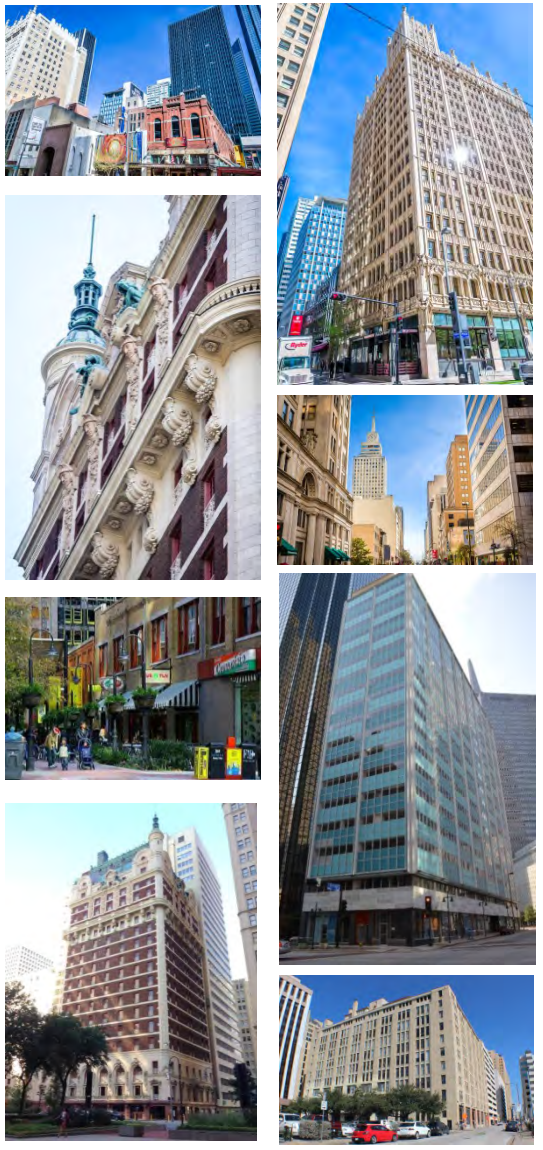
DOWNTOWN DALLAS

HISTORIC PRESERVATION TASK FORCE

Report of Findings and Recommendations



FINAL REPORT April 1, 2015

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"Historic Preservation creates profits and economic development for Dallas. It is our competitive advantage. We have a resource, and we're going to lose it. We don't want to squander what we already have. It is unique to Downtown."

– Downtown Historic Preservation Task Force

Downtown Dallas's historic buildings are valuable, limited resources proven to be major catalysts for growth. Dallas has a history of recognizing the importance of its existing buildings to its economic and cultural health. But now, as Downtown re-emerges as a highly desirable place to live, work, and play, we must do more to position our historic resources as assets that should be used to build upon as the backbone of this resurgence.

Dallas's Preservation Program was once a model for the nation, fully integrated into the larger planning efforts of the City. Best practices in many comparative metropolitan areas use preservation as a planning tool. In contrast, the Dallas's Preservation Program has become largely reactive. Instead, the Program must become participatory by including planning as its main activity in coordination with other departments to accomplish the larger goals of the City.

Preservation must shift from a position of reaction to one that influences change.

1400 Block of Commerce Street; Thomas Garza Photography, courtesy of Downtown Dallas, Inc.

Introduction

Dallas's historic buildings and streetscapes create unique economic development opportunities within Downtown. They are our business community's heritage – where Dallas began as the region's economic engine. They represent the "main streets" of our commercial corridors. They are Downtown's competitive advantage. But these historic resources are gradually disappearing and without creative intervention, they will be lost.

The recent demolition of historic buildings within the Downtown Dallas National Register Historic District prompted a public outcry from Downtown residents, business owners, and the historic preservation community. Stakeholders demanded answers to why historic buildings could be erased so quickly, without public input or even notification, and asked for solutions to prevent similar demolitions from happening in the future. The Mayor and City Council responded, with the Mayor's appointment of the Downtown Dallas Preservation Task Force to address how historic preservation and development can work together for a better Dallas.

The Downtown Preservation Task Force was comprised of Downtown stakeholders and organizations representing preservation, development, architecture, planning, and real estate. Over the course of several months, the Task Force sought, through extensive research and collaborative discussion, to answer this call to action. The recommendations in this report capitalize on the competitive advantage of Greater Downtown and enhance its vitality and viability as one of the City's best place to live, work, and play.

Background

Preservation is most successful when it is in coordination with and in service to the larger goals of the City.

The Dallas "Landmark Program," established in 1973, was first proposed in the 1966 Goals for Dallas, which emphasized the importance of a strong Planning Department. Under then Assistant Director of Urban Planning Weiming Lu, Historic Preservation was one of the most active sections within the Planning Department. Historic Preservation was a highly successful program, and was instrumental in accomplishing several key goals for the City: the revitalization of East Dallas through the designation of several historic neighborhoods; the emergence of Uptown through the designation of the State-Thomas Historic District; and bringing an entertainment use for the previously dormant West End, which subsequently helped the return of residential uses

View of West End Historic District

Dallas Power and Light (1931)

to the Downtown core. The City continues to prosper from these early preservation efforts.

Dallas's Historic Preservation Program became a national model for preservation programs around the country. What made it so successful?

Dallas's "Landmark Program" utilized preservation to help achieve the key goals of the City. It was broadly based and fully integrated within other city planning functions, including urban design and long range planning. The purpose of the Program was greater than simply preserving iconic buildings and neighborhoods. It influenced and facilitated change to benefit the present and future with historic preservation as an integral player. One of the best examples is the West End, once a collection of abandoned and underutilized industrial buildings. The incentives that came with designating the West End as a historic district created a planning opportunity where new uses could take hold. Spurred by the adaptive reuse of these historic structures, it is now one of Dallas's most visited area, filled with offices and new residential development.

The success of the Landmark Program cannot be overstated. However, recent budget cuts, changes in the structure of the Program, and reduction of planning activities citywide have resulted in the Program becoming largely administrative and regulatory. It has become isolated, with little interaction with other City departments. It is no longer a participant in shaping and influencing Dallas's future development. It can no longer serve the City as a resource for solutions, and is no longer able to advocate for existing buildings. This shift to a focus on regulation has contributed to a fracture between preservation and development.

Since its inception in 1973, the City's Historic Preservation Program has successfully designated over 140 local historic districts that incorporate over 4000 individual structures. These historic districts significantly contribute to the economic health of the City, and have jumpstarted additional development and revitalization throughout the City.

Landmark designation supports economic revitalization not only in Greater Downtown, but throughout the City. In addition to the local historic districts, there are also 27 districts and 99 individual properties listed in the National Register of Historic Places. This includes the Dallas Downtown National Register Historic District, created in 2006 (expanded in 2008).

There are 90 contributing structures in the Dallas Downtown National Register Historic District. Buildings within the district may be eligible for Federal tax incentives. Currently, 16 historic properties have benefited from the federal tax credit incentive, for a total of $672.8 million in

Gulf States Building (1929)

investment. Success stories include the former Federal Reserve Bank,

the Busch-Kirby Building, the Magnolia Building, the Adolphus Hotel and Tower, Dallas Power and Light, the Davis Building, and the Wilson Building. All of these redevelopment projects received Federal Tax credits and/or City tax increment finance (TIF) funds.

There are 39 buildings in the Dallas Downtown National Register Historic District that are also City of Dallas historic districts. Because of this designation they are protected from demolition (Figure 1). But this means that over 60% of buildings in the National Register District are not protected and could be demolished even if they have received TIF money or Federal Tax Credits. Buildings that lack protection through local designation include the Wilson Building, the Dallas National Bank Building, 211 North Ervay, and the Gulf States Building. Since the Dallas Downtown National Register Historic District was created less than 10 years ago, 13 contributing buildings have been demolished or significantly altered by either private or City projects (Figure 2). Additional demolition puts the district at risk of losing eligibility for future Federal Tax Credits.

After the recent demolitions Downtown, one of the most asked questions from the public was why Dallas doesn't do more to protect historic buildings. More importantly, why are historic buildings that receive City TIF funds not protected from demolition.

The Task Force unanimously agrees that preservation should have a recognized and meaningful role in shaping the City.

Wilson Building (1904, 1911)

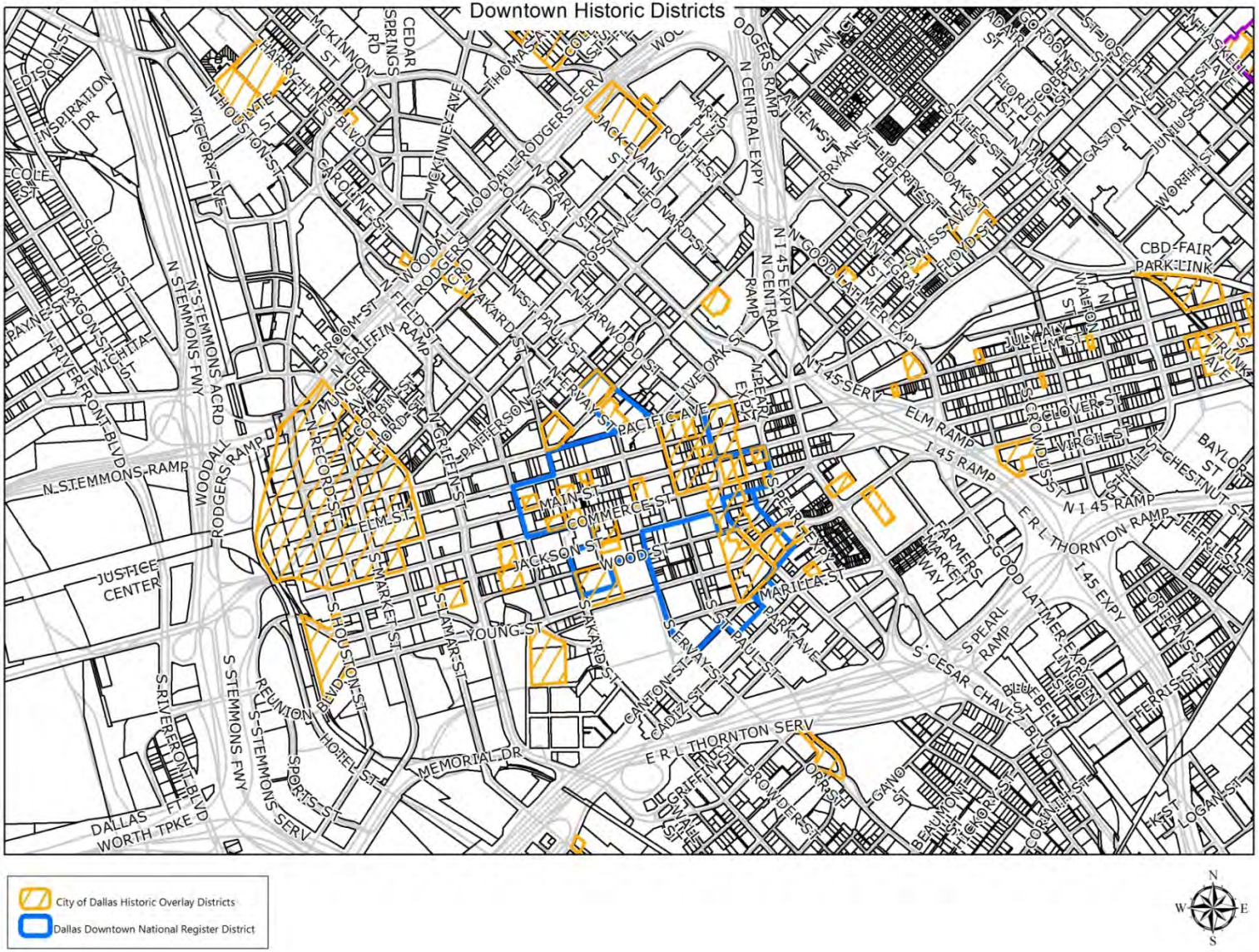

Figure 1. Dallas Downtown National Register District (outlined in blue) and City of Dallas Landmark Districts (outlined in yellow). Courtesy of the City of Dallas.

