

# HISTORIC CRITERIA ANALYSIS

February 16, 2012

West Linn

# Principles of Good Guidelines

# Principles for Guidelines & Standards

- Establish a well-defined regulatory approach, as it will be more effective than advisory or voluntary approaches.
- Regulation establishes clear and mandatory approval criteria for project approval.

# Principles for Guidelines & Standards

- Well-articulated rules will ensure projects of appropriate quality.
- In order to be efficient and effective, rules must be complete and well articulated to provide direction to the public, planning staff and other decision-makers. Rules must also be district-specific, and processes must be well-defined.

# Goals for Guidelines & Standards

- Protect the historic resources.
- Meet public expectations.
- Protect property and values.
- Ensure a fair and predictable process.
- Provide flexibility as appropriate.
- Don't unnecessarily burden owners.
- They're simple and clear for all users.

# Goals for Standards

- Establish a clear Code hierarchy.
- Clearly define those attributes that are clearly measurable, such as height, massing, setbacks.
- Be written with a simplicity that's unambiguous and simply understood for all readers.

## Goals for Guidelines:

- Describe aspirations that cannot be codified.
- Provide clear direction for projects that ensures appropriate compatibility with historic character.
- Educate the public, planners, the Board, Council.

## Successful Guidelines:

- Include a clear background statement, giving context for the guidelines within the specific historic district.
- Define clearly what the specific criteria are, distinct from the rest of the text.
- Provide and describe various ways in which the guidelines might be met, including illustrations and discussions of community goals.



# Successful Guidelines:

- Use district-specific photographic examples from both the past and the present.
- Employ simple understandable language, including definitions and explanations.
- Educate through detailed explanation and accurate historical information.

## Less Successful Guidelines:

- Use technical and less-accessible language through code-based text descriptions.
- Provide few or no illustrative examples or photographs.
- Offer little background or educational information.
- Are generic, and may not be grounded in the defining characteristics of the specific historic district.
- Are clear and efficient to administer.

# Guidelines Examples (scale & mass)

## Ex. 1 - Complete Guidelines:

- Provide a background statement, giving context for the guideline within the specific districts
- Define clearly what the specific criteria are, as distinct from the other text.
- Provide and describe various ways in which the guidelines might be met.
- Use district-specific photographic examples.
- Employ simple understandable language.
- Educate through detailed descriptions within the background and examples statements.

## D 2 NEW CONSTRUCTION

### BACKGROUND

The term "new construction" is used here to include new development and existing buildings that are being altered in accordance with the *Zoning Code*. This includes:

- New development
- New buildings and alterations to existing buildings as the addition of new structure
- Modifications to existing buildings as changes to the structure, massing, or materials

In a historic district, a design of a new building is to complement the surrounding building character. The King's Hill Historic District has a diverse set of buildings from different periods of development that, taken together, create a design vocabulary of existing context offer to build upon. (See *A* for building proportion, scale, materials, as well as window and/or door details.)

Many buildings in the district have porches. Design of a new building should respect the district environment and use the design vocabulary of existing buildings. However, the design of a new building should not imitate existing buildings.

Design of a new building is appropriate when the design is compatible with the scale, color, material, and character of the district, in particular the buildings in the immediate surroundings of the proposal. A new building's design and how it incorporates into the existing context should be evaluated in terms of the building's proportion, scale, and the orientation of nearby buildings.

### GUIDELINE

**Use siting, mass, scale, proportion, color, and material to achieve a coherent composition that adds to or builds on the characteristics of historic buildings in the immediate vicinity and the character of the district as a whole.**

### EXAMPLES

*This guideline may be accomplished in the King's Hill Historic District by:*

A. Respecting the size and scale of historic development. Generally, the district's historic buildings are between two and six stories tall. These structures on SW Vista Avenue illustrate the characteristic variations in height of multi-dwelling structures.



*This guideline may be accomplished in the King's Hill Historic District by:*

B. Using a setback that respects the existing setbacks along the block. These residences on SW Park Place share a similar setback, along with uniform massing and scale characteristics. In combination, these elements contribute to the uniform appearance that is characteristic for that block.



# Guideline Background

## D 2 NEW CONSTRUCTION

### BACKGROUND

The term "new construction" is used here to include new development and exterior alterations as defined in the *Zoning Code*. This includes projects such as:

- New development on vacant sites;
- New buildings and structures on non-vacant sites (such as the addition of a garage); and
- Modifications to existing buildings and structures (such as changes to the façade of a building).

In a historic district, a fundamental consideration in the design of a new building or new construction in a historic district is to complement the local context of the surrounding buildings that contribute to the district's character. The King's Hill Historic District is made up of a diverse set of buildings characterized by the architecture of different periods of development. Buildings in the King's Hill Historic District exhibit design themes and/or details that, taken together, form a "design vocabulary." The design vocabulary of historic contributing structures in the existing context offers developers and established patterns to build upon. (See Appendix A.) These patterns include building proportion, scale, rhythm, and construction materials, as well as smaller-scale elements, such as window and/or door styles, color, and roof shape.

