




# MEMORANDUM

February 8, 2012

TO: Board of Mayor and Aldermen

FROM: Eric Stuckey, City Administrator   
Vernon Gerth, Assistant City Administrator for Community and Economic Development  
Catherine Powers, Planning and Sustainability Director

SUBJECT: Resolution 2012-08, A Resolution Authorizing The Adoption And Implementation Of Amendments To The Historic District Design Guidelines

### Purpose

The purpose of this memorandum is to provide the Board of Mayor and Aldermen (BOMA) with information regarding a resolution to approve and implement proposed amendments to the *Franklin Historic District Design Guidelines*.

### Background

This ordinance was favorably recommended to the BOMA by the Planning Commission by a unanimous vote (8-0) at the January, 26, 2012, FMPC Meeting.

On January 9, 2012, the Franklin Historic Zoning Commission (HZC) recommended that that the revisions proposed in Appendix A be made to the Franklin Historic District Design Guidelines.

The proposed amendments have been compiled with the guidance of the Historic Zoning Commission through a process that involved multiple meetings, including a July trolley tour of the Franklin Historic Preservation Overlay, an August Design Review Committee workshop, and September and October HZC Public Hearings. Several City staff members have also been consulted during the process, including staff from the Building & Neighborhood Services Department, Legal Department, and Planning & Sustainability Department. Additionally, a Neighborhood Meeting was held on January 12, 2012 to discuss the proposed revisions.

The anticipated schedule of meetings to be held through the Guidelines revision process is listed as follows:

December 12, 2011:	HZC Meeting (Recommendation) & Public Hearing
December 15, 2011:	BOMA/FMPC Joint Conceptual Workshop
January 9, 2012:	Final HZC Meeting (Recommendation) & Public Hearing
January 12, 2012:	Neighborhood Meeting
January 26, 2012:	FMPC Meeting (Recommendation)
February 14, 2012	BOMA Work Session
February 28, 2012:	BOMA Meeting (Approval)

### Financial Impact

Not applicable to this item.

### Options

Not applicable to this item.

### Recommendation

Approval of Resolution 2012-08 is recommended.

RESOLUTION 2012-08

RESOLUTION AUTHORIZING THE ADOPTION AND IMPLEMENTATION OF AMENDMENTS TO THE HISTORIC DISTRICT DESIGN GUIDELINES

WHEREAS, the City of Franklin has long been recognized as a community that values historic preservation; and

WHEREAS, the City of Franklin recognizes the importance of historic structures, landmarks and buildings in the development of plans and standards of this community and, in the values expressed in the day to day lives of its residents; and

WHEREAS, the City of Franklin Historic District Design Guidelines are intended to provide the Franklin Historic Zoning Commission (HZC), residents of the City of Franklin's local historic districts, and managers of other properties governed by the HZC with guidelines for building rehabilitation, new construction, and other changes which would affect the overall appearance of Franklin's historic areas; and

WHEREAS, the City of Franklin approved a historic preservation ordinance in 1986 and, in 1991, the Franklin Design Guidelines Manual was adopted. This manual provides information on the design review process and recommended guidelines for property owners. The guidelines in the manual are administered by the HZC in their review of actions affecting historic properties within all of the overlay zones in the City; and

WHEREAS, in 2012, the HZC voted to favorably recommend updates to the guidelines to include additional illustrations, photographs, and language regarding many aspects of HZC review. The guidelines that follow are to be followed by property owners prior to initiating work such as rehabilitation, new construction, demolition or any other actions reviewed by the HZC; and

WHEREAS, the updated City of Franklin Historic District Design Guidelines are in accordance with principles and recommendations set forth by the National Park Service. The National Park Service, United States Department of the Interior, is the federal agency responsible for the national program of historic preservation. It also sets professional guidelines for historic preservation which are used by state and local preservation programs.

NOW, THEREFORE, BE IT RESOLVED by the Board of Mayor and Aldermen of the City of Franklin, Tennessee, that upon the endorsement from the City of Franklin Historic Zoning Commission and the Franklin Municipal Planning Commission, the amendments to the City of Franklin Historic District Design Guidelines as shown in Appendix A are hereby adopted.

