



HISTORIC PRESERVATION PLAN ADVISORY COMMITTEE

October 3, 2019

Subject: Staff and Consultant Response to the Madison Alliance for Historic Preservation's "Observations and suggestions for the Legacy CHPP Draft" (dated 08-19-19)

Legistar File #: 57047

Prepared By: City of Madison Staff (Bill Fruhling, Heather Bailey, Amy Scanlon)
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BACKGROUND

At its meeting on August 21, 2019, the Historic Preservation Plan Advisory Committee (the Committee) considered a partial working draft of the "City of Madison Historic Preservation Plan" (Draft Plan), that was released a week earlier.

On August 19, 2019, the Madison Alliance for Historic Preservation (the Alliance) submitted a document entitled "Observations and suggestions for the Legacy CHPP Draft". At the August 21 meeting, the Committee directed staff and the consultants to prepare a response to the Alliance's communication. A copy of that communication is attached to the end of this document for reference.

This memorandum was jointly prepared by City staff and the consultant team. To facilitate a discussion by the Committee, this memorandum provides a point-by-point response to issues raised in the Alliance's communication.

PLAN DEVELOPMENT

The Alliance's document refers to the Draft Plan as "Legacy's Plan". The Draft Plan is the result of two years of work by the Committee, which was informed by public input and supported by professionals from City staff and the consultant team. Therefore, it is not accurate to label it as "Legacy's Plan" and is referred to in this document as the "Draft Plan".

Staff described the steps in the process at the kickoff meeting in September of 2017, and those steps have not changed. The goals and objectives were endorsed by the Committee in June of 2018. That endorsement was an intentional milestone that provided the foundation for developing the strategies to achieve the established goals and objectives. Likewise, the Committee developed and endorsed the draft strategies to achieve the goals and objectives in October and December of 2018. The two-year-long planning process is now in its final stages. Although minor edits are expected, a comprehensive restructuring and rewriting the goals and objectives a year after the Committee endorsed them seems unproductive.

	Alliance Comment	Staff and/or Staff and Consultant Response
1	<p>The RFP requires a comprehensive historic preservation plan</p> <p>The RFP dated September 9, 2016 clearly states (page 10) that the consultant is expected to produce the following deliverable: “A creative and forward-looking <i>“comprehensive (italics added) Historic Preservation Plan....”</i> The RFP then goes on to define this product in great detail.</p>	<p>Staff and the Consultant believe that the Draft Plan is a comprehensive, creative and forward-looking document that will provide direction for the City’s preservation efforts for the next decade. The Draft Plan addresses the following topics: underrepresented communities, comprehensive future survey strategy, promotion of historic preservation, preserving important places, economic development, policy coordination, engaging the community in future preservation work, and education. It also includes an implementation strategy.</p> <p><u>RECOMMENDATION:</u> This is a general comment. No change.</p>
2	<p>The unique capstone role of CHPPs</p> <p>Among professional preservation consultants the CHPP is widely considered to be the most complicated and sophisticated product of their repertoire. There are four reasons for this. <i>(staff note: see the following four rows for the four reasons)</i></p>	<p>Staff and the Consultant agree.</p> <p><u>RECOMMENDATION:</u> This is a general comment. Please see the following four rows for responses to individual reasons.</p>
3	<p>First, they require an in-depth knowledge of national CHPP trends.</p>	<p>This process has been supported by professional City staff and a consultant team with decades of experience and who have worked in the fields of historic preservation, architecture, public engagement, and planning across the country. The staff and consultant team are well versed in historic preservation trends nationally and locally. Some of the most relevant trends to Madison’s plan are summarized on pages 6-7 of the Draft Plan.</p> <p><u>RECOMMENDATION:</u> This is a general comment. No change.</p>
4	<p>Second, the CHPP is the only document in the preservationist’s repertoire that is truly comprehensive in scope, and uses every tool in the preservationist’s toolbox and a broad spectrum of strategies, policies, and actions to achieve preservation goals. This is why best practice CHPPs use the term “comprehensive” in their title.</p>	<p>Staff and the Consultant agree. However, to be most effective, Staff believe that the recommendations in the Plan need to be clear, focused, and prioritized and not include a “laundry list” of ideas.</p> <p>As required by State statute, the City recently adopted its Comprehensive Plan. That plan is truly comprehensive addressing such wide-ranging topics as land use, housing, transportation, the local economy, parks, and culture and character to name a few. Staff has some concern that adding “comprehensive” to the title of the Draft Plan may cause confusion.</p>

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		<i>RECOMMENDATION: No change. If the Committee feels strongly that the title should include the word “comprehensive”, it could be revised.</i>
5	Third, the CHPP requires an in-depth understanding of local problems and opportunities and what changes are needed to create an effective master plan.	<p>Staff and the Consultant agree and feel that the process used to develop the Draft Plan provided this understanding. In particular, the involvement of current and former preservation staff, coupled with input from the Advisory Committee and community throughout the process ensured that the local problems and opportunities are understood and addressed.</p> <p><i>RECOMMENDATION: This is a general comment. No change.</i></p>
6	And finally, all of these factors must be artfully stitched together in a clear and compelling report.	<p>Staff and the Consultant agree. As noted clearly on the cover, the Draft Plan is a <u>partial working draft</u>, is not formatted, and does not include graphics, illustrations, etc. to make it a visually interesting and compelling document.</p> <p><i>RECOMMENDATION: The goal of the final plan format will be to create a visually interesting and engaging document that will be used by many groups and individuals to guide preservation activities. No change.</i></p>
7	<p>The purpose of a CHPP</p> <p>Although CHPP authors use slightly different statements of purpose, all follow a remarkably similar pattern and use many of the same words. Here is our rendition of a best practice statement of purpose:</p> <p><i>The purpose of a CHPP is to provide more effective identification, preservation, protection, interpretation, and promotion of the historic resources that define the city’s distinctive character by organizing diverse historic preservation efforts into a coherent plan.</i></p>	<p>Staff and the Consultant believe that the purpose of the plan is well stated on p. 4 (as reflected below), and is more comprehensive than just focusing on resource preservation. It is appropriately specific to Madison, articulates a primary purpose in representing the city’s collective histories, and includes practical uses of the plan as enumerated in the first paragraph.</p> <p>PLAN PURPOSE</p> <p>The Madison Historic Preservation Plan is developed to celebrate and preserve the places that represent the city’s collective histories. It provides guidance for development proposals, capital improvements, and implementation policies to ensure preservation is integrated into both long-range planning and current development projects. The Plan recommends strategies and tools to 1) more effectively integrate historic preservation into public policy, 2) utilize existing land use, zoning, and development standards to support preservation, 3) explore educational and promotion partnerships, 4) capitalize on economic development and financial incentives, 5) highlight sustainable building practices, and 6) encourage heritage tourism. In addition, Madison’s Historic Preservation Ordinance is being updated to reflect current historic preservation best practices.</p>