Many buildings in the area have balconies, bay windows, and porches. Designers can complement the historic district environment by using these and other features from the design vocabulary of the King's Hill Historic District. However, the design of a new building should not mimic or imitate existing buildings. Contemporary design for new

buildings is appropriate when the design is compatible with the scale, color, material, and character of the district, in particular the buildings in the immediate surroundings of the proposal. A new building's design and how it incorporates into the existing context should be evaluated in terms of the building's proportion, scale, and the orientation of nearby buildings.

Designers and developers who propose significantly different building styles and/or materials must show that the new design builds on and complements the historic district's character, without dominating or retreating from it. In general, the exterior materials, features, and construction techniques in new construction should reinforce the surrounding historic character. Where changes in scale and form are proposed, design features such as wall texture, materials, color, window proportions, and façade articulation should be applied to connect with the characteristics of the surrounding buildings.

Heights compatible with surrounding structures are encouraged. Similarly, setbacks should be compatible with adjacent and surrounding structures. In general, new buildings should relate most closely to adjacent and surrounding structures, in particular historic contributing structures. In doing so they will complement the local context of historic buildings and the district as a whole.

Landscaping for new construction should include plantings fronting the street, including street trees where appropriate. Street trees need not be one particular species, but should be compatible with the other vegetation on the street and be of a species approved for the district. A list of street trees that may be appropriate for the district is provided in Appendix E. The list is based on the historic context statement written for the King's Hill Historic District.

## Guideline (mandatory approval criteria)

### GUIDELINE

Use siting, mass, scale, proportion, color, and material to achieve a coherent composition that adds to or builds on the characteristics of historic buildings in the immediate vicinity and the character of the King's Hill Historic District as a whole.



*The Holtz Residence at 2370 SW Park Place, shown above, incorporates modifications that include gateway, lighting, and landscape treatments that contribute to the character of the property.*

## Guideline Examples of Application

### EXAMPLES

*This guideline may be accomplished in the King's Hill Historic District by:*

A. Respecting the size and scale of historic development. Generally, the district's historic buildings are between two and six stories tall. These structures on SW Vista Avenue illustrate the characteristic variations in height of multi-dwelling structures.



*This guideline may be accomplished in the King's Hill Historic District by:*

B. Using a setback that respects the existing setbacks along the block. These residences on SW Park Place share a similar setback, along with uniform massing and scale characteristics. In combination, these elements contribute to the uniform appearance that is characteristic for that block.





## Ex. 2 – Less Complete Guidelines:

- Provide general background as to the basis and elements to be addressed by the guideline.
- Define clearly what the specific criteria are, as distinct from the other text, identifying a Code reference.
- Use simple, illustrative examples, and limited photographic examples.
- Employ simple understandable language.
- Educate through the intent descriptions within the background and examples statements

## Guideline Background, Definition

### SCALE, MASS, PROPORTION, HEIGHT & RHYTHM



- Scale is the relative or apparent size of a building in relation to its neighbors. Scale is also the apparent size of building elements, such as windows, doors, cornices, and other features to each other and to the building.
- Proportion is the relationship of the dimensions of building elements, such as the height to width dimension of windows, doors and other building elements, their sizing to each other, and to the facade of the building.
- A building's massing is the arrangement of its volumes, whether symmetrical or asymmetrical, in a central block, L-shaped, or arranged in wings. Mass and scale also relate to lot coverage.
- Height includes foundation walls, porch roofs, and main roofs. Albany's buildings range from one to two and a half stories tall.
- Rhythm is the spacing and repetition of elements on the front of the building and fronts along a street. It can be thought of the 'music' made by the building. The location of porches, windows and door openings affects the rhythm of a building.
- Neighborhood block frontages are often characterized by a consistent rhythm of development created by recurring building patterns.
- Craftsman, Bungalow, and Mid century architectural styles emphasize horizontality. Victorian styles – Italianates and Queen Anne's typically emphasize verticality.

# Guideline Using Language and Simple Examples

## REVIEW CRITERIA

- 7.270(1) (a) The development maintains any unifying development patterns such as building coverage.  
(b) The structure is of similar size and scale of surrounding buildings.

## DESIGN GUIDELINES

*New construction will be compatible to other buildings on the block in scale, proportion, height, spacing, and rhythm of window and door openings.*

### THIS

### NOT THIS

#### Scale & Proportion

New buildings should relate in scale and proportion to adjacent historic buildings.

Avoid buildings that are too large or too small in scale or massing to adjacent buildings.



This new house uses appropriate detailing, scale, & rhythm.



