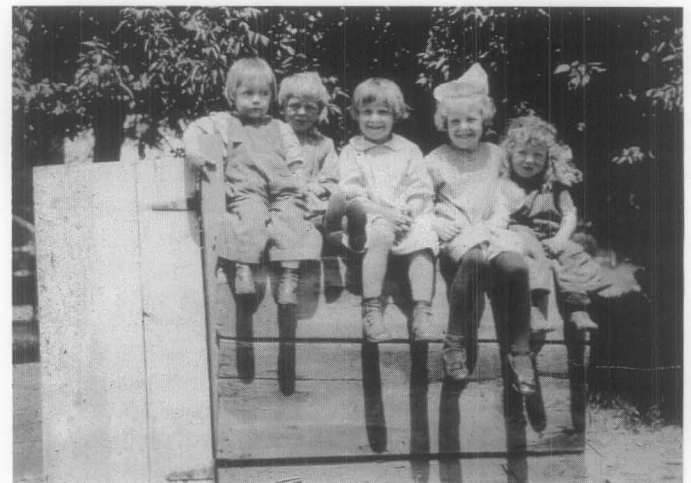
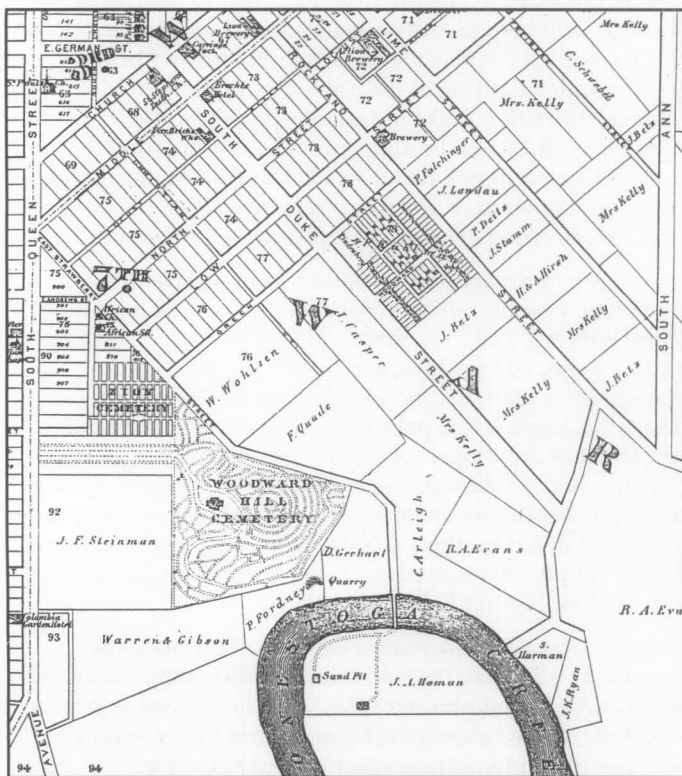
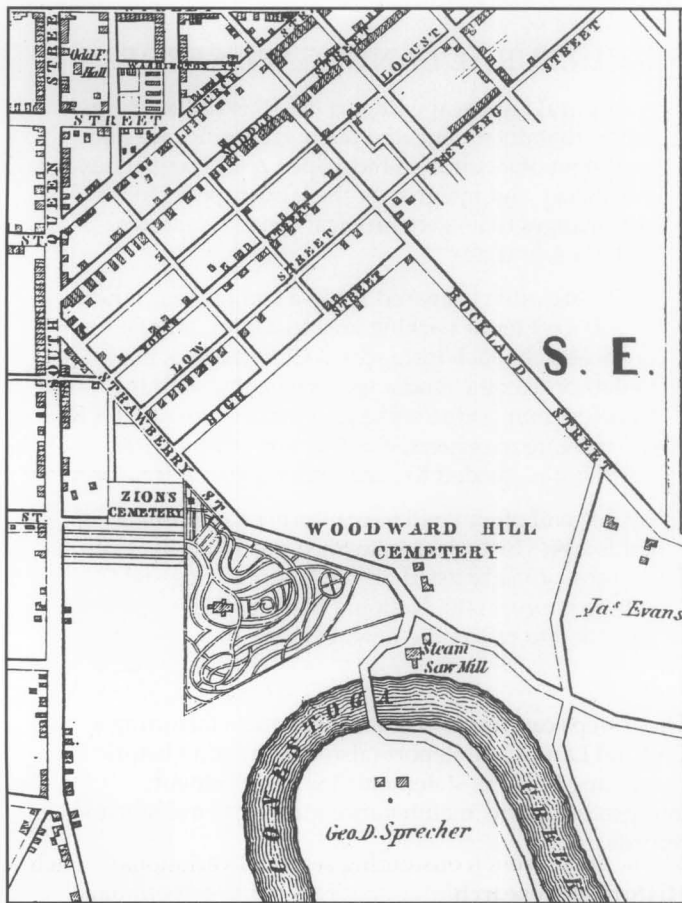
These steps can result in several products including a Cultural Landscape Report (also known as a Historic Landscape Report), statements for management, interpretive guide, maintenance guide and maintenance records.

Historical Research

Research is essential before undertaking any treatment. Findings will help identify a landscape's historic period(s) of ownership, occupancy and development, and bring greater understanding of the associations and characteristics that make the landscape or history significant. Research findings provide a foundation to make educated decisions for work, and can also facilitate ongoing maintenance and management operations, interpretation and eventual compliance requirements.

A variety of primary and secondary sources may be consulted. Primary archival sources can include historic plans, surveys, plats, tax maps, atlases, U. S. Geological Survey maps, soil profiles, aerial photographs, photographs, stereoscopic views, glass lantern slides, postcards, engravings, paintings, newspapers, journals, construction drawings, specifications, plant lists, nursery catalogs, household records, account books and personal correspondence. Secondary sources include monographs, published histories, theses, National Register forms, survey data, local preservation plans, state contexts and scholarly articles. (See Figures 5–7, page 4.)

Contemporary documentary resources should also be consulted. This may include recent studies, plans, surveys, aerial and infrared photographs, Soil Conservation Service soil maps, inventories, investigations and interviews. Oral histories of residents, managers, and maintenance personnel with a long tenure or historical association can be valuable sources of information about changes to a landscape over many years. (Figures 8–9, page 4) For properties listed in the National Register, nomination forms should be consulted.



Figures 5-7: Atlases and aerial photographs were useful for understanding the evolution of burial grounds in Lancaster County, Pennsylvania. Comparing the plans from the 1864 and 1875 atlases (courtesy Lancaster County Historical Society) with a 1980 aerial photograph (courtesy Lancaster County Planning Commission) revealed the growth and development of Woodward Hill Cemetery and its geographic context for over a century.

Figures 8, 9: Mary Smith Nelson spent her childhood at the Zane Grey family compound in Lackawaxen, Pennsylvania. Recently, her recollections of nearly eighty years ago helped landscape architects to document the evolution of this cultural landscape. These oral memoirs have since been confirmed by archeological and archival findings. (courtesy National Park Service, Zane Grey House Archives and LANDSCAPES)



Figure 10: Traditional land uses are often the key to long term preservation. Therefore, a knowledge of prior landscape management practices is essential as part of the research phase. Land use patterns were often the result of traditional activities such as agriculture, fishing or mining. In Hanalei, Hawaii for example, taro fields are important because they reflect the continuity of use of the land over time. (courtesy Land and Community Associates)

Preparing Period Plans

In the case of designed landscapes, even though a historic design plan exists, it does not necessarily mean that it was realized fully, or even in part. Based on a review of the archival resources outlined above, and the extant landscape today, an *as-built period plan* may be delineated. For all successive tenures of ownership, occupancy and landscape change, *period plans* should be generated (see Figure 13, page 6). Period plans can document to the greatest extent possible the historic appearance during a particular period of ownership, occupancy, or development. Period plans should be based on primary archival sources and should avoid conjecture. Features that are based on secondary or less accurate sources should be graphically differentiated. Ideally, all referenced archival sources should be annotated and footnoted directly on *period plans*.

Where historical data is missing, period plans should reflect any gaps in the CLR narrative text and these limitations considered in future treatment decisions (See Treatments for Cultural Landscapes on page 13.)

Inventorying and Documenting Existing Conditions

Both physical evidence in the landscape and historic documentation guide the historic preservation plan and treatments. To document existing conditions, intensive field investigation and reconnaissance should be conducted at the same time that documentary research is being gathered. Information should be exchanged among preservation professionals, historians, technicians, local residents, managers and visitors.

To assist in the survey process, National Register Bulletins have been published by the National Park Service to aid in identifying, nominating and evaluating designed and rural historic landscapes. Additionally, Bulletins are available for specific landscape types such as battlefields, mining sites, and cemeteries.⁶

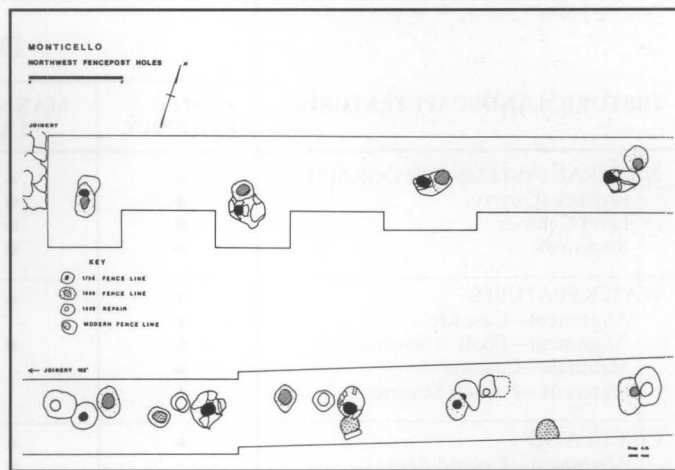


Figure 11: Landscape archeology is an important research tool that can provide location, dating and detail verification for landscape features. At Monticello, the estate of Thomas Jefferson in Charlottesville, Virginia, archeological research has employed both excavational and non-invasive methods. This has included aerial photography, soil resistivity, transect and stratified sampling and photogrammetric recording. As illustrated in the plan above, fence post spacing and alignment can be confirmed with a transect trenching technique.³ (courtesy Thomas Jefferson Memorial Foundation)

Although there are several ways to inventory and document a landscape, the goal is to create a baseline from a detailed record of the landscape and its features as they exist at the present (considering seasonal variations).⁷ Each landscape inventory should address issues of boundary delineation, documentation methodologies and techniques, the limitations of the inventory, and the scope of inventory efforts. These are most often influenced by the timetable, budget, project scope, and the purpose of the inventory and, depending on the physical qualities of the property, its scale, detail, and the interrelationship between natural and cultural resources. For example, inventory objectives to develop a treatment plan may differ considerably compared to those needed to develop an ongoing maintenance plan. Once the criteria for a landscape inventory are developed and tested, the methodology should be explained.

