

DRAFT REPORT

# MARGARET PLACE HISTORIC DISTRICT DESIGN GUIDELINES LAKE CHARLES, LOUISIANA

JANUARY 2012



PREPARED FOR:  
LOUISIANA DIVISION OF HISTORIC PRESERVATION

PREPARED BY:  
HARDY•HECK•MOORE, INC.  
AUSTIN, TEXAS

DRAFT REPORT

MARGARET PLACE HISTORIC DISTRICT DESIGN GUIDELINES  
LAKE CHARLES, LOUISIANA

JANUARY 2012

---

PREPARED FOR:

LOUISIANA DIVISION OF HISTORIC PRESERVATION

PREPARED BY:

HARDY•HECK•MOORE, INC.  
AUSTIN, TEXAS

## TABLE OF CONTENTS

---

Purpose and Goals .....	1
History and Development of Lake Charles, Louisiana, and the Margaret Place Historic District .....	2
Design Review Process .....	4
Architectural Character of Margaret Place Historic District.....	7
Building Forms.....	8
Architectural Styles .....	20
Landscape and Streetscape Features.....	30
Margaret Place Historic District Design Guidelines.....	33
General .....	33
Retention of Historic Style .....	33
Avoidance of False Historicism.....	33
Sequence of Appropriate Treatment Options.....	33
Architectural Barriers and Accessibility.....	34
Energy Efficiency .....	34
Rehabilitation of Historic Buildings .....	34
Exterior Walls .....	35
Porches.....	37
Roofs.....	38
Windows and Screens .....	39
Doors .....	41
Chimneys .....	42

Mechanical Equipment.....	43
Landscape and Streetscape Features.....	43
Additions to Contributing Buildings .....	45
Preservation of the Original Building .....	45
Location and Height .....	45
Massing and Roof Form.....	45
Design and Style .....	48
Exterior Walls .....	48
Roofs.....	48
Windows and Screens .....	48
Doors .....	48
Non-Contributing Buildings .....	49
New Construction in Historic Districts .....	50
Orientation, Set-backs, and Height .....	50
Design and Style .....	50
Exterior Walls .....	52
Porches .....	52
Roofs.....	52
Windows and Screens .....	52
Doors .....	52
Chimneys .....	52
Garages and Accessory Buildings .....	53

Independent Fences and Walls .....	53
Landscaping .....	53

## APPENDICES

Appendix A: Glossary .....	54
Appendix B: Maps of Margaret Place Historic District .....	59
Appendix C: Inventory of Properties and Calcasieu Historical Preservation Society Landmarks in Margaret Place Historic District .....	61
Appendix D: Secretary of the Interior’s Standards for Rehabilitation .....	65
Appendix E: Treatment Guidelines for Historic Building Materials .....	66
Appendix F: Federal Rehabilitation Tax Credit .....	70
Appendix G: State of Louisiana Residential Rehabilitation Tax Credit .....	78
Appendix H: National Trust for Historic Preservation Historic Window Tip Sheet .....	84
Appendix I: Additional Resources .....	88
Appendix J: Items Necessary for Planning Commission/Conditional Use Permit Application .....	91

## PURPOSE AND GOALS

---

In 2011, the City of Lake Charles was one of several communities selected by the Louisiana Division of Historic Preservation to receive design guidelines for historic districts in the City of Lake Charles. The purpose of the design guidelines is to enable property owners contemplating renovation and/or restoration within the Margaret Place Historic District to maintain the historic look, feel, and character of the district. The guidelines also address new additions to historic buildings and new construction within the historic district. The goal is to encourage long-term planning for historic district resources in Louisiana that were negatively impacted by Hurricanes Katrina and Rita. The intended result is an improved quality of the district that will contribute to the economic health of the district and the community.

The Louisiana Division of Historic Preservation received federal funding for the development of design guidelines as a result of the Section 106 consultation process following Hurricanes Katrina and Rita. Section 106 of the National Historic Preservation Act

requires that projects that entail federal funding or licensing take measures to avoid, minimize, or mitigate adverse effects to historic properties. The Louisiana State Historic Preservation Office, the Louisiana Division of Historic Preservation, and the Louisiana Division of Archaeology together conduct review of federal projects under Section 106. Following Hurricanes Katrina and Rita, the Louisiana Division of Historic Preservation determined that recovery efforts undertaken by the Office of Community Development (OCD) under the Road Home Program had an adverse effect on historic properties. The Road Home Program is funded by Community Block Grant funds provided by the U.S. Department of Housing and Urban Development (HUD). In order to mitigate that adverse effect, the Louisiana Division of Historic Preservation received Community Block Grant funds to develop design guidelines to insure that historic resources are protected in the future.

## HISTORY AND DEVELOPMENT OF LAKE CHARLES, LOUISIANA, AND THE MARGARET PLACE HISTORIC DISTRICT

---

Calcasieu Parish was considered an attractive place to settle due to its access to various waterways, broad prairies for pasturage, and abundant timber lands. In 1781 French immigrant Barthelemy LeBleu and his wife established a home on English Bayou, six miles east of the future site of the City of Lake Charles, becoming the area's first non-native settlers. In 1800, another French immigrant, Charles Sallier, built his home on the banks of the lake that would later bear his name (Sallier Street runs east-west through his former homestead). Two years later, he married the LeBleu's daughter, the first white female born east of the Calcasieu River. As the use of given names was popular at the time, Sallier was referred to as "Mr. Charles." The lake near his homestead was therefore called "Charles' Lake." The surrounding area was called "Charleston" or "Charles Town."

Most early settlers were French or Spanish, but southerners from east of the Mississippi arrived in the 1810s and 1820s. Calcasieu Parish was created out of St. Landry Parish in 1840. "Charleston" became the parish seat in 1852 at the urging of Jacob Ryan, Jr. who had a sawmill on the lake and a home at Broad and Pujo Streets. He sold property on present-day Ryan Street which became the core of downtown Lake Charles. In 1855, Daniel Goos established his mill on the lake, improving production methods and expanding the lumber trade between ports in Galveston, Texas, and Mexico. "Charleston" was incorporated in 1861, but after dissatisfaction grew over the city's name, it was changed to Lake Charles in 1867. By the Civil War, Lake Charles remained a sparsely settled village confined primarily to the downtown area until the lumber boom of the 1880s.

After the Civil War, the city made a transition from Louisiana French to Midwestern with the influx of immigrants from the northern and Midwestern states. Their arrival was precipitated by the lumber boom brought on by the investments of northern lumber barons and the immigrant recruiting activities of J. B. Watkins and the American Land and Timber Company. The city's population quadrupled, and many of the lumber barons and mill workers settled in the area east of downtown in what is now the Charpentier Historic District. The downtown area, with Ryan Street as its core, housed various commercial and cultural enterprises. In 1910, thirty blocks of the downtown area were destroyed by fire. Various infrastructural changes prompted by the 1910 fire encouraged new construction and expansion of Lake Charles. Swampy land along Pithon Coulee and the southern shore of Lake Charles was drained and filled. Streetcar lines were extended outside of the central business district. The South Ryan Street line provided access from the downtown area southward to recreational sites at Shell Beach and Barbe Pier. The area in between was ripe for residential development. In 1912, Allan Jefferson Perkins, a partner of the Perkins and Miller Land Company Ltd., platted and developed Margaret Place southwest of the central business district along Lake Charles. Shell Beach Drive, the eastern terminus of the subdivision along the lake, became part of the new route for the Old Spanish Trail. Long leaf yellow pine, a popular building material in Calcasieu Parish, was used in homes throughout the new subdivision. The availability of lumber also prompted the incorporation of features such as "Lake Charles Columns" at some residences. Though wood was the predominant material for exterior cladding, homes in Margaret Place were also constructed of brick masonry.