## Ex. 3 – Limited Guidelines:

- Use simple, clear language,
- Provide diagrammatic examples
- Do not provide an educational aspect, either within the guidelines or the overall document.

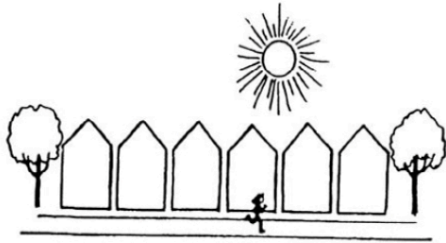
# Guideline Background

## C. Historic District Design Standards

In addition to the standards found in Section II, the following standards will be used by the Planning and Historic Commission for new development and renovation of existing structures within the Historic District:

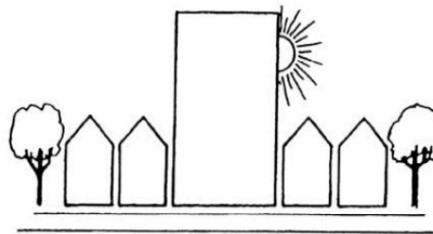
### IV-C-1 Height

RECOMMENDED



Construct buildings to a height of existing buildings from the historic period on and across the street.

AVOID



Avoid construction that greatly varies in height (too high or too low) from older buildings in the vicinity.

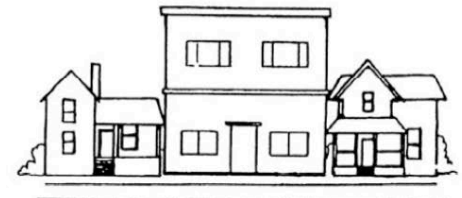
### IV-C-2 Scale

RECOMMENDED



Relate the size and proportions of new structures to the scale of adjacent buildings

AVOID



Avoid buildings that in height, width, or massing, violate the existing scale of the area.

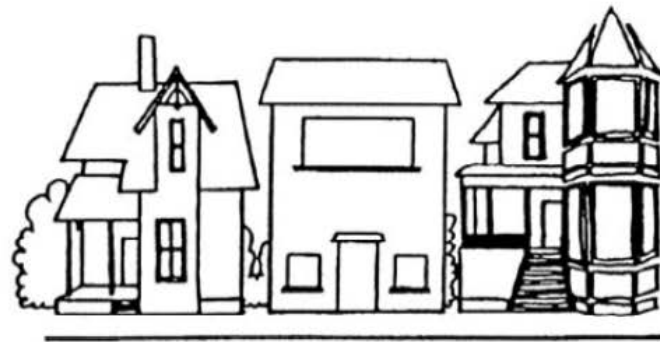
### IV-C-3 Massing

RECOMMENDED



Break up uninteresting boxlike forms into smaller, varied masses which are common on most buildings from the historic period.

AVOID



Avoid single, monolithic forms that are not relieved by variations in massing.

## Ex. 4: More Limited Guidelines:

- Use technical and less-accessible language in Code-based text descriptions.
- Provide no illustrative examples.
- Provide no background or educational aspect.

- d) Scale and Proportion - The size and proportions of the Alteration or New Construction shall be compatible with existing structures on the site, if in existence and proposed in part to remain, and with any surrounding comparable structures. New additions or New Construction shall generally be smaller than the impacted Designated Historic Resource, if in existence and proposed in part to remain. In rare instances where an addition or New Construction is proposed to be larger than the original Designated Historic Resource, it shall be designed such that no single element is visually larger than the original Designated Historic Resource, if in existence and proposed in part to remain, or any existing surrounding comparable Designated Historic Resources.
- e) Height - To the extent possible, the height of the Alteration or New Construction shall not exceed that of the existing primary Designated Historic Resource, if in existence and proposed in part to remain, and any existing surrounding comparable Designated Historic Resources. However, second story additions are allowed, provided they are consistent with the height standards of the underlying zoning designation and other chapters of this Code, and provided they are consistent with the other review criteria contained herein.



# West Linn's Guidelines:

- Use technical and less-accessible language in Code-based text descriptions.
- Provide no illustrative examples.
- Provide no background or educational aspect.

## Individual Landmarks

5. Building height. Existing building heights should be maintained. Alteration of roof pitches shall be avoided. Raising or lowering a structure's permanent elevation when constructing a foundation shall be avoided, except as required by building code or floodplain overlay zone.

6. Horizontal additions. The scale and proportion of building additions, including the relationship of windows to walls, shall be visually compatible with the traditional architectural character of the historic building. Contemporary construction for alterations and additions is acceptable if the design respects the building's original design and is compatible with the original scale, materials, and window and door opening proportions of the structure.