Approved this \_\_\_ day of \_\_\_\_\_, 20 \_\_\_\_

ATTEST:

CITY OF FRANKLIN, TENNESSEE

BY: \_\_\_\_\_  
ERIC S. STUCKEY  
City Recorder/Administrator

BY: \_\_\_\_\_  
KEN MOORE, M.D.  
Mayor

HISTORIC ZONING COMMISSION RECOMMENDED APPROVAL: 1/9/12

PLANNING COMMISSION RECOMMENDED APPROVAL: 1/26/12

BOMA PASSED: \_\_\_\_\_

## Appendix A

### 1. Incorporate non-substantive grammatical corrections, format revisions, and textual clarifications, including the following:

- Change all references to “Historic Preservation Officer” to “Preservation Planner.”
- Reorganize all topical headings within the “Residential” and “Commercial” sections into alphabetical order.
- Change “Introduction” heading within the “Design Guidelines and Historic Preservation” section to be named “Development of Historic Zoning in Franklin.”
- Change all instances of “primary” buildings to “principal” buildings in accordance with the verbiage used in the Franklin Zoning Ordinance (p.3, p.78, p.82).
- Change all instances of “secondary” buildings to “accessory” buildings in accordance with the verbiage used in the Franklin Zoning Ordinance (p.82).
- Change Table of Contents to reflect all topical heading name and alphabetization edits.
- Create a “*Secretary of the Interior’s Standards for Rehabilitation*” heading from the existing “Introduction” heading within the “Design Guidelines and Historic Preservation” section (beginning at the existing 5<sup>th</sup> paragraph) with the addition of the following verbiage at the end of the new heading:
  - The Secretary of the Interior’s Standards for the Treatment of Historic Properties have been expanded and interpreted to cover a wide variety of preservation situations and issues in addition to rehabilitation, including preservation, restoration, and reconstruction. When researching these Standards, it is important to know which subset of the Standards applies to one’s situation. The definitions of the each treatment are listed as follows:
    - **Preservation:** Preservation is defined as the maintenance and repair of existing historic materials and retention of a property’s form as it has evolved over time. Protection and stabilization are inherent to preservation treatment.
    - **Rehabilitation:** Rehabilitation is defined as 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, and architectural values.
    - **Restoration:** Restoration is defined as the depiction of a property at a particular period of time in its history, while removing evidence of other periods.
    - **Reconstruction:** Reconstruction is defined as the depiction, by means of new construction, the form, features, and detailing of a non-surviving building or structure for the purpose of replicating its appearance at a specific period of time.

The complete list of each treatment's set of standards can be accessed through the National Park Service website at <http://www.nps.gov/hps/tps/standguide/>.

- Add the following verbiage as a final paragraph to the “Design Guidelines Principles” heading within the “Design Guidelines and Historic Preservation” section:
  - Historic zoning does not exist to prevent change. Rather, the HZC works with property owners in shaping and managing change while meeting the intent of the *Guidelines*. The document provides for a process that ensures that property changes are within the spirit and the character of the Franklin Historic Preservation Overlay. Within this design review process, plans are reviewed and evaluated before work takes place. The process does not require property owners to make changes to their properties, and it does not apply to interior alterations or exterior in-kind/routine maintenance and repairs that do not affect exterior appearance.

**2. Create an “Administrative Review” heading at the end of the “Design Guidelines and Historic Preservation” section with the following verbiage:**

The Preservation Planner shall have the authority to exclude from Franklin Historic Zoning Commission consideration of minor alterations and installations not substantially affecting the exterior appearance of the property. Minor exterior alterations considered for administrative review include the following:

- Signage meeting the provisions of the Franklin Zoning Ordinance;
- Awning installation and replacement;
- HVAC mechanical installation and related mechanical equipment screening;
- Fences meeting the provisions of the Franklin Zoning Ordinance;

The Preservation Planner shall have the discretion to approve such installations administratively or to refer the proposed project to the Franklin Historic Zoning Commission for its consideration.