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		<p>The City has an established preservation program, with numerous successful adaptive reuse projects that have been catalytic for individual properties and neighborhoods. While Madisonians value their historic properties, many factors challenge the preservation of those properties. This plan identifies policies, resources, training, and other strategies to make preservation feasible and valued.</p> <p>The Historic Preservation Plan should be updated every 10 years, following the City’s Comprehensive Plan update.</p> <p><u>RECOMMENDATION:</u> No change.</p>								
8	<p>HPPAC should determine what taxonomy should be used for structuring the CHPP.</p> <p>In our study of best-practice CHPPs we noticed that all used a hierarchical system to sequence master plan recommendations. Further analysis caused us to conclude that the most compelling system was based on a hierarchical system beginning with strategies, then policies, and finally actions. Our definitions of each appear in the right-hand column below. The Legacy definitions appear in the left-hand column.</p> <table><tr><th>Legacy system</th><th>Alliance system</th></tr><tr><td>Goal An overarching statement to guide preservation-based decisions</td><td>Strategy <i>A cluster of logically-related top-of-the-hierarchy goals whose scope and content comprehensively cover the most important components of historic preservation and whose achievement requires multiple policies and actions, and collaboration among disparate groups.</i></td></tr><tr><td>Objective A more specific statement to guide preservation decisions and policies</td><td>Policy <i>A logically distinct method to achieve a strategy.</i></td></tr><tr><td>Strategy An action to address the objective</td><td>Action <i>A method for achieving a policy that can be measured, prioritized, and calendarized.</i></td></tr></table> <p>[10-2-18 Legacy document]</p>	Legacy system	Alliance system	Goal An overarching statement to guide preservation-based decisions	Strategy <i>A cluster of logically-related top-of-the-hierarchy goals whose scope and content comprehensively cover the most important components of historic preservation and whose achievement requires multiple policies and actions, and collaboration among disparate groups.</i>	Objective A more specific statement to guide preservation decisions and policies	Policy <i>A logically distinct method to achieve a strategy.</i>	Strategy An action to address the objective	Action <i>A method for achieving a policy that can be measured, prioritized, and calendarized.</i>	<p>Staff and the Consultant believe that this is largely an issue of semantics and that the hierarchical structure in the Draft Plan is appropriate. The taxonomy used in the Draft Plan was first outlined in the RFP and is integral to the scope of work defined in the City’s contract with the consultant. At this point, changing the terminology and definitions that have been used throughout the process would be confusing.</p> <p><u>RECOMMENDATION:</u> No change. If the Committee feels strongly that the goals/objectives/strategies construct is unclear, staff suggests that the Comprehensive Plan construct of goals/strategies/actions would be an acceptable alternative.</p>
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9	<p>Additional research showed that several rules should govern the use of strategies:</p> <ul style="list-style-type: none"> ▪A CHPP should be composed of the fewest number of relatively short, clear, optimally discrete, logically-related, and coherently sequenced <i>statements of strategic direction</i> that cover all of the territory in today's expanded definition of historic preservation and provide the most effective protection for historic resources. ▪Totally independent statements of strategic direction are neither possible nor desirable. In fact, all strategy statements overlap to some degree. The goal is to achieve <i>minimal</i> conceptual overlap between statements of strategic direction. ▪Each strategic statement should be broken down into clearly-stated policies and actions as defined in the above table. <p>The Legacy system uses another taxonomy that can work if it is used consistently. That said, we believe our system is better.</p>	<p>Staff and the Consultant agree with these points and believes that the Draft Plan's goals (what the Alliance calls "strategies") embody these qualities. Staff and the Consultant also believe that the taxonomy is used consistently in the Draft Plan.</p> <p><u>RECOMMENDATION:</u> No change.</p>
10	<ul style="list-style-type: none"> ●Begin with "leadership" because without it no CHPP can succeed. 	<p>Staff and the Consultant agree that leadership is the foundation of success. At its July 17, 2019 meeting, the Committee recommended removing the "Responsible Parties" column from the implementation matrix since members agreed that the City should be the leader for each strategy and the Draft Plan reflects that direction. Upon adoption of the plan by the Common Council, it becomes formal City policy and provides direction to elected and appointed officials, City staff, and community partners.</p> <p><u>RECOMMENDATION:</u> No change.</p>
11	<ul style="list-style-type: none"> ●Cluster and sequence the <i>three fundamental functions</i> of historic preservation: <ul style="list-style-type: none"> ▪Identifying, evaluating and designating historical resources ▪Preserving and protecting <i>designated</i> historical resources ▪Preserving <i>undesignated</i> areas with unique architectural, urban and spatial characteristics that enhance the character of the built environment. 	<p>Staff and the Consultant believe these elements are included in the Draft Plan. In Chapter 4, Strategy 2a.i., all Objectives and Strategies under Goal 2, Strategy 4e.i, Strategy 4e.ii address these functions. Likewise, in Appendix B, Objective 4e., and strategies 4e.v, 4e.vi, and 4e.vii reflect current activities that will continue.</p> <p>To keep with current best practices in the field and trends in preservation, the goal is to have Madison's plan be uniquely Madison and further broader City priorities, including inclusivity, economic development, arts, etc. and how preservation can play a prominent role in achieving those. The Draft Plan seeks to expand Madison's understanding of the definition of historic resources beyond "unique</p>

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		<p>architectural, urban and spatial characteristics” to include Madison’s full diverse history.</p> <p><u>RECOMMENDATION:</u> No change.</p>
12	<ul style="list-style-type: none"> ●Recognize two essential “support” functions: <ul style="list-style-type: none"> ▪researching, writing, and publishing of local history ▪historic preservation education and outreach 	<p>Staff and the Consultant agree.</p> <p>Goal 6 is entirely devoted to historic preservation education, including a variety of outreach methods. Outreach is further highlighted in Goal 5.</p> <p><u>RECOMMENDATION:</u> The text supporting Strategy 4b.i. could be revised to include: “Support the researching, writing, and publishing of local history.”</p>
13	<ul style="list-style-type: none"> ●Recognize the need to end preservation’s all too common “orphan” status in city hall by integrating historic preservation planning into the city’s decision-making and administrative processes. 	<p>Staff does not concur with the perspective of the “orphan” status of preservation planning. In fact, the resources allocated to develop this plan and the implementation after it is adopted reflect the value placed on preservation by policymakers. However, it is recognized that there is often the need to balance preservation with other City priorities, and that will continue. Several strategies build on preservation recommendations contained in other adopted City plans, and Goal 4 is entirely dedicated to coordinating municipal policies to protect historic resources.</p> <p><u>RECOMMENDATION:</u> No change.</p>
14	<ul style="list-style-type: none"> ●Remind civic leaders that historic preservation should play a large but often unrecognized role in helping the city achieve economic development, sustainability, and inclusivity goals. 	<p>Staff and the Consultant agree and feel that all of these are included in the Draft Plan. Goal 3 is entirely dedicated to promoting historic preservation as a part of economic development. Objective 4c. addresses integrating historic preservation and environmental sustainability policies.</p> <p>From the beginning, inclusivity has been an emphasis of this effort. In fact, the first sentence of the Plan Purpose reads: “The Madison Historic Preservation Plan is developed to celebrate and preserve the places that represent the city’s collective histories.” Because of this emphasis, the Draft Plan intentionally weaves that theme throughout the document instead of isolating it in one section. Consistent with the Comprehensive Plan, it is an overarching theme.</p> <p><u>RECOMMENDATION:</u> No change.</p>