Preparing Existing Condition Plans

Inventory and documentation may be recorded in plans, sections, photographs, aerial photographs, axonometric perspectives, narratives, video—or any combination of techniques. Existing conditions should generally be documented to scale, drawn by hand or generated by computer. The scale of the drawings is often determined by the size and complexity of the landscape. Some landscapes may require documentation at more than one scale. For example, a large estate may be documented at a small scale to depict its spatial and visual relationships, while the discrete area around an estate mansion may require a larger scale to illustrate individual plant materials, pavement patterns and other details. The same may apply to an entire rural historic district and a fenced vegetable garden contained within. (See Figures 14-15, page 8).

When landscapes are documented in photographs, *registration points* can be set to indicate the precise location and orientation of features. Registration points should correspond to significant forms, features and spatial relationships within the landscape and its surrounds (see

HISTORIC LANDSCAPE FEATURES	DEGREE OF DOCUMENTATION					
	SITE EVIDENCE	MANNING PLAN	HISTORIC PHOTOS	LETTERS 1914-1946	1955-1993 RECORDS	SECONDARY SOURCES
NATURAL SYSTEMS/TOPOGRAPHY Bedrock (Quarry) Land Contour Rockwork	▲ ● ● ●	▲ ● ● ●	▲ ● ● ●	▲ ● ● ●	▲ ● ● ●	?
WATER FEATURES Alignment—Cascade Alignment—Pools & Streams Materials—Cascade Materials—Pools & Streams	▲ ● ● ● ●	▲ ● 	▲ ● ● ● ●	▲ ● ● ● ●	▲ ● ● ● ●	?
CIRCULATION Alignment—Upland Area Alignment—Perimeter Paths Alignment—Internal Paths Materials—Upland Area Materials—Perimeter Paths Materials—Internal Paths	▲ ● ● 	▲ ● ● ● ● ● ●	▲ ● ● ● ● ● ●	▲ ● ● 	▲ ● ● ● ● ● ●	?
SPATIAL RELATIONSHIPS Garden Site (Quarry) Viewshed (Cuyahoga Valley) Vista over Garden from Terrace Views within Garden Views within Upland Views from Croquet Lawn	▲ ● ● 	▲ ● ● ● ● ●	▲ ● ● ● ● ● ●	▲ ● ● ● ● ● ●	▲ ● 	?
VEGETATION Native Forest Trees Ornamental Shrubs in Garden Groundcovers in Garden Herbaceous Plants in Garden	▲ ● ● ● ●	▲ ● 	▲ ● ● ● ●	▲ ● ● ● ●	▲ ● ● ● ●	?
SITE FURNISHINGS Lanterns Seats	▲ ● ●	▲ 	▲ ● ●	▲ ● ●	▲ ● 	?
STRUCTURES Torii Gate Cistern Stone Wall Concealing Cistern Lagon Bridges Umbrella House Trellis/Lattice	▲ ● ● ● 	▲ ● 	▲ ● ● ● ● ●	▲ ● ● ● ● ● ●	▲ ● ● ● 	?

Figure 12: This chart measures available documentation for character-defining features in the Japanese Garden at Stan Hywet Hall, Akron, Ohio designed by Warren Manning. Areas with little or no historic documentation are noted, thus identifying areas where future treatment options may be restricted. As illustrated, restoration or reconstruction are viable alternatives based on the rich research findings. (courtesy Stan Hywet Hall Foundation, Inc. and Doell and Doell)

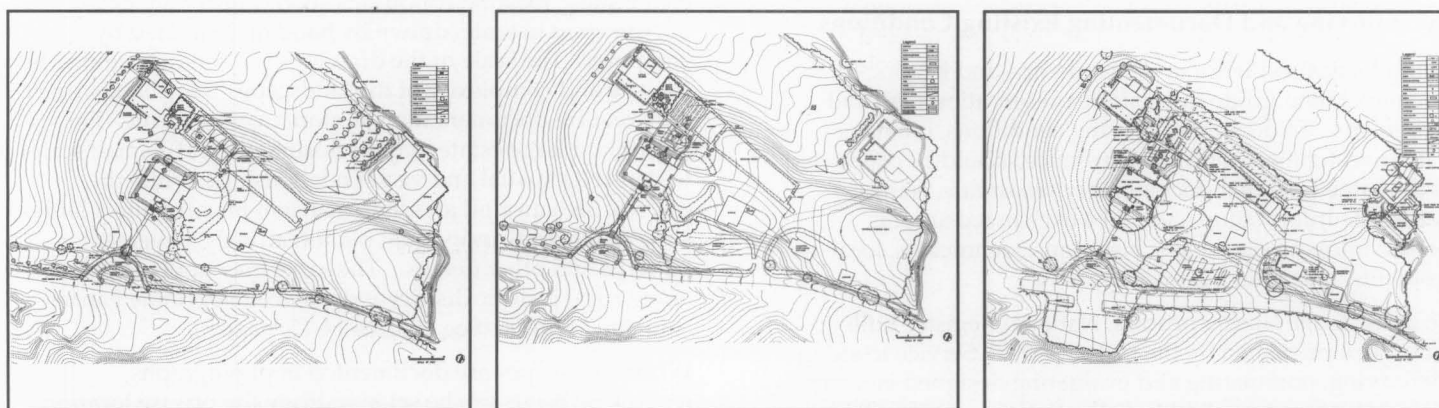


Figure 13: Period plans show the evolution of Aspet, the home of Augustus St. Gaudens, Cornish, New Hampshire. Plans were developed at two scales: first for the entire estate's development, and second for the core area around the house, studio and gardens. For both, plans were generated for five time periods: 1885-1903, 1903-1907, 1907-1926, 1926-1965 and 1965-1992. Illustrated above are the 1885-1903, 1907-1926, and the 1926-1965 plans for the core area. (courtesy National Park Service, North Atlantic Region and Pressley Associates)

READING THE LANDSCAPE

A noted geographer stated, "The attempt to derive meaning from landscapes possesses overwhelming virtue. It keeps us constantly alert to the world around us, demanding that we pay attention not just to some of the things around us but to all of them—the whole visible world in all of its rich, glorious, messy, confusing, ugly, and beautiful complexity."⁴

Landscapes can be read on many levels—landscape as nature, habitat, artifact, system, problem, wealth, ideology, history, place and aesthetic.⁵ When developing a strategy to document a cultural landscape, it is important to attempt to read the landscape in its context of place and time. (See Figures 16-17, page 8)

Reading the landscape, like engaging in archival research, requires a knowledge of the resource and subject area as well as a willingness to be skeptical. As with archival research, it may involve serendipitous discoveries. Evidence gained from reading the landscape may confirm or contradict other findings and may encourage the observer and the historian to revisit both primary and secondary sources with a fresh outlook. Landscape investigation may also stimulate other forms of research and survey, such as oral histories or archeological investigations, to supplement what appeared on-site.

There are many ways to read a landscape—whatever approach is taken should provide a broad overview. This may be achieved by combining on-the-ground observations with a bird's-eye perspective. To begin this process, aerial photographs should be reviewed to gain an orientation to the landscape and its setting. Aerial photographs come in different sizes and scales, and can thus portray different levels of detail in the landscape. Aerial photographs taken at a high altitude, for example, may help to reveal remnant field patterns or traces of an abandoned circulation system; or, portions of axial relationships that were part of the original design, since obscured by encroaching woodland areas. Low altitude aerial photographs can point out individual features such as the arrangement of shrub and herbaceous borders, and the exact locations of furnishings, lighting, and fence

alignments. This knowledge can prove beneficial before an on-site visit.

Aerial photographs provide clues that can help orient the viewer to the landscape. The next step may be to view the landscape from a high point such as a knoll or an upper floor window. Such a vantage point may provide an excellent transition before physically entering the cultural landscape.

On ground, evidence should then be studied, including character-defining features, visual and spatial relationships. By reviewing supporting materials from historic research, individual features can be understood in a systematic fashion that show the continuum that exists on the ground today. By classifying these features and relationships, the landscape can be understood as an artifact, possessing evidence of evolving natural systems and human interventions over time.

For example, the on-site investigation of an abandoned turn-of-the-century farm complex reveals the remnant of a native oak and pine forest which was cut and burned in the mid-nineteenth century. This previous use is confirmed by a small stand of mature oaks and the presence of these plants in the emerging secondary woodland growth that is overtaking this farm complex in decline. A ring count of the trees can establish a more accurate age. By *reading* other character-defining features—such as the traces of old roads, remnant hedgerows, ornamental trees along boundary roads, foundation plantings, the terracing of grades and remnant fences—the visual, spatial and contextual relationships of the property as it existed a century ago may be understood and its present condition and integrity evaluated.