**3. Create Alternative Materials & Systems topical headings within both “Residential” and “Commercial” sections, to include the “Matrix for Evaluation of Alternative Materials and/or Systems” chart. *See attachment***

**4. Create Solar Installations topical headings within both “Residential” and “Commercial” sections, to include the following guidelines:**

- Heading verbiage:
  - When planning the installation of solar panels, the overall objective is to preserve character-defining features and historic fabric while accommodating the need for solar access to the greatest extent possible. All solar panel installations must be considered on a case-by-case basis, recognizing that the best option will depend on the characteristics of the property under consideration. Owners planning solar installations should contact the Preservation Planner before beginning work to ensure that a COA is not required.

- **Freestanding or Detached On-Site:**
  - Freestanding or detached on-site solar panels should be installed in locations that minimize visibility from the public right-of-way. These systems should be screened from the public right-of-way with materials elsewhere in the district such as fencing or landscaping of suitable scale for the district and setting.
  - Placement and design should not detract from the historic character of the site or destroy historic landscape materials.
  - Consideration to the visibility of solar panels from neighboring properties should be taken, without infringing upon the required solar access.
  
- **New Construction On-Site, Principal Structures (Secondary Elevations), & Accessory Structures:**
  - Solar panels should be integrated into the initial design of new construction or infill projects, when possible, to assure cohesion of design within a historic context.
  - Solar panels should be installed on rear slopes or other locations not highly visible from the public right-of-way. Panels should be installed flat and not alter the slope of the roof. Installation of panels must be reversible and not damage the historic integrity of the resource and district.
  - Flat roof structures should have solar panel installations set back from the roof edge to minimize visibility. Pitch and elevation should be adjusted to reduce visibility from public right-of-way.
  - Solar panel installations should be positioned behind existing architectural features such as parapets, dormers, and chimneys to limit their visibility.
  - Use solar panels and mounting systems that are compatible in color to the property's roof materials. Mechanical equipment associated with the photovoltaic system should be as unobtrusive as possible.
  - Use of solar systems in non-historic windows or on walls, siding, and shutters should be installed as to limit visibility from the public right-of-way.
  
- **Principal Structures (Primary Elevations):**
  - *For most properties, locating solar panels on the primary façade is the least desirable option because it will have the greatest adverse effect on the property's character-defining features. All other options should be thoroughly explored.*
  - Utilization of low-profile solar panels on the primary façade is recommended. Solar shingles laminates, glazing, or similar materials should not replace original or historic materials. Use of solar systems in window or on walls, siding, and shutters should be avoided.
  - Panels should be installed flat and not alter the slope of the roof. Installation of panels must be reversible and not damage the historic integrity of the resource and district.
  - Solar panel installations should be positioned behind existing architectural features such as parapets, dormers, and chimneys to limit their visibility.
  - Use solar panels and mounting systems that are compatible in color to the property's roof materials. Mechanical equipment associated with the photovoltaic system should be as unobtrusive as possible.

**5. Amend the following topical headings, as indicated:**

- **Awnings: Residential (p. 45)—**
  - Add the following verbiage within the heading caption, as indicated:

- Awnings may qualify for administrative review. The Preservation Planner shall have the discretion to approve awnings administratively or to refer the proposed project to the Franklin Historic Zoning Commission for its consideration.
- **Awnings: Commercial (p. 89)—**
  - Add the following verbiage within the heading caption, as indicated:
    - Awnings may qualify for administrative review. The Preservation Planner shall have the discretion to approve such installations administratively or to refer the proposed project to the Franklin Historic Zoning Commission for its consideration.
- **Enclosed Additions: Residential (p. 47)—**
  - Remove following guideline:
    - #3: Limit the square footage of additions to no more than half of the square footage of the original building.
  - Add following guideline:
    - Limit the square footage of additions to no more than half of the square footage of the footprint of the original building.
    - Maximum building coverage should not exceed 35% in R-1(Low Residential), R-2 (Medium Residential), R-3 (High Residential), R-6 (Historic Core Residential), Estate Residential, and Office Residential base zoning districts, as measured by building footprint.
    - ‘Building footprint’ refers to the sum of the square footage areas of the largest floors of buildings or structures. ‘Building footprint’ includes all structures on a lot and any roof-covered surfaces.
- **Signage: Residential (p. 63)—**
  - Amend the following verbiage within the heading caption, as indicated:
    - ~~Signage within the Historic Preservation Overlay shall be reviewed and approved by the Historic Zoning Commission to assure the intent of the guidelines are met.~~ Signage may qualify for administrative review. The Preservation Planner shall have the discretion to approve signage administratively or to refer the proposed project to the Franklin Historic Zoning Commission for its consideration.
  - Add the following guidelines underneath the “size and placement” section:
    - Post and panel: Maximum of 12 sq. ft. for sign face; maximum height of 6 ft. for the sign face; posts cannot exceed 8 ft.
  - Add the following guidelines:
    - Do not use more than three signs per building.
    - Mount signs such that they minimize damage to historic materials. Install mounting bolts through mortar joints rather than the face of the masonry.
    - Design signs to have no more than two or three colors.
    - Use signs based on styles from the mid-19<sup>th</sup> and early-20<sup>th</sup> century.
    - Avoid signs which reflect an earlier period of history such as Colonial Williamsburg or New England.
  - Remove the “monument sign” illustration, as it is incorrect.
  - Remove sandwich board signage photograph, as it is misleading (sandwich board signage is not allowable in residential-character sections of the HPO).

- **Signage: Commercial (p. 101)—**
  - Amend the following verbiage within the heading caption, as indicated:
    - ~~Signage within the Historic Preservation Overlay shall be reviewed and approved by the Historic Zoning Commission to assure the intent of the guidelines are met.~~ Signage may qualify for administrative review. The Preservation Planner shall have the discretion to approve signage administratively or to refer the proposed project to the Franklin Historic Zoning Commission for its consideration.
  - Remove the following guideline:
    - #9: Size sandwich-board signs to be nine square feet or less, and design them to have a dark background and light lettering.
    - #25: Use traditional fonts like Serif.
  - Add the following guideline:
    - Size sandwich-board signs to be a maximum of nine square feet with a maximum of 4.5 square feet on each side, and design them to have a dark background and light lettering.
    - Do not use neon window signs.
  
- **Utilities: Residential (p. 65)—**
  - Amend the following verbiage within the heading caption, as indicated:
    - ~~Owners planning work on existing utilities should contact the Historic Preservation Officer before beginning work to ensure that a COA is not required.~~ HVAC mechanical installation and related mechanical screening may qualify for administrative review. The Preservation Planner shall have the discretion to approve such installations administratively or to refer the proposed project to the Franklin Historic Zoning Commission for its consideration. Owners should contact the Preservation Planner before beginning work to determine if a COA is required.
  - Remove following guideline:
    - #5: Place solar panels and solar shingles on elevations that cannot be seen from the front of the house.
  - Add following guideline:
    - For guidance on solar installations, please refer to the “Solar” topical heading within the “Residential” section of the guidelines.
  
- **Utilities: Commercial (p. 108)—**
  - Amend the following verbiage within the heading caption, as indicated:
    - ~~Owners planning work on existing utilities should contact the Historic Preservation Officer before beginning work to ensure that a COA is not required.~~ HVAC mechanical installation and related mechanical screening may qualify for administrative review. The Preservation Planner shall have the discretion to approve such installations administratively or to refer the proposed project to the Franklin Historic Zoning Commission for its consideration. Owners should contact the Preservation Planner before beginning work to determine if a COA is required.
  - Amend the following guideline as noted:
    - #7: Satellite dishes ~~and solar panels~~ may be placed on roofs where they are not readily visible from the street.
  - Add the following guideline:

- For guidance on solar installations, please refer to the “Solar” topical heading within the “Commercial” section of the guidelines.
- **Windows: Residential & Commercial (pgs. 66 & 105)—**
  - Add the following guidelines:
    - Use true divided-light (TDL) or simulated divided-light (SDL) windows as new or replacement windows.
    - New and replacement windows should be wood in material.
    - New and replacement shutters should be wood and appear operable.
- **Fences (p. 71)—**
  - Add the following verbiage within the heading caption, as indicated:
    - Fencing may qualify for administrative review. The Preservation Planner shall have the discretion to approve fencing administratively or to refer the proposed project to the Franklin Historic Zoning Commission for its consideration.
  - Add the following guideline:
    - Fencing should be utilized to fully screen pools from street view.
- **Infill Buildings: Primary [Residential] (p. 78)—**
  - Change “primary” to “principal” in heading.
  - Remove the following guideline:
    - #5: Make new construction compatible in height with adjacent structures. New construction should vary no more than 10 percent with the average building height along its block.
  - Add the following guidelines:
    - Make new construction compatible in height, scale, and proportions with adjacent structures. New construction should be consistent with the context of the surrounding neighborhood. Building height should be measured from grade (ground) and not from finished floor grade.
    - Maximum building coverage should not exceed 35% in R-1(Low Residential), R-2 (Medium Residential), R-3 (High Residential), R-6 (Historic Core Residential), Estate Residential, and Office Residential base zoning districts, as measured by building footprint.
    - ‘Building footprint’ refers to the sum of the square footage areas of the largest floors of buildings or structures. ‘Building footprint’ includes all structures on a lot and any roof-covered surfaces.
    - Foundation heights of new construction should be compatible with those of neighboring buildings.
- **Infill Buildings: Secondary (p. 82)—**
  - Change “secondary” to “accessory” in heading and caption.
  - Amend the following guideline as noted:
    - #2: Place ~~secondary~~ accessory buildings in traditional locations such as behind garages and to the side of houses for garages.
    - #3: Make outbuildings smaller than ~~primary~~ principal buildings.
    - #4: Design outbuildings simply, and use forms reflective of the adjacent ~~primary~~ principal building.
    - #7: Do not use strictly modern siding materials like vinyl, ~~fiber cement~~, or pressed wood.
  - Add the following guidelines:



- Make new construction compatible in height, scale, and proportions with adjacent structures. New construction should be consistent with the context of the surrounding neighborhood.
  - Infill accessory structures should be consistent with the context of their primary structures.
  - Maximum building coverage should not exceed 35% in R-1 (Low Residential), R-2 (Medium Residential), R-3 (High Residential), R-6 (Historic Core Residential), Estate Residential, and Office Residential base zoning districts, as measured by building footprint.
  - ‘Building footprint’ refers to the sum of the square footage areas of the largest floors of buildings or structures. ‘Building footprint’ includes all structures on a lot and any roof-covered surfaces.
- **Relocation: Residential & Commercial (pgs. 83 & 112)—**
    - Add the following verbiage to the heading:
      - “Relocation is the physical move of an entire building or structure from its original and/or current location to another location.”
    - Add the following guideline:
      - Refer to the City of Franklin’s Administrative Manual for information regarding the required public notification procedure for proposed full primary structure demolitions and proposed primary structure relocations.
        - \*Note: The Administrative Manual updates are pending amendment.
        - \*Note: The public notification procedure will be the similar to 500-ft. mailing notification requirement process currently prescribed for zoning variance requests in Subsection 2.3.8 of the Franklin Zoning Ordinance.
        - \*Note: The public notification procedure will differ from the zoning variance request procedure in that letters to adjacent property owners shall be postmarked no later than 10 days prior to the formal meeting at which the item is considered (as opposed to 15 days).
        - \*Note: A pre-application meeting with the Preservation Planner will be required for primary structure demolition and primary structure relocation proposals.
- **Demolition: Residential & Commercial (pgs. 84 & 113)—**
    - Add the following verbiage to Criterion #1 (addressing Architectural and Historical Integrity):
      - Loss of integrity must be substantiated with photographic documentation and a physical description of the property that addresses relevant issues.
    - Add the following verbiage to Criterion #2 (addressing Unreasonable Economic Hardship):
      - Please refer to the Economic Hardship Evidentiary Checklist as provided on the following page. The HZC will use this checklist to assist with review of economic hardship claims. See attachment
    - Add the following guideline:
      - Refer to the City of Franklin’s Administrative Manual for information regarding the required public notification procedure for proposed full primary structure demolitions and proposed primary structure relocations.
        - \*Note: The Administrative Manual updates are pending amendment.