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15	<ul style="list-style-type: none"> Recognize that metropolitan and even regional policies play significant roles in achieving historic preservation goals. 	<p>Staff and the Consultant ask that this statement be clarified to understand exactly which of these policies affect preservation planning in the city of Madison.</p> <p>Coordination with other governmental and community entities is addressed in Objective 4b.</p> <p><u>RECOMMENDATION:</u> No change at this time unless more specific information suggests otherwise.</p>									
16	<ul style="list-style-type: none"> And, finally, focus on the need to provide preservation with the financial resources and incentive programs it requires. 	<p>Staff and the Consultant agree. Objective 3b. is entirely devoted to identifying incentives and financial resources and allocating funding for historic preservation projects.</p> <p><u>RECOMMENDATION:</u> No change at this time unless additional specific resources are identified, in which case they could be added to the plan as appropriate.</p>									
17	<p>HPPAC should recognize that CHPP methodology matters and that the different ones used by Legacy and the Alliance to prepare the basic CHPP framework produce very different contents. This is evident from the table below.</p> <table border="1"> <thead> <tr> <th></th><th>Legacy</th><th>Alliance</th></tr> </thead> <tbody> <tr> <td>Method used to develop content</td><td>Primary dependence upon community meetings using sticky notes and chart pads to distill results</td><td>Primary dependence upon a framework derived from a study of best practice CHPPs</td></tr> <tr> <td>Content</td><td> <p>Lots of good ideas, many in the form of activities such as:</p> <ul style="list-style-type: none"> provide an online calendar of historic and cultural related events List the top 10 buildings to be preserved <p>Citizen ideas were then collected, distilled, and prioritized by HPPAC into 6 goals.</p> </td><td>10 comprehensive strategies needed to achieve effective historic preservation</td></tr> </tbody> </table>		Legacy	Alliance	Method used to develop content	Primary dependence upon community meetings using sticky notes and chart pads to distill results	Primary dependence upon a framework derived from a study of best practice CHPPs	Content	<p>Lots of good ideas, many in the form of activities such as:</p> <ul style="list-style-type: none"> provide an online calendar of historic and cultural related events List the top 10 buildings to be preserved <p>Citizen ideas were then collected, distilled, and prioritized by HPPAC into 6 goals.</p>	10 comprehensive strategies needed to achieve effective historic preservation	<p>Staff and the Consultant agree that methodology matters, however the suggestion that the method used to develop content was primarily dependent on “sticky notes and chart pads” is incorrect. As with many of the City’s planning processes and consistent with best practices for the Planning profession, public engagement is critical in generating ideas, discovering information, identifying resources and prioritizing actions. Likewise, the Secretary of the Interior’s Standards for Preservation Planning emphasizes that public participation is integral to a preservation plan, and should include various groups. Staff, the Consultants, and the Committee have worked hard throughout the process to solicit input from a variety of constituencies, especially from underrepresented communities.</p> <p>In conjunction with that input, professional staff from the City and the Consultant team provided their expertise, knowledge and experience in vetting and generating content. This included researching similar plans in other communities and the Alliance’s “Best Practices” document.</p> <p><u>RECOMMENDATION:</u> This is a general comment. No change.</p>
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18	<p>HPPAC should decide what CHPP outline—Legacy’s goals or Alliance’s strategies—is best. The two systems are shown in the table below.</p> <table><tr><th>Legacy goals</th><th>Alliance strategies</th></tr><tr><td>1. Promote historic preservation</td><td>Strategy 1. Provide spirited historic preservation leadership</td></tr><tr><td>2. Preserve places that represent architecture, events, and people important to Madison’s history</td><td>Strategy 2. Identify, evaluate, and designate historic resources</td></tr><tr><td>3. Promote historic preservation as part of economic development</td><td>Strategy 3. Preserve and protect <i>designated</i> historic resources</td></tr><tr><td>4. Coordinate municipal policies to protect historic resources</td><td>Strategy 4. Preserve and protect <i>undesignated</i> areas with unique architectural and contextual qualities that enhance the character of the built environment</td></tr><tr><td>5. Engage the community in determining ongoing historic preservation priorities</td><td>Strategy 5. Recognize and encourage researching, writing, and publishing of local history.</td></tr><tr><td>6. Educate the public about Madison’s history and the value of and benefits of historic preservation</td><td>Strategy 6. Increase the effectiveness of historic preservation education and outreach</td></tr><tr><td></td><td>Strategy 7. Integrate historic preservation planning into the decision-making and administrative processes of the city.</td></tr><tr><td></td><td>Strategy 8. Harness historic preservation to achieve city goals in economic development, land use, tourism, sustainability, and inclusivity</td></tr><tr><td></td><td>Strategy 9. Address historic preservation needs in a metropolitan context</td></tr><tr><td></td><td>Strategy 10. Strengthen and promote financial support and incentives for historic preservation</td></tr></table> <p>These alternative systems pose two questions:</p> <ul style="list-style-type: none">▪Which system provides the most comprehensive coverage of the key topics a CHPP requires?▪Which system provides the clearest, most precise categories with the least overlap?	Legacy goals	Alliance strategies	1. Promote historic preservation	Strategy 1. Provide spirited historic preservation leadership	2. Preserve places that represent architecture, events, and people important to Madison’s history	Strategy 2. Identify, evaluate, and designate historic resources	3. Promote historic preservation as part of economic development	Strategy 3. Preserve and protect <i>designated</i> historic resources	4. Coordinate municipal policies to protect historic resources	Strategy 4. Preserve and protect <i>undesignated</i> areas with unique architectural and contextual qualities that enhance the character of the built environment	5. Engage the community in determining ongoing historic preservation priorities	Strategy 5. Recognize and encourage researching, writing, and publishing of local history.	6. Educate the public about Madison’s history and the value of and benefits of historic preservation	Strategy 6. Increase the effectiveness of historic preservation education and outreach		Strategy 7. Integrate historic preservation planning into the decision-making and administrative processes of the city.		Strategy 8. Harness historic preservation to achieve city goals in economic development, land use, tourism, sustainability, and inclusivity		Strategy 9. Address historic preservation needs in a metropolitan context		Strategy 10. Strengthen and promote financial support and incentives for historic preservation	<p>The Committee endorsed the goals (and objectives) a year ago and Staff and the Consultant do not feel that they need to, or should be, entirely redone. Staff and the Consultant believe that the Committee’s work to date has resulted in a full and comprehensive set of goals. Staff and the Consultant believe that all of the Alliance’s strategies are represented in the Draft Plan as noted below. Many of the Alliance’s strategies directly correspond to contents of the Draft Plan Goal included in parenthesis.</p> <p>Alliance Strategy 1: See response to comments 10 and 21.</p> <p>Alliance Strategy 2: See response to comments 11 and 22. (Draft Plan Goal 2)</p> <p>Alliance Strategy 3: See response to comment 11. (Draft Plan Goal 2)</p> <p>Alliance Strategy 4: See response to comments 11 and 22. (Draft Plan Goal 2)</p> <p>Alliance Strategy 5: See response to comment 12. (Draft Plan Goal 2)</p> <p>Alliance Strategy 6: See response to comment 12. (Draft Plan Goal 6)</p> <p>Alliance Strategy 7: See response to comment 13. (Draft Plan Goal 4)</p> <p>Alliance Strategy 8: See response to comment 14. The Alliance’s Strategy 8 mentions a wide variety of topics that are covered separately in the Draft Plan, including economic development (Draft Plan Goal 3), land use (Draft Plan Objective 4a.), tourism (Draft Plan Strategy 1a.iii), sustainability (Draft Plan Objective 4c.), and inclusivity which is an overarching theme of the plan and intentionally weaves throughout the document instead of siloing it in one section.</p> <p>Alliance Strategy 9: See response to comment 24.</p> <p>Alliance Strategy 10: See response to comments 16 and 25. (Draft Plan Objective 3b.)</p> <p><u>RECOMMENDATION:</u> <i>If the Committee feels that there are aspects of the Alliance’s “strategies” that are not covered by the comprehensive set of goals, they should identify what those are and whether they can be incorporated into existing goals or if new ones need to be added. Otherwise, no change.</i></p>
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19	<p>We believe the Legacy goals system suffers from several shortcomings, which we will outline below. However, before we do, we need to explain that in Legacy's system, goals are the big "overarching" statements; therefore, they should call attention to the most important CHPP recommendations. We do not believe they do this. Remember, we are talking only about "goals" and not "objectives" and "strategies" in Legacy's system.</p>	<p>Staff and the Consultant believe that Goals, by definition, are big overarching statements and identify what the City is trying to achieve with this plan. Staff and the Consultant believe that the set of six goals in the Draft Plan are comprehensive, reflect input received, are consistent with industry best practices, and do represent what is important to Madison. The Committee discussed Goals and Objectives at multiple meetings and endorsed those contained in the Draft Plan in June 2018.</p> <p>Note that the Committee is/will be undertaking an exercise to identify the most important strategies for achieving each goal.</p> <p><u>RECOMMENDATION:</u> No change.</p>
20	<p>Legacy's goals <i>omit</i> several important topics (strategies in our system):</p> <p><i>(staff note: see the following five rows for these topics)</i></p> <p>Yes, Legacy mentions some of these topics but only in subordination to other objectives; therefore, they are not as visible and prominent as they should be.</p>	<p>As stated previously, Staff and the Consultant believe that the Goals included in the Draft Plan and endorsed by the Committee a year ago cover the important topics.</p> <p><u>RECOMMENDATION:</u> This is a general comment. See the following five rows for responses to each topic.</p>
21	<p>▪Provide spirited historic preservation leadership (our Strategy #1)</p>	<p>See response to comment 10.</p> <p><u>RECOMMENDATION:</u> No change.</p>
22	<p>▪Preserve and protect <i>undesigned</i> areas with unique architectural and contextual qualities that enhance the character of the built environment. (our Strategy #4)</p>	<p>Appendix A of the Draft Plan is a Strategy for Future Survey Work that lays out a comprehensive and logical sequence for surveying the entire city. Historic resources in currently undesigned areas will be identified over time through that process. Otherwise, this is a historic preservation plan and other areas with "unique architectural and contextual qualities that enhance the character of the built environment" are not the subject of this effort and are best addressed through other planning efforts, such as neighborhood plans.</p> <p><u>RECOMMENDATION:</u> No change.</p>
23	<p>▪Recognize and encourage the importance of researching, writing, and publishing local history (our Strategy #5)</p>	<p>See response to comment 12.</p> <p><u>RECOMMENDATION:</u> The text supporting Strategy 4b.i. could be revised to include: "Support the researching, writing, and publishing of local history."</p>