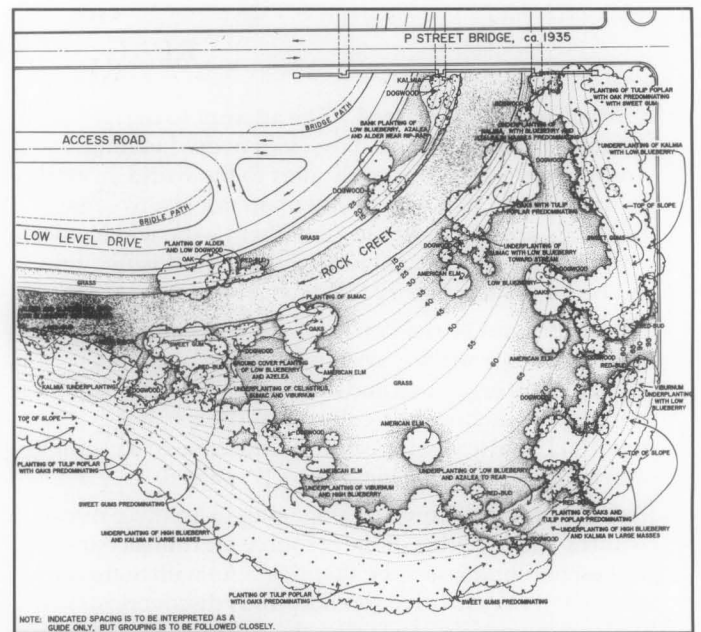
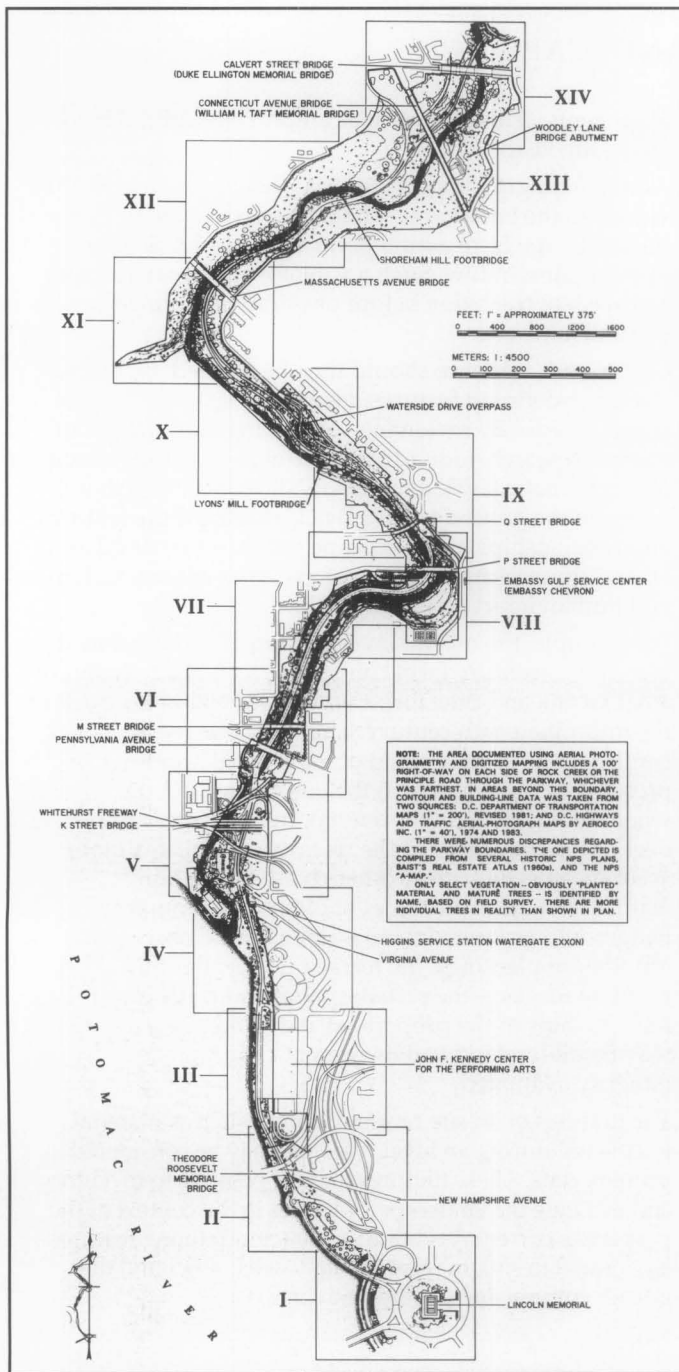
The findings of on-site reconnaissance, such as materials uncovered during archival research, may be considered primary data. These findings make it possible to inventory and evaluate the landscape's features in the context of the property's current condition. Character-defining features are located in situ, in relationship to each other and the greater cultural and geographic contexts.

Figure 22, page 11 for an example.) The points may also correspond to historic views to illustrate the change in the landscape to date. These locations may also be used as a management tool to document the landscape's evolution, and to ensure that its character-defining features are preserved over time through informed maintenance operations and later treatment and management decisions.

All features that contribute to the landscape's historic character should be recorded. These include the physical features described on page 1 (e.g. topography, circulation), and the visual and spatial relationships that are character-defining. The identification of existing plants, should be specific, including genus, species, common name, age (if known) and size. The woody, and if appropriate, herbaceous plant material should be accurately located on the existing conditions map. To ensure full representation of successional herbaceous plants, care should be taken to document the landscape in different seasons, if possible.

Treating living plant materials as a curatorial collection has also been undertaken at some cultural landscapes. This process, either done manually or by computer, can track the condition and maintenance operations on individual plants. Some sites, such as the Frederick Law Olmsted National Historic Site, in Brookline, Massachusetts have developed a field investigation numbering system to track all woody plants. (See Table, page 9) Due to concern for the preservation of genetic diversity and the need to replace significant plant materials, a number of properties are beginning to propagate historically important rare plants that are no longer commercially available, unique, or possess significant historic associations. Such herbarium collections become a part of a site's natural history collection.

Once the research and the documentation of existing conditions have been completed, a foundation is in place to analyze the landscape's continuity and change, determine its significance, assess its integrity, and place it within the historic context of similar landscapes.



Figures 14 and 15: Existing conditions plans for large corridor landscapes can employ a variety of documentation methodologies. For the 2-1/2 mile Rock Creek and Potomac Parkway, Washington, D.C., the Historic American Buildings Survey (HABS) used aerial photogrammetric photographs as the basis for digitized mapping and delineated drawings. Overall documentation was done at a scale of 1" = 40' with a 100' either side geographic context. Contours were shown at 2' intervals, tree canopy with trunk placement for specimen species, bridges (also drawn in detail), roads, and the creek itself. In all, there are 36 drawings measuring 34" x 44" for the project. These two sample drawings include the index to plans (above) and an area of existing conditions documentation (opposite top). (courtesy Historic American Buildings Survey)

Figures 16 and 17: Landscapes cannot be inventoried in a vacuum. Therefore, an understanding of its geographic context or setting should be part of inventory process. At Rancho Los Alamitos, Long Beach, California (middle and bottom opposite), a comparison between the 1936 aerial view with a present day aerial photograph illustrates the encroachments and adjacent developments that will affect the future treatment of visual and spatial relationships. (courtesy Rancho Los Alamitos Foundation)

HISTORIC PLANT INVENTORY

Within cultural landscapes, plants may have historical or botanical significance. A plant may have been associated with a historic figure or event or be part of a notable landscape design. A plant may be an uncommon cultivar, exceptional in size, age, rare and commercially/unavailable. If such plants are lost, there would be a loss of historic integrity and biological diversity of the cultural landscape. To ensure that significant plants are preserved, an inventory of historic plants is being conducted at the North Atlantic Region of the National Park Service.⁸ Historical landscape architects work with landscape managers and historians to gather oral and documented history on the plant's origin and potential significance. Each plant is then examined in the field by an expert horticulturist who records its name, condition, age, size, distribution, and, any notable botanic characteristics.

Plants that are difficult to identify or are of potential historical significance are further examined in the laboratory by a plant taxonomist who compares leaf, fruit, and flower characteristics with herbarium specimens for named species, cultivars and varieties. For plants species with many cultivars, such as apples, roses, and grapes, specimens may be sent to specialists for identification.

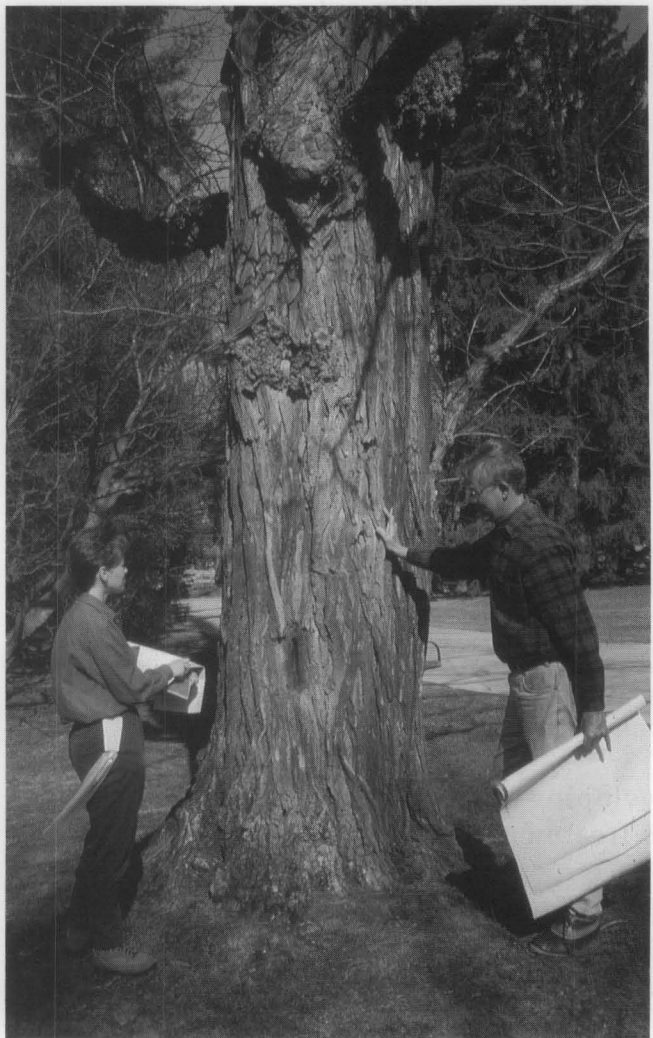
If a plant cannot be identified, is dying or in decline, and unavailable from commercial nurseries, it may be propagated. Propagation ensures that when rare and significant plants decline, they can be replaced with genetically-identical plants. Cuttings are propagated and grown to replacement size in a North Atlantic Region Historic Plant Nursery.



1. The Arnold Arboretum's preservation technician, lilac specialist, and horticulturist compare lilacs from the Vanderbilt Mansion National Historic Site in Hyde Park, New York with lilac specimens in the Arboretum's living collection. (courtesy Olmsted Center)



3. The Arnold Arboretum's horticulturist, landscape historian, and preservation technician examine shrubs at the Longfellow National Historic Site in Cambridge, MA. (courtesy Olmsted Center)



2. The Arnold Arboretum's horticulturist and preservation technician examine an enormous black locust tree at the Home of F.D. Roosevelt National Historic Site in Hyde Park, NY. (courtesy Olmsted Center)

Site Analysis: Evaluating Integrity and Significance

By analyzing the landscape, its change over time can be understood. This may be accomplished by overlaying the various period plans with the existing conditions plan. Based on these findings, individual features may be attributed to the particular period when they were introduced, and the various periods when they were present.

