

**LOVELAND HISTORIC PRESERVATION COMMISSION
REGULAR AGENDA
MONDAY, FEBRUARY 20, 2012 6:00 PM
CITY COUNCIL CHAMBERS
500 E. THIRD STREET**

THE CITY OF LOVELAND DOES NOT DISCRIMINATE ON THE BASIS OF RACE, COLOR, NATIONAL ORIGIN, SEX, RELIGION, AGE OR DISABILITY IN THE PROVISION OF SERVICES. FOR DISABLED PERSONS NEEDING REASONABLE ACCOMMODATION TO ATTEND OR PARTICIPATE IN A CITY SERVICE OR PROGRAM, CALL 962-2303 OR TDD #962-2620 AS FAR IN ADVANCE AS POSSIBLE.

6:00 PM

- I. CALL TO ORDER**
- II. PLEDGE OF ALLEGIANCE**
- III. ROLL CALL**
- IV. APPROVAL OF THE AGENDA**
- V. APPROVAL OF PREVIOUS MEETING'S MINUTES**

- VI. REPORTS** 6:00-6:10
 - a. Citizen Reports
This agenda item provides an opportunity for citizens to address the Commission on matters not on the consent or regular agendas.
 - b. Council Update (John Fogle)
 - c. Staff Update (Bethany Clark)

- VII. AGENDA – CONSIDERATION OF NEW BUSINESS**
 - a. Dinger Carousel Presentation (Ashley Dinger) 6:10-6:35
 - b. Historic Building Permit Fee Waiver Policy (Greg George and Tom Hawkinson) 6:35-7:00
 - c. Commission and Historic Preservation Program Evaluation 7:00-7:30
 - d. Historic Preservation Month Planning 7:30-7:45
 - e. Review Saving Places Conference 7:45-7:55
 - f. Next Meeting's Agenda/Action items 7:55-8:00

- VIII. COMMISSIONER COMMENTS** 8:00-8:05
This agenda item provides an opportunity for Commissioners to speak on matters not on the regular agenda.

- IX. ADJOURN**

City of Loveland
Historic Preservation Commission
Meeting Summary
January 16, 2012

A meeting of the Loveland Historic Preservation Commission was held Monday, January 16, 2012 at 6:00 P.M. in the City Council Chambers of the Civic Center at 500 East Third Street, Loveland, CO. Historic Preservation Commissioners in attendance were: Robin Ericson, Jim Cox, David Berglund, Trudi Manuel, Laura McGinley and Matt Newman. Cara Scohy was absent. City Council Liaison, John Fogle, and staff members, Bethany Clark and Nikki Garshelis were also present.

Guests: Bill Meirath, Loveland Historical Society

CALL TO ORDER

Commission Chair Cox called the meeting to order at 6:00 p.m. and introduced and welcomed Laura McGinley, the newest Commissioner to the HPC. Laura gave a brief summary of her background and each HPC member introduced themselves.

APPROVAL OF AGENDA

Commission Chair Cox asked for approval of the agenda with the change of removing Item VIII.a., The Larimer Home Improvement Program. Bethany Clark explained that the item had been rescheduled to the March meeting. Commissioner Manuel motioned to approve the agenda with the change, Commissioner Ericson seconded and the motion passed unanimously.

APPROVAL OF MINUTES

Commissioner Manuel motioned for approval of the minutes with the following changes requested by Commissioner Ericson:

1. Page One, Lines 38-40: Clarify: Commissioner Ericson was referring to the grant contract's PR and Media Clause which requires acknowledgement of the grantor in media sources.
2. Page Two, Line 51, Change: CPI to Colorado Historical Society and add CPI and CHS will visit to tour the property...
3. Page Two, Line 58, Add: Mike Perry, Loveland Historical Society, distributed a handout of their thoughts for possible uses of the Swartz Farmhouse property.
4. Page Two, Line 74-75, Clarify: Money was not charged during past realtor trainings and the suggested \$25 charge for this year would help with fundraising for the HPC.
5. Page Four, Line 156-157, Clarify: Commissioner Ericson reported that this year was unique in that every commissioner played a role in being part of the solution to historic preservation challenges.

The motion was seconded by Commissioner Ericson and the motion passed unanimously.

CITIZEN REPORTS

Bill Meirath, of the Loveland Historical Society, provided information regarding the Mariano Medina Family Cemetery, Project Renewal Site. The land is being donated by owner, Jess Rodriguez, to allow for the reconstruction of the cemetery and create a place of remembrance for the mountain man, Mariano Medina. Mr. Meirath distributed paperwork containing the site renderings. He explained the plans are to start soon with the clean-up, resurfacing and the wall. The historic grant he will be applying for has an April 1st deadline, he said. There was a discussion about waiting until the land transfer is complete before applying. The Commissioners encouraged him to start the application as soon as possible and offered to help with the application. They thanked him for his hard work on the project. He handed a notebook to staff with additional information and said he will pick it up at the February meeting. Commissioner Ericson requested that staff begin the work to put the property on the historic register prior to the grant deadline.

CITY COUNCIL UPDATE

City Council Liaison, John Fogle, reported that the City Council Advance was scheduled for Saturday, January 21 in the Museum basement. He invited the Commissioners to attend.

STAFF UPDATE

- *Commission Chair Ericson* asked Bethany Clark if she had any updates on the Viestenz-Smith Mountain Park where there is a Mariano Medina house. Bethany said she sent out an email requesting an update but has not heard anything. She will follow up and report back, she said.
- *Commission Chair Ericson* reminded staff to let her know when the opening of the Rialto Bridge is scheduled so she can invite the President of the National Trust for Historic Preservation, Stephanie Meeks. Stephanie Meeks is from Loveland and expressed a desire to attend the opening, she explained.
- *Councilor Fogle* asked if the HPC would like a tour of the Rialto Bridge building. The Commissioners agreed they would like a tour and suggested either morning or late afternoon for scheduling. Bethany Clark said she will contact Mike Scholl to set up a tour. There was a discussion about the progress of the project.

CONSIDERATION OF NEW BUSINESS

HISTORIC BUILDING PERMIT FEE WAIVERS

- *Bethany Clark* reported that the policy to issue historic building permit fee waivers was created by the Building Division, Legal Department and Community & Strategic Planning Division. After an explanation of the policy, she asked for Commission input. Commissioner Ericson said the policy seemed written more like code and not for the general public. She suggested that it might be confusing for property owners to understand. Commissioner Manuel agreed that the policy needs clarification. Commissioner Ericson asked if examples could be added on how much an owner could save on a project. Bethany explained that the policy document is meant to be legal in nature so the language must reflect that. She also explained that savings depended upon each project. She added that this policy has not yet been implemented so there are no real examples. Commission Chair Cox said the policy looked like a standard policy in the way it was written. Bethany agreed that a separate informational sheet for property owners could be created. The policy does not have to go to City Council and can be amended by the HPC, she said. Commissioner McGinley asked if anyone has expressed interest in the fee waiver. No one expressed interest because the policy was never implemented until now, replied Bethany. Commissioner Ericson expressed concern over waiving fees up front instead of refunding fees after the work was complete. She said there was not enough incentive to do the work correctly. Bethany explained that the property owner would not receive their Certificate of Occupancy or Letter of Completion if the work was not done properly. They would be required to correct the issues or lose their historic designation, apply for a new building permit and pay the fees, she said. The Commissioners decided to table the issue until the next meeting and requested that the Building Division Official and Director of Development Services attend in February to address their concerns.

Commissioner Berglund motioned to table the fee waiver item and ask the Director of Development Services and the Building Division Official to attend the February 20, 2012 meeting to address the HPC's concerns. The motion was seconded by Commissioner Ericson and it passed unanimously.

FOLLOW-UP ON SWARTZ/OLAC PRESENTATION

- *Commission Chair Cox* reported that the presentation to the Open Lands Advisory Commission had gone well. He distributed an article about the presentation and thanked all the Commissioners for their work on the report. He expressed gratitude for Commissioner Newman's extra work on the PowerPoint

slides. The OLAC was very receptive to the suggestion to incorporate the structures into the whole project, *Commission Chair Cox* said. February 29 is the date for the design consultants to present their plans for the land use. Cox encouraged the HPC members to attend the presentation. Commissioner Ericson reported that she created a letter with informational documents for the City Council. Commissioner Newman added that members of the OLAC expressed interest in saving the structures and seemed to want to be involved in the process. Councilor Fogle asked about examples of similar projects and the Commissioners assured him they have many examples.

HPC MONTH PLANNING

- Bethany Clark distributed a list of possible workshops for the Historic Preservation month. She said she would like to get started on finding professionals to lead the workshop chosen. Some of the ideas discussed were windows, energy loss and architectural salvage. Commissioner Ericson suggested having monthly planning meetings to be more organized and to obtain more media coverage. She discouraged holding the Realtor Workshop because of the amount of work involved. Commissioner Manuel said the Tour of Homes is scheduled for Saturday May 5th. Locations for a photography display were discussed and Nikki Garshelis offered to ask Jan Sawyer if the front room window can be used as a historic photo gallery.

NEXT MEETING AGENDA (FEBRUARY 20, 2012)

- *Dinger Carousel Presentation*
- *Review Savings Places Conference*
- *Historic Building Permit Fee Waivers- Development Services Director and Building Division Manager*

COMMISSIONER COMMENTS

- *Commission Chair Cox* asked if the Commissioners would like to contribute funds for snacks at the meeting and everyone agreed.

Meeting adjourned at 7:42 p.m.



Community & Strategic Planning

500 East Third Street, Suite 310 • Loveland, CO 80537
(970) 962-2745 • Fax (970) 962-2945 • TDD (970) 962-2620
www.cityofloveland.org

Staff Update

Meeting Date: February 20, 2012
To: Loveland Historic Preservation Commission
From: Bethany Clark, Community & Strategic Planning

Staff Update Format:

The staff update contains *informational* items. Five minutes is set aside on the agenda for brief questions and comments on staff update items. If a more in-depth discussion or extensive questions on a specific item is desired, staff requests that the HPC Chair establish if it is the Commission's consensus to have a longer discussion. Staff will be happy to answer questions on any item with individual commissioners after the meeting.

If the staff update indicates that staff will be pursuing a particular course of action, no comment from the Commission indicates that the Historic Preservation Commission is supportive of that course of action.

Staff Update Items:

Odd Fellows Building

When the contractor removed the existing trim and door assembly, they uncovered some unexpected conditions that have delayed completion until mid-February: 1) The masonry east of the door requires repair, patching, and brick replacement. 2) Additional wood trim is required because the opening is approximately 6 inches out of plumb from the top to the bottom. 3) Plaster repairs will be required at the interior ceiling immediately adjacent to the door. 4) At the interior of each jamb, some gyp board work will be required to make the walls align with where they need to be. Expected completion is February 21st.