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24	<p>▪Address historic preservation needs in a metropolitan context (our Strategy #9)</p>	<p>Staff and the Consultant are unsure what this is referring to, but the Draft Plan is being done for the City of Madison by the City of Madison and therefore does not consider areas beyond its boundaries. Coordination with other governmental and community entities is addressed in Objective 4b.</p> <p><u>RECOMMENDATION:</u> No change.</p>
25	<p>▪Strengthen and promote financial support and incentives for historic preservation (our Strategy #10)</p>	<p>See response to comment 16.</p> <p><u>RECOMMENDATION:</u> No change at this time unless additional specific resources are identified, in which case they could be added to the plan as appropriate.</p>
26	<p>B. Some of Legacy’s most important goals such as achieving inclusivity are <i>scattered</i> among Legacy’s 4 goals, 3 objectives, and 8 strategies.</p> <p>We believe that historic preservation should be seen as an effective strategy for solving some of the City’s most challenging problems such as how to achieve inclusivity. The truth is, few city officials understand that historic preservation as <i>any</i> role to play, much less a large one in achieving inclusivity. However, when they read the consultant’s “Underrepresented Communities: Historic Resource Survey Report,” they will see that there are dozens of buildings out there that should be considered for designation. And there are steps the City should take that go beyond buildings—all of which should be collected in one place to make historic preservation’s role easier to see and understand.</p> <p>In our system, inclusivity is a key part of Strategy #8.</p>	<p>As stated in the response to comment 14: From the beginning, inclusivity has been an emphasis of this effort. In fact, the first sentence of the Plan Purpose reads: “The Madison Historic Preservation Plan is developed to celebrate and preserve the places that represent the city’s collective histories.” Because of this emphasis, the Draft Plan intentionally weaves that theme throughout the document instead of isolating it in one section. Consistent with the Comprehensive Plan, it is an overarching theme.</p> <p><u>RECOMMENDATION:</u> No change.</p>
27	<p>C. Some of Legacy’s goals are too general to be clear and effective.</p> <p>For example, the first Legacy goal, “promote historic preservation,” suffers from this problem. We believe that achieving this goal requires all 10 of our proposed strategies.</p>	<p>See response to comment 19.</p> <p><u>RECOMMENDATION:</u> No change.</p>
28	<p>HPPAC should determine whether and how the two basic structures—Legacy’s goals and our strategies—should be <i>blended</i>.</p> <p>We believe the best results for Madison will result from blending the many good ideas from Legacy’s bottom-up</p>	<p>See responses to comments 8, 9, 17, 18, 19, and 20.</p> <p><u>RECOMMENDATION:</u> No change.</p>