Figure 2. Dallas Downtown National Register District (outlined in blue), City of Dallas Landmark Districts (outlined in yellow), extant buildings contributing to the National Register District (green) and buildings contributing to the National Register District that have been demolished (red). Courtesy of the City of Dallas.

Methodology

The Downtown Preservation Task Force was created with the intention of capturing a broad base of interests and expertise. With this approach, challenges and concerns regarding preservation of historic resources could be introduced and discussed from all perspectives; as many stakeholders as possible could then benefit from the creative solutions generated.

The Task Force sought to identify the reasons that more buildings were not preserved and protected in Downtown, and find ways to effectively address this situation. With presentations from present and former City staff, the Task Force looked at the existing Preservation Program from its inception to the present. It also reviewed other City of Dallas programs and master plans that influence or affect historic buildings. The Task Force reviewed the practices formerly in place in Dallas, and also looked at eight other cities with a strong track record of aligning preservation and development (see Appendix). It was quickly understood that there are many impediments to preservation in Dallas, which have combined to create an environment where preservation often becomes a hindrance to development, instead of working in coordination with and in service to the larger goals of the City.

Once challenges were identified, the Task Force sought solutions that would return the Preservation Program to its role as an advocate for historic buildings, a partner with economic development, and an influence on the City's future plans.

As the Task Force sought solutions, a vision or "North Star" emerged:

There must be a major shift in how Dallas views historic preservation. Instead of viewing preservation and development as opposing goals, they must be seen as the same goal – to create a Downtown that embraces its historic past while being a culturally, socially, and economically diverse center of activity for the City.

Observations

The Task Force identified a number of reasons that more buildings in Dallas. Foremost is the perception that preservation intrudes on individual property rights. For this reason, the Task Force insisted on respecting the rights of property owners in all suggested recommendations.

Advocacy for historic preservation within the City of Dallas has been lost, and there is no voice for its mission as the City grows and evolves. As a result, the historic fabric of the City: its existing buildings, street patterns, block faces, landscape, and other characteristics, are not always considered when the City plans for improvements to streets, the creation of new parks, and other infrastructure projects. The City should be held to the same expectations as any other property owner, and when public funds are expended, preservation must be an important consideration.

Owner-initiated designations can take up to 15 months to complete. This was identified as a major issue by the Task Force. With no set deadlines, designation applications do not receive priority. Also, the lengthy and involved reports and criteria contribute to the delay.

The information regarding the City's historic resources is almost 30 years out-of-date. Both the City historic resource surveys and the Preservation Plan do not reflect current conditions, and hinder decision making. Owners seeking information about historic buildings and redevelopment processes cannot easily find it. It is buried in the City website, and much of what is available is out-of-date. Staff spends much of their day fielding calls from the public for basic information. The educational "arm" of the Preservation Program must be enhanced. The greatest tool for elevating the importance of our historic resources, particularly within Downtown, is educating the public and the development community as to the role historic resources play in creating a vibrant Downtown that fosters

recognition and appreciation of historic buildings and streetscapes.

Great downtowns consider the entire user experience. Along with iconic buildings, the tangible vestiges of the past like street patterns, historic signs, and collections of "background" buildings having a variety of scale and use are part of any experience we cherish. The understanding of what is historic should be expanded to include the complete "urban fabric" instead of just iconic architecture. Downtown's goals of connectivity and walkability will be greatly enriched with a distinctive and authentic experience. In Dallas, this is exemplified by Deep Ellum, where no one building may stand out, but the "fabric," the combination of the buildings, small-scale and walkable streets, and a variety of materials and textures that evolved over its long and rich history, create a truly unique and treasured place.

The Task Force recognizes the competitive advantage that the City's authentic historic fabric gives Dallas. Other cities and suburbs in the DFW area are trying to replicate what Dallas already has by embracing mixed use areas with walkable streets, human scale buildings, and facades with character in their new construction. Dallas already has what others want. One of the developers on the Task Force put it very well: "We can't squander our unique resources."

Once designated, there are often few incentives that justify the inherent risk of and challenges to redeveloping a historic property for new uses. A review of best practices in eight other comparable metropolitan cities clearly showed that the most successful cities used creative solutions to encourage redevelopment of existing buildings, achieving a broad range of goals. These were not typical incentives like abatements, grants and loans, but still resulted in financial gains for the owner. Of particular note is the Adaptive Reuse Ordinance in Los Angeles, where the Economic Development Department identified a need for live-work housing. Through coordination with code officials, it created a program that made it easier to convert existing buildings. It has saved dozens of buildings and created thousands of new housing units, and while it does not require designation or impose restrictions, it is fully supported by the preservation community.

Creative incentives must be used that have more benefits than restrictions. The Task Force overwhelmingly supported an increase in "carrots" versus "sticks."

Storefronts, streets, sidewalks, awnings, landscape, and variety in scale: the historic and authentic urban fabric of Main Street. Thomas Garza Photography, courtesy of Downtown Dallas, Inc.

Recommendations

The Downtown Historic Preservation Task Force has identified the following phased approach for the Mayor and City Council to consider. When implemented, it will result in benefits to all Downtown stakeholders, overcome existing challenges to the mutual benefits of historic preservation and development, and change the perception of preservation as a hindrance to one of fostering change.

These phased recommendations support the shift from a reactionary position to one that influences change. Although recommendations are presented in phases, the most gain will be achieved by implementing them all. To ensure the best outcome, support must come from leadership in the City of Dallas, as well as from the community of stakeholders as represented by Task Force members.

Phase 1 (0 to 12 months)

Issue 1: Insufficient advocacy within the Historic Preservation Program.

The Historic Preservation Program needs to re-establish a broad-based advocacy platform. When first established, the Program was strongly supported by community advocates from all sectors of the City (including the developer community). This wider perspective pushed preservation to solve a broad range of problems. The Historic Preservation Program needs such an advocacy vehicle, to promote its purpose and goals.

Recommendation: Establish a Preservation Solutions Committee under the City Manager's Office.

The Preservation Solutions Committee would be a public/private partnership and might be comprised of a representative from the Sustainable Development and Construction Department; other department heads (or their designee); as well as a balanced representation from downtown stakeholders and organizational appointments from the preservation, planning, design, and development community.

The newly formed Committee would be appointed by the Mayor and approved by City Council. It would meet regularly to undertake activities such as:

- implement the recommendations of the Downtown Historic Preservation Task Force;
- review existing ordinances and policies for their effectiveness and impact on reuse of historic resources;
- recommend new ordinances, programs, and tools that address preserving downtown's historic fabric; and
- produce a "Preservation Progress Report" for City departments working on downtown planning activities and offer assistance to those seeking improvement in dealing with historic resources.

Issue 2: Lengthy historic designation process.

Landmark designation is a vital component of the Historic Preservation Program. Presently, the designation process for a single property can take up to 15 months from initiation to council approval of the landmark. The lengthy application process is burdensome for most applicants, and has no specific timeline. It becomes a "deal-killer" for the development community, where time is money. Recent reductions in staff are partially contributing to these problems.

Recommendation: Streamline the landmark designation process.

Review the landmark designation application and process to ensure it is effective and not an impediment to landmark designation. Consider an expedited or streamlined designation process that incorporates clear milestones and deadlines for Designation Committee and Staff review.

Explore the possibility of allowing expedited approval for City Landmark applications when the building is contributing to a National Register Historic District.

Issue 3: Focus of staff is on administrative duties, limiting time for preservation planning.

It is essential that Historic Preservation staff capabilities are broadened beyond a regulatory and administrative role. Staff must possess an understanding of historic fabric beyond buildings, and be able to develop creative and programmatic solutions. These solutions will then serve the City's broad goals of bringing the urban fabric of the past into developing the present. Best practices seen in Preservation programs across the country show that the strongest programs are those that work in coordination with other departments, as opposed to the Dallas model, where the Preservation Program works largely in isolation.

At its peak the Historic Preservation Program had eight preservation planners. Currently, there are three, with no reduction in workload.

Recommendation: Broaden staff capabilities and review staff priorities to foster efficiency.

Existing staff positions could be re-allocated to focus on public education and new planning initiatives. Programs such as the Preservation Tax Abatement should be moved to the Office of Economic Development for additional effectiveness.

Identify ways to more quickly process landmark designations, file certificates of appropriateness, and field inquiries from the public.

Funding should be made available to re-allocate existing staff positions to reflect additional responsibilities. Immediate funding of two additional planners is needed.

Issue 4: Demolition review period for historic buildings does not allow adequate time to explore alternative solutions.

There is currently no effective mechanism in place to address the demolition of historic buildings and resources that are not designated City of Dallas Landmarks. This issue is what triggered the appointment of the Task Force and drove its call to action. Historic buildings, especially those within National Register Historic Districts, are valuable resources and should be reviewed prior to their demolition.

Preservation of historic resources should be given at least the same consideration as streets and sewers, and treated as important infrastructure.

Recommendation: Evaluate time limits for demolition review periods for historic buildings.

Expanding staff review time for proposed demolition of historic buildings and resources within the Greater Downtown area would allow time for staff and owners to consider alternatives to demolition.

