Date:	January 12, 2021
То:	LORC members and staff
From:	David Mollenhoff
Subject:	District-specific exceptions

1. You have challenged us to prove to you that there are many district-specific exceptions.

A. The only valid method to determine how many district-specific exceptions there are is to carefully compare today's ordinance with the proposed generic ordinance. This process is tedious and very time consuming in part because nearly every component of today's ordinance must be carefully aligned with the generic ordinance sequence.

B. Nevertheless, we have compared <u>portions</u> of three of today's ordinances (Marquette Bungalows, University Heights, and First Settlement) and have come up with 78 examples where the generic ordinance failed to pick up district-specific qualities. In earlier submissions we have given you our research for the Marquette Bungalows and First Settlement and I am happy to provide the latest analysis for University Heights.

C. Third Lake Ridge, our most complicated district, contains dozens of additional districtspecific qualities that the generic ordinance does not cover. This fact is clear from an analysis of BUILD-II report, which recognized five sub-districts, each of which requires specific metrics. Significantly, in 2005 the Common Council directed staff to "prepare the necessary ordinance amendments to update the Third Lake Ridge Historic District Ordinance." This was never done. All of you know this district is under siege by developers and we need clear standards to prevent inappropriate development.

To allow you to see the inadequacy of generic standards compared to BUILD-II standards, we gave you a two-column chart several weeks ago. A copy of that document (The Third Lake Ridge Example: Why District-Specific Standards Are Needed) is **attached**.

I believe that if BUILD II standards were compared to the generic ordinance (as we did in B above), an objective observer could count at least 50 instances there the generic ordinance was not capable of preserving the character of the Third Lake Ridge Historic District.

D. The combination of the limited analysis that we explained in B above and the estimated 50 exceptions from Third Lake Ridge would provide 128 exceptions. That's a lot!

E. It is imperative that ALL of the district-specific exceptions be identified so that we can determine whether they are adequately covered by the generic ordinance. Some may be, but many may not. This is important because the fundamental purpose of this ordinance is to preserve the distinctive character of our historic districts—and this requires district-specific standards.

2. The substantial number of district-specific exceptions raises a policy question: How shall these exceptions be accommodated in the generic ordinance? And what principles should determine how these exceptions should be accommodated? My answer is that user convenience and friendliness should govern this organizational question.

3. For your January 12 meeting staff prepared a thoughtful memo titled "Staff Response to Questions and Issues Raised at Recent LORC meetings." One of the points made in a section of that paper (District Character vs. Individual Structures) was that the visual compatibility standard was sufficient to preserve historic character. I do not believe that visual compatibility is sufficient for this purpose. The attachment shows why.

THE THIRD LAKE RIDGE EXAMPLE: WHY DISTRICT-SPECIFIC STANDARDS ARE NEEDED

The attached chart compares the city staff's proposed uniform standards for new construction in historic districts (7-30-19) to the BUILD II standards for new commercial construction on Williamson Street (part of the Third Lake Ridge Historic District). BUILD II provides district-specific standards that vary by block and by use. The chart compares these general vs. district-specific standards with respect to 2 key parameters: building size and placement.

BUILD II (formally known as *Design Guidelines & Criteria for Preservation: Williamson Street, 600-1100 Blocks*), was created under Common Council directive though a process that sought broad public input. Because of this broad public input, and because the Council directed that BUILD II recommendations be implemented by ordinance, BUILD II standards provide a useful comparison to the uniform general standards now proposed by city staff.

• The BUILD II land use plan was adopted by the Common Council in 2005. The plan was created, in part, by a Dane County Better Urban Infill Development ("BUILD") grant, matched by funds from the City of Madison, the Marquette Neighborhood Association, and the Greater Williamson Street Business Association. The BUILD program's purpose is:

"... to **plan and implement infill development** through planning grants. Infill development is defined as the economic use of vacant land, or restoration or rehabilitation of existing structures or infrastructure, in already urbanized areas where water, sewer, and other public services are in place, **that maintains the continuity of the original community fabric**. BUILD grants help pay for planning consultants who assist communities with preparation of infill plans." (emphasis added)