Agilent Open Lands/Swartz Farmstead

The public workshop for the Agilent Open Lands design is scheduled for February 29th at 6:30pm in the Chilson Senior Center. Open Lands staff has indicated that the design concepts will likely be posted on their website a few days before the public workshop. Staff will work with the Commission in drafting a set of comments to submit to the design team and Open Lands staff.

Survey Amendment

The recommendation that the HPC made to City Council in November to add the additional surveyed properties to the Survey is now scheduled for the February 21st agenda. Historic Preservation Commission members are encouraged to attend.



Community & Strategic Planning

500 East Third Street, Suite 310 • Loveland, CO 80537
(970) 962-2745 • Fax (970) 962-2945 • TDD (970) 962-2620
www.cityofloveland.org

To: Historic Preservation Commission
From: Bethany Clark, Community & Strategic Planning
Date: February 20, 2012
RE: Historic Preservation Building Permit Fee Refunds

In January, staff presented a policy for the Commission to approve which would implement the building permit fee refunds for exterior restoration, preservation, or rehabilitation work on local landmark properties (per Section 15.56.160). This policy was developed in coordination with the Building Division and the City's legal staff in response to the Commission's direction to pursue this incentive for historic preservation. After much deliberation, the Commission continued the item to the February agenda due to concerns of some members regarding the controls the Commission is afforded for enforcing appropriate alterations with the incentive being processed as a waiver.

Staff has since met with Greg George, Director of Development Services, Tom Hawkinson, Building Official, and the building permit technicians to discuss the concerns of the HPC. The staff has determined that processing the incentive as a waiver, rather than a refund, is the most appropriate as well as the most fiscally responsible method and still provides the HPC the same degree of protection.

Economic Incentive

It is important to recognize that the refund of building permit fees to property owners undertaking rehabilitation or restoration work on their Historic Landmark property is an incentive. The purpose is to encourage those property owners who have taken pride in their historic property and designated it as a historic landmark to continue to improve their property. It is also important to consider that as an incentive, offering the permit fee refunds up front provide property owners more cash flow to use for their rehabilitation project.

Approved Alterations

Staff understands that a recent example of an owner who underwent a significant out-of-character alteration project without proper Historic Preservation Commission approval makes the Commission a little wary to adopt the proposed policy. However, it is important to remember that since that time staff has put new procedures in place with building permit acceptance and review to prevent issues like this from occurring in the future. Staff believes that the majority of property owners who have taken efforts to designate their property as a historic landmark are interested in ensuring their alterations are historically responsible. It is the City's position not to develop policy based on the exception rather than the rule.

The new procedures implemented with the Building Division have resulted in staff requiring inspections for work on Historic Landmark properties. Both a rough inspection partway through the project and a final inspection at project completion are performed before a Letter of Completion is approved and issued. Staff believes that this added layer of oversight will further protect properties from undergoing any unauthorized alterations.

Corrective Actions

Regardless of whether this incentive is offered as a waiver of the fees up front or as a refund after work is approved, the same protections are in place for alterations that are done without appropriate approval. Because staff is now involved in the building permit review and approval procedures, the City can ensure that the work authorized by the Historic Preservation Commission in an Alteration Certificate is the same work approved in a building permit. Any alterations done inconsistent with the approved work in the Alteration Certificate would be inconsistent with the approved building permit. This would prevent the property owner from receiving a Letter of Completion. In addition, the policy also sets the following penalties for unauthorized alterations: a one-year moratorium and all building permits (per Section 15.56.090 of the Loveland Municipal Code); revocation of the building permit fee waiver, and; possible rescission of the historic landmark designation.

To receive their Letter of Completion, a property owner would be required to correct the issues which triggered the denial, or revise the building permit to reflect the as-built work. If a property owner sought to revise the building permit, they would be required to submit another alteration certificate for review by the HPC. The HPC can review the work for compliance with the criteria set forth in Section 15.56.110 of the code and if the decision is made to deny the alteration certificate, the HPC has the authority to recommend that the landmark designation be rescinded. As a reminder, these corrective actions are the same regardless of how the incentive is processed. The only difference is, if processed as a refund the property owner would not be refunded their fees after the work was not approved, rather than having to pay the fees after disapproval.

Processing as a Refund

As staff alluded to at the January meeting, processing refunds requires a significant amount of staff time. The question was then raised at the meeting as to the typical amount a property owner could expect as a refund/waiver in comparison to the amount of administrative time required to process the refund. Staff has only one example of solely exterior work on a Historic Landmark property within the past two years. So to provide a more accurate average, permit fees were pulled for 6 additional residential properties not designated as Historic Landmarks, but identified in the Historic Preservation Survey. Only residential properties were used as all of the properties on the Loveland Historic Register outside of the already established Historic Downtown Fee Exempt Area are residential. Work ranged anywhere from re-roofing to porch reconstruction to structural work. Based on these 7 examples, the average permit fees that could be expected to be refunded for exterior rehabilitation, restoration, or preservation are a little over \$200. Based on the amount of staff time required to process a refund this would not be a cost-effective approach.

Staff Recommendation:

Staff recommends the following action:

Motion to adopt the Building Permit Fee Refund Policies as outlined in Exhibit A

Attachments:

Exhibit A: Building Permit Fee Refund Policies

Exhibit B: Revised Application for Landmark Alteration

Exhibit C: Examples of building permit fees



HISTORIC PRESERVATION BUILDING PERMIT FEE REFUND POLICIES

Building Permit refunds for Loveland Historic Landmark properties are offered by the City of Loveland as an incentive to owners in the maintenance, upkeep, and improvement of historic properties.

The following policies are adopted by the Historic Preservation Commission to implement Section 15.56.160 of the Loveland Municipal Code which provides, in part:

- A. An owner of a property that has been designated as a landmark or an owner of a contributing property in a historic district may apply for the following economic incentives for the restoration or rehabilitation of that property:
 1. Refund of City building permit fees for exterior restoration, preservation, and rehabilitation. The Commission shall develop a format for establishing projected costs, rules of the restoration, preservation, or rehabilitation in order that such refund of fees is equitable.

Approved refunds will be processed as a fee waiver upon approval of a building permit for exterior restoration, preservation, or rehabilitation of properties designated as Loveland Historic Landmark properties.

An approved Historic Landmark Alteration Certificate is required before application to the Building Department for a permit and before work is commenced.

ELIGIBLE APPLICANTS

- Eligible applicants include owners and/or contractors of residential, investment, commercial, or industrial properties designated as a landmark or a contributing property in a designated historic district on the Loveland Historic Register as of the date of Landmark Alteration Certificate Application.

ELIGIBLE FEE REFUNDS

- Refunds are for the building permit fees for exterior restoration, preservation, and rehabilitation only; applicants must pay all other applicable fees and any applicable city, county or state construction materials use or sales taxes.
- Building permit fees eligible for a refund may include plan check fees, electrical fees, structural building permit fees, building permit fees, mechanical permit fees, mechanical sub fees, plumbing fees, and plumbing sub fees (not all such fees may be applicable to all projects).

ELIGIBLE PROJECTS

- Refunds are only applicable for **exterior** work that requires a building permit. If the project for which a permit is required includes both exterior *and* interior work, a separate permit will be required for exterior work in order to apply for the building permit fee refund.

- Projects must fall within the definitions of restoration, preservation, or rehabilitation, as defined by the U.S. Secretary of the Interior (see below).
- Work must comply with the Loveland Historic Residential Design Guidelines and/or the criteria set forth in Section 15.56.110 of the Loveland Municipal Code.
- Work can be for the following, provided such work is exterior in nature: routine maintenance and repair; life safety projects, and those bringing building systems into compliance with current building and/or zoning codes, and; rehabilitation and restoration projects.
 - Qualifying exterior project examples (where building permit is required):
 - Re-roofing
 - Rehab/repair of existing historic details such as doors, windows, mouldings, door hoods, brackets, and rafter tails.*
 - Siding repair and replacement.*
 - Rehab/repair of existing historic detached garages
 - Rehab/repair of existing historic carports
 - Rehab/repair of existing historic sheds
 - Rehab/repair of existing historic porches
- * (if historically appropriate materials are used and in accordance with the Secretary of the Interior's Standards).
- New construction is eligible if the work is undertaken to keep the property viable and does not exceed 10% of the building footprint's square footage.
 - Examples: an addition to a house for accessibility; reconstruction of a historic porch.

INELIGIBLE PROJECTS

- Projects that do not meet the U.S. Secretary of the Interior's Standards, the Historic Residential Design Guidelines, or the criteria set forth in Section 15.56.110 of the Loveland Municipal Code.
- Those projects paid for by insurance (such as a replacement roof).
- New construction or improvement of new accessory structures, such as sheds and garages.
- New construction that is not for the purpose of keeping the property viable or adequately maintained.
- Projects commenced without proper City of Loveland or Historic Preservation Commission approval (e.g. without approval of an application for building permit fee refund, a building permit, or a Landmark Alteration Certificate).

PROCEDURES (see flow chart)

- Owners must apply for a Landmark Alteration Certificate prior to submitting a building permit application. The Landmark Alteration Certificate must include the request for a building permit fee refund.
 - Applications will be reviewed by staff and two members of the Historic Preservation Commission within 15 days to determine if the alteration would have a significant impact upon or be potentially detrimental to the Historic Landmark or Historic District.
 - Determination of No Significant Impact – the Landmark Alteration Certificate is issued.
 - Determination of Significant Impact – referred to a public hearing with the Historic Preservation Commission.
 - Decisions of the Commission will be considered final unless appealed to Council within 10 days of the Commission's decision.
 - Approval of a Landmark Alteration Certificate shall constitute approval of an accompanying request for a building permit fee refund.

- Following the approval of a Landmark Alteration Certificate application and request for a building permit fee refund, the owner or contractor must apply for a building permit. *All applications must include a copy of the Landmark Alteration Certificate.*
 - A fee waiver for building permit fees will be issued upon approval of the building permit.
 - Issuance of a building permit is subject to all provisions of the Loveland Municipal Code and other rules, regulations, and requirements of the City.
 - An approved building permit issued by the City's Building division must be picked up and all fees not subject to the building permit fee refund must be paid within 90 days after notification that the permit application has been approved. If not picked up within 90 days, the building permit expires and an application for reissuance may be required.
 - Building permits for residential projects expire one year from the date of issuance, non-residential permits expire 18 months from the date of issuance, and all final inspections must be requested prior to expiration.
 - Historic Preservation Staff will ensure that upon final inspection all work is in accordance with the approved Landmark Alteration Certificate before the building official's office will issue a Certificate of Occupancy or Letter of Completion.
 - No Certificate of Occupancy or Letter of Completion will be issued if the work performed was not approved by the Historic Preservation Commission.
 - In addition, any unauthorized alterations will result in a one-year moratorium on all building permits, revocation of the building permit fee waiver, and may also result in rescission of the historic landmark designation.