	Alliance Comment	Staff and/or Staff and Consultant Response
	<p>community engagement process and our top-down best practice CHPP analysis. We believe such a blend will produce a document that is clearer, has less overlap, and is more sequential, and is more comprehensive in scope.</p> <p>To allow you to better understand whether a blend of both methodologies is a good idea, we have prepared a detailed outline based on an explication of our strategy, policy, and action system. It is entitled “Preliminary CHPP framework proposed by the Alliance for structuring strategies, policies, and actions” and is provided in Appendix 1.</p>	
29	<p>Legacy has never done a CHPP but argues that this is not a problem for two reasons: (1) no other Wisconsin consultant has done one either; and (2) Legacy can compensate this fact by basing its CHPP content upon extensive community engagement.</p> <p>We disagree with both reasons. Experience matters. Consultants must be familiar with the structure and rationale of best-practice CHPPs to that they can use them as a template for organizing their CHPP. Also, it is important that Legacy assures the City that the CHPP they are delivering is state-of-the-art.</p> <p>There can be no doubt that community engagement is an important <i>component</i> of a good CHPP and that many good ideas will trickle up from this process, but these good ideas must be supplemented by professional knowledge of <i>best practice</i> CHPPs. This knowledge will ensure that Madison is getting its best ideas organized in a clear, logical, and comprehensive framework.</p>	<p>Staff feels strongly that the combination of experience and expertise of the Consultant and professional City staff in fields of historic preservation, architecture, planning, and public engagement form a team that is extremely well qualified to support all aspects of this project. This team has a diverse set of experience in completing historic resource surveys, authoring historic context studies, developing neighborhood plans, and creating comprehensive plans.</p> <p>That extensive experience and expertise should guide a process that is focused on highlighting the direction that Madisonians want to take historic preservation. Madisonians expect a robust public process and that is an essential part of what defines how our City government works. The key feature of our preservation plan is that it is distinctly local.</p> <p><u>RECOMMENDATION:</u> This is a general comment. No change.</p>

Observations and suggestions for the Legacy CHPP Draft

Madison Alliance for Historic Preservation, 08-19-19

INTRODUCTION

We feel bad that HPPAC did not see our report in February when we sent it to staff with the request that you see it. We say this because if you had seen it five months ago—before the consultant and staff did substantial additional report drafting—it may have prompted changes to the report’s format and content. Now, in mid-August, our February report must seem like a where-did -this-come from late hit!

We feel bad for three reasons: (1) This is Madison’s first CHPP; (2) Madison deserves and requires a sophisticated historic preservation guidance system for the next 10 years, a state-of-the-art CHPP; and (3) we have one chance to do it right. Indeed, this is why we wrote our report.

All of our observations and suggestions are based upon our report (“The Comprehensive Historic Preservation Plan: An Analysis of Best Practice Qualities”) and upon our research.

PART I. KEY POINTS OF DEPARTURE

1. The RFP requires a comprehensive historic preservation plan

The RFP dated September 9, 2016 clearly states (page 10) that the consultant is expected to produce the following deliverable: “A creative and forward-looking “*comprehensive* (italics added) Historic Preservation Plan...” The RFP then goes on to define this product in great detail.

2. The unique capstone role of CHPPs

Among professional preservation consultants the CHPP is widely considered to be the most complicated and sophisticated product of their repertoire. There are four reasons for this. First, they require an in-depth knowledge of national CHPP trends. Second, the CHPP is the only document in the preservationist’s repertoire that is truly comprehensive in scope, and uses every tool in the preservationist’s toolbox and a broad spectrum of strategies, policies, and actions to achieve preservation goals. This is why best practice CHPPs use the term “comprehensive” in their title. Third, the CHPP requires an in-depth understanding of local problems and opportunities and what changes are needed to create an effective master plan. And finally, all of these factors must be artfully stitched together in a clear and compelling report.

3. The purpose of a CHPP

Although CHPP authors use slightly different statements of purpose, all follow a remarkably similar pattern and use many of the same words. Here is our rendition of a best practice statement of purpose:

The purpose of a CHPP is to provide more effective identification, preservation, protection, interpretation, and promotion of the historic resources that define the city’s distinctive character by organizing diverse historic preservation efforts into a coherent plan.

PART II. THE HIERARCHICAL STRUCTURE OF CHPPS

One of the most important decisions that you—HPPAC—must make is how the CHPP should be structured. Appearing below are five decisions that you should consider making to optimize CHPP structure.

1. HPPAC should determine what taxonomy should be used for structuring the CHPP.

In our study of best-practice CHPPs we noticed that all used a hierarchical system to sequence master plan recommendations. Further analysis caused us to conclude that the most compelling system was based on a hierarchical system beginning with strategies, then policies, and finally actions. Our definitions of each appear in the right-hand column below. The Legacy definitions appear in the left-hand column.

Legacy system	Alliance system
Goal An overarching statement to guide preservation-based decisions Objective A more specific statement to guide preservation decisions and policies Strategy An action to address the objective [10-2-18 Legacy document]	Strategy <i>A cluster of logically-related top-of-the-hierarchy goals whose scope and content comprehensively cover the most important components of historic preservation and whose achievement requires multiple policies and actions, and collaboration among disparate groups.</i> Policy <i>A logically distinct method to achieve a strategy.</i> Action <i>A method for achieving a policy that can be measured, prioritized, and calendarized.</i>

Additional research showed that several rules should govern the use of strategies:

- A CHPP should be composed of the fewest number of relatively short, clear, optimally discrete, logically-related, and coherently sequenced *statements of strategic direction* that cover all of the territory in today’s expanded definition of historic preservation and provide the most effective protection for historic resources.

- Totally independent statements of strategic direction are neither possible nor desirable. In fact, all strategy statements overlap to some degree. The goal is to achieve *minimal* conceptual overlap between statements of strategic direction.

- Each strategic statement should be broken down into clearly-stated policies and actions as defined in the above table.

The Legacy system uses another taxonomy that can work if it is used consistently. That said, we believe our system is better.

2. Once the taxonomy issue is settled, HPPAC should determine whether certain rules should govern the sequencing of strategies.

Based upon our analysis, we believe the following sequence possesses great merit:

- Begin with “leadership” because without it no CHPP can succeed.
- Cluster and sequence the *three fundamental functions* of historic preservation:
 - Identifying, evaluating and designating historical resources
 - Preserving and protecting *designated* historical resources
 - Preserving *undesignated* areas with unique architectural, urban and spatial characteristics that enhance the character of the built environment.
- Recognize two essential “support” functions:

- researching, writing, and publishing of local history
- historic preservation education and outreach

●Recognize the need to end preservation’s all too common “orphan” status in city hall by integrating historic preservation planning into the city’s decision-making and administrative processes.

●Remind civic leaders that historic preservation should play a large but often unrecognized role in helping the city achieve economic development, sustainability, and inclusivity goals.

●Recognize that metropolitan and even regional policies play significant roles in achieving historic preservation goals.

●And, finally, focus on the need to provide preservation with the financial resources and incentive programs it requires.

3. HPPAC should recognize that CHPP methodology matters and that the different ones used by Legacy and the Alliance to prepare the basic CHPP framework produce very different contents. This is evident from the table below.

	Legacy	Alliance
Method used to develop content	Primary dependence upon community meetings using sticky notes and chart pads to distill results	Primary dependence upon a framework derived from a study of best practice CHPPs
Content	<p>Lots of good ideas, many in the form of activities such as:</p> <ul style="list-style-type: none"> ▪provide an online calendar of historic and cultural related events ▪List the top 10 buildings to be preserved <p>Citizen ideas were then collected, distilled, and prioritized by HPPAC into 6 goals.</p>	10 comprehensive strategies needed to achieve effective historic preservation

4. HPPAC should decide what CHPP outline—Legacy’s goals or Alliance’s strategies—is best. The two systems are shown in the table below.