- An advisory committee oversaw the creation of the BUILD II plan. This 12-person advisory committee was made up of 2 Marquette Neighborhood Association representatives, 2 Common Wealth Development representatives, one Greater Williamson Street Business Association representative, one Landmark representative, 5 property owners in the targeted area, 2 residents in the area, and the District Alder. The advisory committee held approximately 30 public meetings, including 5 public forums. Based on this process, the BUILD II advisory committee recommended updated standards for the Third Lake Ridge historic district. The committee recommended specific updated standards for new construction, additions and alterations in that part of the historic district covered by BUILD II. Those standards were included in the BUILD II plan adopted by the Common Council.
- The Common Council resolution adopting BUILD II (RES-05-00074) resolved that: "Planning Unit staff is hereby directed to prepare the necessary ordinance amendments to update the Third Lake Ridge Historic District Ordinance." To date, that has not been done.

The attached comparison makes abundantly clear that the district-specific BUILD II standards would give clear, detailed guidance to property owners, developers, contractors, architects and Landmarks Commissioners. By contrast, the uniform standards now proposed by staff are so vague that they are nearly meaningless.

Current staff proposal vs. BUILD II standards for new construction on Williamson Street

July 30 staff proposal	BUILD II standards	
Visual Size	Height	
When determining visual compatibility for visual size, the Landmarks	In general, maximum 2 ¹ / ₂ stories above grade.	
Commission shall consider factors such as massing, building height in feet and	Exceptions:	
stories, the gross area of the front elevation (i.e., all walls facing the street), street	1. A flat-roofed building on the north side of the 800 or 900 blocks may extend 3 stories above grade.	
presence, and the dominant proportion of width to height in the façade.	2. North 600 and 700 blocks, back half (along the bike path) 5 stories/54 feet.	
	- 2 bonus stories, up to a maximum of 85 feet/7 stories, for preservation, affordable housing,	
Architectural Expression	structured parking	
When determining visual compatibility for architectural expression, the	3. North 600 block, front half along Williamson, western approximate 2/3 maximum of 4 stories,	
Landmarks Commission shall consider factors such as the building's modulation,	eastern approximate 1/3 3 stories (preservation of the Capitol view)	
articulation, building planes, proportion of building elements, and rhythm of solids	4. North 700 block, front half along Williamson, western approximate 3/4 maximum of 5 stories/54	
to voids created by openings in the façade.	feet, eastern approximate 1/42 ¹ / ₂ stories	
to volus created by openings in the raçade.	- 3 stories at mid-block along the Livingston side street, with 1 bonus story for preservation,	
	affordable housing, structured parking	
	 North 700 block, back half (along the bike path) 5 stories South 600 block 4 stories 	
	 7. South 700 block (Elks Club property), 4 stories. - 1 bonus story available for a project that incorporates significant publicly accessible green 	
	space along Lake Monona.	
	8. North 800-1100 blocks back half (along the bike path) 3 stories.	
	 I bonus story for preservation, affordable housing, structured parking 	
	 Bonus story in 800 and 900 blocks (which are closer to Williamson that the 1000 and 1100 	
	blocks) must be stepped back at least 45 feet from the property line for residential structures	
	and 30 feet for mixed use, flat roofed structures. The fourth story must be stepped back from	
	the street such that it cannot be seen at sidewalk level from the opposite side of the street	
	9. Corner features on corner buildings can be higher if the features are comparable in scale to	
	historically representative corner features on Williamson Street.	
	Street Façades	
	1. Maximum of 60 feet in width	
	 A residential street façade more than 25 feet wide shall be divided into visually distinct masses 	
	that are no more than 25 feet wide and that are visually separated from each other by at least 5	
	feet.	
	- Commercial nixed-use articulation and breaks buildings must be sufficient to maintain the	
	rhythm of masses and spaces of existing commercial and mixed-use buildings in the visually	
	related area	
	Residential facades	
	1. Articulated with dormers, bays, porches, recesses, or other architectural features to visually reduce	
	the apparent mass of the new building and to blend with the details of older existing residential	
	buildings within the visually related area.	
	2. One or more porches and at least one entry door on the main street facade.	
	3. The main front entrance shall be scaled large enough to be a focal point on the facade.	
	4. Finished first floor elevation of the street façade shall be at least 18 and not more than 48 inches	
	above grade (does not apply to north 700 block).	