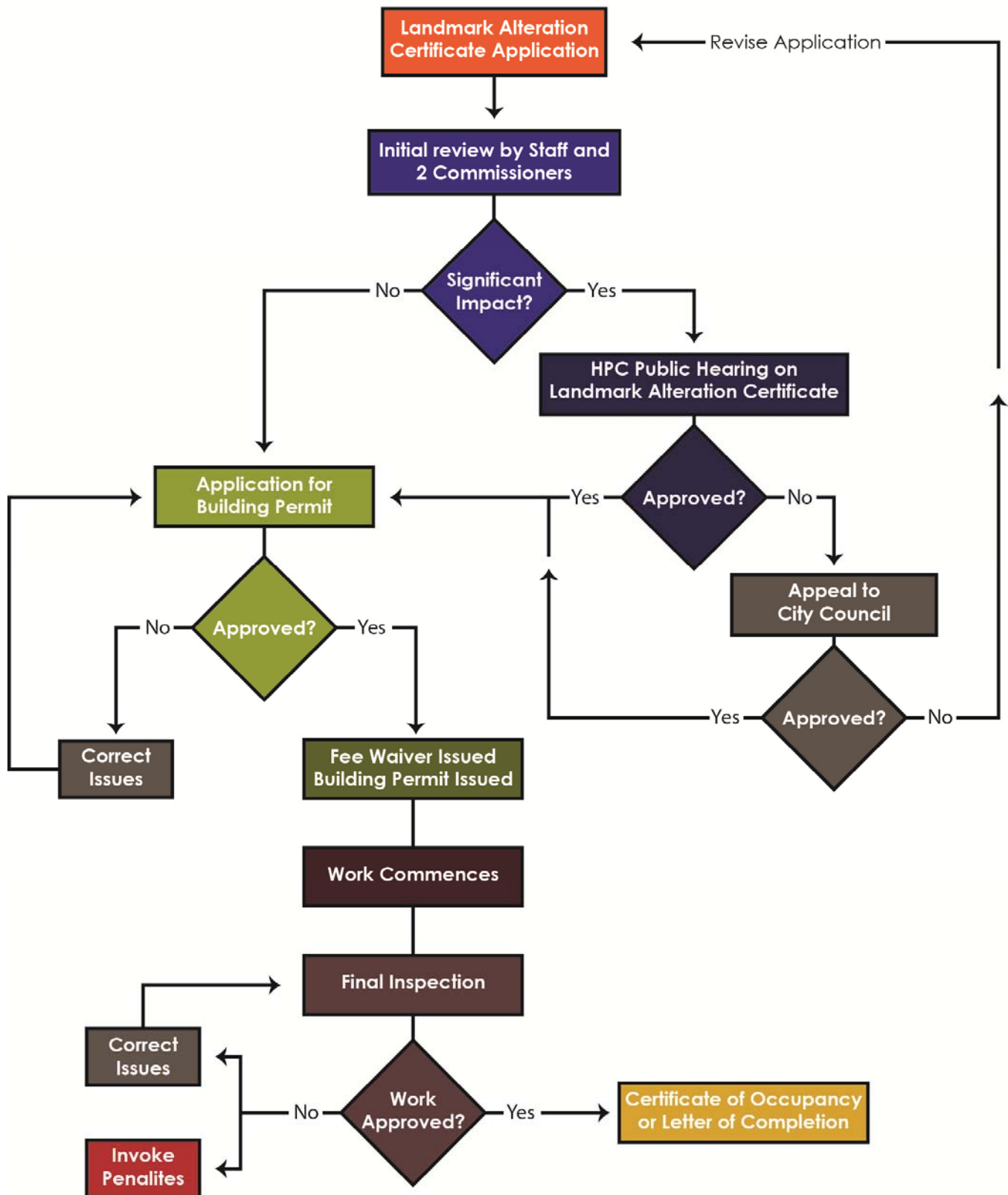
U.S. SECRETARY OF THE INTERIOR DEFINITIONS

Restoration is the act or process of accurately depicting the form, features, and character of a property as it appeared at a particular period of time by means of the removal of features from other periods in its history and reconstruction of missing features from the restoration period.

Preservation is the act or process of applying measures necessary to sustain the existing form, integrity, and materials of an historic property. Work, including preliminary measures to protect and stabilize the property, generally focuses upon the ongoing maintenance and repair of historic materials and features rather than extensive replacement and new construction. New exterior additions are not within the scope of this treatment; however, the limited and sensitive upgrading of mechanical, electrical, and plumbing systems and other code-required work to make properties functional is appropriate within a preservation project.

Rehabilitation is the act or process of making possible a compatible use for a property through repair, alterations, and additions while preserving those portions or features which convey its historical, cultural, or architectural values.

BUILDING PERMIT FEE REFUND PROCESS





LOVELAND HISTORIC LANDMARK ALTERATION CERTIFICATE APPLICATION

LOVELAND HISTORIC LANDMARK ALTERATION CERTIFICATE PROCESS

STAFF CONTACTS

Bethany Clark, City Planning Technician

Office: 500 E. Third Street
Phone: (970) 962-2745
Fax: (970) 962-2945
Email: clarkbe@ci.loveland.co.us
Website: <http://www.cityofloveland.org/historicpreservation>

Please submit all applications to:

City of Loveland
Community & Strategic Planning
500 E. Third Street
Loveland, CO 80537

Please refer to the Loveland Municipal Code, Chapter 15.56 Historic Preservation for the formal procedures and requirements regarding landmark alteration certificate applications. If you do not have a copy of this information, staff will provide you with one.

STEP 1. Pre-Application Conference

- Schedule a time to meet with the City Staff to discuss the application process, and proposed scope of work.

STEP 2. Submit an Alteration Certificate Application

- The Applicant must submit a completed application form to the Community & Strategic Planning Division before commencing with alterations, new construction, removal, or demolition activities, etc. for a property on the Loveland Historic Register.
- Attach all applicable items, such as scale drawings, written description of proposed work, etc.
- Sign the Submittal Checklist and Acknowledgement Signature sheet.
 - Properties on the Loveland Historic Register are eligible for a refund of their building permit fees for exterior restoration, preservation, or rehabilitation. If you wish to take advantage of this benefit, please be sure to check the appropriate box on the Submittal Checklist. (Please see the Historic Preservation Building Permit Fee Refund Policies)
- Staff will review the application and notify the Applicant that the application is considered complete, or note any deficiencies within 20 days of application submittal.

STEP 3. Review of Impact

- The Community Services director, or designee, and two (2) designated members of the Historic Preservation Commission will review the application

and determine within fifteen (15) days of notification of completed application whether or not the proposed work would have a significant impact upon or would be potentially detrimental to the landmark site or historic district.

STEP 4. Determination of No Significant Impact

- If it is determined by the Community Services Director, or designee, and the designated members of the Historic Preservation Commission that there will be no significant impact or potential detriment to the landmark site or historic district, then the Community Services Director will issue an approved alteration certificate to the Applicant and will notify the Commission of the issuance – Proceed to Step 7.

STEP 5. Determination of Significant Impact

- If either the Community Services Director, or designee, or one of the Historic Preservation Commission designees determines that the proposed work would create a significant impact or potential detriment to the property, then they will refer the application to the Historic Preservation Commission for a public hearing.
- The Community Services Department will notify the Applicant of the referral, and provide notice of the time, date, place and subject matter of the hearing. The public hearing notice will be published in the newspaper of general circulation not less than fifteen (15) days prior to the hearing. The property will also be posted with a sign indicating that an application for an alteration certificate has been submitted. Written notice of the public hearing will be provided to the Applicant by both first class mail and certified mail return receipt.

STEP 6. Alteration Certificate Public Hearing

- The public hearing will occur within sixty (60) days of when a completed application was filed.
- The Commission will determine whether the application meets the standards in Section 15.56.110 , 15.56.120 or 15.56.130 of the Loveland Municipal Code, as applicable. SEE ATTACHMENT A.
- The Commission has thirty (30) days from the public hearing date, unless mutually agreed upon by the Commission and Applicant, to adopt written findings and conclusions regarding the application.
- When alteration certificates involve the moving or demolition of a landmark, the Commission may extend the review period up to ninety (90) additional days if the Commission finds that the original application does not meet the standards of Section 15.56.120 or 15.56.130, whichever applies. The ninety (90) day extension will be used to encourage the Applicant and Commission to explore acceptable alternatives to the work proposed in the original application.
- The decision of the Commission approving, disapproving, or suspending action on an application for a landmark alteration certificate is final unless the Applicant appeals the decision to the City Council. All Applicant appeals must be filed with the Community Services Department with ten (10) days of the Commission's decision. Property owners of landmark properties or owners

of property within a historic district have standing to appeal the Commission's decision on an application for an alteration certificate.

- In the event of an appeal to the City Council, a public hearing on the appeal will be held within thirty (30) days of the date the appeal was filed with the Community Services Department. Public notification procedures, as defined in Step 5, above, will be followed for all public hearings regarding an appeal to the City Council.
- The Community Services Department will issue a landmark alteration certificate when the Commission or City Council has approved an application. The Commission or Council has the authority to impose a time limit for the Applicant to apply for a building permit conforming to the certificate.

STEP 7. Building Permit Required

- When an approved alteration certificate has been issued, the Applicant must apply for a building permit and comply with all other requirements under the City's building codes, fire codes and all other ordinances of the City, applicable rules, regulations and policies of the City.
- The building permit fee refund will be processed as a fee waiver issued upon approval of the building permit.

STEP 8. Final Inspection

- Historic Preservation Staff will ensure that upon final inspection all work is in accordance with the approved Landmark Alteration Certificate before the building official's office will issue a Certificate of Occupancy or Letter of Completion.
 - No Certificate of Occupancy or Letter of Completion will be issued if the work performed was not approved by the Historic Preservation Commission.
 - In addition, any unauthorized alterations will result in a one-year moratorium on all building permits, revocation of the building permit fee waiver, and may also result in rescission of the historic landmark designation.

ALTERATION CERTIFICATE APPLICATION

The following information must be provided to ensure adequate review of your proposal. Please type or print answers to each question. Digital copies (MS Word or fillable PDF) of this application are available by contacting Community & Strategic Planning Division at 970-962-2745.