The Perkins Homestead ([www.calcasieupreservation.org](http://www.calcasieupreservation.org)).

The City of Lake Charles designated Margaret Place a historic district in 1998. Margaret Place Historic District retains its historic integrity to convey its significance as one of Lake Charles' early residential streetcar neighborhoods. The district—bound by Griffith Coulee, Shell Beach Drive, Pithon Coulee, and the north side of South Ryan Street—is characterized by an angular grid of



Original plat of Margaret Place ([www.calcasieupreservation.org](http://www.calcasieupreservation.org)).

streets shaded by mature trees. It contains a diverse stock of residential buildings, from modest wood frame homes to larger high style brick dwellings, in a variety of architectural styles that were popular in from the early twentieth century through the 1960s.



## DESIGN REVIEW PROCESS

---

### **Designated Landmarks and Historic Districts**

The design guidelines contained within apply to resources in the Margaret Place Historic District as designated by the City of Lake Charles. Maps illustrating the historic district boundaries are included in *Appendix B*. An inventory listing resources and Calcasieu Parish Historical Preservation Society landmark properties in the district to date is included in *Appendix C*.

### **Design Review Application**

Before initiating any work that may affect the exterior of a resource within the Margaret Place Historic District, the owner must submit an application for a Certificate of Appropriateness to the City of Lake Charles Historic Preservation Commission (HPC). The list of “Items Necessary for Planning Commission/Conditional Use Permit Application” is included in *Appendix J*.

### **Major Work**

The HPC will review all applications proposing major work projects—alterations (change in the design, materials, or general appearance of a building) or new construction—within the district and shall grant or deny Certificates of Appropriateness contingent upon the applicant’s acceptance of specific conditions set forth by the HPC. The HPC is authorized to hear and decide appeals, variances, and special exceptions (see zoning ordinance).

The HPC will review applications for the following exterior alterations to historic resources:

- New construction
- Expansions of a building footprint
- Changes in original materials
- Demolition of a historic building or structure

- Relocation of a historic building or structure

The HPC strongly discourages demolition and relocation of historic resources. Special instructions for applications involving demolition or relocation are found in the zoning ordinance at Section 5-307(17). Applications for alternate uses (uses not specified in the zoning district) of a historic resource are discussed at Section 5-307(19).

### **Minor Work**

Minor work projects are reviewed by the Director of Planning or an appointee. The application for minor work projects will be approved or denied within five working days of receipt by the Director of Planning. Exterior alterations considered to be minor work projects include:

- Installation of/alteration to awnings, gutters, and downspouts
- Incandescent lighting fixtures
- Restoration of original architectural features constituting a change of existing non-historic conditions
- Additions and changes not visible from any street or public right-of-way and located to the rear of the main structure
- Additions and changes to an accessory structure

The Director of Planning may refer minor work applications to the HPC if the changes are deemed by the Director and/or Planning staff to involve alterations, additions, or removals that are substantial; do not meet the guidelines for minor work; or are a precedent-setting nature. A checklist delineating minor work from major work is available from the Director of Planning by request.

### ***Routine Maintenance***

Routine maintenance of properties within the Margaret Place Historic District does not require a Certificate of Appropriateness. Work that consists of routine maintenance, defined as “any work that does not constitute a change in design, material or outward appearance of the structure, and it includes in-kind replacement or repair,” shall be determined by the Director of Planning.

### ***Review Process***

The process for HPC review is set forth in the Lake Charles Historic Preservation Ordinance (Ordinance No. 15813, adopted April 6, 2011) found in the *Zoning Ordinance for the City of Lake Charles*, Article V, Part 3, Section 5-307. The ordinance is available online at:

[http://www.cityoflakecharles.com/egov/docs/1321550243\\_861602.pdf](http://www.cityoflakecharles.com/egov/docs/1321550243_861602.pdf)

Applicants are strongly encouraged to request a pre-application conference with the City of Lake Charles Director of Planning to discuss aspects of the proposed project. Applications for a Certificate of Appropriateness will be reviewed by the HPC within 30 days of receipt and being deemed complete by the HPC. Incomplete applications are not reviewed. Each proposed Certificate of Appropriateness is discussed at a public hearing (the public hearing process is outlined in Section 4-201(4)(b) of the city’s zoning ordinance).

The HPC will use these design guidelines when reviewing the Design Review Application. Additional criteria for approval are presented in the *Zoning Ordinance for the City of Lake Charles* at Section 5-307(10)(a-g).

HPC decisions will be rendered in writing. If the application is not approved, the HPC may suggest alternatives. The applicant may then modify the project in accordance with the HPC decision and resubmit the application. An applicant may appeal the HPC’s written decision to the City Council within 10 days from the date of the written decision but not more than 15 days after the commission’s decision is rendered.

### ***Responsibilities of the Applicant***

The responsibility for demonstrating that the proposed project meets these design guidelines and historic preservation, zoning, and building codes lies with the applicant. In order to expedite the review process, it is helpful if the applicant submits the following documentation:

- Name, address, and telephone number of applicant;
- detailed description of proposed work;
- Location and current photograph of the property and adjacent properties. Historical photographs are helpful;
- Scaled elevation drawings of building or structure and proposed changes showing all sides that are visible by pedestrians from any public right-of-way;
- Building material schedules including all façade materials (i.e. foundation, walls, trim, windows, and doors);
- Scaled site plan detailing placement of building or structure on property;
- Sample of materials to be used and product brochures;
- If the design review application includes signs or lettering, submit:
  - a scaled drawing showing the type of lettering,
  - dimensions and colors,
  - a description of materials,
  - method of illumination (if any),
  - plan showing location of sign on property;

- Any other information that City staff or the HPC may deem necessary for review

***Penalties for Violation***

If a contributing building or structure within a historic district is altered without complying with these design guidelines and the *Zoning Ordinance for the City of Lake Charles* and/or without obtaining a Certificate of Appropriateness, the penalty may

include reversal of unapproved alterations, permit delays, and fines. Failure to comply with the provisions of the historic preservation ordinance is a violation, and the violator will be punished with fines of \$10.00 to \$25.00 for each and every day that a violation continues.

## ARCHITECTURAL CHARACTER OF MARGARET PLACE HISTORIC DISTRICT

---

Building forms and architectural styles are useful categories for analyzing general types of historic resources. The following list of the specific building forms and architectural styles found within the Margaret Place Historic District is based on a windshield survey of resources in the district.

The analysis within this section sets forth typical character-defining features of building forms and architectural styles. Note that many examples of historic resources do not strictly fit any building form or architectural style classification. Similarly, a

typical example of a building form or architectural style may exhibit some of the character-defining features defined below, but not all. Other examples of historic resources may combine elements from several building forms or architectural styles and present a more eclectic appearance. This analysis of building forms and architectural styles seeks to find commonalities among general trends, though the inventory of resources within a historic district inevitably will include exceptions.

## **BUILDING FORMS**

Building form denotes the overall shape and axis of a building. Building form designation is primarily based upon the function intended for the building at the time of its construction – whether residential, commercial, or institutional. Because form follows function, properties that share a use-type often possess similarities in floor plan, roof form, size, and scale. Similar building forms often are clustered together due to a variety of factors influencing development, including proximity to transportation, property values, desire for visibility versus desire for privacy, and convenience. Building form classifications are based on a combination of the resource’s original use or function, stylistic influences, and form/plan type. Although this system works well for the majority of the identified resources, some properties are unique and may not fall under a single standard building form classification.