	 Commercial/Mixed-use facades First floor storefronts shall be broken into bays similar in width to those on existing pre-1945 storefronts (does not apply to north 700 block). Storefronts shall have the general historic pattern of large storefront windows, low kick panels, transom windows, side pilasters and cornices. Finished first floor elevation shall be as close to grade as possible, and shall meet ADA requirements for entrances. For corner buildings, angled corner entrances are encouraged. For buildings with multiple commercial tenants, a sign band should be included in the design to maintain consistency in the building design. Internal sign illumination, if any, shall be appropriately subdued and shall illuminate only characters or letters – not background. Parapet caps or cornices should be incorporated to terminate the top of façade The first floor window sill height shall be 18" to 36" above grade. Primary entranceways should be easily identifiable as a focal point of the building. Recessed entrances are encouraged.
 Street Setback When determining visual compatibility for street setbacks, the Landmarks Commission shall consider factors such as the average setback of historic resources on the same block face within two hundred (200) feet, and the setback of adjacent structures. Building Placement. When determining visual compatibility for building placement, the Landmarks Commission shall consider factors such as lot coverage, setbacks, building orientation, and historic relationships between the building and site. 	 Street Setbacks The street façade of a residential structure, other than a mixed-use structure, shall be located at least 15 feet from the public right-of-way that it faces. A shorter setback of not less than 6 feet is allowed if the setback is not less than the average setback of other residential structures on the block face. A one-story unenclosed porch, including stairs, may encroach up to 6 feet into the setback but may not be located less than 6 feet from the public right-of-way. Commercial or mixed-use structure shall be located 2 feet from the public right-of-way that it faces, except that a setback of up to 8 feet may be allowed to accommodate outdoor retail space. Side yard setbacks Non-corner lots less than 44 feet wide shall have at least 4 feet on each side, with the sum of the side lot setbacks at least 10 feet. Non-corner over 44 feet wide shall have at least 6 feet on each side, with the sum of the side lot setbacks at least 16 feet. Side lots for corner properties is 8 feet for the side facing the street for residential and 2 feet for commercial and mixed-use. Rear yard setbacks Minimum 35 feet 16 feet fine if the structure has underground or structured parking 10 feet for the back half of the 600 block and for the 700 block

Date:	January 12, 2021
То:	LORC members and staff
From:	David Mollenhoff
Subject:	Standards for New Construction and Thank You

Standards for New Construction

New construction projects in historic districts occur infrequently, but when they do they almost always prove to be time consuming and contentious. Therefore, it is essential that the new ordinance have the best possible standards for regulating new construction.

Attached is a simple three-column chart that allows you to compare new construction standards quickly and easily for the current ordinance, the proposed generic ordinance, and the Alliance proposal.

I believe that the Alliance standards are the clearest, most comprehensive, and most coherent option and will therefore do the best job of preserving the historic character of our district.

Thank you!

The task we have been given—revising Chapter 41—is downright difficult! The ordinance is technical, intricately interrelated, and sequential. As a person who worked with LORC-1, I would remind you that this group met 20 times and prepared 12 iterations of the ordinance, but the attention to detail, organizational structure, and specific words paid off. We are all eager to finish LORC-2, but we still must address several key policies and many details. I think we will be glad we did.

NEW CONSTRUCTION IN HISTORIC DISTRICTS: GENERAL STANDARDS COMPARED

Madison Alliance for Historic Preservation ("Alliance")