1. OWNER/APPLICANT INFORMATION

Owner or Organization

- a. Name: _____
- b. Mailing Address: _____
- c. Telephone: _____
- d. Email: _____

Applicant/Contact Person (if different than owner)

- e. Name: _____
- f. Mailing Address: _____
- g. Telephone: _____
- h. Email: _____

2. PROPERTY INFORMATION

- a. Landmark Address: _____
- b. Exact name of the landmark property as listed with the City of Loveland:

- c. Provide a brief description of the primary use of the property:

3. ABUTTING PROPERTY OWNERS

Provide the names and addresses of all abutting property owners. (Please attach additional sheets as necessary)

- a. _____
name address
- b. _____
name address
- c. _____
name address
- d. _____
name address

In the event that a public hearing is a necessary requirement of this alteration certificate application process, the Applicant/Owner is encouraged, as a courtesy, to contact neighboring property owners to make them aware that an application has been submitted.

4. PROJECT DESCRIPTION (Please attach additional sheets as necessary.)

- a. Identify the scope of work as new construction, alteration, removal, or demolition, or combination thereof. Provide a brief description of the proposed scope of work. Include photos of all sides (elevations) of the property.

Type of Work *(please check one of the following):*

- ☐ New Construction (Site Improvement)
- ☐ Alteration (Change Exterior Façade)
- ☐ Removal (Removal of Specific Feature(s))
- ☐ Demolition Permit
- ☐ Awning
- ☐ Private Improvements in the Public Right-of-Way (outdoor seating areas, landscaping, utility work)
- ☐ Other (explain) _____

PROJECT DESCRIPTION (continued)

- b. Summarize and describe below who will carry out the work and how it will be performed. Include a description of any new construction, alteration, removal, or demolition and describe work techniques that will be used. (Please use attached forms when describing specific work to individual features of the landmark property).

5. DESCRIPTION OF PROPOSED WORK TO ARCHITECTURAL FEATURES OR OTHER FEATURES OF THE LANDMARK PROPERTY

Feature A _____ Name of Architectural Feature or other Feature of Landmark	
Describe feature and its present condition:	Describe proposed work on feature and techniques:
Feature B _____ Name of Architectural Feature or other Feature of Landmark	
Describe feature and its present condition:	Describe proposed work on feature:
Feature C _____ Name of Architectural Feature or other Feature of Landmark	
Describe feature and its present condition:	Describe proposed work on feature:

5. DESCRIPTION OF PROPOSED WORK (continued)

Please photocopy this sheet and attach copies as necessary.

Feature D _____ Name of Architectural Feature or other Feature of Landmark	
Describe feature and its present condition:	Describe proposed work on feature and techniques:
Feature E _____ Name of Architectural Feature or other Feature of Landmark	
Describe feature and its present condition:	Describe proposed work on feature:
Feature F _____ Name of Architectural Feature or other Feature of Landmark	
Describe feature and its present condition:	Describe proposed work on feature:

SUBMITTAL CHECKLIST & ACKNOWLEDGEMENT SIGNATURE

All proposals must contain sufficient information for adequate review and documentation. Please supply the following information as it applies to your design proposal.

I. NEW CONSTRUCTION OR ALTERATIONS *(Check box if completed)*

- ☐ A. Scale drawing or construction document showing all dimensions of existing building and dimensions of proposed work, noting all changes to facades, including cross sections (if applicable) of facades and proposed materials to be used. **(3 copies - and if plans are larger than 11"x17", submit one set of 11"x17" reductions).**
- ☐ B. Color evaluation of building, indicating proposed color scheme.
- ☐ C. Photos of existing building and area of proposed work.
- ☐ D. Color sample(s) or chip(s) of all proposed paint colors and/or materials.
- ☐ E. Site and landscape plans (drawn to scale), if appropriate (3 copies).
- ☐ F. Location of all signs, with dimensions showing approximate size, height from grade, and relation to windows, doors, and other primary features of the facade.

II. AWNINGS and SIGNS *(Check box if completed)*

- ☐ A. Scale drawing showing all dimensions of all lettering, designs, or logos; minimum 1/4" = 1'. For awnings, include cross section or side view showing slope and projection. (3 copies)
- ☐ B. Scale drawing or photograph of building facade demonstrating placement and proportions (height and width), include dimensions showing height from grade and relationships to roofline, doors, windows, and other primary facade features.
- ☐ C. Color sample(s) and material(s) of all proposed materials.
- ☐ D. Lighting specifications, including layout and installation details (this may be part of the side view scale drawing, as required in A, above).

III. REMOVAL *(Check box if completed)*

- ☐ A. Provide description of items or features to be removed from property exterior.
- ☐ B. Identify reasons for removing items or feature, and provide a summary of the impact removal will have on significance and integrity of the landmark property.
- ☐ C. If feature or item to be removed is to be replaced with equivalent, please follow Section I. New Construction or Alterations above.

IV. PRIVATE IMPROVEMENTS IN THE PUBLIC RIGHT-OF-WAY

- ☐ A. Site plan drawn to scale (3 copies).
- ☐ B. Landscape plan drawn to scale (3 copies).
- ☐ C. Samples of all proposed materials.
- ☐ D. Color sample(s) or chip(s) of all proposed colors.
- ☐ E. Scale drawings showing all dimensions of any new construction including utility.

V. HISTORIC BUILDING PERMIT FEE REFUNDS

- ☐ A. Check this box if you are applying for a refund of your building permit fees. (Please see the Historic Preservation Building Permit Fee Refund Policies)

VI. ACKNOWLEDGMENT - (To be signed by Owner, or authorized Representative)

I acknowledge this is a complete application, ready for Historic Preservation Commission review. Each information requirement (described above) has been checked off, as it applies to this design proposal. I understand incomplete submittals will be returned to me for completion. If I am the owner's authorized representative, I certify that I have the owner's permission to affect these design changes upon the referenced landmark property.

Signature of Owner **OR** Owner's Representative

Date of Submittal

ATTACHMENT A:

15.56.100 Criteria to Review an Alteration Certificate

(For exact text from this section, please refer to the Loveland Municipal Code)

The Commission shall issue an alterations certificate for any proposed work on a designated historical site or district only if the Commission can determine that the proposed work would not detrimentally alter, destroy, or adversely affect any architectural or landscape feature which contributes to its original historical designation. The Commission must find a proposed alteration is visually compatible with designated historic structures located on the property in terms of design, finish, material, scale, mass, and height. When the subject site is in an historic district, the Commission must also find that the proposed alteration is visually compatible with the development on adjacent properties. For the purposes of this section, the term “compatible” shall mean consistent with, harmonious with, and/or enhances the mixture of complementary architectural styles either of the architecture of an individual structure or the character of the surrounding structures.

A. The Commission shall use the Historic Residential Design Guidelines to review alteration certificates on historically residential properties. In addition to the criteria in the Design Guidelines, the Commission shall also use the following criteria to determine compatibility:

1. The effect upon the general historical and architectural character of the structure and property;
2. The architectural style, arrangement, texture, and material used on the existing and proposed structures and their relation and compatibility with other structures;
3. The size of the structure, its setbacks, its site, location, and the appropriateness thereof, when compared to existing structures and the site;
4. The compatibility of accessory structures and fences with the main structure on the site, and with other structures;
5. The effects of the proposed work in creating, changing, destroying, or otherwise impacting the exterior architectural features of the structure upon which such work is done;
6. The condition of existing improvements and whether they are a hazard to public health and safety;
7. The effects of the proposed work upon the protection, enhancement, perpetuation and use of the property; and
8. Compliance with the Secretary of the Interior’s Standards for the Treatment of Historic Properties set forth in Title 36 of the Code of Federal Regulations, Part 68. This reference shall always refer to the current standards, as amended. (Copies are available in the Community & Strategic Planning Division Office. Please contact staff for copies.)

ATTACHMENT A (continued):

15.56.110 Criteria to Review Relocation of a Structure

(For exact text from this section, please refer to the Loveland Municipal Code)

The Commission shall use the following criteria in considering alteration certificate applications for relocating a landmark, a structure on a landmark site, a building or structure within a historic district, a structure onto a landmark site, or a structure onto property in an historic district:

A. Original Site Review Criteria. For consideration of the original site, the Commission shall determine compliance utilizing all of the following review criteria:

1. Documentation showing the structure cannot be rehabilitated or reused on its original site that would allow for any reasonable beneficial use of the property;
2. The significance of the structure to its present setting;
3. Whether plans are specifically defined for the site to be vacated;
4. If the structure can be moved without significant damage to its physical integrity and the applicant can show the relocation activity is the best preservation method for the character and integrity of the structure;
5. Whether the structure has been demonstrated to be capable of withstanding the physical impacts of the relocation and re-siting; and
6. Whether a structural report submitted by a licensed structural engineer adequately demonstrates the soundness of the structure proposed for relocation.

B. New Site Review Criteria. For consideration of the new location, the Commission shall determine compliance utilizing all of the following review criteria:

1. Whether the building or structure is compatible with its proposed site and adjacent properties and whether the receiving site is compatible in nature with the structure or structures proposed to be moved;
2. The structure's architectural integrity is not detrimental or inconsistent with the character of the neighborhood; and
3. Whether the relocation of the historic structure would diminish the integrity or character of the neighborhood of the receiving site.

ATTACHMENT A (continued):

15.56.120 Criteria to Review Demolition of a Landmark Structure

(For exact text from this section, please refer to the Loveland Municipal Code)

If a demolition approval is granted on any basis, other than that of an imminent hazard or economic hardship, a certificate will not be issued until a replacement/reuse plan for the property has been approved by the City.

A. Review Criteria for Total Demolition. Applicants requesting an alteration certificate for demolition must provide data to clearly demonstrate that the situation meets all of the following criteria:

1. The structure proposed for demolition is not structurally sound despite evidence of the owner's efforts to properly maintain the structure;
2. The structure cannot be rehabilitated or reused on site to provide for any reasonable beneficial use of the property;
3. The structure cannot be practically moved to another site in Loveland;
4. The applicant demonstrates that the proposal mitigates to the greatest extent practical the following:
 - (a) Any impacts that occur to the visual character of the neighborhood where demolition is proposed to occur;
 - (b) Any impact on the historic importance of the structure or structures located on the property and adjacent properties;
 - (c) Any impact to the architectural integrity of the structure or structures located on the property and adjacent properties; and
5. In the case of archaeological sites, consideration will be given to whether historically significant information can be recovered as part of the demolition process.