The review period for proposed demolitions is recommended to increase from the current 10 days to a phased period of between 30 and 120 days for buildings 50 years old and older. Upon receipt of an application for demolition, including City undertakings, the Building Inspection office would immediately notify City Historic Preservation Staff. Staff would immediately share the application with the Preservation Solutions Committee, the Landmark Commission, Preservation Dallas and the Landmark Commission Designation Task Force. Each would be given 30 days to discuss the proposed demolition, and provide comment to City Staff regarding potential historic or cultural significance. In addition, notice of the application would be posted on the building proposed to be demolished in the same manner as zoning changes to allow for public comment. Public comments would be accepted by City staff and incorporated into any recommendations issued. If no concerns regarding the historic or cultural significance of the building or resource are presented, the permit for demolition would be granted at the conclusion of the 30 day review period. If concerns are presented, the applicant would be notified and the review period extended another 90 days for a total of 120 days. During this 120 day period, owners would be encouraged

to meet with stakeholder groups and City staff to consider viable alternatives.

Phase 2 (1 to 3 years)

Issue 5: Lack of education regarding historic preservation

Education has always been of primary importance to Dallas's Historic Preservation Program, a modern City characterized by opportunity and entrepreneurship, not its historic legacy. The educational "arm" of the Preservation Program has been lost, and existing resources on the City's website are buried and out-of-date.

By broadening an understanding of the Historic Preservation Program's goals and its accomplishments, we encourage cooperation and communication. By providing information and resources to historic property owners, we reduce frustration and increase their understanding of the value of their historic property to the city.

Recommendation: Increase the educational initiatives within the Historic Preservation Program.

Information on the City of Dallas's website should be regularly updated to reflect the activities and resources of Dallas's Historic Preservation Program and provide ready access to citizens and the development community related to preservation of historic properties. The website should elevate the visibility of the City's Historic Preservation Program and staff assistance available, as well as fillable electronic forms for expediting submissions.

Staff should be encouraged to participate in speaking engagements, attend conferences, etc. This elevates the program, provides opportunities for public input and outreach, and keeps the constituency engaged.

Issue 6: Existing historic preservation surveys in Dallas are out-of-date and do not identify historic urban context and fabric

Historic resource surveys provide a base-layer for direction for preservation goals, help establish preservation priorities, and become a tool for existing and future planning initiatives. Previous downtown surveys have identified historic buildings and included architectural and historical descriptions, but did not include other historic fabric.

An updated survey is needed, one which takes a broad view of our City's urban context beyond buildings, to identify remnants of disappearing urban fabric, thematic structures that define an area's character, and prominent built features of the City. The use of new technology provides opportunities to capture the larger street fabric, so that the benefits of preservation can reach a larger segment of the community, contribute to public health and welfare, and allow the City to act in a proactive rather than reactive way.

Recommendation: Conduct a new Historic Resources Survey for Downtown Dallas.

Dallas needs a new historic resources survey using state of the art technology to document Greater Downtown – its historic buildings, as well as its streets and urban form. Historic patterns should be identified including, forms, spatial relationships, design characteristics, and design features that comprise the urban fabric. This prototype survey could then be extended throughout the City.

Funding possibilities include grants such as Community Development Block Grants, and Certified Local Government grants; and local private foundations. The newly-formed Preservation Solutions Committee could review the RFP, guide the process, and review the new survey.

Issue 7: Existing incentives for Downtown's historic buildings are limited and do not address barriers for re-use.

While the City offers a few incentives for the re-use of historic buildings, namely the historic preservation tax exemption and Tax Increment Finance funds, these only work for some projects, and are often regulatory in their approach. Developers on the Task Force cited several barriers to adaptive re-use of downtown's historic buildings and those built over 50 years ago, particularly the small-scale commercial buildings. Thus many of these underutilized buildings have been demolished despite their potential to be a part of a meaningful and distinctive urban environment. Creative incentives are needed for redevelopment of these historic and older buildings that do not impose insurmountable restrictions and hinder reuse.

Demolition of historic buildings is a frequent response when land values are unproven, such as the southern side of Downtown's core, and, conversely when land values are high and the market potential is strong, such as Uptown. Within each of these conditions, the incentive strategies need to address challenges to preservation.

In the case of an unproven market, or a "revitalizing" condition, a promise of return (loan guarantee), stability (designation or zoning) and mitigation of risk (buy-back arrangement) must be addressed.

The task force looked at best practices in eight other cities for ideas regarding tools and incentives used to encourage the re-use of historic buildings in and around their downtowns. Los Angeles's Adaptive Re-Use Ordinance was identified as the most applicable model for Dallas. The ordinance has been in effect since 2012, and more than 90 vacant or under-developed buildings have been put into use using this ordinance. The ordinance is a pilot project of the National Trust for Historic Preservation and the Urban Land Institute, and is viewed as one of the City's most successful tools for historic preservation.

Recommendation: Identify strategies that will re-animate older buildings that are otherwise vacant, underutilized, and threatened with demolition.

The Preservation Solutions Committee should identify and develop strategic incentives that address market conditions and barriers to re-development. Barriers include lack of flexibility in preservation criteria that may prevent amenities to promote reuse, such as signage and balconies; as well as restrictive parking requirements; and permitting and code requirements that are difficult to meet given building size, design, or layout.

Phase 3 (3 to 5 years)

Issue 8: Outdated Preservation Plan.

A preservation plan addresses the historic fabric of the entire City as well as the Historic Preservation Program and policies themselves. A new plan is one of the most fundamental tools needed to implement the recommendations of the Task Force.

The City's existing preservation plan, *Historic Preservation Plan 1987-88*, was adopted by the City Council in 1988. It has served its purpose and the plan is long overdue for an update in order to address the new patterns of development, and to consider buildings that have become historic over the last 25 years.

Recommendation: Prepare and adopt a new Preservation Plan for Dallas.

The proposed Preservation Plan should address not only the historic preservation program, but all aspects of the City's programs and policies that impact the City's historic urban fabric.

Funding possibilities include grants such as Community Development Block Grants, and Certified Local Government grants; and local private foundations. The proposed Preservation Solutions Committee could review the RFP, guide the process, and review the new Plan.

Issue 9: Dallas's Historic Preservation Program is singularly focused on regulation at the detriment of comprehensive and more valuable planning.

In contrast to Dallas's earlier model, today's Historic Preservation Program deals almost exclusively with landmark designation. Its approach is regulatory and often restrictive, thus the program is stymied in accomplishing its Purpose.

In looking at how other cities approach historic preservation, there appears to be an emerging trend towards a more integrated structure coordinating multiple departments to achieve economic growth, sustainability, preservation, design, and more walkable and livable downtowns.

Recommendation: Create interdepartmental forum to shift the focus of the preservation program from regulation to influence by including planning as a main activity.

Preservation should be used as a planning tool, and planning should be its main activity. This could be accomplished if preservation engaged with other City departments.

Preservation must have a voice in future planning efforts of the City and there must be a place for preservation to provide input on such efforts.

An Interdepartmental Forum for City departments should be created, where there is broad input when a common interest is being pursued such as Capital Improvements, allocation of TIF funds, Land Use/Zoning, and certain aspects of Economic Development. Unlike the Preservation Solutions Committee, an external effort to provide a voice for the private sector, the Interdepartmental Forum is an internal effort.

To accomplish this, new partnerships are needed so that preservation may influence existing and future planning efforts. Consider placing the Forum under the Office of Economic Development. Partners might include:

- Sustainable Development and Construction
- City Design Studio
- Zoning and Land Use
- Public Works
- Streets
- Park and Recreation
- Code Enforcement
- Economic Development
- City Attorney

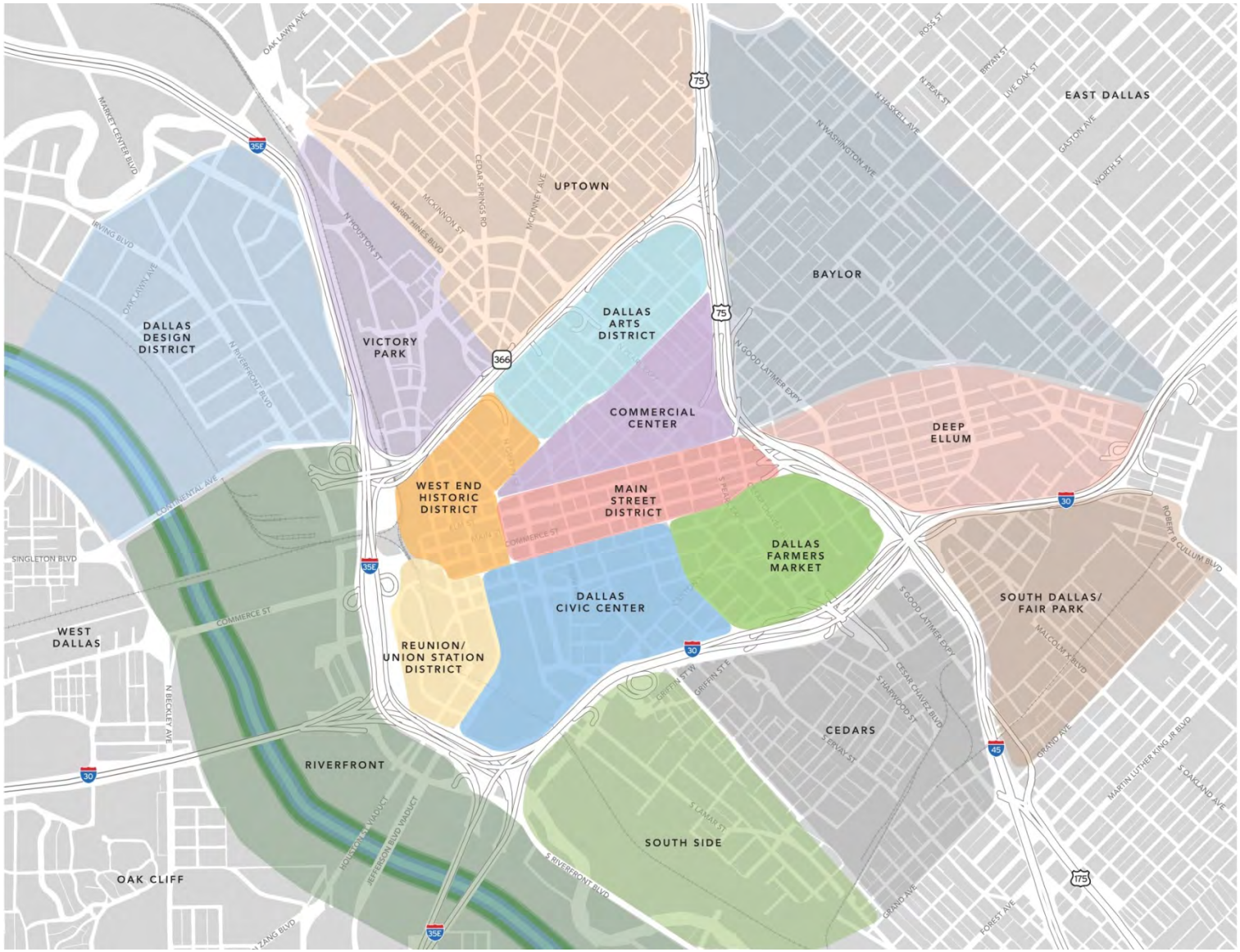

Figure 3. Greater Downtown Dallas. Courtesy of Downtown Dallas, Inc.