It is during this step that the *historic significance* of the landscape component of a historic property and its integrity are determined. Historic significance is the recognized importance a property displays when it has been evaluated, including when it has been found to meet National Register Criteria.⁹ A landscape may have several areas of historical significance. An understanding of the landscape as a continuum through history is critical in assessing its cultural and historic value. In order for the landscape to have integrity, these character-defining features or qualities that contribute to its significance must be present.

While National Register nominations document the significance and integrity of historic properties, in general, they may not acknowledge the significance of the landscape's design or historic land uses, and may not contain an inventory of landscape features or characteristics. Additional research is often necessary to provide the detailed information about a landscape's evolution and significance useful in making decision for the treatment and maintenance of a historic landscape. Existing National Register forms may be amended to recognize additional areas of significance and to include more complete descriptions of historic properties that have significant land areas and landscape features.

Integrity is a property's historic identity evidenced by the survival of physical characteristics from the property's historic or prehistoric period. The seven qualities of integrity are location, setting, feeling, association, design, workmanship and materials.¹⁰ When evaluating these qualities, care should be taken to consider change itself. For example, when a second-generation woodland overtakes an open pasture in a battlefield landscape, or a woodland edge encloses a scenic vista. For situations such as these, the reversibility and/or compatibility of those features should be considered, both individually, and in the context of the overall landscape. Together, evaluations of significance and integrity, when combined with historic research, documentation of existing conditions, and analysis findings, influence later treatment and interpretation decisions. (See Figure 21-23)

Developing a Historic Preservation Approach and Treatment Plan

Treatment may be defined as work carried out to achieve a historic preservation goal—it cannot be considered in a vacuum. There are many practical and philosophical factors that may influence the selection of a treatment for a landscape. These include the relative historic value of the property, the level of historic documentation, existing physical conditions, its historic significance and integrity, historic and proposed use (e.g. educational, interpretive, passive, active public, institutional or private), long- and short-term objectives, operational and code requirements (e.g. accessibility, fire, security) and costs for anticipated capital improvement, staffing and maintenance. The value of any significant archeological and natural resources



Figure 18: At Lawnfield, the home of President James A. Garfield near Cleveland, Ohio, the Sugar Maple that shadowed the porch during Garfield's 1880 "Front Porch Campaign" is in decline. Cuttings were taken from the historically significant tree by the Holden Arboretum and the National Park Service for eventual in-kind replacement. (courtesy NPS, Midwest Region)



Figure 19: The landscape of Lyndhurst, Tarrytown, New York is significant in American culture and meets Criterion C of the National Register because it embodies the distinctive character of a type and period in American landscape architecture, known as early Picturesque; it possesses high artistic value; and it is the work of a recognized master gardener, Ferdinand Mangold. (courtesy National Trust for Historic Preservation)

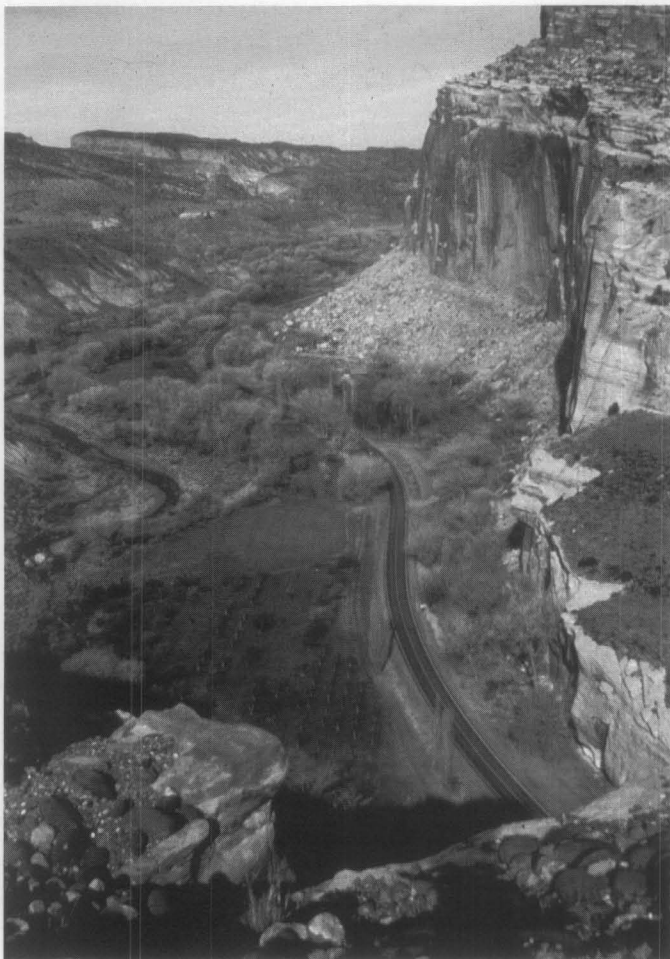
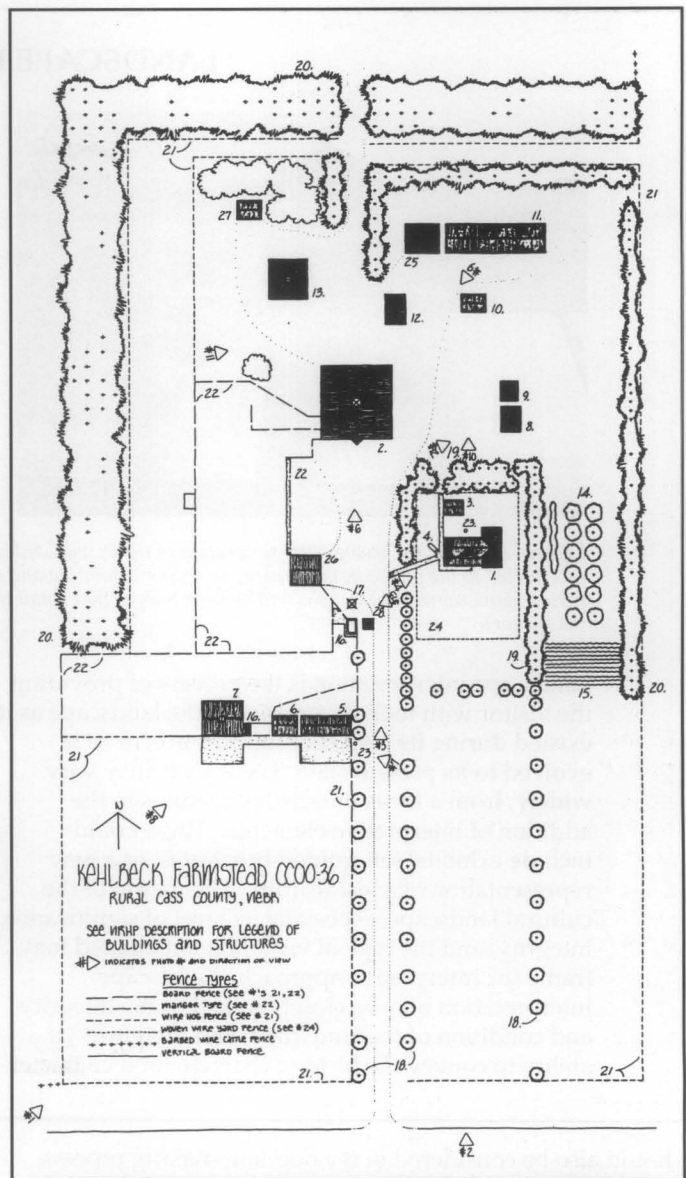


Figure 20: Cultural landscapes often contain plant communities such as orchards or meadows—both of which may or may not require a management intervention. When analyzing a landscape, it is important to recognize the present-day biodiversity of these resources—for example at the Fruita Rural Historic District in Capitol Reef National Park in Utah, the landscape contains 2,500 fruit trees associated with settlement and agriculture on the Colorado Plateau (courtesy D. White).

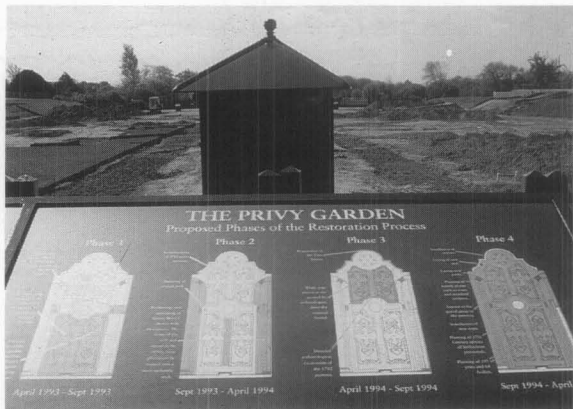


Figures 22 and 23: The plan for the Kehlbeck Farmstead, located in Cass County in Southeastern Nebraska, illustrates a well-planned, and aesthetically arranged general farm complex of the twentieth century. The farmstead is composed of 23 contributing and 5 non-contributing resources. Integrity was judged uniformly high because many character-defining resources were present and the visual and spatial relationships intact. Note the varied graphic techniques used to document a variety of fence types, and, the key to photographs illustrating the various landscape features and spatial relationships. The photograph above, labeled #3 on the farmstead, is looking north along the farm lane allée. (courtesy National Register Files)



Figure 21: Integrity can involve both continuity and change. This can be evidenced by a detailed review of materials. Although the surface material has changed on some roads through the Port Oneida (near Empire, Michigan) community, the character-defining alignment, width and rows of Sugar Maple trees remain intact. (courtesy NPS, Midwest Region).