B. Review Criteria for Partial Demolition. Applicants requesting a certificate for partial demolition must provide data to clearly demonstrate that the situation meets all of the following criteria:

1. The partial demolition is required for the renovation, restoration or rehabilitation of the structure; and
2. The applicant has mitigated, to the greatest extent possible:
 - (a) Impacts on the historic importance of the structure or structures located on the property; and
 - (b) Impacts on the architectural integrity of the structure or structures located on the property.

**LOVELAND HISTORIC LANDMARK
ALTERATION CERTIFICATE OF APPROVAL**

(For office use only)

Date complete application received by Community & Strategic Planning: _____

INITIAL REVIEW

Date of initial review by Review Committee: _____

☐ Finding of No Significant Impact

☐ Finding of Significant Impact (*Public Hearing Required*)

Signature of Reviewing Commission Member #1

Signature of Reviewing Commission Member #2

PUBLIC HEARING

Scheduled Hearing Date: _____

Date of Action: _____

Date Applicant Notified: _____

ACTION BY THE HISTORIC PRESERVATION COMMISSION

☐ Approved ☐ Denied

Conditions of Approval:

Signature of Approval – Community & Strategic Planning

USEFUL HISTORIC PRESERVATION RELATED RESOURCES

Colorado Historical Society

Office of Archeology & Historic Preservation
1560 Broadway, Suite 400, Denver CO 80202
Office Hours: M-F 8:00-5:00
Phone: 303.866.3395
Fax: 303.866.2711
email: oahp@chs.state.co.us
Website: <http://www.coloradohistory-oahp.org/>

National Park Service

Technical Preservation Services for Historic Buildings
Technical Preservation Briefs
Website: <http://www2.cr.nps.gov/tps/briefs/presbhom.htm>
Copies also available at Community & Strategic Planning Office, 500 E. Third St. Loveland, CO

National Register of Historic Places

National Register of Historic Places
National Park Service
1201 Eye St., NW
8th Floor (MS 2280)
Washington, DC 20005
Tel. 202-354-2213 or 354-2210
Website: <http://www.cr.nps.gov/nr/>

American Institute of Architects

1735 New York Ave.NW
Washington, DC 20006
Website: <http://www2.aia.org/myaia/communities/community.asp?UserID=2&CommunityID=200>

City of Loveland – Community & Strategic Planning

500 E. Third St.
Loveland, CO 80537
Website:
<http://www.cityofloveland.org/historicpreservation>



Permit Fees Input
BP-11-00068 : Porch Cover, Residential
1035 W 8TH ST

System Functions
Jump To...

Innoprise Software
Community Development

[Permit](#) | [Inspections](#) | [Workflow](#) | [Land](#) | [Logout](#)

[Return](#) | [Edit](#) | [Add](#)

Post Permit Fees [Go](#)

Permit	Party	Contractor	Fee	Statement	Review	Requirement	Inspection	Attachment	Activity	Attributes	Blanketed	Workflow	Projects
Description	Base	Multiplier	Divider	Percentage	Attribute Percentage			Qty	Permit Fee	Effective	Exemption	Rate Range	Total Balance
A04a Res Bldg PC (Other) - 139 B23 (S) Valuation Used	0	0.65000	1	0	0 5000				✓	01/19/2011		RR	72.31 0.00
D01d Res Elec Permit Fee (New) - 090 B07 Electrical Sub-Valuation	0	1	1	0	0 75				✓	01/19/2011		RR	23.50 0.00
D04b Res Bldg Permit Fee (Other) - 139 B23 (S) Valuation Used	0	1	1	0	0 5000				✓	01/19/2011		RR	111.25 0.00
D14 City Use Tax - 139 B23 (S) Valuation Used	0	0.01500	1	0	0 5000				✓	01/19/2011			75.00 0.00
D15 County Open Space Tax - 139 B23 (S) Valuation Used	0	0.00125	1	0	0 5000				✓	01/19/2011			6.25 0.00
D16 County Courthouse Tax - 139 B23 (S) Valuation Used	0	0.00100	1	0	0 5000				✓	01/19/2011			5.00 0.00
D16 County Jail Tax - 139 B23 (S) Valuation Used	0	0.00100	1	0	0 5000				✓	01/19/2011			5.00 0.00
D17 County Fairgrounds Tax - 139 B23 (S) Valuation Used	0	0.00075	1	0	0 5000				✓	01/19/2011			3.75 0.00
Balance									✓				\$302.06 \$0.00

Minimum Fee:
Maximum Fee:

\$207.06

[Return](#) | [Edit](#) | [Add](#)

Post Permit Fees [Go](#)

[↑ Move To Top Of The Page ↑](#)

User: Bethany Clark

[Email Comments](#)

Last Login: 01/24/2012 01:08 PM

Copyright © 2010 Innoprise Software, Inc. All Rights Reserved



Permit Fees Input
BP-11-01487 : Structural Work, Residential
1201 E 1ST ST

System Functions
Jump To...

Innoprise Software
Community Development

[Permit](#) | [Inspections](#) | [Workflow](#) | [Land](#) | [Logout](#)

[Return](#) [Edit](#) [Add](#)

Post Permit Fees [Go](#)

Permit	Party	Contractor	Fee	Statement	Review	Requirement	Inspection	Attachment	Activity	Attributes	Blanketed	Workflow	Projects
Description	Base	Multiplier	Divider	Percentage	Attribute Percentage	Qty	Permit Fee	Effective	Exemption	Rate	Range	Total	Balance
A04a Res Bldg PC (Other) - 139 B23 (S) Valuation Used	0	0.65000	1	0	0 7500			<input checked="" type="checkbox"/>	10/12/2011	RR		99.61	0.00
D04b Res Bldg Permit Fee (Other) - 139 B23 (S) Valuation Used	0	1	1	0	0 7500			<input checked="" type="checkbox"/>	10/12/2011	RR		153.25	0.00
D14 City Use Tax - 139 B23 (S) Valuation Used	0	0.01500	1	0	0 7500			<input checked="" type="checkbox"/>	10/12/2011			112.50	0.00
D15 County Open Space Tax - 139 B23 (S) Valuation Used	0	0.00125	1	0	0 7500			<input checked="" type="checkbox"/>	10/12/2011			9.38	0.00
D16 County Courthouse Tax - 139 B23 (S) Valuation Used	0	0.00100	1	0	0 7500			<input checked="" type="checkbox"/>	10/12/2011			7.50	0.00
D16 County Jail Tax - 139 B23 (S) Valuation Used	0	0.00100	1	0	0 7500			<input checked="" type="checkbox"/>	10/12/2011			7.50	0.00
D17 County Fairgrounds Tax - 139 B23 (S) Valuation Used	0	0.00075	1	0	0 7500			<input checked="" type="checkbox"/>	10/12/2011			5.63	0.00
Balance								<input type="checkbox"/>				\$395.37	\$0.00

Minimum Fee:
Maximum Fee:

\$252.86

[Return](#) [Edit](#) [Add](#)

Post Permit Fees [Go](#)

[↑ Move To Top Of The Page ↑](#)

User: Bethany Clark

[Email Comments](#)

Last Login: 01/17/2012 09:05 AM

Copyright © 2010 Innoprise Software, Inc. All Rights Reserved



Permit Fees Input
BP-12-00003 : Patio Cover, Residential
1336 E 7TH ST

System Functions
Jump To...

Innoprise Software
Community Development

[Permit](#) | [Inspections](#) | [Workflow](#) | [Land](#) | [Logout](#)

[Return](#) | [Edit](#) | [Add](#)

Post Permit Fees - [Go](#)

Permit	Party	Contractor	Fee	Statement	Review	Requirement	Inspection	Attachment	Activity	Attributes	Blanketed	Workflow	Projects	
Description	Base	Multiplier	Divider	Percentage	Attribute Percentage			Qty	Permit Fee	Effective	Exemption	Rate Range	Total	Balance
A04a Res Bldg PC (Other) - 139 B23 (S) Valuation Used	0	0.65000	1	0	0 4000				✓	01/04/2012		RR	63.21	0.00
D04b Res Bldg Permit Fee (Other) - 139 B23 (S) Valuation Used	0	1	1	0	0 4000				✓	01/04/2012		RR	97.25	97.25 Delete
D04d Res Elec Permit Fee (Other) - 090 B07 Electrical Sub-Valuation	0	1	1	0	0 0				✓	01/04/2012		RR	0.00	0.00* Delete
D14 City Use Tax - 139 B23 (S) Valuation Used	0	0.01500	1	0	0 4000				✓	01/04/2012			60.00	60.00 Delete
D15 County Open Space Tax - 139 B23 (S) Valuation Used	0	0.00125	1	0	0 4000				✓	01/04/2012			5.00	5.00 Delete
D16 County Courthouse Tax - 139 B23 (S) Valuation Used	0	0.00100	1	0	0 4000				✓	01/04/2012			4.00	4.00 Delete
D16 County Jail Tax - 139 B23 (S) Valuation Used	0	0.00100	1	0	0 4000				✓	01/04/2012			4.00	4.00 Delete
D17 County Fairgrounds Tax - 139 B23 (S) Valuation Used	0	0.00075	1	0	0 4000				✓	01/04/2012			3.00	3.00 Delete
Balance									✓				\$236.46	\$173.25

Minimum Fee:
Maximum Fee:

\$1160.46

[Return](#) | [Edit](#) | [Add](#)

Post Permit Fees - [Go](#)

↑ Move To Top Of The Page ↑

User: Bethany Clark

[Email Comments](#)

Last Login: 01/16/2012 02:51 PM

Copyright © 2010 Innoprise Software, Inc. All Rights Reserved



Permit Fees Input
BP-11-01130 : Structural Work, Residential
245 W 8TH ST

System Functions
Jump To...