Summary of Recommendations

Phase 1: Immediate Solutions (0-12 months)

1. Advocacy: Establish broad-based Preservation Solutions Committee to advocate for historic fabric and be its voice as the City grows and evolves. Its first order of business is to help implement the following recommendations.

2. Simplify Designation: Streamline the landmark designation application and process.

3. Assess Staffing: Broaden staff capabilities to include planning and provide a new focus on public education. Review staff priorities to expedite landmark designations, file certificates of appropriateness, field inquiries, and assist owners with incentives. Fund two additional planners.

4. Demolition Delay: Enhance notification and expand staff review time for proposed demolition of historic buildings in Greater Downtown to foster dialogue and consider alternatives.

Phase 2: Near Term Solutions (1 to 3 years)

5. Education: Educate the public about the goals and accomplishments of preservation.

6. Downtown Survey: Conduct a new, state-of-the-art survey of Greater Downtown as a base-layer for direction, to establish preservation priorities, and to provide a tool for existing and future planning. Explore funding sources such as Community Development Block Grants, Certified Local Government money, and private foundations.

7. Incentives: Identify strategies and incentives that address market conditions and barriers to re-development to re-animate vacant and underutilized buildings, such as: more flexibility in preservation criteria, parking requirements, permitting, and code requirements.

Phase 3: Long Term Solutions (3 to 5 years)

8. Preservation Plan: Prepare and adopt a new Preservation Plan for Dallas to address the programs and policies that impact the City's historic urban fabric. Explore funding sources such as public/private partnerships, private foundations, and private sector money.

9. Planning: Create a forum for strategic interdepartmental partnerships where a common interest is being pursued such as Capital Improvements, Tax Increment Finance Districts, Land Use/Zoning, and certain aspects of Economic Development.

Magnolia Building (1922)
Thomas Garza Photography, courtesy of Downtown Dallas, Inc.

APPENDIX

- ***Historic Preservation/Development Incentives and Policy Comparison***

- ***Historic Preservation Best Practices and Incentives: Comparative Analysis***

Historic Preservation/Development Incentives and Policy Comparison

Program Area	City of Dallas	Denver, CO	Austin, TX	Charleston, SC	Baltimore, MD
Districts	• 99 NR individual properties • 27 NR districts • 145 local historic districts with 4000+ individual properties • approx. 20 neighborhood districts, not including conservation district	• 51 historic districts with 6000+ buildings • 332 landmarks	• 3 historic districts • 567 landmarks • 17 NR districts	• 5000 individual landmarks • 26 landmark districts	• 163 exterior landmark (2012) • 1 interior landmark (2012) • 33 historic districts with 12,000 properties • 50 NR districts
HP City Staff	• 2 city staff		• 2 city staff	• 5 city staff	• 5 city staff
Demolition Review	• **10 day demo delay** currently in place; allows time for announcement but no process for demo prevention • streamlined demo process for properties under 3000 sf • **CD process** for landmark buildings/districts	• most applications reviewed at staff level for significance • demo **delay of 21 days** for buildings found significant • demo delay for properties in areas where designation is under consideration • non-contributing building demo may be approved by staff or forwarded to LPC • LPC may approve or disapprove without public hearing if non-contributing • for contributing LPC holds public hearing within 20 days • if no commission decision on an appeal in 60 days demo app is granted • replacement structure must be approved prior to demo approval	• **HPO review required for all demo applications for buildings 50 years old** or located in NR, Local, or state district to determine landmark eligibility, sent to HLC within 5 days if work would cause adverse impact to eligibility • public hearing held within 60 days • no demo permit issued within 75 days after first commission meeting or 180 days for properties in NR or pending local district • HLC can recommend historic zoning for property • size of new construction is limited ("McMansion ordinance")	• BAR **reviews all demolitions in historic districts** and all structures listed in historic inventory • BAR may deny demo outright or **postpone for 180 days** • public GIS database and map showing current permit applications • BAR **reviews all demolitions of buildings 50 years of age** or older on any structures south of Mount Pleasant Street, and any demolitions (regardless of age) within the Old and Historic District	<u>Landmarks and Districts</u> • **public hearing to determine if building is contributing** to a historic district, or remains eligible as landmark • if permit issued, plans for replacement structure are reviewed <u>Special List Buildings</u> • buildings on Special List **subject to review and comment** from CHAP prior to issuance of building or demo permit • public hearing for major work or demo • **6 month delay if permit objection**, Commission and outside organizations meet with owner to discuss alternatives
Non-Designated Properties	• **no protection or review for non-designated property** • 10 day demo delay currently in place; allows time for announcement but no process for demo prevention • no review for properties under 3000 sf	• **review required for all buildings larger than 120 sf regardless of age or designation**	• building and demo permits for **any buildings over 40 years old** are forwarded to Historic Preservation Office for review		<u>"Special List"</u> • city maintains "Special List" of buildings that have a **6 month postponement** for alterations and demo to seek alternatives • limited authority • not eligible for tax credits • anyone may request property to be on Special List • go through public hearing • owner consent not necessary
NR vs. Local Designation	• **no direct association** between local and NR	• National and State Register listed buildings **do not automatically become local landmarks**	• **HPO reviews building, site, demolition and relocation permits within NR districts**; **advisory only** unless HPO recommends designation	• **no direct association** between local and NR	• **no direct association** between local and NR • NR not subject to CHAP review

Program Area	City of Dallas	Denver, CO	Austin, TX	Charleston, SC	Baltimore, MD
Zoning Overlays and Districts	• tourism PID • Neighborhood stabilization overlay • Historic District Overlay • TIF	• context zone districts: Downtown, Urban Center, etc. • conservation overlays • historic use overlays • design overlays • Planned Unit Development district	• combining districts including PDAs and neighborhood conservation districts • Central Urban Redevelopment district • Downtown Overlay	• landmark overlay zones • Old and Historic District overlays	

Incentives:
 	
• **Tax Exemptions**
• **TIFs**
• **State Tax Credits**
• **CDBGs**
• **TDRs**
• **Parking Exceptions**
• **Easements**
• **Streetscaping**
• **Hotel/Motel Tax Grants**
• **Value Cap**
• **Homeowner Incentives**
	• city **tax exemptions** for local landmarks
	• city **TIF**
	• currently "double dipping" into TIF and tax exemptions is discouraged
	• **state tax credit**
	• **Community Development Block Grants** (now primarily used for housing; was used for HP projects and rehabilitation in the past)
	• used to have **transfer development rights**
		• **transfer development rights** in business zones
		• eligibility for **expanded uses** in certain residential zones
		• **city tax rebate**
		• **parking exceptions**
		• **state tax credits**
		• Colorado Job Creation & Main Street Revitalization Act
		• **easements** through Historic Denver
		• **Community Development Block Grants** (used for housing and business assistance)
		• **state historical fund**
			• **city tax exemptions** for local landmarks, contributing building, or buildings that could be contributing if restored
			• **state tax credit**
			• **Community Development Block Grants** (used for community resource centers, heritage center, sidewalks, etc.)
			• **Great Streets Development Program** reimbursements for streetscape revitalization; primarily an urban design tool
			• **façade loan program** was used in the past
			• small **hotel-motel tax grant** program; mostly for cultural and arts programs
				• **variances** for repair or rehab for historic buildings can be granted by city engineer
				• SC state offers **ad valorum tax relief** for rehabilitation
				• **easements and convenants** though Historic Charleston Foundation
				• Bailey Bill: **ceiling on appraised value** (statewide, not yet adopted by Charleston)
				• **Community Development Block Grants** (used for housing economic development, programs, etc., including historic rehab through Historic Charleston Foundation)
					• **state tax credit**
					• Property Tax Incentive:
					  o **property tax incentive** for local landmarks, NR properties, and properties in local and national districts
					  o 10 years
					  o credit granted on increased assessment resulting from qualifying improvements: interior and exterior
					  o residential and commercial
					  o transferrable to new owner
					  o can be combined with federal and state tax credits
					  o can be combined with **enterprise zone credit**, for portions of project not covered by EZ credit
					• Community Development Block Grants
					  o fund **Neighborhood Stabilization Program**, rehabs abandoned and foreclosed properties for low income residents
					  o **Vacants to Value** program
					• Baltimore **Homeowner Incentive** Program

Program Area	City of Dallas	Denver, CO	Austin, TX	Charleston, SC	Baltimore, MD
Landmarks Commission Structure	• 15 Landmark Commission members, 1 City Plan Commission Liaison, 1 Park & Recreation Board Liaison • appointment by city council and mayor • meet 1x per month • 9 Designation Committee members	<u>Landmarks Preservation Commission</u> • LPC meets twice per month • 9 members selected by mayor from nominees: 2 nominees from AIA, 2 from History Colorado, 2 nominees from Chair of Planning Board, 2 appointments by mayor, 1 nominee from CO Chapter of ASLA <u>Lower Downtown Denver Review Board</u> • meets once per month • reviews all demo and design review for LODO • 7 members nominated by city council member representing district, Denver AIA, Historic Denver, Inc.; History Colorado, National Trust or registered neighborhood organization • bylaws pertain to LPB and LDDRB	• 7 Landmark Commission members • appointed by city council	• Board of Architecture Review • meets 2x per month	• 13 members of Commission for Historical and Architectural Preservation • CHAP reviews districts, landmarks, "Special List" properties, and city-owned structures, including outdoor sculptures and monuments • 11 appointed by mayor based on qualifications, 1 council member, 1 commissioner of housing and community development
Landmarks Nomination	• owner or council can initiate	• anyone can initiate • demo delay during designation proceedings	• owner or council can initiate		• owner, commission or member of public may request designation
Landmark and Historic District Designation	• non-consensual designation permitted • city council designates • public hearing	• non-consensual designation permitted (minimum of 3 applicants) • city council designates	• non-consensual designation not permitted • city council designates • reviewed by HLC, land use commission, and city council • public hearing	• non-consensual designation permitted	• mayor and city council designate • CHAP, planning commission, and urban affairs committee make recommendations • public hearing involved • non-consensual designation permitted
Design Review: Landmark Buildings/Districts	• Landmark Commission reviews all proposed exterior and site alterations to City Historic Landmarks and properties in Local Historic Districts through CA process; staff and task forces provide recommendations • staff reviews minor work	• design review for exterior changes • majority of review by staff • minimum maintenance requirements: preservation against decay and free from structural defects • LPC or LDDRB may order structure returned to prior condition or reconstructed if demolished • mandatory design review with mandatory compliance • CA required for all exterior work requiring permit	• Historic Landmark Commission reviews all proposed exterior and site alterations to City Historic Landmarks and properties in Local Historic Districts • staff reviews minor work • HLC has CA committee	• required for designated individual properties and all properties in historic districts • BAR public hearing • BAR makes design recommendations • detailed design standards • BAR reviews all new construction, alterations and renovations visible from the public ROW in historic overlay; BAR has jurisdiction over all structures included on the Landmark Overlay Properties list • staff may review minor work	• owners must get CHAP approval before permit is issued • notification to interested parties is issued • neighborhood associations play advisory role and review applications • public hearing is held • staff may review minor work