LANDSCAPE INTERPRETATION



Figures A and B: Archeology and restoration of the Privy Garden at Hampton Court Palace gardens, England. The project is being interpreted to the public in the garden, an indoor exhibition and a multimedia show. The outdoor interpretive display, (above left) includes period plans, aerial photographs and historic images that detail the history of the garden and current work, 1994. (courtesy the author)

Landscape interpretation is the process of providing the visitor with tools to experience the landscape as it existed during its period of significance, or as it evolved to its present state. These tools may vary widely, from a focus on existing features to the addition of interpretive elements. These could include exhibits, self-guided brochures, or a new representation of a lost feature. The nature of the cultural landscape, especially its level of significance, integrity, and the type of visitation anticipated may frame the interpretive approach. Landscape interpretation may be closely linked to the integrity and condition of the landscape, and therefore, its ability to convey the historic character and character-

defining features of the past. If a landscape has high integrity, the interpretive approach may be to direct visitors to surviving historic features without introducing obtrusive interpretive devices such as free-standing signs. For landscapes with a diminished integrity, where limited or no fabric remains, the interpretive emphasis may be on using extant features and visual aids (e.g. markers, photographs, etc.) to help visitors visualize the resource as it existed in the past. The primary goal in these situations is to educate the visitor about the landscape's historic themes, associations and lost character-defining features or broader historical, social and physical landscape contexts.

should also be considered in the decision-making process. Therefore, a cultural landscape's preservation plan and the treatment selected will consider a broad array of dynamic and interrelated considerations. It will often take the form of a plan with detailed guidelines or specifications.

Adopting such a plan, in concert with a preservation maintenance plan (page 18-19), acknowledges a cultural landscape's ever-changing existence and the interrelationship of treatment and ongoing maintenance. Performance standards, scheduling and record keeping of maintenance activities on a day-to-day or month-to-month basis, may then be planned for. Treatment, management, and maintenance proposals can be developed by a broad range of professionals and with expertise in such fields as landscape preservation, horticulture, ecology, and landscape maintenance.

The selection of a primary treatment for the landscape, utilizing the Secretary of the Interior's Standards for the Treatment of Historic Properties, establishes an overall historic preservation approach, as well as a philosophical framework from which to operate. Selecting a treatment is based on many factors. They include management and interpretation objectives for the property as a whole, the period(s) of significance, integrity, and condition of individual landscape features.

For all treatments, the landscape's existing conditions and its ability to convey historic significance should be carefully considered. For example, the life work, design philosophy and extant legacy of an individual designer should all be understood for a designed landscape such as an estate, prior to treatment selection. For a vernacular landscape, such as a battlefield containing a largely intact mid-nineteenth century family farm, the uniqueness of that agrarian complex within a local, regional, state, and national context should be considered in selecting a treatment.

The overall historic preservation approach and treatment approach can ensure the proper retention, care, and repair of landscapes and their inherent features.¹¹ In short, the Standards act as a preservation and management tool for cultural landscapes. The four potential treatments are described in the box opposite.

Landscape treatments can range from simple, inexpensive preservation actions, to complex major restoration or reconstruction projects. The progressive framework is inverse in proportion to the retention of historic features and materials. Generally, preservation involves the least change, and is the most respectful of historic materials. It maintains the form and material of the existing landscape. Rehabilitation usually accommodates contemporary

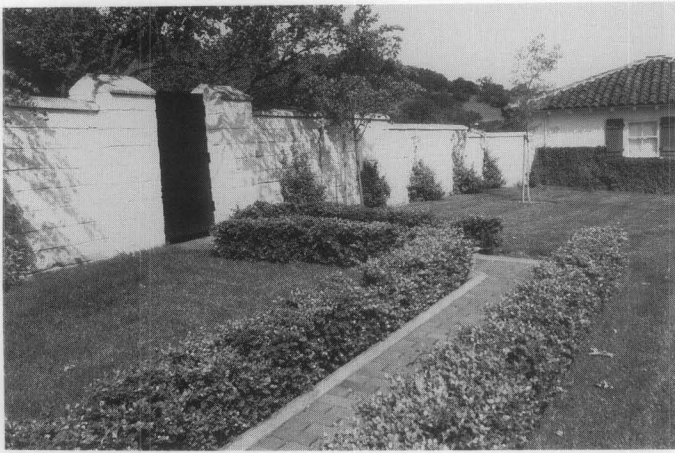


Figure 24: On some occasions, especially larger landscapes, it is possible to have a primary treatment, with discrete, or secondary areas of another treatment. This is most common for an individual feature in a larger landscape. At the Eugene and Carlotta O'Neill Historic Site, Danville, California the primary treatment selected for the courtyard was restoration. When accommodating universal accessibility requirements, the introduction of a grass paver walk was installed which warranted the removal of a few historic shrubs. This discrete project would be considered a rehabilitation treatment. (courtesy Patricia M. O'Donnell)

TREATMENTS FOR CULTURAL LANDSCAPES

Prior to undertaking work on a landscape, a treatment plan or similar document should be developed. The four primary treatments identified in the Secretary of the Interior's Standards for the Treatment of Historic Properties¹², are :

Preservation is defined as the act or process of applying measures necessary to sustain the existing form, integrity, and materials of an historic property. Work, including preliminary measures to protect and stabilize the property, generally focuses upon the ongoing maintenance and repair of historic materials and features rather than extensive replacement and new construction. New additions are not within the scope of this treatment; however, the limited and sensitive upgrading of mechanical, electrical and plumbing systems and other code-required work to make properties functional is appropriate within a preservation project.

Rehabilitation is defined as the act or process of making possible a compatible use for a property through repair, alterations, and additions while preserving those portions or features which convey its historical or cultural values.

Restoration is defined as the act or process of accurately depicting the form, features, and character of a property as it appeared at a particular period of time by means of the removal of features from other periods in its history and reconstruction of missing features from the restoration period. The limited and sensitive upgrading of mechanical, electrical and plumbing systems and other code-required work to make properties functional is appropriate within a restoration project.

Reconstruction is defined as the act or process of depicting, by means of new construction, the form, features, and detailing of a non-surviving site, landscape, building, structure, or object for the purpose of replicating its appearance at a specific period of time and in its historic location.



Figures 25 and 26: When the American Elm (*Ulmus americana*) was plagued with Dutch Elm Disease many historic properties relied on the Japanese Zelkova (*Zelkova serrata*) as a substitute plant. As illustrated, the overall form and scale of these trees is really quite different, and would therefore not be an appropriate substitute plant material under a restoration or reconstruction treatment.

alterations or additions without altering significant historic features or materials, with successful projects involving minor to major change. Restoration or reconstruction attempts to recapture the appearance of a property, or an individual feature at a particular point in time, as confirmed by detailed historic documentation. These last two treatments most often require the greatest degree of intervention and thus, the highest level of documentation.

In all cases, treatment should be executed at the appropriate level reflecting the condition of the landscape, with repair work identifiable upon close inspection and/or indicated in supplemental interpretative information. When repairing or replacing a feature, every effort should be made to achieve visual and physical compatibility. Historic materials should be matched in design, scale, color and texture.

A landscape with a high level of integrity and authenticity may suggest preservation as the primary treatment. Such a treatment may emphasize protection, stabilization, cyclical maintenance, and repair of character-defining landscape features. Changes over time that are part of the landscape's continuum and are significant in their own right may be



Figure 27: The historic birch alley at Stan Hywet Hall, Akron, Ohio was suffering from borer infestation and leaf miner. Dying trees were topped and basal sprout growth encouraged. Next, trees were selectively thinned, and ultimately, when the new growth matured, older trunks were removed. Original rootstock and genetic material were preserved. As illustrated, this preservation treatment took fifteen years to realize. (courtesy Child Associates)



Figure 28: Patterns on the land have been preserved through the continuation of traditional uses such as the grape fields at the Sterling Vineyards in Calistoga, California. (courtesy author)



Figures 29: Rehabilitation was selected as the primary treatment for Columbus Park, Chicago, Illinois. Originally designed and executed between 1917 and 1920 by Jens Jensen, the waterfall, cascades, rocky brook and associated landscape, are well documented and possesses a high level of integrity. (courtesy author)

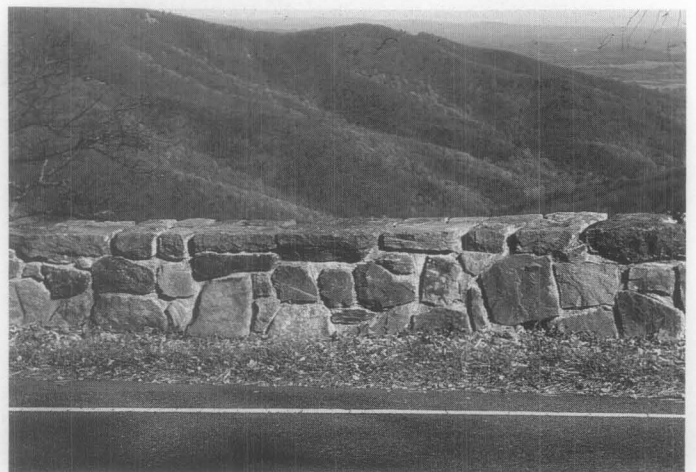


Figure 30, 31: A 75-mile portion of Skyline Drive at Shenandoah National Park overlooking the Blue Ridge Mountains of Virginia required the rehabilitation of a 22'-high, dry-laid stone wall. The new wall was built to a height of 27' - code normally requires a height of 36'. The wall was constructed of precast concrete, clad with split stone and mortar joints. To achieve visual compatibility recessed mortar joints were arranged in a random pattern (courtesy Robert R. Page)



retained, while changes that are not significant, yet do not encroach upon or erode character may also be maintained. Preservation entails the essential operations to safeguard existing resources. (Figures 27-28)

Rehabilitation is often selected in response to a contemporary use or need—ideally such an approach is compatible with the landscape's historic character and historic use. Rehabilitation may preserve existing fabric along with introducing some compatible changes, new additions and alterations. Rehabilitation may be desirable at a private residence in a historic district where the homeowner's goal is to develop an appropriate landscape treatment for a front yard, or in a public park where a support area is needed for its maintenance operations. (Figures 29-31)

When the most important goal is to portray a landscape and its character-defining features at an exact period of time, restoration is selected as the primary treatment. Unlike preservation and rehabilitation, interpreting the landscape's continuum or evolution is not the objective. Restoration may include the removal of features from other periods and/or the construction of missing or lost features and materials from the reconstruction period. In all cases, treatment should be substantiated by the historic research findings and existing conditions documentation.