Innoprise Software
Community Development

Permit | Inspections | Workflow | Land | Logout |

Return | Edit | Add

Post Permit Fees - Go

Permit	Party	Contractor	Fee	Statement	Review	Requirement	Inspection	Attachment	Activity	Attributes	Blanketed	Workflow	Projects
Description	Base	Multiplier	Divider	Percentage	Attribute Percentage	Qty	Permit Fee	Effective	Exemption	Rate Range	Total	Balance	
A04a Res Bldg PC (Other) - 139 B23 (S) Valuation Used	0	0.65000	1	0	0 1500		☑	08/03/2011		RR	35.10	0.00	
D04b Res Bldg Permit Fee (Other) - 139 B23 (S) Valuation Used	0	1	1	0	0 1500		☑	08/03/2011		RR	54.00	0.00	
D14 City Use Tax - 139 B23 (S) Valuation Used	0	0.01500	1	0	0 1500		☑	08/03/2011			22.50	0.00	
D15 County Open Space Tax - 139 B23 (S) Valuation Used	0	0.00125	1	0	0 1500		☑	08/03/2011			1.88	0.00	
D16 County Courthouse Tax - 139 B23 (S) Valuation Used	0	0.00100	1	0	0 1500		☑	08/03/2011			1.50	0.00	
D16 County Jail Tax - 139 B23 (S) Valuation Used	0	0.00100	1	0	0 1500		☑	08/03/2011			1.50	0.00	
D17 County Fairgrounds Tax - 139 B23 (S) Valuation Used	0	0.00075	1	0	0 1500		☑	08/03/2011			1.13	0.00	
Balance							☐				\$117.61	\$0.00	

Minimum Fee:
Maximum Fee:

\$89.10

Return | Edit | Add

Post Permit Fees - Go

↑ Move To Top Of The Page ↑

[Email Comments](#)

User: Bethany Clark

Last Login: 01/24/2012 01:08 PM

Copyright © 2010 Innoprise Software, Inc. All Rights Reserved



Permit Fees Input

 BP-11-00490 : Deck - Uncovered, Residential
 728 W 6TH ST

 System Functions
 Jump To...

 Innoprise Software
 Community Development

Permit | Inspections | Workflow | Land | Logout

Return | Edit | Add

Post Permit Fees - Go

Permit	Party	Contractor	Fee	Statement	Review	Requirement	Inspection	Attachment	Activity	Attributes	Blanketed	Workflow	Projects
Description	Base	Multiplier	Divider	Percentage	Attribute Percentage			Qty	Permit Fee	Effective	Exemption	Rate Range	Total Balance
A04a Res Bldg PC (Other) - 139 B23 (S) Valuation Used	0	0.65000	1	0	0 6000				☑	04/15/2011		RR	81.41 0.00
D04b Res Bldg Permit Fee (Other) - 139 B23 (S) Valuation Used	0	1	1	0	0 6000				☑	04/15/2011		RR	125.25 0.00
D14 City Use Tax - 139 B23 (S) Valuation Used	0	0.01500	1	0	0 6000				☑	04/15/2011			90.00 0.00
D15 County Open Space Tax - 139 B23 (S) Valuation Used	0	0.00125	1	0	0 6000				☑	04/15/2011			7.50 0.00
D16 County Courthouse Tax - 139 B23 (S) Valuation Used	0	0.00100	1	0	0 6000				☑	04/15/2011			6.00 0.00
D16 County Jail Tax - 139 B23 (S) Valuation Used	0	0.00100	1	0	0 6000				☑	04/15/2011			6.00 0.00
D17 County Fairgrounds Tax - 139 B23 (S) Valuation Used	0	0.00075	1	0	0 6000				☑	04/15/2011			4.50 0.00
Balance									☐				\$320.66 \$0.00

 Minimum Fee:
 Maximum Fee:

9206.66

Return | Edit | Add

Post Permit Fees - Go

↑ Move To Top Of The Page ↑

User: Bethany Clark

[Email Comments](#)

Last Login: 01/24/2012 01:08 PM

Copyright © 2010 Innoprise Software, Inc. All Rights Reserved



Permit Fees Input

 BP-11-00564 : Re-roof, Residential
 946 W 5TH ST

 System Functions
 Jump To...

Innoprise Software

Community Development

[Permit](#) | [Inspections](#) | [Workflow](#) | [Land](#) | [Logout](#)
[Return](#) | [Edit](#) | [Add](#)

 Post Permit Fees · [Go](#)

Permit	Party	Contractor	Fee	Statement	Review	Requirement	Inspection	Attachment	Activity	Attributes	Blanketed	Workflow	Projects
Description	Base	Multiplier	Divider	Percentage	Attribute Percentage			Qty	Permit Fee	Effective	Exemption	Rate Range	Total Balance
D04b Res Bldg Permit Fee													
(Other) - 139 B23 (S) Valuation Used	0	1	1	0	0 2300				☑	04/27/2011		RR	83.25 0.00
D14 City Use Tax - 139 B23 (S) Valuation Used	0	0.01500	1	0	0 2300				☑	04/27/2011			34.50 0.00
D15 County Open Space Tax - 139 B23 (S) Valuation Used	0	0.00125	1	0	0 2300				☑	04/27/2011			2.88 0.00
D16 County Courthouse Tax - 139 B23 (S) Valuation Used	0	0.00100	1	0	0 2300				☑	04/27/2011			2.30 0.00
D16 County Jail Tax - 139 B23 (S) Valuation Used	0	0.00100	1	0	0 2300				☑	04/27/2011			2.30 0.00
D17 County Fairgrounds Tax - 139 B23 (S) Valuation Used	0	0.00075	1	0	0 2300				☑	04/27/2011			1.73 0.00
Balance									☐				\$126.96 \$0.00

 Minimum Fee:
 Maximum Fee:

\$83.25
[Return](#) | [Edit](#) | [Add](#)

 Post Permit Fees · [Go](#)
[↑ Move To Top Of The Page ↑](#)

User: Bethany Clark

[Email Comments](#)

Last Login: 01/24/2012 01:08 PM

Copyright © 2010 Innoprise Software, Inc. All Rights Reserved



Permit Fees Input
BP-12-00184 : Porch Cover, Residential
544 E 4TH ST

System Functions
Jump To...

Innoprise Software
Community Development

[Permit](#) | [Inspections](#) | [Workflow](#) | [Land](#) | [Logout](#)

[Return](#) | [Edit](#) | [Add](#)

Post Permit Fees [Go](#)

Permit	Party	Contractor	Fee	Statement	Review	Requirement	Inspection	Attachment	Activity	Attributes	Blanketed	Workflow	Projects
Description	Base	Multiplier	Divider	Percentage	Attribute Percentage	Qty	Permit Fee	Effective	Exemption	Rate Range	Total	Balance	
A04a Res Bldg PC (Other) - 139 B23 (S) Valuation Used	0	0.65000	1	0	0 17328		✓	02/08/2012		RR	190.61	0.00	Delete
D04b Res Bldg Permit Fee (Other) - 139 B23 (S) Valuation Used	0	1	1	0	0 17328		✓	02/08/2012		RR	293.25	0.00	Delete
D14 City Use Tax - 139 B23 (S) Valuation Used	0	0.01500	1	0	0 17328		✓	02/08/2012			259.92	259.92	Delete
D15 County Open Space Tax - 139 B23 (S) Valuation Used	0	0.00125	1	0	0 17328		✓	02/08/2012			21.66	21.66	Delete
D16 County Courthouse Tax - 139 B23 (S) Valuation Used	0	0.00100	1	0	0 17328		✓	02/08/2012			17.33	17.33	Delete
D16 County Jail Tax - 139 B23 (S) Valuation Used	0	0.00100	1	0	0 17328		✓	02/08/2012			17.33	17.33	Delete
D17 County Fairgrounds Tax - 139 B23 (S) Valuation Used	0	0.00075	1	0	0 17328		✓	02/08/2012			13.00	13.00	Delete
Balance							✓				\$813.10	\$329.24	

Minimum Fee:
Maximum Fee:

\$483.86

[Return](#) | [Edit](#) | [Add](#)

Post Permit Fees [Go](#)

[Move To Top Of The Page](#)

User: Bethany Clark

[Email Comments](#)

Last Login: 02/08/2012 04:16 PM

Copyright © 2010 Innoprise Software, Inc. All Rights Reserved



Community & Strategic Planning

500 East Third Street, Suite 310 • Loveland, CO 80537
(970) 962-2745 • Fax (970) 962-2945 • TDD (970) 962-2620
www.cityofloveland.org

To: Historic Preservation Commission
From: Bethany Clark, Community & Strategic Planning
Date: February 20, 2012
RE: Commission and Historic Preservation Program Evaluation

The Historic Preservation Program has now been in existence for 10 years and much has been accomplished during this time. Numerous grants have been awarded for planning and restoration projects, 67 properties have been designated as local Historic Landmarks, the Commission has been successful in saving historic treasures such as the Bishop House and the Milner-Schwarz House, and a new Historic Walking Tour brochure is helping to market historic downtown Loveland and promote historic preservation. However, as with any program it is beneficial to do a periodic self-evaluation to see what areas are working well and what areas need improvement. Staff would like to open this topic up for discussion and brainstorm what has been working well, what the Commission feels needs improvement, and try to set a work plan for 2012.

Following is a brief highlight of some of the major accomplishments as well as the goals set during the Comprehensive Plan update last year. Additionally, staff would like the Commission to entertain the idea of conducting a self-assessment based on the publication from the National Trust for Historic Preservation (see Attachment A, and described below).

Accomplishments

- The City of Loveland has been awarded a cumulative total of \$596,592 in grant money from the State Historical Fund since 1995 for preservation planning, Historic Structure Assessments, and historic rehabilitations/restorations. Nine buildings have benefited from these grants to the City.
- In 2011, received a \$14,715 grant from the State Historical Fund to complete a Historic Structural Assessment of the Pulliam Community Building.
- Completed the exterior restoration and rehabilitation of the historic Milner-Schwarz house near the old fairgrounds.
- Received a grant from the Community Marketing Commission and successfully developed a Historic Walking Tour brochure for downtown Loveland. These brochures are now used as marketing material and distributed to area hotels and the Visitors Center.
- Integrated historic review procedures into the Building Permit procedures to create a smoother process and to provide more protection to historic buildings.
- Received an Excellence for Best Practices-Outreach award by the National Alliance of Preservation Commissions in 2008 for May Historic Preservation Month.
- Created and adopted a set of Historic Residential Design Guidelines to provide design assistance to property owners for restoration or rehabilitation of their historic properties, and to be used by the Commission as the design criteria to review alterations on historic landmark properties.
- Designated a total of 67 properties to the Loveland Historic Register, including 3 historic districts.

2012-2015 Goals (from Comprehensive Plan)

- Objective 4.1.IP1: Prepare and adopt an updated Historic Preservation Plan and Historic Inventory Survey.
- Objective 4.1.IP2: Prepare a report to determine the most appropriate method for preserving the community character of Loveland's historic areas, such as a historic overlay zone, compatibility zoning, design overlay zone, or FAR regulations, and work towards implementing the recommended method(s).
- Objective 4.2.IP1: Create and nominate a Historic Downtown District.
- Objective 4.2.IP2: Seek funds from public and private partners to reestablish the Historic Rehabilitation Loan Program.
- Objective 4.3.IP1: Revise and update the Cultural Heritage Tourism items from the Preservation Action Plan of the Historic Preservation Plan, and incorporate them into the City's tourism plan.

