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Preparing Design Guidelines for a Historic District

What are Design Guidelines?

Design guidelines are a preservation and redevelopment management tool used to help retain the historic character of a designated historic district (or districts, as they may be developed to cover more than one). Compiled and used in conjunction with a local preservation ordinance, project review by a local preservation commission, and other construction permitting regulations, they help ensure that historic properties are protected and that new construction respects district character.

Design guidelines establish the architectural character context of a historic district by identifying and categorizing existing historic properties and resources. They provide guidance addressing alterations and improvements to those historic properties, for new construction and development, for regulating demolition and dealing with neglected properties, and recommendations for appropriate maintenance practices. They serve to guide individuals, businesses, architects, designers, as well as the local historic commission, in making consistent and objective decisions involving work and development within the historic district.

Preliminary Preparation

Before design guidelines are prepared, the historic character of the associated historic district must be documented so that detailed knowledge of its resources is available for incorporation into the guidelines as necessary. If the district is already a local or nationally registered historic district, then much of this research will already have been accomplished in previous surveys. If it has not been previously surveyed or if a previous survey is inadequate, then it is essential to conduct a (new) survey. For design guideline purposes, survey information is analyzed to determine district historic character-defining building patterns and forms, architectural styles and features, landscape and streetscape features, and to identify intrusive or non-contributing properties.

It is also important that development patterns or opportunities within the district be understood as much as possible and that other local/regional governmental development plans and regulations be studied to identify potential conflicts between those and the goals of the historic district. Ideally, this preparatory information will be used to develop design guidelines that will promote appropriate improvements or changes to existing historic properties and will direct quality development to suitable areas, all the while supporting broader planning objectives.

Components of a Design Guidelines Manual / Historic District Manual

The document containing historic district design guidelines is typically the **Design Guidelines Manual** or **Historic District Manual**, which also needs to include a brief history of the district, information about the purpose of the design guidelines and the review process it supports, descriptions of the district's historic features and characteristics collected from survey information, terms and definitions, and applicable reference information. As a compilation, the Design Guidelines Manual or Historic District Manual should be configured in a logical and user-friendly manner, use terms understandable by the general public to the extent possible, and be divided into subject matter sections for ease of finding information. Essentially, these subject sections

should be determined according to the manner desired for organizing information for presentation, which could be by resource type (residence, building, landscape, etc.), feature (roof, porches, windows, storefronts, etc.), or some combination thereof.

Recommendations and cautions contained in design guidelines are often applicable to any historic district because of their numerous similarities. However, the design guidelines of a particular historic district need to be tailored to its individual character. To this end, general recommendations that have no application to a historic district should not be included, while situations that are unique to the district should have custom recommendations developed.

Consultants

Although members of the local preservation commission or other volunteers could complete some of the activities associated with producing design guidelines, engaging a professional preservation consultant may be useful to ensure that the design guidelines are thorough, impartial, professional, and consistent with the *Secretary of the Interior's Standards for the Treatment of Historic Properties* and the *Secretary of the Interior's Standards for Preservation Planning*. Hiring a preservation consultant should include the following: considering their or their employees' education, training, and experience; reviewing their previous work; and contacting references to find out how useful/user-friendly design guidelines developed for their other clients have been.

It is also important to remember the limits of the consultant's role in the design guidelines development process. Clearly, the consultant should be responsible for gathering new or compiling existing information, making guideline recommendations based on recognized preservation treatments, and formatting/producing the design guidelines manual. However, it is the responsibility of the government who commissions the Design Guidelines Manual / Historic District Manual to set the agenda and objectives of the design guidelines project, direct the consultant accordingly, and establish end-product expectations. To fulfill this role, the local government should possess basic familiarity with and understanding of design guideline concepts, which can be gained by examining a variety of existing design guidelines, including those developed by the selected/preferred consultants and other consultants or agencies.

A Design Guidelines Manual for a Historic District should include:

1. Introductory information including: table of contents, district identification information (including district location, district boundaries, listing on historic registries), and an executive summary (including acknowledgements, explanation of the importance of protecting the historic district, why the guidelines manual was developed, and how to use the guidelines manual).

2. Explanation and text of the historic preservation ordinance.

3. Explanation of the historic preservation commission and the review process, including the Certificate of Appropriateness application and review process, application forms, appeals process, and other related regulations, as applicable.

4. Brief history of the historic district, including its historical development, significant properties, and designated period of significance.

5. Identification of district historic character-defining features, including but not limited to: road patterns, lot configurations, building-to-building/building-to-site relationships, building types and styles, building materials, features and details, building uses, landscape features, and streetscape features. Identification should include photographs of representative examples taken from the district.

6. Guidelines for treatment of historic properties including but not limited to: appropriate treatment of historic features*, maintenance, alterations, and additions. Recommendations should follow the *Secretary of the Interior's Standards for the Treatment of Historic Properties* and should be based on the **identified** historic character-defining features of the district. (General recommendations that have no application to the historic district should not be included; unique features and situations in the district should be addressed with customized recommendations).

7. Guidelines for new construction including but not limited to: acceptable locations, site setting and orientation, setbacks, size, height, styles, materials, and design of various features such as windows, doors, roofs, etc. Guidelines for new construction should be based on identified preservation goals developed for the historic district through a public planning process. And, while new construction should be compatible with and complement existing historic properties, it does not need, nor should it, replicate existing character-defining features.

8. Guidelines for landscape planning and construction activities including but not limited to: streetscape improvements, utilities, tree preservation, fences, retaining walls, parking, paving materials, and lot size.

9. Guidelines for demolition, neglect of properties, and relocating buildings.

10. Resources & references, including but not limited to: Glossary of Terms, the *Secretary of the Interior's Standards for the Treatment of Historic Properties* and associated guidance materials such as the National Park Service's Preservation Briefs, local historic district regulations (apart from the historic preservation ordinance) and other applicable laws and regulations, applicable forms & applications, lists of available resources with contact information and a Bibliography. These resources and references may be part of other sections of the manual or included as appendices.

*Historic Features include, but are not limited to: visible roofs, exterior wall material(s), foundation material(s), windows, doors, trim, porches, storefronts, and architectural ornamentation. Treatment recommendations should be provided for all common historic feature categories and types. Guidance for identifying historic features is provided in NPS Preservation Brief No.17: *Architectural Character-Identifying the Visual Aspects of Historic Buildings as an Aid to Preserving Their Character*.

*Photographs **from the historic district** should be used throughout the Manual to illustrate building types and styles, character-defining features, landscape features, appropriate new construction, and other guidelines subjects.*