January 12, 2021

Current Ordinance	City Staff Proposal (10-26-20)	Alliance Proposal (1-12-21)
Current OrdinanceSummary• Under the current ordinance (ch. 41, MGO), new construction standards vary by district.• When proposing a new or updated district ordinance, the Landmarks Commission need only "consider" including certain provisions as "standards or guidelines" in the proposed district ordinance.	 Summary Eliminates Current District Ordinances. The staff proposal eliminates current district ordinances, and substitutes "one-size-fits-all" standards. Uniform Standards for All Districts. The staff proposal spells out uniform standards for all new construction in all current and future historic districts. The same standards apply, regardless of building type (e.g., commercial or residential) or differences in historic style. Overall Building Size and Design: The staff proposal merely 	 Summary Core Standards. The Alliance proposal spells out 10 core standards for new construction in all current and future historic districts. Terms used in the core standards are clearly defined (defined terms are <i>italicized</i> in the ordinance text). The core standards are designed to protect the historic character of historic districts, while facilitating sensitive development. The core standards avoid excessive detail. District Ordinances. The Alliance proposal would keep
	 requires a new structure to be "visually compatible" with "other historic resources" located within 200 feet (the word other is confusing). This does not protect the overall character of the historic district (what if there is no "historic resource" within 200 feet?). The overall structure must only be "visually compatible" with respect to building placement, street setback, "visual size," building form and "architectural expression." None of these terms is clearly defined. When applying these "visual compatibility" criteria to an individual structure, the Landmarks Commission must "consider such factors as" [undefined factors listed]. This 	district ordinances, but update them consistent with the new core standards. District ordinances may add district- specific detail, based on the unique needs and context of each district.
	 effectively permits the Commission to consider all, some, or none of the undefined factors, or to add its own <i>ad hoc</i> factors. This is not a clear "standard." <i>Building Details</i>: By contrast, the staff proposal spells out highly detailed requirements related to smaller design details such as windows and doors, siding, roofing materials, skylights, balconies, porches, decks, garage doors, chimneys, awnings, shutters, mechanicals and fences. These highly detailed requirements apply to all new structures in all historic districts, regardless of the type of property (e.g., commercial or residential) or the differing historic styles of the individual districts. 	

Text

41.11(2) DEVELOPMENT STANDARDS AND

GUIDELINES. In any proposed ordinance under this section, the Landmarks Commission should consider including the following as standards or guidelines:

(a) Any new structure located on a lot that lies within two hundred (200) feet of a designated historic resource shall be visually compatible with that historic resource, particularly in regards to:

1. Bulk and massing.

2. In the street elevation of a structure, the facade's proportion of width to height.

3. The proportions and relationships between doors and windows in the street and publicly visible facade.

4. The proportion and rhythm of solids to voids, created by openings in the facades.

5. Colors and patterns used on all facades.

6. The design of the roof.

7. The landscape treatment.

8. The texture and materials used in all facades.

(b) The existing rhythm created by existing structure masses and spaces between them shall be preserved

(c) The amount, shape, and pattern of open spaces shall be sensitive to the character of the district.

(d) The landscape plan shall be sensitive to the individual structure, its occupants and their needs.

(e) All street facades shall blend with other structures via directional expression. When adjacent structures have a dominant horizontal or vertical expression, this expression shall be carried over and reflected.

(f) Architectural details should be incorporated as necessary to relate the new with the old and to preserve and enhance the historic character of the district.

(g) Gross volume, height, and other quantitative measurements of the proposed structure shall be sensitive to similar quantitative measurements of historic resources within two hundred (200) feet of the proposed structure.

Text

41.XX STANDARDS FOR NEW STRUCTURES. (1) <u>General</u>

(a) Primary Structures.

1. <u>Requirements</u>. The design for a new structure in a historic district shall be visually compatible with other historic resources within two hundred (200) feet in the following ways:

a. <u>Building Placement</u>. When determining visual compatibility for building placement, the Landmarks Commission shall consider factors such as lot coverage, setbacks, building orientation, and historic relationships between the building and site.

b. <u>Street Setback</u>. When determining visual compatibility for street setbacks, the Landmarks Commission shall consider factors such as the average setback of historic resources on the same block face within two hundred (200) feet, and the setback of adjacent structures.

c. <u>Visual Size</u>. When determining visual compatibility for visual size, the Landmarks Commission shall consider factors such as massing, building height in feet and stories, the gross area of the front elevation (i.e., all walls facing the street), street presence, and the dominant proportion of width to height in the façade

d. <u>Building Form</u>. When determining visual compatibility for building form, the Landmarks Commission shall consider factors such as building type and use, roof shape, symmetry or asymmetry, and its dominant vertical or horizontal expression.

e. <u>Architectural Expression</u>. When determining visual compatibility for architectural expression, the Landmarks Commission shall consider factors such as the building's modulation, articulation, building planes, proportion of building elements, and rhythm of solids to voids created by openings in the façade.

(b) <u>Accessory Structures</u>.