- \*Note: The public notification procedure will be the similar to 500-ft. mailing notification requirement process currently prescribed for zoning variance requests in Subsection 2.3.8 of the Franklin Zoning Ordinance.
  - \*Note: The public notification procedure will differ from the zoning variance request procedure in that letters to adjacent property owners shall be postmarked no later than 10 days prior to the formal meeting at which the item is considered (as opposed to 15 days).
  - \*Note: A pre-application meeting with the Preservation Planner will be required for primary structure demolition and primary structure relocation proposals.
- Add the following statement under new heading “Recommended:”
  - Demolition by Neglect: Demolition by Neglect is long-term neglect of a historic structure that contributes to a level of dilapidation so severe that rehabilitation of the structure no longer serves as a viable option and demolition must be considered on account of the public safety and welfare of the community. Property owners should conduct routine maintenance and major repairs on historic structures in order to ensure their preservation.
- **Infill Buildings: Primary [Residential & Commercial] (pgs. 78 & 110)—**
  - Remove the following guideline:
    - #18: Use a minimum roof-slope ratio of six-to-12 and a maximum of 12-to-12.
  - Add the following guideline:
    - Roof-slope ratio should be designed to be compatible with a building’s architectural style.

## ECONOMIC HARDSHIP EVIDENTIARY CHECKLIST

In support of an application for relief on economic hardship grounds, the applicant must submit evidence sufficient to enable the HZC to render a decision. The burden of proof is on the applicant.

In reviewing an application to remove a historic structure, the HZC may consider economic hardship based on the following information:

### 1. Current level of economic return

- Amount paid for the property, date of purchase, party from whom purchased, and relationship between the owner of record, the applicant, and person from whom the property was purchased;
- Annual gross and net income from the property and the previous three years; itemized operating and maintenance expenses for the previous three years, and depreciation deduction and annual cash flow before and after debt service, if any, during the same period;
- Remaining balance on the mortgage or other financing secured by the property and annual debt services, if any during the prior three years;
- Real estate taxes for the previous four years and assessed value of the property according to the two most recent assessed valuations;
- All appraisals obtained within the last two years by the owner or applicant in connection with the purchase, financing, or ownership of the property;
- Form of ownership or operation of the property, whether sole proprietorship, for-profit or not-for-profit corporation, limited partnership, joint venture, or other;
- Any state or federal income tax returns relating to the property for the last two years.

### 2. Any listing of the property for sale or rent, price asked, and offers received, if any, within the previous two years, including testimony and relevant documents regarding:

- Any real estate broker or firm engaged to sell or lease the property;
- Reasonableness of price or rent sought by the applicant;
- Any advertisements placed for the sale or rent of the property.

### 3. Feasibility of alternative uses for the property that could earn a reasonable economic return:

- Report from a licensed engineer or architect with experience in rehabilitation as to the structural soundness of any buildings on the property and their suitability for rehabilitation;
- Cost estimates for the proposed construction, alteration, demolition, or removal, and an estimate of any additional costs that would be incurred to comply with the requirements for a certificate of appropriateness;
- Estimated market value of the property: (a) in its current condition; (b) after completion of the proposed alteration or demolition; and (c) after renovation of the existing property for continued use;
- Expert testimony or opinion on the feasibility of rehabilitation or reuse of the existing structure by an architect, developer, real estate consultant, appraiser, and/or other real estate professional experienced in historic properties and rehabilitation.