Restoration and reconstruction treatment work should avoid the creation of a landscape whose features did not exist historically. For example, if features from an earlier period did not co-exist with extant features from a later period that are being retained, their restoration would not be appropriate. (Figures 32-34)

In rare cases, when evidence is sufficient to avoid conjecture, and no other property exists that can adequately explain a certain period of history, reconstruction may be utilized to depict a vanished landscape. The accuracy of this work is critical. In cases where topography and the subsurface of soil have not been disturbed, research and existing conditions findings may be confirmed by thorough archeological investigations. Here too, those features that are intact should be repaired as necessary, retaining the original historic features to the greatest extent possible. The greatest danger in reconstruction is creating a false picture of history.

False historicism in every treatment should be avoided. This applies to individual features as well as the entire landscape. Examples of inappropriate work include the introduction of historic-looking benches that are actually a new design, a fanciful gazebo placed in what was once an open meadow, executing an unrealized historic design, or designing a historic-looking landscape for a relocated historic structure within "restoration."

Figure 32-34: Tower Grove Park in St. Louis, Missouri, is a National Historic Landmark. The music pavilion, just north of the main drive is a circular lawn area with radiating walks, white marble busts of eminent composers, walks, and curb. The area was in general decline, especially the marble busts which were suffering from acid rain damage. Based on the excellent documentation in nineteenth century annual reports, postcards and photographic images, this area was recently restored. Illustrated above are a sample historic view, work in progress and the completed restoration project. (courtesy Tower Grove Park)

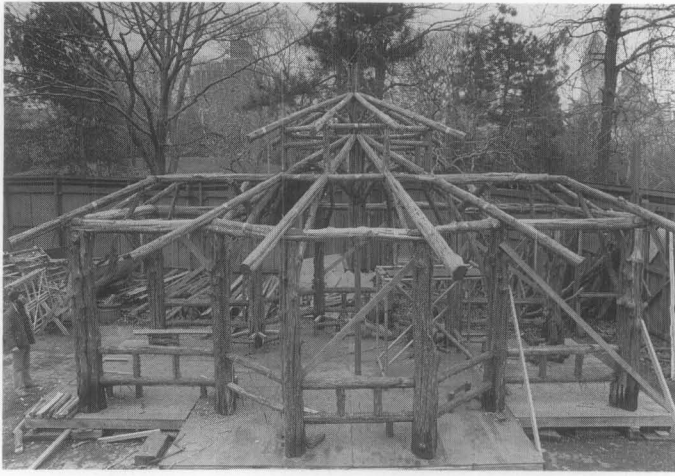


Figure 35-37: Central Park has developed an in-house historic preservation crew to undertake small projects. A specialized crew has been trained to specifically repair and rebuild rustic furnishings. As illustrated, the restoration of the Dene rustic shelter was achieved by constructing it in the Ramble compound, moving in-place opposite 67th street and completed. (courtesy Central Park Conservancy)

Developing a Preservation Maintenance Plan and Implementation Strategy

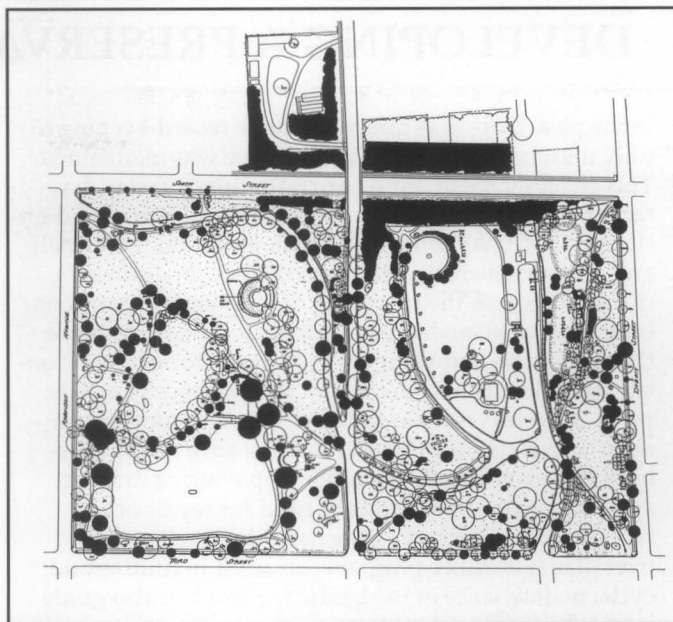
Throughout the preservation planning process, it is important to ensure that existing landscape features are retained. Preservation maintenance is the practice of monitoring and controlling change in the landscape to ensure that its historic integrity is not altered and features are not lost. This is particularly important during the research and long-term treatment planning process. To be effective, the maintenance program must have a guiding philosophy, approach or strategy; an understanding of preservation maintenance techniques; and a system for documenting changes in the landscape.

The philosophical approach to maintenance should coincide with the landscape's current stage in the preservation planning process. A Cultural Landscape Report and Treatment Plan can take several years to complete, yet during this time managers and property owners will likely need to address immediate issues related to the decline, wear, decay, or damage of landscape features. Therefore, initial maintenance operations may focus on the stabilization and protection of all landscape features to provide temporary, often emergency measures to prevent deterioration, failure, or loss, without altering the site's existing character.

After a Treatment Plan is implemented, the approach to preservation maintenance may be modified to reflect the objectives defined by this plan. The detailed specifications prepared in the Treatment Plan relating to the retention, repair, removal, or replacement of features in the landscape should guide and inform a comprehensive preservation maintenance program. This would include schedules for monitoring and routine maintenance, appropriate preservation maintenance procedures, as well as ongoing record keeping of work performed. For vegetation, the preservation maintenance program would also include thresholds for growth or change in character, appropriate pruning methods, propagation and replacement procedures.

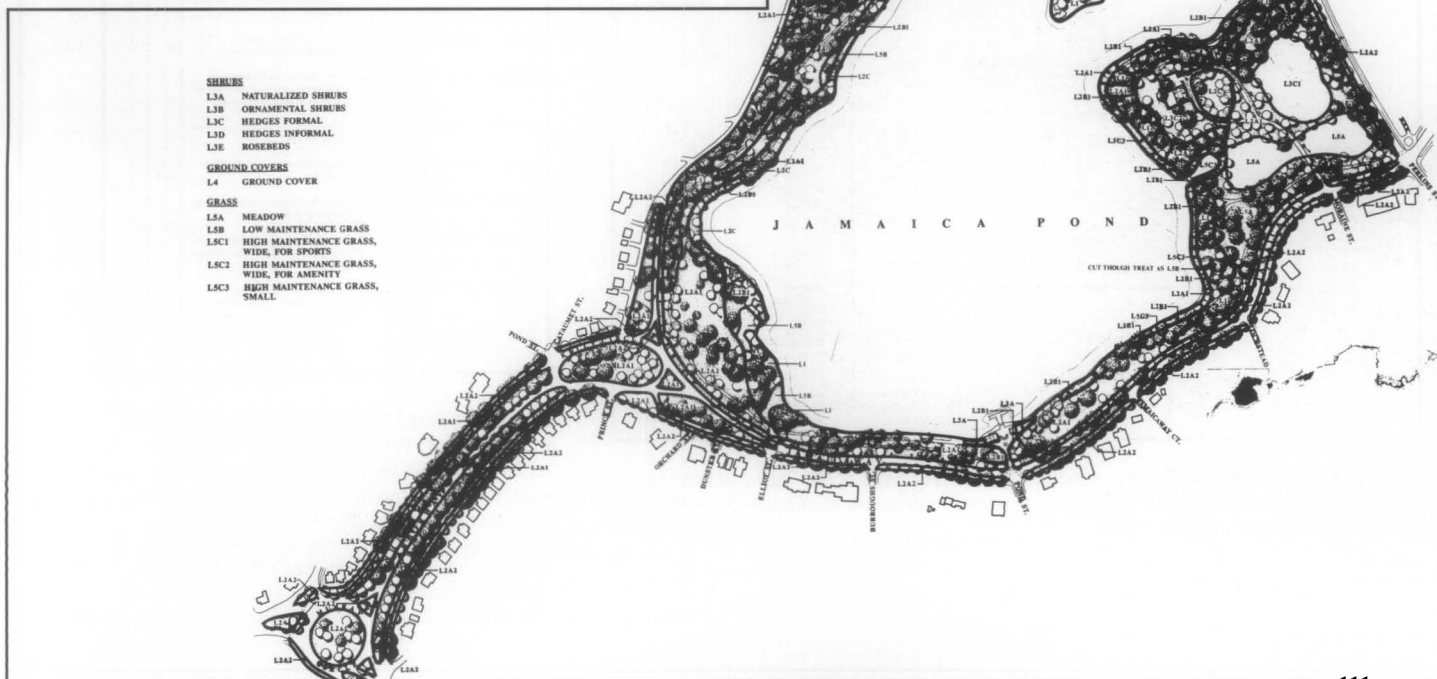
To facilitate operations, a property may be divided into discrete management zones (Figure 41). These zones are sometimes defined during the Cultural Landscape Report process and are typically based on historically defined areas. Alternatively, zones created for maintenance practices and priorities could be used. Examples of maintenance zones would include woodlands, lawns, meadow, specimen trees, and hedges.

Training of maintenance staff in preservation maintenance skills is essential. Preservation maintenance practices differ from standard maintenance practices because of the focus on perpetuating the historic character or use of the landscape rather than beautification. For example, introducing new varieties of turf, roses or trees is likely to be inappropriate. Substantial earth moving (or movement of soil) may be inappropriate where there are potential archeological resources. An old hedge or shrub should be rejuvenated, or propagated, rather than removed and replaced. A mature specimen tree may require cabling and careful monitoring to ensure that it is not a threat to visitor safety. Through training programs and with the assistance of preservation maintenance specialists, each property could develop maintenance specifications for the care of landscape features.



A black and white photograph of a large, spreading tree in a park. The tree has a thick trunk and a wide, dense canopy of leaves. To the right of the large tree stands a tall palm tree. In the background, a building with a gabled roof is visible, surrounded by other trees and a fence. The foreground is a grassy area.