1. <u>Requirements</u>

- a. Comply with requirements for new primary structures
- b. Minimally visible from the street
- c. Clearly be secondary to the primary structure
- 2. Guidelines

a. New accessory structures should be of a similar architecture style as the primary structure while clearly being a new building so as not to create a false sense of history

(2) Exterior Walls

(a) <u>General</u>

1. <u>Requirements</u>. Materials used for new structures shall be similar in design, scale and architectural appearance to other materials on historic buildings, but differentiated enough so that it is not confused as a historic building.

2. The following building materials are prohibited: pebble dash, wide clapboards over six (6) inches in exposure, composite clapboards and vertical panels with faux wood grain texture, diagonal boards, vertical boards, rough sawn wood, rough split shingles, shakes, and metal and vinyl siding.

$(3) \underline{\text{Roofs}}$

- (a) <u>Form</u>
- 1. <u>Requirements</u>

a. Roof form and pitch shall be similar to the form and pitch of the roofs on historic resources within two hundred (200) feet.

(b) <u>Materials</u>

1. Requirements

a. The following roof treatments are prohibited: thick wood shakes; corrugated or ribbed metal roofing panels; metal shingles; architectural asphalt

Text

41.10 HISTORIC DISTRICT ORDINANCE.

(1) General. Every *historic district* shall have a *historic district ordinance* that defines the district and establishes preservation *standards* for properties in the district....

(2) Preservation Standards. Every *historic district ordinance* under sub.
 (1) shall include the general *standards* in Sec. 41.11. A district ordinance may also include district-specific *standards*, not incompatible with the general standards under Sec. 41.11, which are appropriate for that district....
 (3) Guidelines. A district ordinance ... may include *guidelines* to aid the interpretation and application of *standards* under sub. (2).

41.11 PRESERVATION STANDARDS: GENERAL A historic district ordinance shall include all of the following general standards:

(1) New Construction

(a) <u>New Primary Structures</u>. A new primary structure shall be visually compatible with the historic district, and with each historic resource located within 200 feet of the new structure, with respect to the following factors:

1. Its size as indicated by its *height*, number of stories above grade, *gross volume*, *bulk*, and *street facade area*.

2. Its relationship to the *lot* on which it is located, as indicated by its *lot* coverage and setbacks, and the size of its front, side and rear yards.

3. Its overall form as indicated by its shape, *massing*, ratio of width to *height*, symmetry or asymmetry, and roof shape.

4. The articulation of its *street façade* and other *visible facades*, including visual patterns created by building planes, wall recesses, wall protrusions, window and door openings, and *architectural features*.

5. The *character* of its roof, including roof shape, style, pitch and surface materials, as well as roof features such as dormers, skylights, chimneys, rooftop decks, green roofs, and attached appurtenances.

6. Its exterior wall and foundation surfaces, including surface materials, textures, detailing and trim.

7. The *character* of its doors, windows, and related features such as storm doors, storm windows, trim and shutters. Relevant considerations may include size, shape, style, proportion, materials and placement, as well as the patterns created by door and window openings on *visible facades*.

8. The nature, size, appearance and placement of exterior *architectural features* and appurtenances such as entryways, porches, decks, balconies, railings, stairways, rescue platforms, fire escapes, accessibility features, *signs*, awnings, lighting fixtures, *HVAC equipment*, electrical equipment, elevator equipment, solar equipment, telecommunications equipment and building mechanicals.

9. Its sensitivity to the site and surrounding *landscape*. Relevant considerations may include the nature, size, appearance and location of its parking accommodations, refuse storage facilities, *landscape features* and drainage systems, as well as its sensitivity to distinctive *natural features*, archaeological features, *historically representative landscape features*, and open spaces that materially contribute to the *character* of the *historic district*.