Self-Assessment

The National Trust for Historic Preservation developed A Self-Assessment Guide for Local Preservation Commissions to help local commissions review their accomplishments, identify areas for improvement, and set priorities for the future. In addition to conducting surveys of the commission members themselves, the self-assessment focuses on surveying community members and community leaders to determine how well informed they are about the program, and the perceptions of the commission. Staff believes this could be of some benefit to gauge how well the program is functioning, not only the Commission's eyes, but in the public's eyes as well. Please see Attachment A for the Self-Assessment Guide.

Attachments:

Attachment A: A Self-Assessment Guide for Local Preservation Commissions (excerpt)

A Self-Assessment Guide for Local Preservation Commissions

"If you don't know where you're going, you'll end up somewhere else."

— Peter Principle

There comes a time in the life of every local preservation commission when members and staff alike begin to wonder if the time and energy they invest is really saving buildings and furthering preservation in their community. A quote often used by Independent Sector president Brian O'Connell aptly describes the most frequent response to this speculation: "Any group as bright as we are which has worked as long and hard as we have must have done a lot of good."

A decade ago the National Trust produced a self-assessment guide for nonprofit preservation organizations which has been used by hundreds of statewide and local groups in preparation for strategic planning. The nonprofit preservation group in your community may, in fact, have already undertaken this process, and you can benefit from the community and stakeholder information they've already gathered as a starting point for an assessment of the commission. Or the commission and the nonprofit might join forces to conduct a broad community assessment that would benefit both entities as they appraise themselves.

Taking lessons from the nonprofit assessment, application of its tools by some commissions in recent years, and commission experience using strategic planning processes, the nonprofit self-assessment guide has been

adapted for local preservation commissions. The questionnaires, instructions for analysis and interpretation, and general guidelines have been modified to serve as the basis for future planning by commissions. While there is little doubt that a third-party assessment—conducted by National Trust regional staff or an independent consultant, for example—would produce a more objective picture and be a more expeditious means of carrying out the process, the financial resources to support this investment in your commission's future are often limited and the appropriate human and technical resources not always readily accessible.

When Should You Conduct an Assessment?

In an ideal world, assessment of the past and present takes place annually, at least on a limited scale, to lay the groundwork for future planning and to fine-tune existing operations and programs. It is part of developing the coming year's plans, reviewing accomplishments, identifying areas for improvement, and setting priorities for the future. In the less than ideal world that most of us inhabit, the urge to assess is more likely to arise at times of change or political crisis.

Typical points of change occur when the local landmarks ordinance is under review or amendment, when commission staff changes, or when people who have been in leadership roles since the beginning of time rotate off the commission or leave the community. Taking the

Common Traits of Effective Local Preservation Commissions

Mission

The mission is a clear and succinct articulation of the purpose of the commission, supported by its programs and services. It is communicated equally to members, constituents, and the community.

Leadership

Leaders have a firm grasp of the commission's mission, the ability to clearly articulate a vision and to effectively marshal human and financial resources to achieve that vision.

Political Savvy

Political savvy encompasses both understanding of the political process—who makes decisions, based on what information, in what time frame—and a willingness to act upon that knowledge by affirming or interceding in the process.

Resources

Adequate resources are available to support the mission, including a broad and diverse base of community support with access to the necessary human, financial, and technical resources.

Property

Direct involvement with or influence on property-related issues can be achieved in a variety of ways, including ownership, control and planning for the protection and preservation of historic resources. Property-related activities range from ownership and maintenance to designation, design review, demolition delay or denial, easement programs, grant and loan funds, or financial incentives for preservation.

time to step back, assess your progress, and objectively define your current situation can help clarify and strengthen roles and relationships between staff and commission members, citizens and elected officials. It can provide a common perspective on the local government's preserva-

tion services, ordinance, and processes, as well as a solid basis for planning the next steps in improving or expanding a public preservation program.

A frequent assessment spur for long-standing commissions is finding that the landmarks program is “stalled,” staff and commission members are “burned out,” public policies don’t support preservation the way they used to, or the commission is suffering from “designation stagnation.”

A younger program may face a different set of issues. For example, the commission won’t have a long history to pull together, may have only limited public funding, and may not have a dedicated preservation staff person. But it is still a good idea to invest in finding out if you’re making the best use of the human and financial resources you have and to plan for building public support and increasing local government investment in preservation.

Finally, commissions often take the time to reassess when they’ve just achieved a major goal and must decide where next to set their sights. The historic resources survey that consumed all your staff resources for two years is finally completed. That large historic district was just designated, or you finally passed strong ordinance amendments. What next?

Benefits of Organizational Planning

We often hear that commissions should be involved in comprehensive planning for community development. Less frequently though do we hear about planning for the future of the commission itself. In a world of unlimited choices, how does a commission with finite resources go about the task of deciding where to devote its efforts? The commission can potentially do more with less by

carefully developing organizational structures and strategic plans that enable its members to work more effectively as a group.

Time has value too. A small investment of time devoted to a candid assessment of how effective your commission is in deciding its work program priorities, how it carries out that work, how it adapts to changing situations, and how it reviews and updates its strategic plans can reap significant time benefits later. Successful organizational design will enable the commission to avoid spinning its wheels while trying to figure out how to do what it wants to do, and instead go efficiently about the task of accomplishing its goals.

Image in the Community

The importance of *perception* should not be underestimated. What people—commission members, elected officials, other public agencies, and the community at large—*think* the commission is doing, or not doing, underlies their assessment of your effectiveness, and may or may not bear any resemblance to what you really are doing. Make no mistake about it—perception and reality are sometimes strangers. Before you try to find out what your community *thinks* of what you’re doing, it helps to discover if they know what you’re doing. Before you try to expand your program or take it in a new direction, it’s critical to know what the public wants and needs, whether another entity is providing these services, and what activities will best move preservation forward in your community.

The self-assessment process goes well beyond introspection and surveys community leaders for their perceptions about both preservation in general and your commission in particular. Do they know who you are? Do they confuse you with nonprofit preserva-

tion organizations or other public agencies? Do they know what you can and can’t do? Your commission may be doing great things, but if no one knows about them or, worse yet, if the community thinks another group is responsible, you’re not exactly well positioned for future action. Surveying outsiders may also produce fresh ideas for improving existing programs or beginning new initiatives to better serve landmark property owners, educate the citizenry, or involve the general public in good preservation practices.

Public Service and Community Preservation Personality

In addition to determining your commission’s image in the community, it is important to understand the community’s desires for its preservation program. As a governmental program, it is your job to provide service to your citizens, and you have a duty to give them the services they want: a preservation program administered on behalf of the citizens’ needs and desires. Different communities have different approaches to preservation, and you need to acknowledge how the lay public perceives and supports preservation in the community. Some communities are extremely preservation-oriented, aspiring to high standards for the preservation of their historic fabric. In other places, citizens who live and work in historic areas just like the way it feels to be there; they don’t necessarily care about every little detail. Instead they simply want to protect their property values and maintain the scale and general character of the area. Yet other communities may prefer to use planning tools such as conservation districts rather than preservation design review districts.

The preservation commission needs to have an awareness of where the community is on the continuum of community preservation personality. Preservation programs that are continuously in conflict, with numerous appeals of decisions and suffering regular bouts of negative publicity, are likely out-of-step with what the community wants from its preservation program. The commission may need to adjust its activities to reflect the personality of the community. That might mean more work to educate citizens about why we should be doing preservation as a community value and helping them learn how to do it well and economically. The assessment guide is one way to help you locate the pulse and personality of your community.

What's the Process?

The self assessment is both an internal and external process. It uses a variety of assessment tools and is divided into four parts:

- 1) developing an objective, factual profile of your commission, your landmarks program, and your community;
- 2) surveying commission members to gain their perspective on the effectiveness of ordinance processes and commission dynamics;
- 3) surveying community members to determine how well informed they are about your program's mission, leadership, policies, and activities, and to ascertain their perceptions of the commission's effectiveness;
- 4) surveying community leaders, citizens, and elected officials to determine their level of knowledge about and perceptions of your commission.

The self-assessment process touches a wide range of people, asking them to take time to give their thoughts on how your commission might improve. A self-examination of this sort has advantages and disadvantages. If your commission truly intends to use the results of this process in planning for the future and to act on what you've learned, there is much to be gained. Not only will you gather valuable information so that planning can be based in reality, but the process itself provides an opportunity for you to enhance the visibility of your commission and of preservation issues. If, on the other hand, you take on the process halfheartedly at the insistence of a minority and without a solid commitment to change and improvement, you'll waste time and resources, and only add fuel to the fire for those who already have reservations about your effectiveness.

The process takes several months and ideally should be completed by the time your commission normally begins planning for the coming year and determining priorities for a Certified Local Government (CLG) grant application. If member turnover also takes place at this point, both current and new commission members should be involved in reviewing and interpreting what you've learned and in formulating plans based on that information. People are inclined to be more enthusiastic about implementing plans and decisions they've had a part in developing.

Presentation of the Findings

The instructions provided with each assessment tool explain how to analyze and interpret the results. The simplest way to present the results of the community survey, commission member questionnaire, and community assessment interviews is to provide your audience with a copy of the original questions followed by a summary analysis of the responses.

A series of pie charts showing the distribution of human and financial resources based on the information gathered and simple charts illustrating the relationships of various community organizations and agencies to the local preservation commission are an effective way to supplement the narrative analysis. Graphics of this type can be generated on most home computers or can be produced by hand. Many people find information, particularly data describing relationships and proportions of time or money invested in various activities, easier to digest when it is illustrated graphically than when it is presented as seemingly endless pages of numbers or words.

These approaches are most useful in providing the full scope of information to decision makers, who may include your commission members, agency managers, elected officials, or others. But what about those who responded to your survey and the people who participated in the community assessment interviews? It is unlikely that you'll want to share raw or complete data with an audience this broad. Providing an executive summary of the findings, however, along with an outline of future ideas and plans to deal with issues uncovered, tells the participants that their time wasn't wasted.

How to Use the Assessment Tools

Suggestions are offered on both the administration and the interpretation of the assessment tools. Each tool provides a different perspective from which to evaluate progress and identify opportunities.

- The Community Profile creates an overview of the context in which your preservation program exists.
- The Commission Profile Worksheet summarizes the characteristics of your commission and the public context in which it operates.
- The Commission Member Questionnaire helps assess the health of your operating processes, as well as increasing members' awareness of group dynamics.
- Community Assessment interviews ascertain the perceptions of community leaders, property owners, and government officials responsible for making and implementing policy decisions.
- The Community Survey takes the pulse of broad community views on a variety of issues.