The following building forms are found within the Margaret Place Historic District:

- Center Passage Residence
- American Foursquare Residence
- Bungalow Residence
- Raised Bungalow Residence
- Cape Cod Residence
- Ranch House
- Detached Garage
- Carport
- Shed
- Apartment Block
- Horizontal School

## Center Passage Residence



*Example of a center passage residence.*

The front façade of a central passage residence is generally symmetrical, with the entrance located at the center. This house form is one-, two- or two-and-a-half stories in height, featuring a floor plan with a central entry hall on the ground floor, leading to a central stair. These houses usually are set back with a front yard. Concrete sidewalks or driveway runners may be present. A detached garage and/or a *porte cochere* may be associated with the main house.

- **Exterior Walls:** Either brick masonry or milled lumber, with wood siding finished with paint.
- **Foundations:** Pier and beam, typically with brick piers.
- **Porches:** Either partial-width or full-width, with a projecting front-gabled, flat, or shed roof form. Porch floors may be wood or concrete. Often feature Classical Revival Style, Tudor Revival Style, Spanish Colonial Revival Style, Mission Revival Style, Prairie Style, or Craftsman Style porch supports and detailing.
- **Roofs:** Typically low-pitched gabled, hipped or pyramidal in form. Originally usually standing seam metal or asphalt or asbestos shingle. Dormer windows may be present.
- **Windows:** Double-hung wood-sash, usually with a one-over-one configuration. Often feature wood screens with geometric detailing on the upper sash with Craftsman Style or Prairie Style motifs.
- **Doors:** Located at the center of the front façade. Typically paneled wood with glazing.
- **Chimneys:** Typically brick masonry chimney located at side façade.

## American Foursquare Residence



*Example of an American foursquare residence. (Source: Calcasieu Historical Preservation Society.)*

American foursquare houses are usually two- or two-and-a-half stories in height. Floor plans typically include four rooms on each floor, with an asymmetrically-located entry into one of the front rooms on the ground floor. In Margaret Place, these houses typically are set back with a front yard. Concrete sidewalks or driveway runners may be present. They often include a detached garage and/or a *porte cochere* attached to a side façade.

- Exterior Walls: Typically brick masonry, but sometimes constructed of milled lumber with wood siding finished with paint.
- Foundation: Pier and beam, typically with brick piers.
- Porches: Typically full-width with a front-gabled or shed roof form and wood or concrete porch floor. Often feature Craftsman Style tapered porch piers, sometimes on wood or stone bases. However, sometimes feature Classical Revival Style, Tudor Revival Style, Spanish Colonial Revival Style, or Mission Revival Style porch supports and detailing.
- Roofs: Roof form typically low-pitched hipped or pyramidal. Originally usually standing seam metal or asphalt or asbestos shingle.
- Windows: Double-hung wood-sash, usually with a one-over-one configuration. Often feature wood screens with geometric detailing on the upper sash with Craftsman Style or Prairie Style motifs.
- Doors: Located asymmetrically, offset to one side of front façade. Typically paneled wood with glazing.
- Chimneys: Typically brick masonry chimney located at side façade.



## Bungalow Residence



*A two-story example of a bungalow residence.*

Bungalows typically were constructed from ca. 1915 to ca. 1945. Bungalow plans were standardized, often distributed through lumber companies. Bungalows are usually one-story in height but are sometimes one-and-a-half or two-stories. Floor plans usually are organized with the living room, dining room, and kitchen aligned on one side of the house, and the bedrooms aligned on the other side, so that corridor space is minimized. Bungalows typically are set back from the street, with a front yard. Concrete sidewalks or driveway runners may be present. Because bungalows often were constructed after the advent of the automobile, a detached garage may be associated with the house, and/or a *porte cochere* attached to a side façade of the house.

- Exterior Walls: Typically constructed of milled lumber with wood siding finished with paint, but sometimes constructed of brick or stone masonry.
- Foundation: Typically pier and beam with brick piers, but sometimes concrete stem wall and footing.
- Porches: Typically partial-width with a front-gabled roof form and wood or concrete porch floor. Often feature Craftsman Style tapered porch piers, sometimes on wood or stone bases. However, sometimes feature Classical Revival Style, Tudor Revival Style, Spanish Colonial Revival Style, or Mission Revival Style porch supports and detailing.
- Roofs: Roof form typically front- or side-gabled, with deep eaves. Originally usually standing seam metal or asphalt or asbestos shingle. Often detailed with exposed rafter ends.
- Windows: Double-hung wood-sash, usually with a one-over-one configuration. Often feature wood screens with geometric detailing on the upper sash with Craftsman Style or Prairie Style motifs. Eyebrow gable windows may be present.
- Doors: Typically paneled wood with geometric pattern of lites in the upper portion.
- Chimneys: When present, typically brick masonry and located at side façade.

## Raised Bungalow



*The raised foundation makes this residence a raised bungalow.*

A raised bungalow is bungalow with the Louisiana vernacular architectural tradition of a raised Creole- or Acadian-influenced foundation.

- Exterior Walls: Typically constructed of milled lumber with wood siding finished with paint, but sometimes constructed of brick or stone masonry.
- Foundation: Typically pier and beam with brick piers, but sometimes concrete stem wall and footing.
- Porches: Typically partial-width with a front-gabled roof form and wood or concrete porch floor. Often feature Craftsman Style tapered porch piers, sometimes on wood or stone bases. However, sometimes feature Classical Revival Style, Tudor Revival Style, Spanish Colonial Revival Style, or Mission Revival Style porch supports and detailing.
- Roofs: Roof form typically front- or side-gabled, with deep eaves. Sometimes include a clipped-gable roof form. Originally usually standing seam metal or asphalt or asbestos shingle. Often detailed with exposed rafter ends.
- Windows: Double-hung wood-sash, usually with a one-over-one configuration. Often feature wood screens with geometric detailing on the upper sash with Craftsman Style or Prairie Style motifs. Eyebrow gable windows may be present.
- Doors: Typically paneled wood with geometric pattern of lites in the upper portion

## Cape Cod Residence



*Local example of a Cape Code residence.*

The Cape Cod house is always one-and-a-half stories in height with dormer windows. The floor plan usually features a central entry hall on the ground floor, leading to a central stair. These houses typically are set back with a front yard. Concrete sidewalks or driveway runners may be present. A detached garage often is associated with the house.

- Exterior Walls: Either brick masonry or constructed of milled lumber with wood siding or wood shingles, either unfinished or finished with paint.
- Foundations: Pier and beam, typically with brick piers.
- Porches: Often lack a porch or feature only a bracketed portico. When present, porches may be partial-width or full-width, with a projecting front-gabled, flat, or shed roof form. Often feature Classical Revival Style, Tudor Revival Style, Spanish Colonial Revival Style, or Mission Revival Style porch supports and detailing.
- Roofs: Roof form always side-gabled or gambrel. Dormer windows are a character-defining feature. Originally usually standing seam metal or asphalt or asbestos shingle.
- Windows: Double-hung wood-sash, usually with a one-over-one configuration.
- Doors: Typically paneled wood with glazing.
- Chimneys: Typically brick masonry chimney located at side façade.



## Ranch House



*Example of a Ranch house.*

Ranch houses were constructed nationwide beginning ca. 1940, continuing with the post-World War II housing boom. Ranch houses were constructed using prefabricated building materials, and often standardized plans were repeated within subdivisions. The Ranch house form is nearly always one-story. The footprint may be rectangular, L-Plan, rambling and irregular, or even split-level. The interior floor plan of a Ranch house is open, with free-flowing living, dining, and kitchen spaces, many of which open out onto outdoor spaces such as courtyards or patios. Ranch houses typically lack applied architectural ornament, and instead feature details integral to the design of the house that are influenced by the Ranch Style, Modern Style, or Contemporary Style. Garages or carports are integral to the overall form and design of the Ranch house, and most examples include an attached carport or a one- or two-car garage.