Program Area	City of Dallas	Denver, CO	Austin, TX	Charleston, SC	Baltimore, MD
CLG	Yes	Yes • established 1985 • awarded 3 grants totaling $16,860	Yes • established 2001 • received $31,600 between 2010 and 2012	Yes	Yes
Public Outreach	• limited outreach and advocacy	• city works with Historic Denver, Inc.	• meetings 2x/month for CA applicants • Historic Survey Wiki • resources on city website	• worked with public and Historic Charleston to develop updated preservation plan	
Preservation Plan	• latest preservation plan 1987	• Procedures and guidelines updated in 2014	• updated plan identifies future conservation	• updated plan in 2007 • preservation large part of comprehensive plan	• Procedures and guidelines updated in 2012
Survey	• numerous neighborhood surveys • no survey of downtown outside of NR districts	• 11 historic surveys completed • city works with Historic Denver to conduct Discover Denver survey	• interactive GIS based Wiki tool for users to contribute info about historic buildings and sites • comprehensive survey planned	• conduct "Area Character Appraisals"	

Additional Tools:

<u>Programs for non-designated buildings:</u>

- Boulder, Colorado: Structures of Merit program recognizes non-designated properties with historical, architectural, or aesthetic merit; process is less regulated, strictly honorary listing and not subject to same design review process; recognition of thematic groups.
- Longmont, Colorado: Certificate of Merit program recognizes historic, architectural, or aesthetic merit not recognized under other provisions; encourages protection, restoration, preservation, enhancement, and adaptive reuse.

Historic Preservation Best Practices and Incentives: Comparative Analysis

Summary:

City	Integrated Preservation Program[1]	Holistic Preservation and/or Area Plan[2]	Special or Creative Incentives[3]	Special or Creative Outreach/ Advocacy
Dallas	Sustainable Development and Construction umbrella	No; Preservation Plan is outdated	No; incentives are typical examples	no
Los Angeles	Department of City Planning umbrella with team approach	Yes: Cultural Heritage Master Plan	Yes: carrots alone and carrots + sticks	yes
Denver	Community Planning and Development umbrella	Yes: Downtown Denver Area Plan; Citywide Design Guidelines	Yes: carrots + sticks	yes
Austin	Planning & Development Review Department umbrella	Imagine Austin and Downtown Austin Plan	Yes: carrots alone and carrots + sticks	yes
San Antonio	Works closely with other departments through Historic Districts Council and Historic Building Enforcement Officer	Yes: Strategic Historic Preservation Plan and emphasis on historic resources in Streetscape Plan and Downtown Plan	Yes: carrots + sticks	yes

[1]Historic Preservation Program is located within broader planning department or equivalent.
[2]Preservation Plan addresses broader goals of preservation, including streetscape, land use patterns, and future development goals.
[3]See details below. Note: text is quoted or paraphrased from City documents.

Los Angeles

Integrated Preservation Program:

Office of Historic Resources

- within the **Department of City Planning**.
- Recently expanded staff and Cultural Heritage Commission and Historic Preservation Division of the Cultural Affairs Department were moved to the Department of City Planning, becoming the new **Office of Historic Resources (OHR)**
- Mission is to create a **comprehensive**, state-of-the-art, and **balanced** historic preservation program for the City of Los Angeles. Key goals:
- Complete a pioneering **citywide historic resources survey**
- Integrate historic preservation fully into Los Angeles' **planning process**
- Serve as an **expert resource** on preservation for the City departments
- Provide **responsive customer service** in conducting historic preservation reviews
- Create **additional incentives and creative partnerships** for historic preservation

Preservation Plan/Survey:

Cultural Heritage Masterplan: Provides a **vision for the future** of historic resources in the city, and **outlined specific goals and strategies** to achieve the vision. The master plan addressed:

- lack of effective **preservation programming** and **inter-departmental coordination**
- inaccessibility of **information for stakeholders**
- lengthy **review and approval times**
- lack of **awareness and education**
- insufficient **resources**

http://preservation.lacity.org/resources/cultural-heritage-master-plan

SurveyLA:

- mobile app with GIS capability for use as a **planning tool**
- provides baseline information to inform planning decisions and **support City policy goals and processes**
- provide opportunities for **public engagement and education** in areas relating to curriculum development, heritage **tourism**, **economic development**, and marketing historic neighborhoods and properties.

Special or Creative Incentives:

Conservation/Facade Easements: *(carrot + stick)*

- offer an **income tax deduction** for the donation of a specified portion of a historic building. Easements are held by Los Angeles Conservancy

https://www.laconservancy.org/resources/guide/conservation-easements-permanent-protection-historic-places

Mills Act: *(carrot + stick)*

- **property tax relief** in exchange for the continued preservation of historic properties for a **revolving ten-year term**. Property owners restore, maintain, and protect the property in accordance with **historic preservation standards**.
- Periodic inspections by City and County officials ensure proper maintenance of the property.
- Contract **transferred to new owners** if the property is sold, and is binding to all successive owners.
- Valuations are determined by an **Income Approach to Value** rather than by the standard Market approach to determining appraised value. The Income Approach, divided by a capitalization rate, determines the assessed value of the property.
- Applies to **locally-designated Historic-Cultural Monument or Contributing Property** to an approved Historic Preservation Overlay Zone. Additionally, single-family residences (with a property tax value assessment of not more than $1,500,000) and income producing multi-family/commercial/industrial properties (with a property tax value assessment of not more than $3,000,000) are eligible to apply. Property values in excess of these limits may apply for an exemption if they meet certain criteria. Properties seeking an Exemption from the Valuation Limits of $1.5 million for Single-Family Residences and $3 million for Multi-family/Commercial Properties are required to prepare a Historic Structure Report (HSR).

http://www.preservation.lacity.org/incentives/mills-act-historical-property-contract-program

Adaptive Reuse Ordinance: *(carrot)*

- **Streamlines the permitting process** and provides **flexibility in meeting zoning and building code requirements** for adaptive reuse projects which convert underutilized commercial buildings to more productive uses such as live/work and residential units
- Provides for expedited approval process and ensures that older and historic buildings are not subjected to the same zoning and code requirements that apply to new construction. The result has been the creation of **several thousand new housing units, with thousands more in the development pipeline,** demonstrating that **historic preservation can serve as a powerful engine for economic revitalization and the creation of new housing supply.** The Adaptive Reuse Ordinance has become **one of the most significant incentives related to historic preservation** in Los Angeles, facilitating the conversion of dozens of historic and under-utilized structures into new housing units.
- Administered through the Department of Building and Safety.

http://www.preservation.lacity.org/incentives/adaptive-reuse-ordinance

California State Historical Building Code: *(carrot + stick)*

- provides **flexibility in meeting code** requirements in **locally or National Register-listed or eligible** historic buildings. Work must meet Secretary of the Interior's Standards. Owners of qualified historic properties are entitled to use the State Historical Building Code (SHBC) for rehabilitation of structures.
- Supplants the Uniform Building Code (UBC) and is particularly useful in code issues related to requirements for **plumbing, electrical, structural, seismic, fire safety, energy requirements, and disabled access**. The SHBC allows greater flexibility in the enforcement of code requirements.

- It allows local building officials to make a determination that a building's internal systems are **reasonably safe** without automatically imposing the requirements of the modern UBC. The SHBC in most cases does not allow code standards to be waived. Instead, the SHBC **provides for alternative methods** to achieve reasonable levels of safety.

http://www.preservation.lacity.org/node/57?phpMyAdmin=656bde215507386e6e1906d727c09691

Transfer of Floor Area Ratio Ordinance (TFAR): *(carrot + stick)*

- Provides for the **transfer of floor area ratios** in the Central Business District (CBD) to promote the **preservation of historic buildings**, create affordable housing, **enhance economic viability**, provide affordable child care, and achieve other goals within the CBD.
- Monies paid to the owner of an eligible site for the transferred density shall be used exclusively for **preserving, improving, expanding, or enhancing the economic vitality** of the historic site, or any other identified public benefit. The obligation to spend the funds is secured by a **performance deed of trust**. The owner of the building must record a covenant assuring the preservation of the historic structure for the longest feasible time.

Historic Resource Parking Exception: *(carrot + stick)*

- Provides that **no additional parking spaces** need be provided for a change in use for any structure listed on the National Register of Historic Places or State or City list of historic or cultural monuments. Existing parking must be retained and, if the floor area is increased, parking must be provided for the increased floor area.