These

Legacy goals	Alliance strategies
1. Promote historic preservation 2. Preserve places that represent architecture, events, and people important to Madison’s history 3. Promote historic preservation as part of economic development 4. Coordinate municipal policies to protect historic resources 5. Engage the community in determining ongoing historic preservation priorities 6. Educate the public about Madison’s history and the value of and benefits of historic preservation	Strategy 1. Provide spirited historic preservation leadership Strategy 2. Identify, evaluate, and designate historic resources Strategy 3. Preserve and protect <i>designated</i> historic resources Strategy 4. Preserve and protect <i>undesigned</i> areas with unique architectural and contextual qualities that enhance the character of the built environment Strategy 5. Recognize and encourage researching, writing, and publishing of local history. Strategy 6. Increase the effectiveness of historic preservation education and outreach Strategy 7. Integrate historic preservation planning into the decision-making and administrative processes of the city. Strategy 8. Harness historic preservation to achieve city goals in economic development, land use, tourism, sustainability, and inclusivity Strategy 9. Address historic preservation needs in a metropolitan context Strategy 10. Strengthen and promote financial support and incentives for historic preservation

alternative systems pose two questions:

- Which system provides the most comprehensive coverage of the key topics a CHPP requires?
- Which system provides the clearest, most precise categories with the least overlap?

We believe the Legacy goals system suffers from several shortcomings, which we will outline below. However, before we do, we need to explain that in Legacy’s system, goals are the big “overarching” statements; therefore, they should call attention to the most important CHPP recommendations. We do not believe they do this. Remember, we are talking only about “goals” and not “objectives” and “strategies” in Legacy’s system.

Our concerns with Legacy’s goals are as follows:

A. Legacy’s goals *omit* several important topics (strategies in our system):

- Provide spirited historic preservation leadership (our Strategy #1)
- Preserve and protect *undesigned* areas with unique architectural and contextual qualities that enhance the character of the built environment. (our Strategy #4)

- Recognize and encourage the importance of researching, writing, and publishing local history (our Strategy #5)

- Address historic preservation needs in a metropolitan context (our Strategy #9)

- Strengthen and promote financial support and incentives for historic preservation (our Strategy #10)

Yes, Legacy mentions some of these topics but only in subordination to other objectives; therefore, they are not as visible and prominent as they should be.

B. Some of Legacy’s most important goals such as achieving inclusivity are *scattered* among Legacy’s 4 goals, 3 objectives, and 8 strategies.

We believe that historic preservation should be seen as an effective strategy for solving some of the City’s most challenging problems such as how to achieve inclusivity. The truth is, few city officials understand that historic preservation as *any* role to play, much less a large one in achieving inclusivity. However, when they read the consultant’s “Underrepresented Communities: Historic Resource Survey Report,” they will see that there are dozens of buildings out there that should be considered for designation. And there are steps the City should take that go beyond buildings—all of which should be collected in one place to make historic preservation’s role easier to see and understand.

In our system, inclusivity is a key part of Strategy #8.

C. Some of Legacy’s goals are too general to be clear and effective.

For example, the first Legacy goal, “promote historic preservation,” suffers from this problem. We believe that achieving this goal requires all 10 of our proposed strategies.

5. HPPAC should determine whether and how the two basic structures—Legacy’s goals and our strategies—should be *blended*.

We believe the best results for Madison will result from blending the many good ideas from Legacy’s bottom-up community engagement process and our top-down best practice CHPP analysis. We believe such a blend will produce a document that is clearer, has less overlap, and is more sequential, and is more comprehensive in scope.

To allow you to better understand whether a blend of both methodologies is a good idea, we have prepared a detailed outline based on an explication of our strategy, policy, and action system. It is entitled “Preliminary CHPP framework proposed by the Alliance for structuring strategies, policies, and actions” and is provided in Appendix 1.

Part III. MISCELLANEOUS CONCERNS

1. Legacy has never done a CHPP but argues that this is not a problem for two reasons:

(1) no other Wisconsin consultant has done one either; and (2) Legacy can compensate this fact by basing its CHPP content upon extensive community engagement.

We disagree with both reasons. Experience matters. Consultants must be familiar with the structure and rationale of best-practice CHPPs to that they can use them as a template for organizing their CHPP. Also, it is important that Legacy assures the City that the CHPP they are delivering is state-of-the-art.

There can be no doubt that community engagement is an important *component* of a good CHPP and that many good ideas will trickle up from this process, but these good ideas must be supplemented by professional knowledge of *best practice* CHPPs. This knowledge will ensure that Madison is getting its best ideas organized in a clear, logical, and comprehensive framework.

SUMMARY

This document—Madison’s first CHPP—will become a sophisticated guidance system for Madison’s historic preservation program for the next 10 years. Therefore, now is the time to take all reasonable steps to cause this document to the best it can be.

Our group, the Madison Alliance for Historic Preservation, recognizes that finalizing a CHPP is a lot of work and we will be happy to be of further assistance to HPPAC if called upon to do so.

Appendix 1

Preliminary CHPP framework for structuring strategies, policies, and actions

Madison Alliance for Historic Preservation, August 19, 2019

Introduction

This CHPP outline is based upon our analysis of eleven best-practice CHPPs and uses what we believe is the best overall framework for a CHPP. By this we mean the hierarchical framework consisting of strategies, policies, and actions.

The great value of analyzing best-practice CHPPs is that the process yields a *template* that can be easily adapted for Madison's unique and special conditions.

Among other things, this template is a reminder that Madison can learn much from studying some of the nation's best CHPPs. To put this differently, we don't need to reinvent the wheel. Many other cities have done CHPPs so it behooves us to study the best ones and extract their lessons.

A template derived from best-practice CHPPs is also a reminder that methodology matters—that community engagement and professional knowledge of the best CHPPs are needed to craft the best product for Madison. The trick for the professional consultant to prepare an *astute blend of national and local* information. This means using the best organizing principles from a study of national CHPPs and all of the great ideas that bubble up from community engagement. The happy result is a synergistic and yeasty marriage of both components. To use one without the other is a prescription for failure and will prevent Madison from securing a truly effective historic preservation guidance system for the next decade.

One final note: This is a *preliminary* draft and does *not* includes dozens of penciled marginal notes that say things like “insert excellent copy from Denver plan, p.23,” “weave in Salem language, pp 105-106,” and “compare with Boulder language, p. 23.” The key point here is that the 1400 pages of CHPP's that we read sparkled with great ideas for policies, concepts, activities, and felicitous wording. In an ideal world, we would have time to incorporate these ideas, but time does not permit.