Figure 41 (below): A small property of under an acre may only have a few management zones including lawn, trees over lawn, shrub and herbaceous borders. Larger, more complex landscapes such as Jamaica Pond Park, Boston and Brookline, Massachusetts, contains a broader range of management zones including: forests, trees over grass—broad areas, trees over grass—narrow areas, meadows, and mown grass for active recreation amenities or passive use. (courtesy Walmsley/Pressley Joint Venture)



DEVELOPING A PRESERVATION MAINTENANCE GUIDE

In the past, there was rarely adequate record-keeping to fully understand the ways a landscape was maintained. This creates gaps in our research findings. Today, we recognize that planning for ongoing maintenance and on-site applications should be documented—both routinely and comprehensively. An annual work program or calendar records the frequency of maintenance work on built or natural landscape features. It can also monitor the age, health and vigor of vegetation. For example, on-site assessments may document the presence of weeds, pests, dead leaves, pale color, wilting, soil compaction—all of which signal particular maintenance needs. For built elements, the deterioration of paving or drainage systems may be noted and the need for repair or replacement indicated before hazards develop. An overall maintenance program can assist in routine and cyclic maintenance of the landscape and can also guide long term treatment projects.

To help structure a comprehensive maintenance operation that is responsive to staff, budget, and maintenance priorities, the National Park Service has developed two computer-driven programs for its own landscape resources. A Maintenance Management Program (MM) is designed to assist maintenance managers in their efforts to plan, organize, and direct the park maintenance system. An Inventory and Condition Assessment Program (ICAP) is designed to complement

MM by providing a system for inventorying, assessing conditions, and for providing corrective work recommendations for all site features.

Another approach to documenting maintenance and recording changes over time is to develop a manual or computerized graphic information system. Such a system should have the capability to include plans and photographs that would record a site's living collection of plant materials. (Also see discussion of the use of photography under Preparing Existing Conditions Plans, page 5.) This may be achieved using a computer-aided drafting program along with an integrated database management system.

To guide immediate and ongoing maintenance, a systematic and flexible approach has been developed by the Olmsted Center for Landscape Preservation. Working with National Park Service landscape managers and maintenance specialists, staff assemble information and make recommendations for the care of individual landscape features.

Each landscape feature is inspected in the field to document existing conditions and identify field work needed. Recommendations include maintenance procedures that are sensitive to the integrity of the landscape.

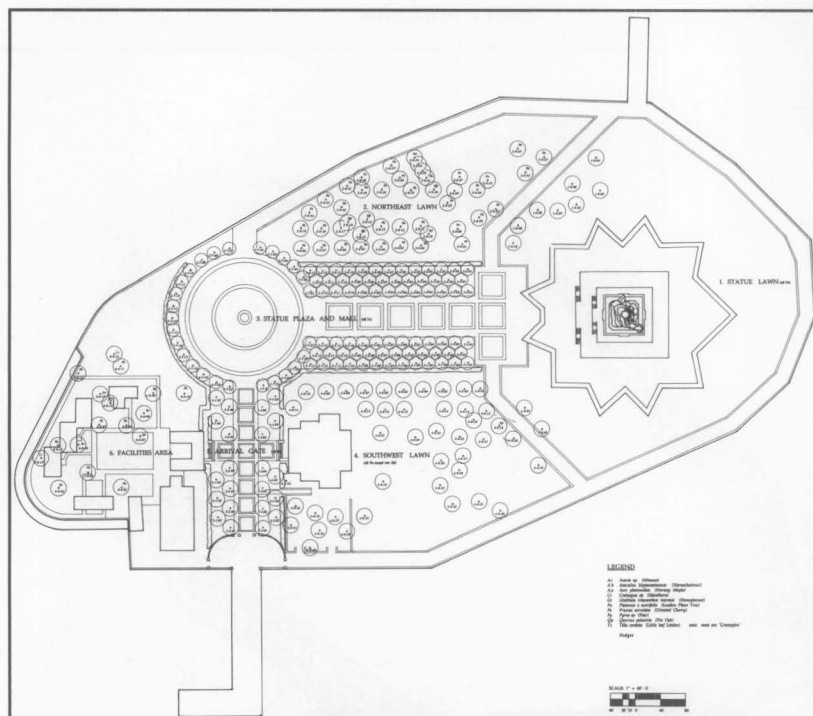


Figure A - Existing Conditions: A map of the existing trees at the Statue of Liberty National Monument is used to indicate necessary preservation maintenance work (Drawn by Margaret Coffin, 1992)

Category: Specimen Trees	Tree ID	DBH	Height	Form	Condition	Work Needed	Priority	Notes
Area: 4 - South Lawn								
Feature Name and Field ID#								
London Plane Tree 4-0-26	2-2	-2	-2	n	Large scar from branch split, structurally weak tree, remove branches with decay at base, plan for replacement	yes	x	P
London Plane Tree 4-0-27	3-1	-2	-2	n	leaner, crowded by larger adjacent tree, remove dead branches	no	*	
London Plane Tree 4-0-28	3-1	-3	-3	n	internal decay, remove large dead branches	yes	*	
London Plane Tree 4-0-29	2-1	-2	-2	n	fair condition, remove dead watersprouts from trunk and dead branches	no	*	
London Plane Tree 4-0-30	1-2	-2	-2	n	good condition, remove watersprouts from trunk	no	x	
London Plane Tree 4-0-31	2-3	-1	-1	n	fair condition, needs structural pruning at top of crown, remove three dead broken branches	no	*	
London Plane Tree 4-0-32	1-3	-2	-2	n	good overall condition, remove one dead branch	no	*	
London Plane Tree 4-0-33	3-2	-1	-1	n	leaner, remove two of five lower branches	no	x	
London Plane Tree 4-0-34	1-2	-2	-2	n	remove watersprouts from trunk, re-cut dead branch spur	no	x	
London Plane Tree 4-0-35	2-2	-2	-2	n	remove watersprouts from trunk, needs structural pruning throughout	no	x	
London Plane Tree 4-0-36	3-3	-3	-3	n	in decline, dieback throughout, safety hazard, remove all deadwood, plan for replacement	yes	*	P
Inspected by: M. Coffin, A. Farago, C. Pepper Date: July 15, 1992								

Figure B - Field Inventory, Inspection, and work needed: Within areas of the landscape, each feature is assigned a field identification number. An inspection is conducted to assess the condition, potential problems, such as deadwood or integral decay, and specify work needed. A map (above) is used to locate features that require attention)

Statue of Liberty National Monument FEATURE DATA - LONDON PLANE TREE	
CATEGORY:	Deciduous Tree
AREAS:	4- South Lawn
FEATURE NAME:	London Plane tree (<i>Platanus x acerifolia</i>)
SOURCE OF IDENTIFICATION:	Al Fargglio, STL Horticulturist, 1992
DESCRIPTIVE CHARACTERISTICS: The fruit of London Plane Tree is typically in clusters of 2, leaves are large, 5-10" width whereas the fruit of American Sycamore is singular, and leaves are slightly smaller.	
HISTORIC SIGNIFICANCE/ APPEARANCE/ INTENT: London Plane trees were specified in the General Development Plan by Norman Newton in 1937 (Newton, N. T. Design on the Land, Harvard University Press, 1971, p. 543).	
PRESERVATION PRACTICES AND WORK PROCEDURES: Winter - Prune out dead, damaged wood and watersprouts as needed. Inspect for interior decay and pest damage. Disinfect tools between cuts to prevent spread of canker stain disease. Spring - Trunk protection. Take preventative actions to protect the base of each tree from string trimmer damage. Train all equipment operators. Monitor and treat anthracnose. Prolonged periods of cool, moist, damp spring weather will increase anthracnose. The best times to control anthracnose are before bud break, at bud break, and when leaves have expanded. Transplant. Spring is the best time to transplant trees. Summer - Water newly transplanted trees so that they receive one inch of water every 10 days. To water, set up water bags around the base of the tree at the end of the day. Remove empty bags in the morning. Do not overwater. Fall - Rake up London Plane tree leaves and dispose off site to remove anthracnose inoculum.	
PESTS, DISEASES AND CULTURAL PROBLEMS: Pests - Plum Borer, Locust Scale, Sycamore Lace Bug, Aphids, Fall Webworm Diseases - Anthracnose, Canker stain, Wetwood, Powdery Mildew Cultural Problems - Susceptible to drought stress, frequently produces watersprouts, often vandalized by carving in bark.	
RECOMMENDED METHOD AND SOURCE OF REPLACEMENT: Replace in-kind with nursery stock. Consider anthracnose resistant cultivars that are similar in size and character to the straight species.	
PROPAGATION METHOD: Take root cuttings in July or August. Treat with IBA.	
ADDITIONAL SOURCES OF INFORMATION: Shigo, Alex L. A New Tree Biology. Durham NH: Shigo & Trees, Assoc., 1986. Sinclair, Lyon & Johnson. Diseases of Trees & Shrubs. Ithaca NY: Cornell U. Press, 1987.	

Figure C - Feature Data: For each feature that requires special care, a detailed sheet is developed. This contains notes on when to monitor and carry out work, specific procedures, cite potential problems, and perform repair or replacement.

Statue of Liberty National Monument CALENDAR - SPRING	
FOR ALL TREES - Transplant. Spring is the best time to transplant trees. If soil or leaf analysis indicates that fertilizer is needed, late fall is the best time to fertilize trees. However, fertilizer may also be applied in early Spring, before bud break. Use an organic fertilizer with the micronutrients needed, such as manganese. If the lawn area below the trees is receiving fertilizer, additional fertilizer is not necessary. Light annual pruning throughout the tree tends to reduce the amount of fertilizer needed.	
LONDON PLANE TREES - Trunk protection. Take preventative actions to protect the base of each tree from string trimmer damage. Train all equipment operators.	
Monitor and treat anthracnose. Prolonged periods of cool, moist, damp spring weather will increase anthracnose. The best times to control anthracnose are before bud break, at bud break, and when leaves have expanded.	
LINDENS - Prune out crossing branches on young trees.	
LAWN - Rake lawn areas in the early spring to remove matted grass and accumulated debris. De-thatch lawn areas where thatch accumulation exceeds 3/4 of an inch. Aerate with a core aerator. Lawn areas that are heavily compacted. However, do not aerate around the trees because of shallow roots.	
Begin mowing and trimming operations. Instruct all equipment operators on how to prevent damage to tree trunks.	
Check soil pH. Send soil samples to Cooperative Extension Service for analysis of pH, phosphorus and potassium levels. Apply lime and fertilizer as necessary to adjust the soil condition.	
Fertilize in late May or early June with an organic fertilizer with an analysis of 5-4-3 or equivalent. Apply at a rate of one pound of nitrogen per 1000 square feet. This is the first of three annual applications.	
Inspect lawn areas for pests (grubs) and disease (leaf spot, leaf smut) damage.	