Matrix for Evaluation of Alternative Materials and/or Systems		Sustainable Considerations
Evaluation Flow Chain	SOI Considerations	Questions to Ask
<div style="border: 1px solid black; padding: 5px; text-align: center;">Repair Existing Feature?</div> <p style="text-align: center;">↓</p>	<ul style="list-style-type: none"> <li>- property significance</li> <li>- location</li> <li>- distinctive features</li> <li>- visibility</li> </ul>	<p>What does the designation documentation state regarding property significance? Where is the location of the feature? Which are the distinctive features? What is the visibility of the feature? Is there a condition assessment that evaluates the historic fabric? Does the assessment support preservation of the feature? Are there local trades persons who are skilled in preservation practices?</p>
<div style="border: 1px solid black; padding: 5px; text-align: center;">Match original design and material of existing feature?</div> <p style="text-align: center;">↓</p>	<ul style="list-style-type: none"> <li>- condition assessment</li> <li>- reparability</li> <li>- local trades</li> <li>- visibility</li> </ul>	<p>Is there a condition assessment that evaluates the historic fabric? Does the assessment support preservation of the feature? Are there local trades persons who are skilled in preservation practices? What are the visual qualifications of the character defining areas? What is the resemblance of the proposed substitution to the feature? Is the substantiating documentation credible? Is the in-situ sample offered for inspection reliable? What is the compatibility of the alternative material with the historic fabric?</p>
<b>Exterior Alterations/Introduction of new material</b>		
<div style="border: 1px solid black; padding: 5px; text-align: center;">Match material design &amp; visual qualities of feature with alternative materials?</div> <p style="text-align: center;">↓</p>	<ul style="list-style-type: none"> <li>- visual characteristics</li> <li>- resemblance</li> <li>- documentation</li> <li>- in-situ sample</li> <li>- compatibility</li> </ul>	<p>What are the visual qualifications of the character defining areas? What is the resemblance of the proposed substitution to the feature? Is the substantiating documentation credible? Is the in-situ sample offered for inspection reliable? What is the compatibility of the alternative material with the historic fabric?</p>
<b>Exterior Alterations/Introduction of new materials-features-systems</b>		
<div style="border: 1px solid black; padding: 5px; text-align: center;">Introduce new non-imitative material?</div> <p style="text-align: center;">↓</p>	<ul style="list-style-type: none"> <li>- modern design materials</li> <li>- visual effect</li> <li>- reversibility</li> </ul>	<p>Can modern design materials and methods be employed? With what design elements should the substitute material be compatible? What is the visual effect of the resource? Does the new work have a significant historic fabric impact? What is the reversibility of the new work?</p>
<div style="border: 1px solid black; padding: 5px; text-align: center;">Introduce new feature?</div> <p style="text-align: center;">↓</p>	<ul style="list-style-type: none"> <li>- modern design materials</li> <li>- design elements</li> <li>- visual effect</li> <li>- reversibility</li> </ul>	<p>Can modern design materials and methods be employed? With what design elements should the substitute material be compatible? What is the visual effect of the resource? Does the new work have a significant historic fabric impact? What is the reversibility of the new work?</p>
<div style="border: 1px solid black; padding: 5px; text-align: center;">Introduce new system?</div> <p style="text-align: center;">↓</p>	<ul style="list-style-type: none"> <li>- modern design materials</li> <li>- design elements</li> <li>- visual effect</li> <li>- historic fabric impact</li> <li>- reversibility</li> </ul>	<p>Can modern design materials and methods be employed? With what design elements should the substitute material be compatible? What is the visual effect of the resource? Does the new work have a significant historic fabric impact? What is the reversibility of the new work?</p>

\*Source: Becker, D., & Williams, J. (Nov-Dec 2009). A Sustainability Framework for the Local Consideration of Alternative or Substitute Materials - Part II: News from the National Alliance of Preservation Commissions, 11-17.