We hope you find this work helpful

TABLE OF CONTENTS, A FIRST DRAFT OF A CHPP STRUCTURE BASED ON STRATEGIES AND POLICIES

Strategy 1. Provide spirited historic preservation leadership

- A. Make the City a visionary value-based leader
- B. Make the City a policy leader
- C. Make the City a facilitator and convener
- D. Make the City an effective advocate

Strategy 2. Identify, evaluate, and designate historic resources

- A. Develop an ongoing identification and evaluation survey system
- B. Evaluate survey data
- C. Designate historic resources

Strategy 3. Preserve and protect *designated* historic resources

- A. Recognize the importance of predictable, consistent ordinance administration
- B. Implement general policies to protect designated areas

Strategy 4. Preserve *undesignated* areas with unique architectural, urban and spatial characteristics that enhance the character of the built environment

- A. Proactively identify areas with potential historic significance
- B. Secure appropriate types of protection for these areas

Strategy 5. Recognize and encourage researching, writing, and publishing of local history.

Strategy 6. Increase opportunities for historic preservation education and outreach

- A. Identify more effective ways to help the public understand Madison's history and the importance of historic preservation
- B. Deliver educational programs to selected stakeholders

Strategy 7. Integrate historic preservation planning into the broader public policy, land use planning, and decision-making processes of the City.

- A. Evaluate the problem
- B. Provide appropriate initial and refresher training to elected officials, city staff, and members of boards, committees, and commissions
- C. Refine coordination of regulation and planning

Strategy 8. Make greater use of historic preservation to achieve Madison's economic development, land use, sustainability, and inclusivity goals.

- A. Use preservation-based policies to achieve economic development goals
- B. Use preservation-based policies to achieve better land use goals
- C. Use heritage tourism to stimulate economic activity
- D. Use preservation-based policies to achieve sustainability goals
- E. Use preservation-based policies to achieve inclusivity goals

Strategy 9. Address historic preservation in a metropolitan context

Strategy 10. Strengthen and promote financial support and incentives for historic preservation

- A. Identify and all sources of financial support
- B. Prepare a rolling preservation budget

Strategy 1. Provide spirited historic preservation leadership

Policy A. Make the City a visionary value-based leader

1.1. Provide a compelling and inspiring vision of the role that a vigorous historic preservation program must play to create and maintain a great city.

Policy B. Make the City a policy leader

1.2. Create and maintain state-of-the-art regulatory documents to make historic preservation effective, compelling, and user-friendly

- a. Implement and annually review the comprehensive historic preservation plan (CHPP)
- b. Revise and strengthen the historic preservation ordinance to reflect the best practices and tools. (See also Strategy #3)
- c. Cause a comprehensive design manual to be developed and used. (See also Strategy #3)

1.3. Maintain the City's status as a Certified Local Government (See also Strategy 10)

1.4. Strengthen the role of the Landmarks Commission in preservation-related planning, development, and design.

1.5. Continue to secure a city historic preservation planner who meets the Secretary of the Interior's *Professional Qualification Standards*

1.6. Provide sufficient staff commensurate with program requirements. (See also Strategy #10)

1.7. Develop a plan that would allow the historic preservation planner to provide effective leadership for historic preservation within city hall. (See Strategy #7)

Policy C. Make the City a clearinghouse, facilitator, and convener

1.8. Maintain a clearinghouse where information pertaining to historic preservation is collected and disseminated to City departments and the public.

1.9. Develop and maintain effective relationships with neighborhood associations, local preservation organizations, and private sector organizations.

1.10. Develop relationships with federal, state, local governments that will facilitate City preservation efforts.

Policy D. Make the City an effective advocate

1.11. Maintain City-owned historic resources pursuant to recognized preservation standards.

1.12. Develop and implement policies within City Hall that emphasize the importance of historic preservation programs. (See also Strategy 7.)

- a. Consider historic preservation factors when city approvals are required.
- b. Consider historic preservation factors for all budget requests.
- c. Prioritize the retention of designated historic resources (or those determined eligible for historic designation) over demolition when evaluating developments that require city action.
- d. Where appropriate designate city-owned properties as landmarks or place them in historic districts.
- e. Consider videotaping and broadcasting Landmark Commission meetings on City Channel 12.
- f. Determine how the City can adequately fund historic preservation.

1.13. Develop programs to educate the public about historic preservation and strategy. (See also "Strategy #6)

Strategy 2. Identify, evaluate, and designate historic resources

Policy A. Develop an on-going identification and evaluation program

2.1. Develop and implement a comprehensive and systematic city survey program to identify and evaluate all types of historic resources as outlined in “Strategy for Future Survey Work (Legacy, 2019). This survey should be sufficient to identify future historic districts including State Street, Langdon Street, and the Lamp House. Evaluation systems should include: (a) national, state, and local contexts and themes; (b) applicable designation criteria; and (c) high-priority City goals such as inclusivity.

2.2. Enter results from survey work into the historic resources database. (This survey database should include systems to capture, store, and maintain information and should be compatible with the SHPO’s architecture-history and archaeology databases, the City’s Geographic Information System (GIS), and the City permitting system.)

Policy B. Evaluate survey data

2.3. Direct the Landmarks Commission to review the Legacy plan (see above) and to make its recommendations to all appropriate departments, decision-makers, and the public. Review the plan annually.

C. Designate historic resources

2.4. Implement the approved designation plan in accord with priorities

2.5. Create, maintain, and publicize a rolling list of potentially eligible resources (individual sites and districts) and make it available to potential nomination preparers and others who may have an interest in initiating a nomination.

Strategy 3. Preserve and protect *designated* historic resources

Policy A. Recognize the importance of predictable, consistent ordinance administration

- 3.1. Revise Chapter 41 to cause it to be clearer, more user-friendly, more logically-organized, and more predictable.
- 3.2. Develop and periodically distribute to owners of historic properties a handbook that would outline what owners must do, when, and why to make changes to their properties. It should be clearly organized, well-written, and include graphics wherever possible. Flo-charts should be used to show the steps one must take in what sequence, etc. (See also Strategy #6)
- 3.3. Review the adequacy of information received by the historic preservation planner from owners who desire to make changes to their properties, and revise these requirements as appropriate. (This will give city officials and the public a better understanding of what is proposed and why. Other cities require much more than Madison.)
- 3.4. Develop a plan for the development and implementation of a design (guidelines) manual. (This is a critically important tool for implementing and enforcing Chapter 41. However, Madison has never had one.)

Policy B. Implement general policies to protect designated areas

- 3.5. Identify and implement plans, programs, and policies that will provide additional protection for designated areas including: (a) Increasing the number of owner-occupants in historic districts with high percentages of absentee owners; (b) encouraging the greater use of neighborhood conservation districts; (c) developing and implementing appropriate maintenance codes for historic properties; and (d) refining the code enforcement system for historic districts.

Strategy 4. Preserve *undesigned* areas with unique architectural, urban and spatial characteristics that enhance the character of the built environment

Policy A. Proactively identify areas with potential historic significance

- 4.1. Identify areas with special architectural features and historic character that may require additional protective policies and programs.
- 4.2. Identify what types of protection may be desirable or necessary such as conservation areas and historic districts.
- 4.3. Work with residents to develop awareness of an area's special qualities and to develop appropriate plans to protect them from undesirable development.

