

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

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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.