Figure D - Calendar for Monitoring and for Work: All feature-specific monitoring and work recommendations are combined into one seasonal calendar for all areas of the landscape to ensure that important work activities are not overlooked.

Statue of Liberty National Monument RECORD KEEPING - FEATURE: LONDON PLANE TREE									
Record notes on measurements, conditions, work performed, reason for removal, replacement or installation, propagation method and growing location, status of feature, or reference to a related report, etc.	<table border="1"> <thead> <tr> <th>Maintenance</th> <th>Measurements</th> <th>Major Work / Change</th> <th>Removal</th> <th>Replacement</th> <th>Propagation</th> <th>Other</th> <th>Date and Initials</th> </tr> </thead> </table>	Maintenance	Measurements	Major Work / Change	Removal	Replacement	Propagation	Other	Date and Initials
Maintenance	Measurements	Major Work / Change	Removal	Replacement	Propagation	Other	Date and Initials		
All deadwood and watersprouts removed by Arboriculture Class from University of Massachusetts.			X				AF 9/92		
Replaced tree #4-0-26 with London Plane Tree, anthracnose-resistant cultivar 'Columbia' installed through Gardener Intake Project.				X			AF 4/93		
#4-0-26 damaged by vandalism, re-set and re-staked.			X				AF 5/93		
Removed and replaced #4-0-37 with London Plane Tree, anthracnose-resistant cultivar 'Liberty' in order to compare with 'Columbia'.			X				AF 5/93		
#4-0-26 'Columbia' and #4-0-37 'Liberty' both in fairly good condition. Both received water by gator bag 1x a week during July and August.			X				XAF 8/93		

Figure E - Record Keeping: A record sheet is created for each type of feature. Maintenance staff may record information relating to changes in condition, major work performed, removal, replacement, propagation and any other events. As records are added too through the years, they become a valuable source of documentation of the landscape's history.

Because landscapes change through the seasons, specifications for ongoing preservation maintenance should be organized in a calendar format. During each season or month, the calendar can be referenced to determine when, where, and how preservation maintenance is needed. For example, for some trees structural pruning is best done in the late winter while other trees are best pruned in the late summer. Serious pests are monitored at specific times of the year, in certain stages of their life cycle. This detailed calendar will in turn identify staff needs and work priorities.

Depending on the level of sophistication desired, one approach to documenting maintenance data and recording change over time is to use a computerized geographical or visual information system.¹³ Such a system would have the capability to include plans and photographs that would focus on a site's landscape features.

If a computer is not available, a manual or notebook can be developed to organize and store important information. This approach allows managers to start at any level of detail and to begin to collect and organize information about landscape features (see Box opposite and above). The value of these maintenance records cannot be overstated. These records will be used in the future by historians to understand how the landscape has evolved with the ongoing care of the maintenance staff.

Recording Treatment Work and Future Research Recommendations

The last and ongoing step in the preservation planning process records the treatment work as carried out. It may include a series of as-built drawings, supporting photographic materials, specifications and a summary assessment. New technologies that have been successfully used should be

highlighted. Ideally, this information should be shared with interested national organizations for further dissemination and evaluation.

The need for further research or additional activities should also be documented. This may include site-specific or contextual historical research, archeological investigations, pollen analysis, search for rare or unusual plant materials, or, material testing for future applications.

Finally, in consultation with a conservator or archivist—to maximize the benefit of project work and to minimize the potential of data loss—all primary documents should be organized and preserved as archival materials. This may include field notes, maps, drawings, photographs, material samples, oral histories and other relative information.

Summary

The planning, treatment, and maintenance of cultural landscapes requires a multi-disciplinary approach. In landscapes, such as parks and playgrounds, battlefields, cemeteries, village greens, and agricultural land preserves—more than any other type of historic resource—communities rightly presume a sense of stewardship. It is often this grass roots commitment that has been a catalyst for current research and planning initiatives. Individual residential properties often do not require the same level of public outreach, yet a systematic planning process will assist in making educated treatment, management and maintenance decisions.

Wise stewardship protects the character, and or spirit of a place by recognizing history as change over time. Often, this also involves our own respectful changes through treatment. The potential benefits from the preservation of cultural landscapes are enormous. Landscapes provide

scenic, economic, ecological, social, recreational and educational opportunities that help us understand ourselves as individuals, communities and as a nation. Their ongoing preservation can yield an improved quality of life for all, and, above all, a sense of place or identity for future generations.

Selected Reading

Birnbaum, Charles A, guest editor. *Preservation Forum*. "Focus on Landscape Preservation". Washington, D.C.: National Trust for Historic Preservation, Volume 7, No. 3, May/June 1992.

Buggey Susan, guest editor. *APT Bulletin*. Special Issue: *Conserving Historic Landscapes*. Fredericksburg, VA: Association for Preservation Technology International, Volume XXIV, No. 3-4, 1992.

Burns, John A, and the Staff of HABS/HAER. *Recording Historic Structures*. American Institute of Architects Press, 1989. (Includes chapter on the documentation of Meridian Hill Park, pp. 206-219.)

Diehl, Janet and Thomas S. Barrett, et al. *The Conservation Easement Handbook. Managing Land Conservation and Historic Preservation Easement Programs*, The Land Trust Exchange (now Alliance) and the Trust for Public Land, 1988.

International Committee of Historic Gardens and Sites, ICOMOS-IFLA. *Jardins et Sites Historiques*, Scientific Journal. ICOMOS 1993. Compilation of papers on the subject, in both english and french.

Kelso, William M., and Rachel Most. *Earth Patterns: Essays in Landscape Archaeology*. Charlottesville, VA: University Press of Virginia, 1990.

Stokes, Samuel, N., et al. *Saving America's Countryside: A Guide to Rural Conservation*. Baltimore and London: John Hopkins University Press, 1989.

Tishler, William, editor. *American Landscape Architecture, Designers and Places*. Washington, DC: The Preservation Press, 1989.

Several publications available from the National Park Service deal directly with the preservation of historic landscapes. These include:

America's Landscape Legacy, Brochure, Preservation Assistance Division, 1992.

Guidelines for the Treatment of Historic Landscapes, Preservation Assistance Division, 1992 (Draft).

Case Studies in Landscape Preservation, Preservation Assistance Division in cooperation with the Alliance for Landscape Preservation, 1995.

Cultural Landscapes Bibliography: An Annotated Bibliography of Resources in the National Park System, Park Historic Architecture Division, 1992.

Historic Landscape Directory; A Source Book of Agencies, Organizations, and Institutions Providing Information on Historic Landscape Preservation, Preservation Assistance Division, 1991.

CRM, Cultural Resource Management, Thematic Issues: *The Preservation of Cultural Landscapes*, Volume 14, No.6,

1991; *A Reality Check for Our Nation's Parks*, Volume 16, No. 4, 1993; *Historic Transportation Corridors*, Volume 16, No. 11, 1993; and, *The Interpretation of Cultural Landscapes*, Volume 17, No. 8, 1994.

Pioneers of American Landscape Design: An Annotated Bibliography, Preservation Assistance Division, 1993 (ISBN:0-16-041974-3).

Making Educated Decisions: A Landscape Preservation Bibliography, Preservation Assistance Division, 1994 (ISBN:0-16-045145-0)

National Register Bulletin 18: How to Evaluate and Nominate Designed Historic Landscapes; *National Register Bulletin 30: Guidelines for Evaluating and Documenting Rural Historic Landscapes*; *National Register Bulletin 40: Guidelines for Evaluating and Registering Battlefields*; and, *National Register Bulletin 41: Guidelines for Evaluating and Registering Cemeteries*, Interagency Resources Division.

Endnotes

¹ The cultural landscape definitions are contained in NPS-28, *Cultural Resource Management Guideline*, Release No. 4, 1994, National Park Service.

² For an expanded list of offices to contact, see *America's Landscape Legacy* brochure. Free from the National Park Service Preservation Assistance Division.

³ From Kelso, William, *A Report on the Archeological Excavation at Monticello, Charlottesville, VA, 1979-1981*, Thomas Jefferson Memorial Foundation, 1982.

⁴ Lewis, Pierce, "Common Landscapes as Historic Documents," Lubar, Steven and Kingery, W. David (eds.), *Essays on Material Culture*, Smithsonian Institution Press, Washington, DC, 1993, p. 138.

⁵ Meinig, D. W. "The Beholding Eye: Ten Versions of the Same Scene," *The Interpretation of Ordinary Landscapes*, Oxford University Press, New York, 1979, pp. 33-48.

⁶ See National Park Service *National Register Bulletins* under Selected Reading (opposite).

⁷ The Historic American Buildings Survey, HABS, has generated standards for landscape documentation that they now utilize on a number of projects. Specifically, a case study on recording historic landscapes is included in *Recording Historic Structures*, pp. 206-219. See Selected Reading (opposite).

⁸ This is being undertaken with technical assistance from the Olmsted Center for Landscape Preservation a partnership between the National Park Service and the Arnold Arboretum of Harvard University that provides cultural landscape technical assistance, technology development and training.

⁹ See *National Register Bulletin 16A: How to Complete the National Register Registration Form*. Washington, D.C.: U.S. Department of the Interior, National Park Service, Interagency Resources Division, 1991.

¹⁰ Ibid.

¹¹ The standards are general principles for the treatment of buildings, structures, sites, objects, districts and landscapes. The treatment standards are one set of standards included in the broader group known as the *Secretary of the Interior's Standards for Archaeology and Historic Preservation*.

¹² The Secretary of the Interior is responsible for establishing professional standards and providing advice on the preservation and protection of all cultural resources listed on or eligible for the National Register of Historic Places. For a copy of the brochure, *The Secretary of the Interior's Standards for the Treatment of Historic Properties*, 1992 contact the National Park Service Preservation Assistance Division (424) Box 37127 Washington, DC 20013-7127.

¹³ A visual information system, a computer-aided mapping program with a linked database, has been developed for the historic landscape at the Frederick Olmsted National Historic Site. Data can be accessed directly from a digitized map such as information on each plant including identification, age, location, size, condition, and maintenance history.

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