- Exterior Walls: Sometimes constructed of milled lumber with wood siding finished with paint or asbestos shingle siding, and sometimes brick or stone masonry. Masonry units often have a long, thin, rectangular shape, such as Roman brick or flagstone.
- Foundations: Typically concrete slab.
- Porches: Typically partial-width and recessed under the main roof form. Often feature geometric wood or decorative wrought iron porch supports, or porch roof may be cantilevered. Porch floors typically concrete. Brick or stone planters sometimes integrated into porch design.
- Roofs: Roof typically low-sloped and hipped or side-gabled, sometimes with deep eaves. Originally usually asphalt or asbestos shingle.
- Windows: Often wood or metal casement; metal awning or jalousie; or double-hung metal sash. Often feature large, fixed-pane picture windows.
- Doors: Typically wood, often with geometric glazing or relief patterns.
- Chimneys: When present, often wide, constructed of Roman brick or flagstone masonry, and set asymmetrically on front façade.

## Detached Garage



*Example of a detached garage with a second-story garage apartment.*

Detached garages typically are one-story in height with a rectangular footprint and a single, open interior space. Garages typically are sited at the rear of the lot, behind the main house. Many detached garages in the Margaret Place Historic District feature second-level garage apartments. Some historic residences in the districts have *porte cocheres* or covered carports, with open air sides, in lieu of detached garages.

- Exterior Walls: Most commonly wood siding or board-and-batten, but may be brick or stone.
- Foundations: Usually poured concrete slab, but some examples have no foundation, only a dirt floor.
- Porches: Seldom include porches.
- Roofs: Roof form most often front-gabled, but may be side-gabled or hipped. Roofing material usually matches associated main house.
- Windows: Usually limited to side façades. Window materials and configuration typically match associated main house.
- Doors: In garages, overhead rolling doors are common, but original hasp-hung doors or hinged doors may be present.
- Chimneys: Seldom include chimneys.

## Storage Shed



*Example of a storage shed.*

The storage shed is another type of historic domestic outbuilding found in the Margaret Place Historic District. They are typically small, one story in height and have a single, open interior space. Storage sheds are typically sited at the rear of the lot, behind the main house.

- Exterior Walls: Most commonly wood siding or board-and-batten, but may be brick or stone.
- Foundations: Usually poured concrete slab, but some examples have a slightly raised foundation or no foundation, only a dirt floor.
- Porches: Seldom include porches.
- Roofs: May be front-gabled, side-gabled, or hipped. Roofing material usually matches associated main house.
- Windows: Window materials and configuration typically match associated main house.
- Doors: Door materials and configuration may match associated main house.
- Chimneys: Seldom include chimneys.



## Horizontal Apartment Block



*Example of a horizontal apartment block with multiple entries.*

The basic horizontal apartment block has two or more stories containing multiple dwelling units. The façade typically features multiple entries.

- Exterior Walls: Typically masonry units such as brick or stone.
- Foundations: Typically concrete slab.
- Porches: Typically located at the primary entry. Often feature geometric wood or decorative wrought iron porch supports, or porch roof may be cantilevered. Porch floors may be wood or concrete.
- Roofs: Roof typically low-sloped and hipped or side-gabled, sometimes with deep eaves. Originally usually asphalt or asbestos shingle.
- Windows: Typically wood, double-hung.
- Doors: Typically wood, often with large panes of glazing, sometimes with multiple lites.
- Chimneys: Typically brick masonry. May be present at end walls or along the ridgeline.



## Vertical Apartment Block



*The first apartment building in the City of Lake Charles, Margaret Manor, is a four-unit building.*

Square or nearly square sites usually result in an apartment block of two or more stories with a vertical emphasis. Such buildings frequently have a central entry in the façade with access to foyers with adjacent stairs and/or individual units.

- Exterior Walls: Typically masonry units such as brick or stone, but may be wood siding.
- Foundations: Typically concrete slab.
- Porches: Typically located at the primary entry. Often feature geometric wood or decorative wrought iron porch supports, or porch roof may be cantilevered. Porch floors may be wood or concrete.
- Roofs: Roof typically low-sloped and hipped or side-gabled, sometimes with deep eaves. Originally usually asphalt or asbestos shingle.
- Windows: Typically wood, double-hung.
- Doors: Typically wood, often with large panes of glazing, sometimes with multiple lites.
- Chimneys: Typically brick masonry. May be present at end walls or along the ridgeline.

## Horizontal School



*Example of a horizontal school.*

The architectural response to population increase in cities and the need for more space in schools was to expand out. The horizontal school type features a multi-story, broad presence on the site. The building entrance is typically in the center of the rectangular primary façade, often at the top of a large stairway. The walls on horizontal schools are punctuated by multiple windows to allow light into the individual classrooms, which are situated along single or double-loaded corridors. Sometimes, wings off the rear of the building allow for more window area in classrooms. The school campus might include other buildings. The school design may incorporate various classical and period revival styles.

- Exterior Walls: Typically masonry units such as brick or stone.
- Foundations: May be on a concrete slab or feature a raised foundation.
- Porches: Typically located at the primary entry. Often feature decorative stone porch supports, or porch roof may be inset or cantilevered. Porch floors may be wood or concrete.
- Roofs: Roof typically low-sloped with a roof parapet.
- Windows: May be wood or metal, double-hung, casement, awning, or fixed.
- Doors: Typically wood, often with large panes of glazing, sometimes with multiple lites.
- Chimneys: Typically not present.

## ARCHITECTURAL STYLES

Architectural styles may be applied to any number of different building forms. For instance, architectural details influenced by the Classical Revival Style may be applied to a single-family house, a multi-story commercial building, a warehouse, or even a gas station. Unlike building form classifications, architectural styles are seldom related to a building's use. Instead, they tend to be related to the building's era of construction and popular regional trends. Within the Margaret Place Historic District, common architectural styles include the following:

- Colonial Revival
- Gothic Revival
- Classical Revival/Neoclassical
- Tudor Revival
- Spanish Eclectic
- Craftsman
- Minimal Traditional
- Ranch

Not all historic resources exemplify a particular architectural style. Some are purely utilitarian and use no style at all. Others eclectically combine several styles (especially early twentieth century Revival styles). Architectural styles can be integral to the form of the building and related to the building form, or can be displayed through decorative ornament applied to a building. Some typical character-defining features of each architectural style are listed. A resource does not need to display all of the listed character-defining features to be considered a good example of a style; however, when these character-defining features are intact, they must be preserved in order to maintain the overall character of the architectural style. Resources also may exhibit different stylistic elements due to changes over time. If these changes occurred during the historic district's period of

significance, such changes should be respected and possibly retained during restoration or rehabilitation projects.

Architectural styles can be integral to the form of the building or manifested in decorative ornament applied to a building. While building forms often are clustered together, architectural styles may be very eclectic within a grouping. Architectural styles often vary depending on date of construction or historic use. Some architectural styles were very popular for a confined period of time but then declined in popularity, but because many architectural styles—especially “Revival” styles—have their roots in earlier architectural styles, they are used throughout the historic period rather than in one confined era. Standard classifications for architectural styles are set forth by the National Park Service in Bulletin No. 16a, *How to Complete the National Register Registration Form*, and are derived from seminal texts in American Architectural History such as *American Architecture Since 1780: A Guide to Architectural Styles* by Marcus Whiffen; *Identifying American Architecture* by John J. G. Blumenson; *What Style Is It?* by John Poppeliers, S. Allen Chambers, and Nancy B. Schwartz; and *A Field Guide to American Houses* by Virginia and Lee McAlester. (See *Appendix I: Additional Resources*.)