Policy B. Secure appropriate types of protection for undesigned areas

- 4.4. Cause appropriate plans to be approved for selected areas.
- 4.5. Cause these plans to be known to all appropriate City departments and to be included in all appropriate plans and information systems. (See also Strategy #7)

Strategy 5. Recognize and encourage researching, writing, and publishing of local history. [New]

[Written or recorded history is the lifeblood of historical preservation. That may seem obvious, but before a building can be nominated, before a district can be designated, before a city can know its past, someone must do research, write up that research, and disseminate the results. In fact, written or recorded local history is the *foundation* of historical preservation. This is why local history in its many forms should be encouraged. Madison is blessed with library shelves full of articles, pamphlets, and books about the City, but much work remains to be done!]

5.1. Secure a grant to cause a sophisticated and thorough bibliography on Madison's history to be developed and updated every five years. [This could also be done by a private sector organization.]

5.2 Make this bibliography widely available in print and electronically.

5.3. Create and implement a plan for the creation of a committee of historians to identify topics, themes, eras, buildings, and individuals, and underrepresented groups that require additional research, and to cause this work to be disseminated among potential writers, researchers, genealogists, and others.

5.4 Collaborate with appropriate individuals, organizations, educational institutions, and publishers to cause research and writing to be captured in articles, books, videos, oral interviews, and other appropriate methods.

5.5. Develop a consortium of facilities (libraries, educational institutions, research organizations, and newspapers) to make it easier for potential researchers and writers to access Madison history sources.

Strategy 6. Increase the effectiveness of historic preservation education and outreach

Policy A. Identify more effective ways to help the public understand Madison's history and the importance of historic preservation

6.1. Create a task force charged with improving the public's understanding of Madison's history and the importance of historic preservation. The task force should evaluate all current methods used by the public and private sectors (signage, printed documents, video, tours, parades of old homes, award programs, etc.), and make recommendations for the most promising and cost-effective methods that should be pursued.

6.2. Implement the plan.

Policy B. Deliver educational programs for selected stakeholders

6.3. Identify critically important stakeholders who need to better understand the opportunities available with historic preservation and the responsibilities that come with ownership of historic properties, and develop customized programs for each. Key stakeholders should include: realtors, real estate developers, owners of landmarks and properties in historic districts, neighborhood leaders and residents, and owners of properties in areas that are proposed as historic districts.

6.4. Implement the plan

6.5 To supplement this general educational program, identify and deliver programs that target very specific audiences at certain occasions, for example, when historic properties change hands.

Strategy 7. Integrate historic preservation planning into the decision-making processes of the City.

Policy A. Evaluate the problem

7.1 Create a small City Hall team chaired by the preservation planner to determine how well historic preservation is understood among city employees and elected officials, and prepare a report summarizing what the problems are and how areas of insufficient understanding can best be fixed within the framework of City organization.

Policy B. Provide appropriate initial and refresher training to elected officials, city staff, and members of boards, committees, and Commissions

7.2 Provide presentations at appropriate intervals (biennially?) to boards, committees, and commissions that are most directly concerned with historic presentation.

7.3 Provide presentations at appropriate intervals to the departments and divisions that are most directly concerned with historic preservation including but not limited to Building Inspection, Neighborhood and City planning, Engineering, Transportation, and staff serving the Plan Commission and Urban Design Commission.

7.4. Cause the new alder training program to include the key facts about the City's historic preservation program with special briefings for alders with historic districts in their districts.

7.5. Develop and implement a special training program for all new members of the Landmarks Commission.

Policy C. Refine coordination of regulation and planning

7.6. Direct the preservation planner to identify all areas where City functions overlap and where existing policies, procedures, and plans are not sufficiently synchronized (or even in conflict), and to prepare a report identifying these friction points, and how they should be resolved. Special emphasis should be given to maintenance and development processes, land use plans, environmental impact statements, and sustainability.

7.7. Identify and implement a plan to minimize and eliminate these friction points. Review annually and provide updates to the Landmarks Commission.

8. Harness the power of historic preservation to achieve city goals in economic development, land use, tourism, sustainability, and inclusivity.

Policy A. Use preservation-based policies to achieve economic growth

8.1. Identify areas that provide compelling opportunities to use historic preservation programs to significantly increase economic development, to identify specific means to exploit those opportunities, to prepare a report describing and recommending these opportunities, and to cause this report to be widely publicized. The report should tout the advantages of restoration and rehabilitation as a means of increasing the tax base and creating more construction jobs.

8.2. Identify and publicize the availability of financial aid programs including the federal and state tax credit program.

8.3. Identify areas such as State Street that have great potential to provide economic growth without the construction of large new buildings.

Policy B. Use preservation-based policies to achieve land use goals

8.4. Identify old compact neighborhoods where development should be very limited.

8.5. Identify transit corridors that pass through historic neighborhoods and districts and determine where, what type, and how much development can occur in these areas without adversely affecting their historic character.

Policy C. Use heritage tourism to stimulate economic activity

8.6. Develop a plan in conjunction with Destination Madison to expand the contribution of heritage tourism to the larger tourism program.

Policy D. Use preservation-based policies to achieve sustainability goals

8.7. Encourage the use of historic preservation programs to achieve the City's sustainability goals while retaining a rich sense of place based on the following factors: (a) the embodied energy concept; (b) the use of compact historic districts and neighborhoods to achieve anti-sprawl goals; (c) the inherent advantages of popular old commercial areas such as State Street

Policy E. Use preservation-based policies to achieve inclusivity goals

8.8. Implement the recommendations in Legacy's report entitled "Underrepresented Communities: Historic Resource Survey Report." Underrepresented groups are here defined as Native Americans, Latinos, African Americans, Hmong, LGBTQ, and women.

8.9. Create a task force to identify and implement specific plans to cause the general public to be more aware of and appreciative of the contributions of historically underrepresented groups.

8.10. Develop and implement a plan to cause further research, writing, and publication to be done on underrepresented groups.

Strategy #9. Address historic preservation needs in a metropolitan context

9.1 Identify the impact of relatively rapid growth in Dane County on Madison's older, historic areas and develop plans, programs, and policies that can prevent this growth from damaging their historic character.

9.2. Enact proactive plans, programs, and policies.

Strategy 10. Strengthen and promote financial support and incentives for historic preservation

Policy A. Identify and evaluate all sources of financial support for historic preservation

10.1 Direct the preservation planner to identify all existing and potential sources that can provide financial support for historic preservation programs, and to make recommendations on what funding strategies should be used to underwrite the comprehensive historic preservation plan. The plan should include:

- a. Developing more effective and sufficient financial incentives to achieve historic preservation goals.
- b. Expanding the use of state and national tax credit programs.
- c. Determining what changes are needed to current TIF policy that would allow it to provide more funding for historic preservation.
- d. Maintaining the City's status as a Certified Local Government

Policy B. Prepare a rolling budget

10.2 Develop a detailed budget showing the cost of implementing all concepts in the CHPP with recommendations to the Landmarks Commission on how to fund and phase the CHPP.