Special or Creative Outreach/Advocacy:

Booklet: *Incentives for the Preservation and Rehabilitation of Historic Homes in the City of Los Angeles: A Guidebook for Homeowners,* available at:

http://www.preservation.lacity.org/files/GCI%20-%20Incentives%20for%20the%20Preservation%20and%20Rehabilitation%20of%20Historic%20Homes.pdf

White Papers: *Incentives for Preserving Historic Buildings*, available at:

http://www.preservation.lacity.org/files/LAConservancy%20Incentives%20Paper.pdf

GIS Access: Publically accessible and provides historic overlay information, as well as survey data for historic properties. Indicates if property is designated, or has been found to be eligible for designation.

http://www.preservation.lacity.org/survey

Monthly Newsletter:

http://www.preservation.lacity.org/newsletter

Denver

Integrated Preservation Program:

- Landmark Preservation is under Plan Implementation section of Planning Services Department along with Zoning Amendments and Regulatory Tools and Urban Design and Special Projects

Preservation and/or Area Plan/Survey:

Downtown Denver Area Plan: Provides a foundation for strategic actions that shape Downtown's future development, **enhance connections** to surrounding neighborhoods and strengthen Downtown's role as the heart of the region. The plan serves as a **benchmark for public and private decisions** that affect the form and function of Downtown. **Preservation of the historic character** while **integrating infill** is emphasized throughout the plan, as are **walkability, transit, and streetscaping**. Goals are:

- A prosperous city
- A walkable city
- A diverse city
- A distinctive city
- A green city

Includes critical strategies, including:

- **Energizing the commercial core**
- Building on transit
- Creating **grand boulevards**
- Embracing adjacent neighborhoods
- A rejuvenated Civic Center

https://www.denvergov.org/Portals/646/documents/planning/Plans/plans_pre_2013/downtown/DowntownDenverAreaPlan.pdf

Citywide Design Guidelines:

- used to evaluate building projects for local landmarks and properties within the boundaries of designated historic districts. The guidelines are citywide, and have separate appendices for the character-defining features for specific areas. Guidelines reflected comments from numerous **community and stakeholder** meetings where more than 200 historic property owners, stakeholders and neighborhood groups had input.
- The updated guidelines outline a **"how to" approach** and provide easy-to-follow charts and graphs so that property owners and design professionals can more **easily navigate** through the design review and permitting process.

http://www.denvergov.org/cpd/CommunityPlanningandDevelopment/LandmarkPreservation/DesignReview/DesignGuidelinesUpdate/tabid/444801/Default.aspx

Discover Denver Survey: Historic Denver, Inc., in partnership with the City and County of Denver, has launched Discover Denver, a citywide survey designed to identify buildings with cultural, historical or architectural significance. Survey kicked off February 6, 2015 and will build on 3 pilot projects.

Special or Creative Incentives:

Colorado Historical Foundation Revolving Loan Fund: *(carrot + stick)*

- provides low interest rate loans as an additional source of **funding for historic preservation**. This permanent and self-sufficient source of capital funds is managed by CHF. Colorado Housing and Finance Authority (CHFA) acts as the fiscal agent responsible for evaluating risk and closing and servicing the loans.
- Below-market, fixed-rate loans to fund eligible **restoration and rehabilitation** costs.
- Loans can supplement State Historic Fund grants and other historic preservations projects.
- Independent source of external financing
- Flexible terms and collateral
- Nonprofit and public entities
- Private individuals
- For-profit owners of historic properties

State Historical Fund: *(carrot + stick)*

- statewide grants program directs that a portion of gaming tax revenues be used for historic preservation throughout the state.

CLG Grants: *(carrot + stick)* Eligible projects for funding consideration include but are not limited to:

- **Surveys** to identify historic/prehistoric resources in order to complete or update local cultural resource inventories.
- Development of historic/prehistoric contexts for evaluation of resources identified during the survey process.
- **Comprehensive historic preservation planning** that may include:
  - Development of **community-wide preservation plans**.
  - Designations of local landmark districts.
  - Development of architectural design guidelines.
  - **Improvement of local historic preservation ordinances**.
  - Support for **technical or professional administrative assistance** to commissions.
- Nomination of properties to the National, State or local register.
- **Public education programs**, activities or publications that create an awareness or understanding of local, state or federal preservation programs, or that inform broad sectors of the public on preservation issues, including website development.
- Educational speakers, programs, sessions and conferences for historic preservation commissioners.
- **Innovative projects** that address the application or development of new methods, tools or technologies having potential for **broad application** beyond a specific project.

Special or Creative Outreach/Advocacy:

- partnership with Historic Denver for Discover Denver Survey, resources for homeowners
- web links to advocacy groups like Historic Denver and Historic Colorado

Austin

Integrated Preservation Program:

- Office within the Planning & Development Review Department

Preservation and/or Area Plan/Survey:

Downtown Austin Plan: adopted in 2011; addresses pressing issues as well as **long-term growth**. Emphasized economic vibrancy, livability, walkability, mobility, inclusivity, diversity, and culture while preserving the city's character. Elements of the plan are:

- **historic preservation**
- activities and uses through vibrant **pedestrian friendly** districts
- density & design
- the public realm through **interconnectedness** and enhancement of parks, open spaces, and streets
- transportation and parking to **improve mobility** and access
- utilities & infrastructure
- **leadership & implementation**

http://www.austintexas.gov/page/downtown-austin-plan

Preservation Plan: dates from 1981, and has been expanded by the City's new Comprehensive Plan, "Imagine Austin." The Commission created a **Preservation Plan Committee**, which provided input and suggestions to both the staff of Imagine Austin and the Downtown Austin Plan regarding historic preservation issues.

City of Austin Great Streets Master Plan Great Streets Development Program:

- provides a mechanism to **improve the quality of downtown streets and sidewalks**
- provides **financial assistance to private developers** with the cost of implementing streetscape standards that go above and beyond the City's minimum requirements.
- allows the City to leverage needed above and below ground streetscape improvements from private developments by **sharing the cost** of implementing Great Streets enhancements. The program establishes criteria for the City's financial participation in a project based on the following reimbursement criteria:
    - Location of the project and its impact on **pedestrian activity**;
    - Location along a Capital Metro transit route;
    - Implementation of underground utility improvements;
    - Implementation of **streetscape improvements**;
    - Introduction of **active uses** such as sidewalk cafes;
    - Incorporation of **place-making/public art/special features**.
- The Great Streets **Parking Meter fund** sets aside 30% of the parking revenues collected in downtown within the program's boundaries to provide **assistance to the development community** to implement the Great Streets standards. The fund generates approximately $400,000 per year.

- Great Streets is administered by the Urban Design Division/Planning & Development Review Department. It is **primarily used for urban planning**, but some communication is present between Urban Planning and Historic Preservation

http://www.austintexas.gov/page/great-streets

Special or Creative Incentives:

Business Retention & Enhancement Loan Program: *(carrot)*

- low-interest loans of up to $250,000 for eligible costs to existing businesses located along Congress and 6th Street that are being displaced because of development, and businesses locating to the Eligible Area
- available only for Art Gallery, Indoor Entertainment, Food Sales, Restaurant, Retail, and Theater.
- Applies to historic and non-historic buildings; if buildings are designation, Landmark Commission Approval is required. Administered by **Economic Development Department**. Intended to:
  - Improve the image of Congress Avenue and East 6th Street as **destinations for the community, visitors and tourists**.
  - Enhance East 6th Street's live **music and entertainment** district
  - **Stimulate private retail investment** within the Eligible Area through property improvement, business development, retention and expansion.
  - Improve the **quantity and quality of goods and services** available within the Eligible Area.
  - **Create and retain jobs**.
- Tenant finish-out improvements
- Acquisition of machinery and equipment necessary for the operation of the business.
- Building façade improvements that meet Storefront Design Guidelines
  - exterior treatment systems (i.e., painting, murals, siding, and bricking)
  - repair, replacement, or installation of exterior **doors, windows, and trim work**, visible from the street
  - **structural improvements** to building façade
  - exterior electrical and lighting improvements
  - masonry or tile cleaning and repair
  - **restoration of details in historically contributing or significant buildings**
  - **removal of elements that cover architectural details**
  - costs associated with **design work for the eligible facade improvements** which do not exceed 10% of the total cost of the improvements

http://www.austintexas.gov/sites/default/files/files/EGRSO/081314_BRE_application_packet.pdf

City of Austin Great Streets Program: *(carrot)*

- provides **partial reimbursement for private implementation** of the Great Streets program, including curbs, sidewalks, lighting, trees, and street furniture to enhance the walkability of the city. Administered by the Urban Design Division/Planning & Development Review Department

Hotel Occupancy Tax: *(carrot)*

- allocates a portion of HOT revenues to eligible applicants recommended for funding as a result of an equitable process in which they are found to meet established program criteria. For: "(T)he encouragement, promotion, improvement, and application of the arts, including

instrumental and vocal music, dance, drama, folk art, creative writing, **architecture, design and allied fields**, painting, sculpture, photography, graphic and craft arts, motion pictures, radio, television, tape and sound recording, and other arts related to the presentation, performance, execution, and exhibition of these major art forms."

- Administered by Department of Economic Development

Special or Creative Outreach/Advocacy:

- "wiki" survey to allow the general public to participate, offering photos, history, etc.
    - http://soa.utexas.edu/programs/historic-preservation/work/austin-historical-survey-wiki

San Antonio

Integrated Preservation Program:

- Historic Districts Council within the Office of Historic preservation **advises City departments**, boards, and commissions on issues impacting local historic districts.
- OHP and Code Enforcement staff are testing and enhancing an **"early warning system"** to identify endangered historic properties before they become threatened with eminent demolition.
- Historic Building Enforcement Officer position was created in 2011 to investigate permit and code violations related to historic properties and **work with property owners** to make necessary repairs.

Preservation and/or Area Plan/Survey:

Strategic Historic Preservation Plan:

- long-term vision and a set of practical and achievable strategies for improving the City's historic preservation program while building a more **broad-based historic preservation ethic** within the San Antonio community.
- Includes recommendations in six major categories: **planning, zoning, economic development, historic resources, incentives and education/advocacy**.
- Provides **concrete strategies** to enhance the preservation program and capitalize on historic resources that have a proven positive impact on economic development, heritage tourism, and quality of life.
- Utilized a public planning process for development.

http://www.sanantonio.gov/historic/StrategicPlan.aspx

Survey: OHP and Information Technology Services Department (ITSD) created a **survey and case history** database that will be made accessible to the public through the City's website. OHP has digitized the survey information for over 7,000 properties in the first two years.

Downtown Design Guide: for new construction, but design is **compatible with historic elements**

http://www.sanantonio.gov/Portals/0/Files/CityDesignCenter/DowntownDesignGuide.pdf

Downtown Streetscape Design Manual:

- Creates a common design thread throughout the downtown area which contributes to a feeling of **coherence and continuity**.
- Emphasizes maintenance and preservation of historic features, and covers street furniture, paved surfaces, street trees, special elements, and engineering specifications.

http://www.sanantonio.gov/Portals/0/Files/CityDesignCenter/DowntownStreetscapeDesignManual.pdf

Special or Creative Incentives:

Local Tax Incentive: *(carrot + stick)*

- allows the exemption to apply to the property for the full ten years regardless of ownership thereby providing a true incentive for the rehabilitation of the property itself and **encouraging additional investment** in central city historic neighborhoods

http://www.sanantonio.gov/historic/Programs/incentives.aspx

Revolving Fund: *(carrot + stick)*

- OHP established a $250,000 revolving fund for the acquisition, rehabilitation and resale of historic properties in partnership with the San Antonio Conservation Society and Merced Housing and a $350,000 revolving fund for owner-occupied rehabilitation low-interest loans. Both funds are designed to **combat deterioration** in the central city.