An additional extremely useful resource on traditional building and neighborhood patterns is the *Louisiana Speaks: Pattern Book* by Urban Design Associates. Its section on “Architectural Patterns” places the architectural styles prevalent in the Margaret Place Historic District in the following categories:

- Louisiana Classical—Classical Revival/Neoclassical
- Louisiana Victorian—Gothic Revival
- Louisiana Arts & Crafts—Craftsman
- Louisiana Modern—Minimal Traditional, Ranch

It also features a category called “Louisiana Vernacular” that includes examples of Acadian- and Creole-influenced architecture. “Louisiana Vernacular” style residences are not found in the Margaret Place Historic District but would be considered example of Colonial Revival architecture. The Colonial Revival buildings in the district feature elements of Early Classical Revival Style

architecture and are considered to be “Louisiana Classical” in *Louisiana Speaks*. The pattern book does not feature examples of Tudor Revival or Spanish Eclectic residences which fall under the umbrella of late nineteenth to early twentieth century eclectic architectural styles.

## Colonial Revival



*Example of a Colonial Revival two-story center passage residence. Note porch with monumental columns and front-gabled pediment and segmental arched pediment over door surround.*

- Building forms: On residential or institutional examples, American four-square, two-story center-passage, Cape Cod, or bungalow. On commercial or institutional examples, one-part commercial block, two-part commercial block, temple front, two-part vertical block, or three-part vertical block.
- Exterior walls: Typically brick, but may be wood siding.
- Foundations: Typically pier and beam skirted with brick.
- Porches: Residential examples often include partial-width or full-width porches, with front-gabled or flat roof supported by wood or stone columns. Residential examples may include a front-gabled or arched portico over the main entrance, supported by brackets.
- Roofs: On residential or institutional examples, typically side-gabled or gambrel. Wood cornice and enclosed eaves, often painted white. Slate shingles sometimes present. Dormer windows common on residential examples. On commercial examples, typically flat.
- Windows: Typically double-hung wood sash, painted white. Often flanked by wood shutters.
- Doors: Typically wood, sometimes topped with fanlights. Commonly include sidelights, ornate door surrounds, pediments, etc.
- Chimneys: Character-defining feature on residential examples, typically brick.

## Gothic Revival



*Example of a Gothic Revival educational building. Note decorative detailing and the crenellated parapet at the projecting entry bay.*

- Building Forms: On residential or institutional examples, bungalow, L-plan, or irregular. On commercial or institutional examples, one-part commercial block, two-part commercial block, two-part vertical block, or three-part vertical block.
- Exterior Walls: Usually brick or stone masonry in varying colors, patterns, and textures, with exaggerated mortar joints, sometimes seeping. Sometimes stucco.
- Foundations: Usually skirted with brick or stone.
- Porches: If present, typically include Gothic arches supported by brick or stone piers. Often feature heavy hardware, such as handrails and light fixtures.
- Roofs: On residential or institutional examples, typically front-gabled or cross-gabled with steep pitch. On commercial examples, typically flat. Parapets often include stone coping and may include crenellations.
- Windows: Usually double-hung wood sash or casement. Window openings often feature Gothic arches. Leaded glass in a lattice pattern often present. Brick or stone lintels and sills common.
- Doors: Often feature heavy cast-iron hardware. Stone door surrounds common.
- Chimneys: Prominent brick chimneys, often on the front façade are a character-defining feature on residential examples. Sometimes feature chimney caps with corbelling or crenellations. Seldom present on nonresidential examples.



## Classical Revival/Neoclassical



*Example of a one-story, center passage plan Classical Revival house. Note the porch with monumental columns and front-gabled pediment.*

- Building Forms: On residential properties, center-passage, two-story center-passage plan, or irregular.
- Exterior Walls: Wood siding, brick, or stone masonry.
- Foundations: Typically skirted with brick or stone.
- Porches: A character-defining feature on residential, institutional, or commercial examples. Full-width or partial-width colonnade or arcade, supported by columns or pilasters with decorative capitals. Porch roof may be flat or front-gabled with a pediment.
- Roofs: On residential or institutional examples, flat, side-gabled, front-gabled, or hipped. Slate shingles sometimes present. On commercial examples, typically flat. May feature roof cupola.
- Windows: Typically double-hung wood sash.
- Doors: Typically wood, sometimes with glazing, transoms, and/or sidelights.
- Chimneys: Brick or stone if extant.



## Tudor Revival



*Example of a Tudor Revival residence. Note the half-timbering at gable ends.*

- Building Forms: Bungalow, L-plan, or irregular.
- Exterior Walls: Usually brick masonry in varying colors, patterns, and textures, with exaggerated mortar joints, sometimes seeping. Sometimes stucco. Faux half-timbering often adorning gable-ends. Wing walls or buttresses sometimes accenting front façade.
- Foundations: Usually skirted with brick.
- Porches: If present, sometimes include low-sloped Gothic arches supported by brick piers.
- Roofs: Gable-on-hip or front gabled. Often complex. Eaves sometimes curve outward.
- Windows: Usually double-hung wood sash. Window openings sometimes feature low-sloped Gothic arches. Sometimes feature picture windows with leaded glass in a lattice pattern.
- Doors: Round-arched wood doors with small lites.
- Chimneys: Prominent brick chimneys, often on front façade, are a character-defining feature on residential examples. Sometimes feature chimney caps with corbelling or crenellations.

## Craftsman



*Example of Craftsman Style bungalow. Note brackets at wide overhanging roof eaves and tapered porch columns with wide bases.*

- Building Forms: L-plan or bungalow.
- Exterior Walls: Typically wood siding or asbestos shingle, sometimes brick. Sometimes feature wood shingle detailing.
- Foundations: Typically skirted with wood or brick. Skirt walls sometimes battered.
- Porches: Porches are a character-defining feature. Partial-width or full-width, often with front-gabled roof, typically supported by tapered wood, brick, or stone columns but sometimes supported by metal posts.
- Roofs: Low-sloped hipped or gabled, with deep eaves, often with exposed rafter ends.
- Windows: Typically double-hung wood sash, often with wood screens with geometric detail.
- Doors: Typically wood with glazing, sometimes with transoms and sidelights.
- Chimneys: Brick, sometimes with corbelling or stone coping.

## Spanish Eclectic



*Example of a Spanish Eclectic central passage plan house. Note stucco exterior walls and clay tile roof.*

- Building forms: On residential or institutional properties, L-plan, two-story center-passage, bungalow, or irregular. On commercial or institutional examples, one-part commercial block, two-part commercial block, two-part vertical block, or three-part vertical block.
- Exterior walls: Stucco, sometimes with texture or molded decorative wall elements. Tile detailing common.
- Foundations: Typically skirted with masonry finished with stucco.
- Porches: Sometimes lack porches. Residential examples sometimes feature cantilevered awnings over entrance, or partial-width porches with arched openings supported by masonry piers. Often feature heavy hardware, such as handrails and light fixtures. Second story balconies or roof decks sometimes present.
- Roofs: Typically flat or low-sloped hipped, often covered with clay tile.
- Windows: Double-hung or casement windows, with metal or wood sash. Sometimes featuring wrought iron grates or balconies.
- Doors: On residential and institutional examples, typically heavy wood, sometimes with small lites. Often feature heavy hardware. Stone door surrounds common.
- Chimneys: Stucco, often with tile caps.