10. Its relationship to each *block face* of which it is part, including its effect on the collective visual pattern formed by the sizes of, shapes of, directional expression of, and distances between existing *structures* represented in the *block face*.

 shingles that have heavy faux shadowing; and any shingles with scalloped or staggered bottom edges. b. Any roofing material shall be permitted on flat or slightly pitched roofs not visible from the street. (c) Skylights a. Requirements a. If visible from the street, skylight shall be located at least twelve (12) feet back from the front edge of the main roof. b. Skylights shall be flat, parallel to the slope of the roof, and framing painted to match the roof material. c. Tubular, arched, domed, or pyramidal shaped skylights are prohibited on elevations visible from the street. (d) Chimneys 1. Requirements. A chimney's form and materials shall be similar to other chimneys on historic resources within the district. (e) Rooftop Features 1. Requirements. Rooftop decks or terraces and green roofs or other roof landscaping, railings, or fumishings shall be installed so that they are inconspicuous and minimally visible on the site and from the street. (d) Windows and Doors (a) General 1. Requirements. The following materials are prohibited: vinyl; aluminum; glass block, reflective glass; dark glass; plexiglass; doors with a fake wood grain, mill finish or clear anodized aluminum, and other metallic finishes; and faux (decorative/non-functional) hardware. (b) Windows and Storm Windows 1. Requirements. Multi-light windows shall have true divided lights or simulated divided lights with muntin grids on the exterior and interior the same color as the window sash. (c) Entrance Doors and Storm Doors 1. Requirements a. Shutters shall be of a size that they appear operable for the associated window. (e) Suuters a. Awnings will be of a configuration and form consistent with the awnings in the district b. Shutters shall be of a size that they appear operable for the associated window. (f) Garage Doors a. Averings	(b) New Accessory Structures. A new accessory structure should be visually compatible with the primary structure to which it pertains, with the historic district, and with each historic resource located within 200 feet of the accessory structure. New accessory structures should be as inconspicuous as reasonably possible, when viewed from a developed public right-of-way. (c) New Signs: A sign constructed on a lot in a historic district should be visually compatible with the structures on that lot, with the historic district, and with historic resources located within 200 feet of the sign
a. Entrances and porches shall be of a size and configuration consistent with the historic resources in the district.	

b. The primary entrance for the structure shall be located on the front	
elevation, or, structures on a corner lot may have a corner entrance.	
c. Uncovered porches over fifty (50) square feet are considered decks and	
shall be placed so that they are not visible from the street to which the building is	
oriented.	
d. Composite, vinyl, and decorative metal balusters and railings are	
prohibited, unless not visible from the street.	
e. Second exit stairways shall be provided on the interior of the structure.	
(b) <u>Balconies and Decks</u>	
1. <u>Requirements</u>	
a. Projecting, partially projecting/inset, and inset balconies are prohibited	
on elevations visible from the street, unless there is precedent on the historic	
resources in the district.	
(6) Building Systems	
(a) <u>Mechanical Systems</u>	
1. Requirements	
a. Mechanical equipment shall be screened if it is visible from the street.	
b. Static vents, electric vents, wind turbines, and attic fans visible from the	
street are prohibited.	
c. Grilles, vents, equipment, and meters shall be finished or painted to	
match adjacent building materials.	
2. <u>Guidelines</u>	
a. Split system mechanical units and other mechanical equipment should	
be installed on elevations, roofs, and at grade so they are not visible from the	
street.	
b. Grilles (mechanical air intake, exhaust, etc.), vents (plumbing stack,	
mechanical air intake or exhaust, etc.), electrical and communications equipment	
(transformers, cabinets, mobile service boosters, security cameras, etc.), and utility	
meters (water, gas, electric, etc.) should not be placed in the front yard or on the	
front elevation.	
(b) Solar.	
1. <u>Requirements</u>	
a. Roof-mounted solar arrays on sloped roofs shall be flat, parallel to the	
slope of the roof, and arranged in a pattern or grid parallel to the roof's ridge and	
eaves.	
(c) <u>Lighting and Electrical Systems</u> .	
(7) <u>Building Site</u>	
(a) <u>General</u>	
1. <u>Requirements</u>	
a. New parking areas, access ramps, trash or mechanical equipment	
enclosures shall be designed so that they are as unobtrusive as possible, retain the	
historic relationship between the buildings and the building and the landscape, and	
are visually compatible with other historic resources in the district.	
b. Chain link, metal mesh, and composite fences are permitted on	
elevations not visible from the street.	
c. Bamboo, reed, vinyl, and rustic style fences, such as rough sawn wood	
or split-rails, are prohibited.	
d. Fences in the front yard shall not exceed three (3) feet in height.	