You may opt to use some tools and not others, but this choice should be made with the understanding that an incomplete or skewed picture will result.

We have attempted to structure the assessment tools in a sufficiently generic fashion to enable their reproduction and use by any local commission, although you may want to add or modify questions. Note also that all specific responses should remain confidential.

Community Profile and Commission Profile Worksheet

The Community Profile and Commission Profile Worksheet provide mechanisms for assembling and analyzing information about your commission, preservation program, and the environment in which they exist. These tools do not require the creation of new information, but rather offer a format for presenting facts that should be readily available. The result is an overview, both historical and current, of the following:

- human and financial resources—where do they come from, how are they invested, can they be sustained or expanded?
- purpose, government policies, and preservation programs—do these support each other?
- realities of public policies and governance and management practices
- external influences and external working relationships
- political influences
- preservation crises—your role and how the outcomes affected your programs
- your community's preservation personality and the community context within which the commission operates

Commission Member Questionnaire

The Commission Member Questionnaire is designed to assess the health of your operating processes, as well as to increase members' awareness of group dynamics. All questions are framed as positive statements and the response options provide a scale to assess how well individual commission

members believe the body as a whole carries out various leadership tasks and responsibilities.

The most efficient and painless way to gather this information is to distribute the questionnaire at a well-attended commission meeting and have everyone complete it on the spot. Although true anonymity is unlikely to be achieved in a group this small, there is no need to assign identification numbers or have members identify themselves. Questionnaires can be mailed to absent members. Commission members should avoid laboring over responses; if a question doesn't seem to apply to your program, skip it and go on to the next.

The questions are all "close-ended." Individual questionnaires with uniformly high or low scores might uncover overly optimistic or pessimistic perceptions, which will probably come as no surprise. More revealing are questions to which the group as a whole responds with consistently high or low scores, identifying the obvious strengths and weaknesses in the organization's operating systems. Similarly, questions that elicit distinctly polarized responses may point out differing, but possibly valid, perceptions based on historical perspectives, new attitudes, shifting trends, cliques within the group, and so on.

Community Assessment Interviews

Community assessment interviews take the pulse of leaders in your community—those who are very aware of your programs and services as well as those who are not necessarily involved directly with your commission, but whose decisions and perceptions ultimately influence the fate of historic resources. Their perceptions,

support or lack of support, and activities, all influence the context in which your commission operates. Among those who might be interviewed are:

- city and county employees involved in planning, economic development, or tourism
- elected officials, such as the mayor and city council members
- business leaders, such as chamber of commerce representatives, major employers, Main Street program participants, merchants association representatives, bankers, real estate investors/developers
- neighborhood group representatives
- owners of designated historic properties
- major funding sources, such as corporate and private foundation officers or government granting agency officials
- media representatives, such as newspaper and television editors and reporters
- regional planning agency staff
- state historic preservation office and statewide preservation organization representatives
- nonprofit community preservation organization(s)

The community assessment interview format is designed for telephone interviews, but is easily adapted for face-to-face interviews. Although personal interviews are often preferable, they are usually more difficult to arrange and more time-consuming to conduct. Don't try to conduct the interview via e-mail, as it can easily be delayed, responses

will be less complete, and you will not have opportunity for clarification or follow-up questions.

Decide how many interviews can reasonably be conducted given the available resources. Brainstorm to come up with names for the list and narrow it down to a group of interviewees that represents as many of the above categories as possible. Try to interview about 10 to 15 people in order to get a full range of perspectives.

Which raises the question of available resources and who will conduct the interviews. The best interviewers are those who have no vested interest in the responses. It is also helpful if they can stay near the telephone to accept return calls during the interviewing period. As financial resources for this sort of undertaking are usually scarce, you might consider asking the social sciences department of a local college to recruit or assign students to conduct the interviews and summarize the responses as a class project. Although community members can be recruited to take on this task, the closer his or her association with the commission's program, the less likely the interviewer is to elicit a candid response.

Once your interview list is finalized, begin by sending each of the prospective interviewees a letter or e-mail explaining the intent of the community assessment, outlining the types of questions that will be asked, and giving the probable time (about 30 minutes) required for the interview. Provide a telephone number that the interviewee can call if he or she would prefer to initiate the process and give times when the interviewer can best be reached in order to avoid "phone tag." Follow up a few

days later to make an appointment for the interview so that both parties can avoid interruptions, and arrange a specific date, time, and telephone number for the interview. Although pinning down suitable times may seem tedious, telephone interviews are usually less difficult to arrange than face-to-face interviews.

When conducting the interview, read the interview questions in the order they appear, exactly as they are written on the Community Assessment Interview Questionnaire. If the interviewee has responded, in full or in part, to one of the questions in answering a previous one, preface the question with "I know you've touched on this before, but let me ask you..." Although it is often difficult to record everything the interviewee says, try to record key statements in the interviewee's own words. Avoid paraphrasing and summarizing to the extent possible. Thank the interviewee for taking the time to talk with you, mention again that the responses will remain confidential and follow up with a letter or e-mail of thanks.

Although the basic procedures for tallying results and interpreting interview responses are the same as those described in the Community Survey instructions below, analyzing the interviews will pose some additional challenges. First, the numbers will be smaller than those in the Community Survey which means that percentages can be more easily affected by a few answers. Second, interviewees are known and can be identified with particular responses which means that all answers are not necessarily equal. The responses of some interviewees may appropriately carry more weight than others. Interpretation of the interview

responses is, therefore, more a matter of judgment than mechanical calculation.

Certain items have obvious action implications. For example, if responses show that perceptions about the goals and activities of your commission vary from reality, improved communication with the public is needed. Responses to the community assessment interviews should be used as a springboard for further planning and action.

Community Survey

The Community Survey is intended to elicit the opinions of a broad cross-section of citizens on issues related to your commission program and community livability. Three decisions precede initiation of the community survey:

- Will the survey be used as is or revised to suit the particular needs of your commission?
- Who will be asked to complete the survey?
- How will it be distributed?

If the survey will be used as is, simply photocopy the questionnaire. If additional information will be collected, you can add an addendum sheet to the standardized survey. If revisions are to be made throughout, you will need to retype and reformat the survey. We suggest that you include a brief cover letter explaining why the survey is being conducted, emphasizing the importance of each person's response and urging that the survey be returned by a specific deadline. Depending on the politics in your community, you might have the cover letter signed by the chief elected official or head of the government department within which the preservation

program resides.

You may want to limit your survey respondents to property owners or residents of locally designated historic districts or landmarks. Owners and residents in potential districts or National Register districts might also be asked to respond to the survey. In some cases, you may want to give your entire community the opportunity voice their opinions. Simple techniques such as copying survey forms on various colors of paper to identify respondents from different districts might be helpful. The audience you want to reach will also determine your distribution options.

There are several options for distributing the survey—and for collecting the completed surveys. Three inexpensive approaches are:

- Asking the local daily or weekly newspaper to publish the survey if the goal is to reach the entire community.
- Asking volunteers to distribute surveys door to door. Civic organizations, neighborhood groups, or scout troops might agree to perform this service.
- Including the survey in a mailing with some other public notice distributed by another local government agency.

There are also a variety of options for collecting completed surveys. The key to achieving a high rate of return is to make it as easy as possible to complete and submit the survey. Among the collection strategies you might consider are:

- drop off points at community centers, libraries, or city hall
- a pre-addressed postage-paid mailer designed as part of the survey

There are advantages and disadvantages to assuring anonymity. People may be more likely to give their true opinions and, thus, more are likely to respond if they remain anonymous. On the other hand, if you intend to do follow-up mailings and you don't use identification numbers or another method of identifying respondents, follow up must include everyone who originally received the survey, whether or not they've already responded. If you decide to assign identification numbers, explain why in your cover letter and assure those surveyed that replies will remain confidential. If you take this approach, don't forget to keep a list of the names, addresses and identification numbers of those who received the survey.

Once the returns are in, tabulate the responses. Most are easily tabulated since much of the survey consists of "close-ended" questions. The basic calculations you'll want to make, whether with a computer program or paper and pencil, are percentages. After tallying the responses to each question, calculate the percentage by dividing the number of responses to each question by the total number of *meaningful* responses, i.e., ignore the tally in the "no response" category. For example, if you receive a total of 80 surveys and the responses to Question #2 are coded and tallied as (a) 10, (b) 15, (c) 50 and (NR) 5, then the percentage choosing (a) is 10 divided by 75, resulting in 13.3 percent.

For "open-ended" questions, list each of the responses on a separate sheet of paper, showing what people wrote in their own words under each question. An additional category must be added to each survey question in order to show numbers of "no

response or not ascertainable," as people may skip questions or write something illegible.

After the calculations are completed, the most important step remains: interpreting and using the survey data. Keep in mind that the viewpoints of those who respond to the survey are likely to differ from those who do not respond. Treat results as suggestive, not definitive. Although not every item will have an implied action, many will.

Planning for the Future: Setting Goals and Objectives

The information gleaned from the self assessment—analyzed, interpreted and presented in a digestible fashion—forms the basis for both short- and long-range planning. Distribute a summary report in advance to all who will participate in the annual planning session with an explanation of its purpose. Designate a facilitator to briefly review the common traits of effective commissions, summarize the assessment findings, and then lead the group through the planning session. The most successful planning sessions are scheduled to allow sufficient uninterrupted time to conduct the process from start to finish.

Begin at the beginning—do you have a mission statement, a clear statement of purpose? Most nonprofit organizations do, and clarity of purpose benefits commissions too. If you do have a mission statement, take another look at it. Don't hesitate to make revisions if it is unwieldy or no longer accurately reflects your purpose. Shorter is better; the more complex it becomes, the less effective it will be in succinctly conveying your core values.

Then use your mission statement! Bounce every decision you must make off it; if something doesn't fit, you shouldn't be doing it. Develop goals and objectives that support the mission statement and reflect and respond to the realities of the commission and community as revealed through the self-assessment process. All too often, commissions stop here. Taking the time to translate the objectives into specific tasks, developing time lines and identifying the resources necessary to carry out the tasks can make the difference between being able to look back at a solid list of accomplishments at the year's end and wondering how the time slipped by again.

It is often useful to engage an outsider—the "unbiased third party"—to facilitate the planning process. A facilitator who is familiar with the assessment findings and the planning process, but is not intimately involved with your organization and has no particular bias toward other community interests, can help keep the discussion on track, channeling it to find the match between community and commission realities and desires. This role can be played by local government planning staff or community volunteers. United Way organizations, extension services, and universities are resources to explore. National Trust regional office staff may be able to assist you directly or suggest a resource person.