## Minimal Traditional



*Example of a Minimal Traditional Style bungalow.*

- Building Forms: On residential examples, L-plan, modified L-plan, bungalow, or ranch. Seldom applied to commercial or institutional buildings.
- Exterior Walls: Wood siding or asbestos shingle. Decorative wood shingles or board-and-batten siding sometimes present at gable ends. Brick or stone veneer sometimes present at water table.
- Foundations: Pier and beam with wood skirt, or concrete slab.
- Porches: Typically partial width, supported by simple wood posts, geometric wood posts, or metal posts, sometimes adorned with decorative wrought iron.
- Roofs: Cross-gabled or gable-on-hip.
- Windows: Casement or double-hung, wood or metal sash. Fixed picture windows sometimes present at front façade. Decorative wood shutters common.
- Doors: Wood, often with small lites in geometric patterns.
- Chimneys: If present, simple brick or stone.



## Ranch



*Example of Ranch Style applied to Ranch building form. Note broad chimney, low pitched roof, and picture windows.*

- Building Forms: Typically applied to ranch house forms. Seldom applied to commercial or institutional buildings.
- Exterior Walls: Often brick or stone masonry, often using Roman brick or flagstone; sometimes wood siding or asbestos shingle siding.
- Foundations: Concrete slab.
- Porches: If present, typically recessed under main roof form and supported by simple wood posts or metal posts, sometimes adorned with decorative wrought iron. Floor typically concrete. Integral stone or brick planters often are evident. Details may exhibit influences of the Colonial Revival or Tudor Revival Styles.
- Roofs: Low-sloped hipped or side-gabled, with deep eaves. Clerestory windows sometimes present at gable ends or below eaves. Details may exhibit influences of the Colonial Revival or Tudor Revival Styles.
- Windows: Double-hung, casement, awning or jalousie, with wood or metal sash. Picture windows often present at front façade.
- Doors: Wood, often with small lites in geometric patterns. Metal or wood screen doors.
- Chimneys: If present, broad and simple brick or stone.

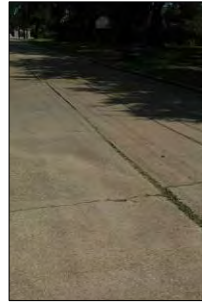
## LANDSCAPE AND STREETScape FEATURES



*Front Setbacks*



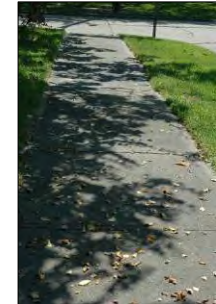
*Side Setbacks*



*Streets*



*Curbs*



*Sidewalks*

### **Front Setbacks**

The distance between the street and the front facades of historic buildings lends the streetscape within a historic district a distinctive pattern. Generally, in residential historic districts, buildings are set back from the street with landscaped front yards.

### **Side Setbacks**

The space between adjacent buildings also gives character to the streetscapes in historic districts. In residential districts, houses are usually structurally independent, with a space between one another.

### **Streets**

The width, slope, and paving materials of streets are character defining features within a historic district. As a utilitarian feature, the roadway may have been resurfaced over time and feature layers of different materials.

### **Alleys**

If alleys were included in the original layout of a historic district, they are an important and character-defining feature. Because

alleys are utilitarian, their original surface often has been replaced repeatedly.

### **Curbs**

Stone or concrete curbing is part of the roadway infrastructure in a historic district. Because curbing is a utilitarian roadway feature, it may have been resurfaced over time and feature layers of several different materials. In addition, the curbing may have inlaid tiles or painted street signs and other decorative features, such as stamped imprints.

### **Sidewalks**

Concrete or brick sidewalks are an often overlooked feature that contributes to the character of historic districts. Sidewalks run parallel with public streets and are adjacent to curbs in the Margaret Place Historic District. Sidewalk detailing may include inlaid tiles at the entry to buildings. Features such as ramps may have been added to provide accessibility into buildings for handicapped persons.



Walkways



Driveways



Perimeter Walls



Coulées



Lakeshore

### Walkways

A walkway leads from a sidewalk to the front door of an individual building. Walkways may be paved with concrete, brick, stone, or aggregate, and their path may be straight or winding.

### Driveways

A driveway leads from the public street onto an individual property. Often, driveways provide access to an automobile-oriented feature, such as a garage, carport, or *porte cochere*. Driveways may be paved with concrete, brick, stone, or aggregate, and their path may be straight or winding.

### Fences

Fences typically are used to delineate the rear and side boundaries of properties in a historic district. In residential districts, though, front yards typically are open and un-fenced. The materials used for fences typically correspond to the date of construction and the materials and style of the associated building, ranging from wood to brick to decorative metal.

### Perimeter Walls

Perimeter walls are low, decorative walls often used to demark the edges of a yard or garden in a residential historic district.

Perimeter walls also may serve as terraces to negotiate a change in topography. Perimeter walls typically are constructed of brick, stone, or concrete and may include metal, stone, or tile detailing.

### Street Trees

Street trees are a designed landscape feature planted uniformly along a public street. As trees age and die, they may be replanted while maintaining the pattern of the streetscape.

### Coulées

Coulées, canalized stream channels from Lake Charles, extend from Lake Charles into Margaret Place. Pithon Coulée serves as the district's northernmost boundary, while Griffith Coulée lies near the district's southern boundary. In addition to providing recreational access to the lake and serving as spillways, the waterways are integral parts of the circulation and landscape patterns of the district. The coulées define the property boundaries of many resources.

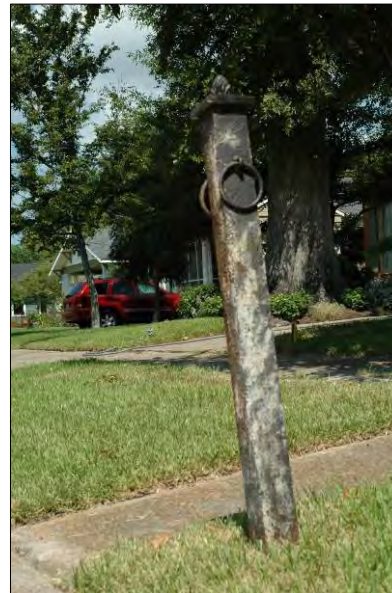
### Lakeshore

The lakeshore is an important landscape feature as it defines the northwestern edge of Margaret Place Historic District at Shell Beach Drive.





*Street marker*



*Tie post*

### **Signage**

Signage includes street signs, traffic signs, and informational signs. These types of are generally printed on metal plates that are mounted on concrete or metal posts.

### **Street Markers**

Before the commonplace use of contemporary street signs, concrete obelisks were placed at intersections to denote streets. The street names would have been stamped onto the sides of the markers.

### **Lamp Posts**

Lamp posts often were erected in residential neighborhoods in the early twentieth century, as electricity became widespread. Lamp posts may have been installed during the earliest development in the district, or they may have been added at a later date. Lamp posts may be constructed of metal, wood, or concrete, with glass globes.

### **Tie Posts**

Tie posts were commonly used in historic residential areas to tether horses before vehicular traffic became widespread.



# MARGARET PLACE HISTORIC DISTRICT DESIGN GUIDELINES

---

## GENERAL

All work requiring design review (Certificate of Appropriateness) within the district will follow the design guidelines set forth below. The design guidelines are based upon the Secretary of Interior's Standards for Preservation, Rehabilitation, Restoration, or New Construction, as appropriate. These Standards can be found in the Appendices to these design guidelines and on the National Park Service website at [www.nps.gov](http://www.nps.gov).