Infill Incentives: *(carrot + stick)*

- OHP is collaborating with Center City Development Office and others regarding strategic redevelopment and **infill opportunities** utilizing historic buildings and in historic neighborhoods.
- Inner City Reinvestment and Infill Policy establishes priority areas of the City targeted for private reinvestment. The intent is to coordinate and prioritize public incentives in these areas to stimulate and facilitate private investment. I
- Incentives include financial assistance, such as **fee waivers and tax abatements** for eligible projects, and **staff support** for assistance in navigating regulatory and procedural obstacles which sometimes serve as a hindrance to infill development.

http://www.sanantonio.gov/CCDO/Resources/InnerCityReinvestmentInfillPolicy.aspx

Vacant Building Registration Program: *(carrot + stick)*

- **encourage redevelopment** of these properties through the establishment of minimum maintenance requirements, regular enforcement, property owner accountability and the promotion of redevelopment opportunities for registered buildings.

http://www.sanantonio.gov/VacantBuilding/Policy.aspx

Operation Facelift: *(carrot + stick)*

- reverse the deterioration of commercial structures
- promote consistency in design, and
- create aesthetically pleasing environments while assisting property owners with the appropriate exterior rehabilitation of their buildings and bring them up to City Code
- Tenants or property owners in target areas apply for matching funds, reimbursed upon completion of project.
- Business or commercial property owners are eligible
- Muse be located within a target area
- Utilized for commercial purpose (no residences or apartments).
- No converted homes, mobile buildings or auto shops
- Operation Facelift **funds facade improvement projects**. All improvements must be permanent or fixed and must comply with applicable design standards, guidelines and applicable city codes.

Special or Creative Outreach/Advocacy:

- T**raining:** for volunteer survey teams, leads surveys of new neighborhoods, and updates existing surveys
- **S.T.A.R. Project** (Students Together Achieving Revitalization), which assists owners with costly **maintenance issues** such as painting, window repair and landscaping. Students from UTSA gain valuable **hands-on training** while helping a community in need.
- The Convention and Visitors Bureau (CVB), Downtown Operations, Downtown Alliance, and OHP partnered to create an **interactive tour** of the original Robert H.H. Hugman features of the River Walk to promote heritage tourism.
- **Preservation Month Activities:** "State of Historic Preservation" press event, the Amazing Preservation Race for kids, the Amazing Preservation Race, the This Place Matters photo contest, and Infill Design Charette for high school students and launched the Go! Historic SA Guided Running and Walking Tours.
- **Historic Homeowner Fair:** 12 educational sessions, kids activities, vendors and hands-on demonstrations
- **Free Historic House Handbook:** resource to historic homeowners and HDRC applicants.
- **Social media** presence on Facebook and Twitter
- Hosts regular preservation **networking events**.
- OHP hosts **continuing education** training classes for realtors and hands-on window rehabilitation workshops
- OHP partnered with the UTSA College of Architecture to create a **design assistance program** for applicants to the HDRC who need technical design or application assistance.

Historic Preservation Best Practices and Incentives:
Comparative Analysis
CONTINUED FROM 2/11/2015

Summary:

City	Integrated Preservation Program[1]	Holistic Preservation and/or Area Plan[2]	Special or Creative Incentives[3]	Special or Creative Outreach/ Advocacy
Dallas	Sustainable Development and Construction umbrella	No; Preservation Plan is outdated, but has good information still	No; incentives are typical examples	no
Chicago	Department of Planning and Development umbrella	Yes; Central Area Plan and Survey that Identifies priority properties	Yes: carrots alone and carrots + sticks	Yes
Durham	City-County Planning Department umbrella	Yes; Downtown Durham Master Plan and Durham Comprehensive Plan	Yes: carrots alone and carrots + sticks	no

[1]Historic Preservation Program is located within broader planning department or equivalent.
[2]Preservation Plan addresses broader goals of preservation, including streetscape, land use patterns, and future development goals.
[3]See details below. Note: text is quoted or paraphrased from City documents.

Dallas

Integrated Preservation Program:

- within **Sustainable Development and Construction Department/Current Planning**:
  - "Current Planning Division is responsible for **the review and processing** of zoning requests, subdivision and platting issues, zoning variances, special exceptions, and use termination cases, development code amendments, notification for public hearings, annexation, custodian of the official zoning maps, and street name changes."
  - Historic Preservation section "provides **services** related to historic districts, historic structures, and potential historic districts and structures. These services include Landmark (historic) Designation, Certificates of Appropriateness (approval forms for work on landmark structures), and **administering** tax incentive programs within Historic Districts and on individual Historic Structures."

Preservation Plan/Survey:

- **Dallas Historical Landmark Survey, 1975**
- Landmark Preservation Plan, July 1, 1976
- Dallas Historic Preservation Plan, 1981
- **Dallas Historic Preservation Plan, 1987-1988;**
  - identifies **goals** of Section 51.3.103 and 51.4.501 of Development Code:
    - to **protect, enhance and perpetuate** historic landmarks
    - to **safeguard** the city's historic landmarks
    - to stabilize and improve **property values** in such areas
    - to foster **civic pride** in accomplishments of the past
    - to protect the city's attractions for **tourists and visitors**
    - to **strengthen the economy** of the city
    - to **promote the use** of historic landmarks
  - **purpose of preservation plan:**
    - preservation **guide and policy statement** on the state of preservation in Dallas
    - **explain all preservation processes** and clarify them to simplify understanding by the public; serve as an introductory guide for Landmark Committee members
    - **serves as a public forum for issues discussion, conflict resolution, and for the establishment of new goals and priorities**
    - serves as a **preservation workbook**, a compendium or appendix of all the legal instruments, incentives and planning tools of preservation in Dallas so that the program is easily available to the general public and local preservation groups
  - **recommendations:**
    - **refine and expand incentives and provide avenue for approaching designation through negotiation rather than confrontation**
    - broaden and strengthen **enforcement mechanisms**
    - expand landmark surveys, and provide **ongoing updates**
    - expand program's goals to address preservation **concerns in low- and moderate-income neighborhoods**
- of note:
  - original landmark ordinance established a policy of **demolition delay** for all landmark structures for up to 240 days; 35-day demolition delay on all buildings

eligible for city designation in downtown area to afford the preservation community time to discuss alternatives t demolition with the owner
- preservation plan was written at the time of the **Landmark Committee**, prior to its change to a commission

Special or Creative Incentives:

Dallas Historic Preservation Plan, 1987-1988 stated that preservation incentives downtown were **"one of the most progressive set of financial incentives in the United States"** and The Mayor's Task Force created "Preservation Incentives for Downtown Historic Landmark Buildings," **(adopted in 1982)**, which provided

- **eight year tax freeze** for renovated landmarks at pre-development land value
- **transfer development rights**
- **façade easement program** for donation to the city or other council-designated organization
- **code revisions** for rehabilitation/renovation code standard
- **Industrial Development Bonds** for parking garages used in conjunctions with renovated landmarks
- **review procedures** of all capital improvement plans and CBD plans to ensure compatibility with downtown landmarks
- **reduction in demolition delay** process from 240 days to maximum of 120 days

Historic Tax Incentive Program (CURRENT):

- **tax incentives to property owners** completing rehabilitation projects to historic properties (City of Dallas Landmarks or structures in Landmark Districts)
- administered by the Historic Preservation Program
- 10 year tax abatement for rehabilitation or residential conversions
- property must be designated a City of Dallas Landmark or be a contributing property within a Landmark district.

Tax Increment Financing Districts (TIFs) (CURRENT):

- used to finance new public improvements in designated areas. The goal is to **stimulate new private investment** and thereby **increase real estate values**. Any increase in tax revenues (caused by new development and higher property values) is paid into a special TIF fund to finance improvements. Potential improvements include wider sidewalks, utilities, public **landscaping**, lighting, environmental remediation, demolition, and **historic façades** etc.
- not specifically for historic buildings, but can be used for them
- Downtown TIFs:
    - City Center
    - Farmers Market
    - Downtown Connection

http://www.dallas-ecodev.org/incentives/tifs-pids/

Public Improvement Districts (PIDs) (CURRENT):

- special assessment area created at the request of the property owners in the district. These owners pay a supplemental assessment with their taxes, which the PID uses for **services above and beyond existing City services**. The assessment allows each PID to have its own work program, which may consist of eligible activities such as marketing the area, providing additional security, **landscaping and lighting**, street cleaning, and **cultural or recreational improvements**.
- Downtown PIDs:
    - Downtown Dallas Improvement District
        - consists of approximately 1,777 properties and is a combination of business, residential, public and light industrial uses. Downtown Dallas, Inc. manages the PID. The general nature of the service and improvements provided by the PID are to enhance security and public safety, maintenance, **capital improvements projects** and special event and other services and activities approved by the Dallas City Council.
    - Klyde Warren Park/Dallas Arts District

http://www.dallas-ecodev.org/incentives/tifs-pids/dallas-downtown-improvement-district/

Special or Creative Outreach/Advocacy:

- **website** provides forms and contact information, copies of preservation plans and surveys; also provides links to architecture, education and advocacy, historic districts, non-profit housing and homeowner education, and research organizations
- website provides links to local landmarks and national register properties
- note: website has improved recently, but is similar to many other examples

Chicago

Integrated Preservation Program:

Historic Preservation Department

- within **Planning and Development**, along with:
  - **Economic Development**
  - Housing
  - Land Use Planning and Policy
  - Sustainable Development
  - Tax Increment Financing (TIF)
  - Workforce Solutions
  - Zoning Ordinance Administration
- **works with property owners, city departments, sister agencies, and the general public**
- administers the **Demolition-Delay Ordinance**, maintains the **Chicago Historic Resources Survey**, and promotes the preservation of historic buildings through incentives, preservation planning, public outreach, and technical assistance

Preservation and/or Area Plan/Survey:

Chicago Historic Resources Survey:

- CHRS database uses color-coded ranking system was used to identify historic and architectural significance relative to age, degree of external physical integrity, and **level of possible significance**
- used to identify buildings subject to **90 day demolition delay** (identified as "red" and "orange" buildings in survey
  - RED (RD) properties possess some architectural feature or historical association that made them **potentially significant** in the broader context of the City of Chicago, the State of Illinois, or the United States of America. About 300 properties are categorized as "Red" in the CHRS.
  - ORANGE (OR) properties possess some architectural feature or historical association that made them **potentially significant** in the context of the surrounding community. About 9,600 properties are categorized as "Orange" in the CHRS.
- buildings identified on city's **GIS system**
  - establishes a hold of up to 90 days in the issuance of any demolition permit for certain historic buildings in order that the Department of Planning and Development can explore options, as appropriate, to preserve the building, including but not limited to landmark designation

http://webapps1.cityofchicago.org/landmarksweb/web/historicsurvey.htm

Central Area Plan:

- guide for **continued economic success, physical growth, and environmental sustainability** in downtown Chicago
- product of a broad group of dedicated Chicago elected officials, government, business and civic leaders, the plan is the city's **response to the transformation of downtown** Chicago in the 1990s
- details the Central Area's potential for growth over the next two decades

- "Chicago's economic engine will be strengthened, it's parks and open spaces will be expanded, and its rapid transit and roadway systems will be extended and improved"
- one of the goals is to "Preserve and strengthen the Central Area's world renowned **architectural and cultural heritage**"

http://www.cityofchicago.org/city/en/depts/dcd/supp_info/central_area_plandraft.html

Special or Creative Incentives:

Class-L Property Tax Incentive: *(carrot + stick)*

- Reduces the property tax rate for 12 years for rehabilitating a landmark building in a commercial or industrial use
- available for **Chicago landmarks and contributing properties**

Facade Easement Donation: *(carrot + stick)*

- A one-time, charitable, Federal income tax deduction equal to the appraised value of the preservation easement; a preservation easement is a legal agreement which assigns the rights to review and approve alterations to a qualified non-profit organization for the purpose of preserving the property
- available for **local and/or National Register contributing properties**
- **commercial or residential** properties eligible

Facade Rebate Program: *(carrot)*

- For certain qualifying **industrial and commercial** buildings, a 30% or 50% rebate (depending on the use and type of project) of approved costs for **facade renovations** of up to $5,000 per storefront or $10,000 per industrial unit.
- **available for local and/or National landmarks and contributing properties and non-designated properties**

Permit Fee Waiver: *(carrot)*

- **Waives all building permit fees** (requires prior application)
- available for **Chicago landmarks and contributing properties**

Property Tax Freeze for Historic Residences: *(carrot + stick)*

- Freezes property taxes over a 12-year period **for rehabilitating an owner-occupied single-family home, condominium, cooperative unit, or a multifamily building** of up to 6 units (where one of the units is owner-occupied)
- available for **local and/or National Register contributing properties**

Historic Chicago Bungalow Initiative: (carrot)

- Department of Housing and Economic Development (HED) created the Historic Chicago Bungalow Association to help **foster an appreciation** of the Chicago Bungalow as a distinctive housing type, **encourage sympathetic rehabilitation** of Chicago bungalows, and assist bungalow owners with making their homes more **energy efficient** and adapting their homes to current needs, which in turn helps to strengthen Chicago bungalow neighborhoods. The association offers a variety of financial and educational resources. Benefits include:

- **Energy$avers grants** of up to $4,000 for energy efficiency improvements; income-restricted; Free **design guidelines** to aid owners in maintaining the architectural character of their bungalows; Monthly **"How-To" seminars** and hands-on workshops on topics related to Bungalow rehab and restoration; Resource and Referral Guide lists crafts people, vendors and specialists in Bungalow restoration, rehab and energy efficiency improvements; Window Campaign offers informational resources to homeowners on how to maintain and preserve historic bungalow windows; The quarterly newsletter "Inside the Belt"
- must be member of Historic Chicago Bungalow Association

http://www.chicagobungalow.org/

Small Business Improvement Fund (SBIF): (carrot)
Uses Tax Increment Financing (TIF) revenues to help owners of **commercial and industrial** properties within specific TIF districts to **repair or remodel their facilities** for their own business or on behalf of tenants Program participants can receive **matching grants** to cover up to half the cost of remodeling work, with a maximum grant amount of $150,000. The grant does not have to be repaid. Used for:

- New windows, floors or roof
- Sign removal and replacement
- Tuckpointing
- New heating, ventilation and air conditioning
- **Improvements to accommodate disabled patrons or workers**
- Purchase of adjacent property for building expansion or parking
- **Vacant business property is eligible**
- administered through **Department of Planning and Development and SomerCor**, a non-profit development company that also originates SBA 504 loans
- currently 18 SBIF districts with $500,000 available in each district, **operates in 87 of the city's 147 active TIFs**
- Since early 2011, **516 participating companies have leveraged more than $38 million in SBIF grants** to improve their facilities. Total project costs over the period exceed **$74 million**. Citywide, nearly fifteen percent of the program participants involved new and startup businesses. Since 2011, the SBIF program has created **5,400 temporary construction jobs, 2,966 new permanent jobs and has retained 4,955 jobs**.
- **endorsed** by Industrial Council of Nearwest Chicago
- must adhere to **design guidelines, designation not required**

http://somercor.com/sbif/

Fulton Market Innovation District: *(stick with possible carrot)*

- intended to **coordinate development patterns** that balance the area's historic role as a center for food production and distribution, along with its more recent evolution as a home to innovative industries, culture, nightlife, and housing, includes:
  - A formal land use plan to **guide future zoning change** requests.
  - General **design guidelines**
  - Assorted **infrastructure and streetscape** projects that reinforce a cohesive district identity that combines food, innovation, culture and nightlife.

- **historic preservation component**, approval pending ongoing discussion and pending actions by the Commission on Chicago Landmarks and the Chicago City Council
- **incentives yet to be identified**

Special or Creative Outreach/Advocacy:

- extensive website
- "virtual tours" on city website, arranged by theme *http://webapps1.cityofchicago.org/landmarksweb/web/tours.htm*
- booklets for homeowners
- "Public Suggestion Form" for citizens to propose landmarks

Durham

Integrated Preservation Program:

Historic Preservation Department is part of **Durham City-County Planning Department**

Preservation and/or Area Plan/Survey:

Unified Development Ordinance (UDO):

- lays out the rules for the physical development of property. The UDO designates zoning of properties in Durham, and is crafted to result in a built environment that meets the goals of the Comprehensive Plan. The UDO superseded the Zoning and Subdivision Ordinances and includes Historic Districts

Downtown Durham Master Plan:

- identifies objectives including: **maintaining Downtown character**, including **encouraging and facilitating historic preservation**, and establishing a **streetscape** program; improve **circulation**; improve the Downtown experience, including **destination uses** and community events; supporting Downtown economics through **private/public reinvestment** in downtown, encourage business retention and development, and **leveraging private investment**; improving Downtown management, including marketing, and fostering partnerships with businesses and non-profits

http://www.downtowndurham.com/images/assets/FinalDraftWeb2-20-08.pdf

Durham Comprehensive Plan:

- includes a **chapter dedicated to historic preservation**

http://durhamnc.gov/ich/cb/ccpd/Pages/Durham-Comprehensive-Plan.aspx

Special or Creative Incentives:

Building Improvement Grant: *(carrot)*

- Capital investment improvements on an existing building having vacant spaces for the purpose of **improving and/or upgrading the interior and exterior**, to make the first floor more rentable or **"retail/restaurant-ready"**.
- Eligible improvements include but are not limited to window replacement, installation of walls, painting, installation of support mechanisms, installation of sound systems, HVAC, electrical systems, plumbing, stairs, demolition, flooring, grease traps and **sprinkler systems**.
- The minimum total project capital investment in the Downtown Development Tier must be at least $225,000, cannot exceed $1M
- maximum award $75,000
- administered through **Office of Economic and Workforce Development**

Retail and Professional Services Grant: *(carrot)*

- property must be a **street level**, retail business, restaurant or a certain professional or personal services business such as a childcare center or beauty salon
- for **permanent interior or exterior improvements**
- expenses include but are not limited to security systems, telephone systems, point of sale equipment, kitchen equipment, millwork, built-in display furnishings and shelving, HVAC, coolers, plumbing, demolition, flooring, grease traps, **sprinkler systems, electrical**, installation of walls, package and labeling equipment and similar items and restoration, **repair, or replacement of windows, doors, exterior walls, chimneys, or other architectural elements**; exterior painting, signs, facades, awnings, marquees, and related exterior lighting and electrical fixtures, masonry repair and cleaning, **property improvements**, including paving and similar items.
- up to $20,000 on **1:1 matching** basis with funds provided by the applicant
- administered through **Office of Economic and Workforce Development**

Sign and Facade Grant: *(carrot [with some stick for designated buildings])*

- objective of the program is to assist business owners and improve the pedestrian experience by enhancing the visibility and appearance of businesses through **signage and façade improvements** that are physically, historically and architecturally **compatible with relevant design guidelines**
- Preference given to **street-level businesses**
- maximum incentive per business or address: $2,500 for the signage portion of a grant and $20,000 overall. In no case shall the incentive exceed 50 percent of total project cost
- Eligible expenses:
  - **Signage**; including design, fabrication and installation; adding lighting to existing signage to enhance the pedestrian experience
  - **Fees** associated with obtaining sign permit and certificate of appropriateness (if required)
  - **Façade improvements** that address and reduce slum/blight and are visible from a public street or municipal parking lot
  - Restoration, repair, or replacement of windows, doors, exterior walls, chimneys, or other architectural elements
  - Awnings, marquees, and related exterior lighting and electrical fixtures
  - **Roof repair** for portion noticeable from the public line of site
  - Exterior work necessary **for conversion to a retail or entertainment storefront**
  - **Property improvements**, including landscaping, fencing, screening, and paving
  - **Parking lot improvements**
- administered through **Office of Economic and Workforce Development**

Downtown Prime Rate Loan Program: *(carrot)*

- administered through **Downtown Durham, Inc.**
- city program organizes local financial institutions, allowing them to provide **low-interest business loans for the acquisition and rehabilitation** of Downtown Durham properties, as well as **purchase of capital equipment** for downtown use. There is a maximum origination fee levied of one-half percent (0.5%) and the minimum loan amount is set at $25,000
- Currently eight (8) local banking institutions participate

Downtown Low Interest Loan Program: *(carrot)*

- administered through **Downtown Durham, Inc.** under authority of the city
- Low Interest Loan Program offers applicants that qualify for the Prime Rate Loan program the opportunity to have the city purchase up to one-half the loan from the bank at two percent (2%) below prime, not to exceed $500,000. A one-half percent (0.5%) origination fee will be charged, but the **city will not involve themselves in further decisions made by the involved lenders**. The result of the **combination of the Low Interest Loan program and the Prime Rate program** (see previous) is a loan provided at one percent (1%) below prime to qualifying firms.

Special or Creative Outreach/Advocacy:

- none identified to date