## Chapter 25: Historic Districts

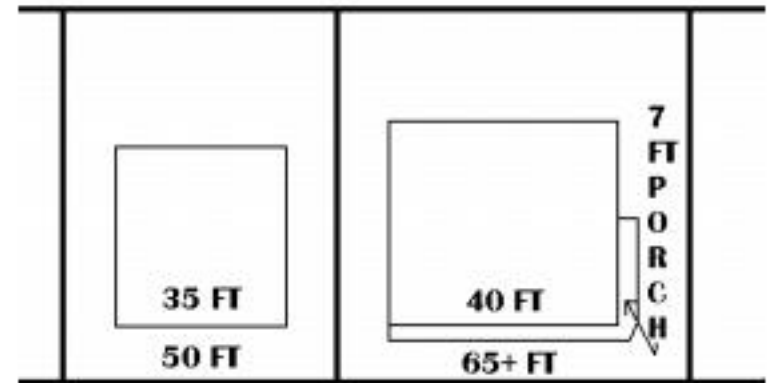


### D. Building height.

(Note: Buildings in Willamette Town vary in height; most evident are one and one-half story Victorians and bungalows. Some buildings reach two stories, and there are several single-story structures as well.)

1. No building shall exceed the height of 28 feet to the dominant gable or roof ridgeline as measured per Chapter 02 CDC. This restriction shall apply regardless of the existing or finished grade of the site.
2. In order to transition in scale, new houses that are taller than homes adjacent to them must have the predominant roof ridgeline extending perpendicular to the front property line so that the roof slopes down on the sides to effect that transition. Dormers are allowed on that sloping roof area facing the adjacent home(s) but cannot constitute more than 25 percent of the roof as measured lineally or horizontally (e.g., if roof is 50 feet long the dormer(s) cannot be more than 25 percent of that distance or 12.5 feet long in total). Also, the dormer height must be at least two feet below the gable ridgeline height.
3. Cupolas and towers are not excluded from the aforementioned height limitation.
4. Alteration of roof pitches or raising or lowering a structure's permanent elevation, when constructing a foundation, shall be avoided.
5. The original height of the structure's front elevation shall be preserved. Additions to the rear portion of the house shall be allowed where those additions do not compromise the character of the front elevation or the scale or significantly modify the mass of the house as seen from the right-of-way.

## Individual Landmarks



### E. Building shapes and sizes.

1. No building on a 50-foot-wide lot shall exceed 35 feet in overall width. Lots with a 65-foot width or greater may have a building width of 40 feet plus the porches, eaves or veranda extensions so that the maximum total width is 47 feet.
2. End walls (street facing) shall be designed with consideration of scale and aesthetic character of the main facade.
3. Buildings shall avoid a horizontal orientation in their roof and window designs, unless the design can be shown to match the original roof design or approximate the design of nearby structures and styles.
4. Sidewalls on the side of new homes shall have a minimum 18-inch “pop out” or indent after every 400 square feet of sidewall measured laterally/horizontally. The “pop out” or indent shall be at least six feet wide and shall be at least nine feet tall. (Bay windows could qualify). Sidewalls on the side street side of new homes shall have minimum 24-inch “pop out” or indent after every 400 square feet of sidewall measured laterally/horizontally. “Pop outs” may intrude into the setback area.

## Chapter 26: Individual Landmarks

**Table 25-1: HISTORIC DISTRICT SETBACKS, HEIGHT AND SIZE:**

<b>New House/Addition</b>	
Front:	Average setback of adjacent homes >
Front Porch:	Additional 6-foot encroachment allowed ^
Rear:	20 feet
Side:	5 feet <
Side Street:	10 feet
Height:	28 feet
Massing:	125% of the average square footage of the adjacent homes including any attached garage (accessory structures/ADUs are exempt) or 1,200 square feet, whichever is greater.
Lot Coverage:	50% for the house and all accessory structures/ADUs. Excludes decks, paved/impermeable surfaces.
Sidewall:	Max. 400 sq. ft. of sidewall before an 18-inch indent or "pop out" on side yard and 24-inch indent or "pop out" on side street.

# West Linn's Code

# Positives

- Defines in detail those elements to be protected or addressed.
- Reflects the values of the community as it's developed rules and approaches over time.

# Areas to be considered

- Little background reference information.
- Having individual landmarks in the Code is atypical, and adds complexity.
- Standards and guidelines are blended.
- The chapters lack hierarchy and structure.
- Some approaches and diagrams are length and/or technical: could be simplified for typical users.



## Areas to be considered

- Many different qualifiers(should, discourage, shall, may be, prohibited, not permitted): need simple and consistent language.
- Design modification needs to be reconsidered: “no negative impacts” is too restrictive and may be legally indefensible.

# Areas to be Considered

- Thresholds for what triggers review need to be clear.
- That which is exempt from review need to be defined.
- Procedural thresholds (what level of review is required for various elements and/or dollar thresholds) also needs to be clearly identified.