The following design guidelines clarify the interpretation of the Secretary of the Interior's Standards for design review in the Margaret Place Historic District. These standards apply to all resources within the historic district – both contributing and noncontributing.

### Retention of Historic Style

Retain the character-defining features of each building based on its original building form and architectural style, as described in the *Architectural Character* section of these design guidelines. Avoid alterations to the original fabric of historic buildings. Reversing non-historic alterations that detract from original historic style may be appropriate.

### Avoidance of False Historicism

Do not add stylistic elements that were not originally present, as evidenced by historic documentation. Avoid alterations that have no historic basis and that seek to create the appearance of a different architectural period. For example, do not add Victorian trim to a Craftsman bungalow or Craftsman details to a 1950s Ranch Style house. Reversing non-historic alterations that detract from original historic style may be appropriate.

## Sequence of Appropriate Treatment Options

Treatment for historic materials within the District shall follow the sequence of priorities set forth in the Secretary's Standards: preservation first, then rehabilitation, then restoration of missing elements if necessary, and finally, new construction. In order to obtain a Certificate of Appropriateness, the applicant shall objectively demonstrate that the proposed project has selected the least intrusive treatment option that is feasible because of the condition of the existing historic materials.

For additional guidance, the National Park Service publishes *Interpreting the Standards* Bulletins and *Preservation Briefs*, available online at the following sites:

<http://www.nps.gov/tps/standards.htm>

<http://www.nps.gov/tps/how-to-preserve/briefs.htm>

### When to Preserve:

Repair rather than replace deteriorated historic features and architectural elements whenever possible. Many times, materials that initially appear beyond repair may be preserved successfully. Guidelines for the conservation of historic materials are set forth in *Appendices D* and *E* to these design guidelines and are available in National Park Service Preservation Briefs.

***When to Rehabilitate:***

If an original architectural feature has deteriorated beyond repair, the replacement shall match the historic feature in size, scale, profile, and finish. The substitution of compatible recycled historic materials is acceptable, provided that the replacement material is compatible with the historic style and character of the resource. Synthetic or composite replacement materials may be appropriate, provided that they do not compromise the preservation of the surrounding historic fabric. In order to be appropriate, synthetic or composite replacement materials shall match the original in size, scale, profile, and finish. Additional recommendations for the rehabilitation of historic materials are provided in *Appendices D* and *E* to these design guidelines.

***When to Restore:***

Missing architectural features may be restored using photographs, historic architectural drawings, or physical evidence as a guide. Physical evidence might include other matching elements that remain extant on the building or a “ghost” showing where the missing element historically was attached. The restored elements shall match the original in size, scale, profile, and finish. Reconstruction of an entire missing building typically is not appropriate.

***When to Construct New:***

New construction within a historic district is appropriate only if it will not entail demolition or significant alteration of an extant

contributing resource. For example, new construction may be appropriate on an empty lot, or to the rear of a contributing resource.

**Architectural Barriers and Accessibility**

Projects such as the construction of Americans with Disabilities Act (ADA) ramps, lifts, and ADA accessible entrances have the potential to impact character-defining features of a historic building. Contact the Louisiana Division of Historic Preservation and/or the Louisiana Office of the State Fire Marshall Public Safety Services for inquiries regarding Accessibility Standards.

**Energy Efficiency**

Construction of any new structures or alterations of existing structures shall be done in such a way as to maximize energy efficiency while maintaining historic character. In no case, however, shall the maximization of energy efficiency be used as a reason to demolish a historic, contributing, or potentially contributing structure, or to change a structure in such a way that its historic features are modified or obliterated.

**REHABILITATION OF HISTORIC BUILDINGS**

The guidelines set forth on the following pages apply to individual contributing buildings within the Margaret Place Historic District. (For non-contributing buildings within a historic district, refer to the discussion on Non-contributing Buildings.)

## Exterior Walls/Murals



*The character of an exterior wall is defined by its texture, color, and pattern. Note use of brick and terracotta tiles.*



*Note the textured brick and depth of the mortar joints in this exterior wall.*



*Use of multiple materials is a character-defining feature of some residences. Note the placement and patterns of the asbestos shingle and brick.*



*The exterior stucco with its swirl patterns is a character-defining feature of this residence.*

- a. Retain the original façades of the building that are visible from the public right-of-way. Do not change the character, appearance, configuration, or materials of the façade, except to restore buildings to their original appearance.
- b. Do not add architectural features to a building that it never had (e.g., do not add stone detailing where it did not exist).
- c. Repair damaged exterior wall materials to the greatest extent possible. Replace only those sections that are deteriorated beyond repair. All repairs should meet the *Secretary's Standards for Rehabilitation* and follow guidelines set forth in National Park Service *Preservation Briefs*. (Refer to the treatment guidelines in *Appendix E*.)
- d. Replace deteriorated wall materials in-kind to match existing wall materials.
- e. Do not apply aluminum, vinyl, or other synthetic siding as a replacement for a primary building material. Artificial siding materials have been documented to cause serious, costly and often irreparable damage to underlying materials and structural members. The use of smooth siding, not faux wood grain, is permissible in the Margaret Place Historic District when the profile matches that of the historic siding.
- f. If conducting a major rehabilitation, the removal of synthetic siding that has been applied to the building is recommended unless it has been determined that such removal will increase damage to the original surface or that the removal will not accomplish the desired intent. The removal of existing synthetic siding is not required unless the owner proposes to replace the existing siding.
- g. Do not paint or coat previously unfinished masonry surfaces. Moisture may become trapped between the paint and masonry, causing deterioration of the underlying materials and structural members. Remove non-historic paint from historic masonry using the gentlest means possible. (Refer to the treatment guidelines in *Appendix E*.)
- h. When cleaning masonry walls or preparing wood walls for paint, use the gentlest means possible. (Refer to the treatment guidelines in *Appendix E*.)

## Porches



*On this porch, the columns with brick bases and flat roof form with balustrade are character-defining features and should be preserved.*



*Wraparound porches and side porches that were designed to be open to the air should remain open, without screens or glass enclosures.*



*The fretwork balustrade on the roof of this Classical Revival Style house is an important feature that should be maintained.*



*Note the columns and ornamental detailing of this Classical Revival porch. The proportions and materials of porch columns are essential features.*

- a. Front porches are character-defining features for many building forms and architectural styles; do not remove any element of an original front porch.
- b. Do not enclose a front porch. If a front porch is screened, it shall be performed in such a way that it is reversible and does not damage any historic fabric.
- c. Do not add a new porch or deck to the main façade where one never existed.
- b. Repair damaged porch elements in-kind whenever possible. All repairs should meet the *Secretary's Standards for*

- Rehabilitation* and follow guidelines set forth in National Park Service *Preservation Briefs*. (Refer to the treatment guidelines in *Appendix E*.)
- d. If replacement is necessary, replace only those elements deteriorated beyond repair. The replacement element shall match the original in design, profile, finish, and texture. Do not add porch elements that were not historically present.
  - e. If original porch elements are missing, they may be restored to their historic appearance if sufficient documentation exists to ensure accuracy.

## Roofs



*The dormer, with its shallow window and support brackets, is a character-defining feature of the roof of this Craftsman Style building.*



*On this apartment building, the wide overhanging eaves, exposed rafter ends, and eyebrow dormers are important character-defining features.*



*Note the ornamentation at the cornice of this building with Classical Revival elements and consistency between the roof forms of these adjoining wings.*



*The high-pitched and low-to-the-ground roof is an important feature of this Tudor Revival dwelling.*

- a. Use roofing materials that duplicate the appearance and profile of the original materials whenever possible. If the original roofing material previously has been replaced with composition shingle roofing, the existing roofing may be replaced with roofing materials that historically would have been appropriate for the building form and style. For example, if the roofing historically was wood shingle but has been replaced with composition shingle, it is acceptable to replace the existing composition shingle roof with a new composition shingle roof. Refer to the *Architectural Character* section of these design guidelines.
- b. Maintain the shape and slope of the original roof as seen from the street.
- c. Maintain and repair original decorative roof elements such as parapets or cornices. All repairs should meet the *Secretary's*

*Standards for Rehabilitation* and follow guidelines set forth in National Park Service *Preservation Briefs*. (Refer to the treatment guidelines in *Appendix E*.)

- d. If replacement of deteriorated or missing elements is necessary, replace only those elements deteriorated beyond repair. The replacement element shall match the original in design, profile, finish, and texture.
- e. Do not add decorative roof elements that were not historically present.
- f. Roof sheathing should be properly ventilated.
- g. Protect a leaking roof with plywood and building paper until it can be properly repaired. Building owners should initiate the design review process as soon as a leak appears, and begin repair immediately upon receiving a Certificate of Appropriateness.



## Windows and Screens



*Note the five-over-one lite pattern of this double-hung wood-sash window.*



*This Ranch Style house features a row of ribbon windows*

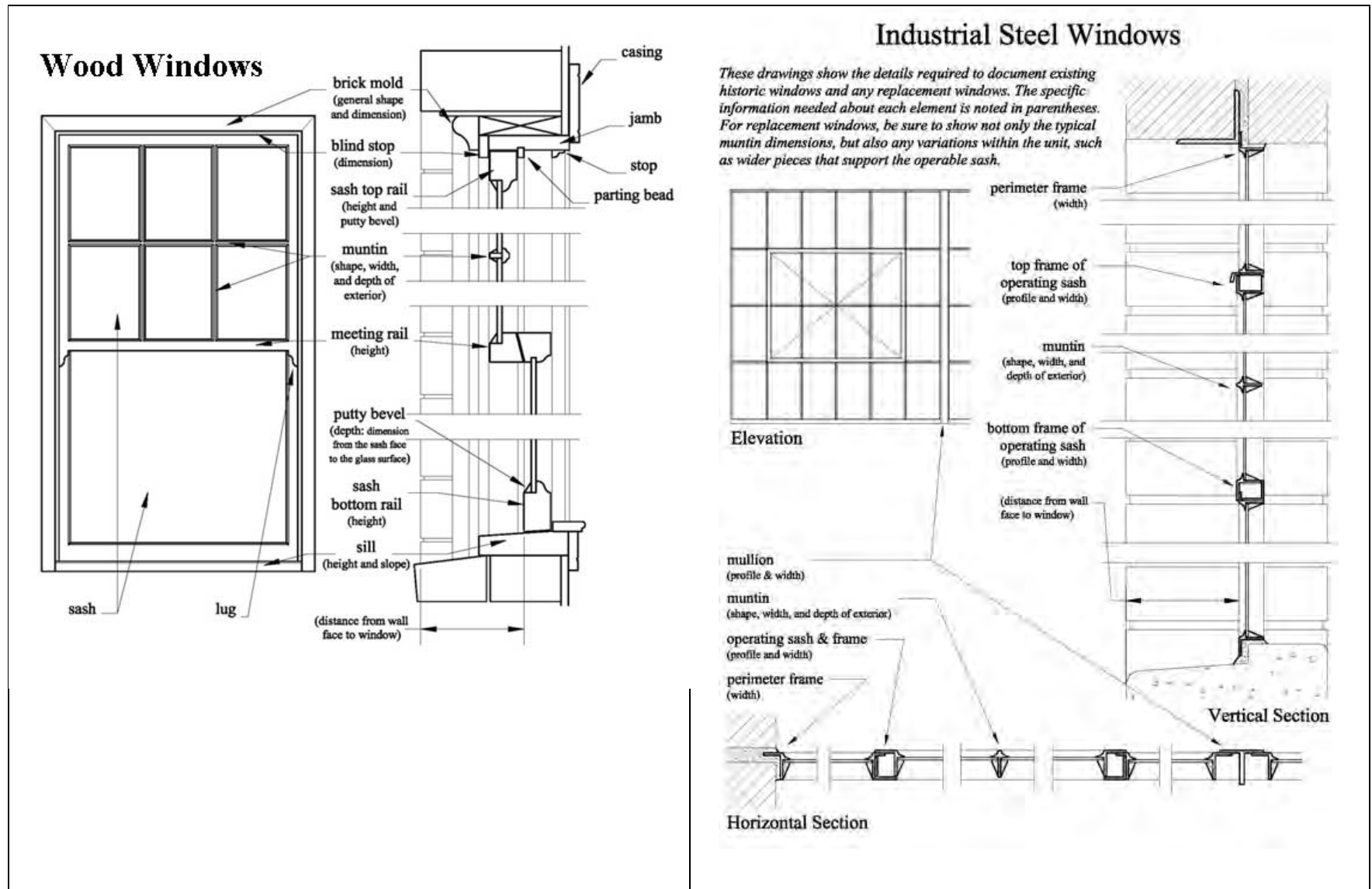


*The geometric grid of muntins in these windows is characteristic of the Spanish Revival Style.*



*Operable wood casement windows complement this residence.*

- a. Do not enlarge, move, or enclose original window openings on façades visible from the public right-of-way. Do not add new window openings on façades visible from the public right-of-way. It may be appropriate to restore original window openings that have been enclosed.
- b. Retain and restore original windows, window surrounds, and screens unless deteriorated beyond repair. Refer to treatment recommendations for windows included in *Appendix E* to these design guidelines.
- c. Storm windows may provide increased energy efficiency without damaging historic windows. Interior storm windows may be used to maintain the historic exterior appearance of the window and are preferred over exterior storm windows. Storm windows shall be installed in such a way that they do not damage historic fabric.
- d. If original windows or screens are deteriorated beyond repair, replacement windows or screens shall maintain the same size, profile, configuration, finish and details as the original windows or screens. See the following page for illustrations of window elements.
- e. If the original windows or screens are no longer extant, replacement windows or screens shall reflect the size, profile, configuration, and finish that are appropriate for the building's form and architectural style. Refer to the *Architectural Character* section of these design guidelines.
- f. False muntins inserted inside the glass are not permitted. Matching the profile of the original window requires the use of either:
  - i. True divided lites; or
  - ii. Dimensional muntins placed on the outside of the glass, along with spacers on the inside of the glass that are an appropriate color, material, and thickness, so that the window appears to have true divided lites even when viewed from an oblique angle.
- g. Tinted or reflective glass is not appropriate for historic buildings. Colored or textured glass is only appropriate if historic documentation confirms that it was used in the building during the historic period.
- h. Although some substitute materials, such as extruded aluminum, may be used for replacement windows, the appearance of the window from the public right-of-way shall closely resemble the original in size, configuration, profile, and finish. Vinyl is not an appropriate substitute material.



*Illustration of historic wood window. (Source: National Park Service.)*

*Illustration of historic steel window. (Source: National Park Service.)*



## Doors



*The sidelights, transom windows, and double doors are character-defining features of this residence.*



*Note the proportions of the doorway and of the glazing to the wood.*



*The paneled door, sidelights, and fan light are character-defining features of this Classical Revival Style home.*

- a. Do not enlarge, move, or enclose original door openings. It may be appropriate to restore original door openings that have been enclosed.
- b. Retain original doors, door surrounds, sidelights, and transoms, unless deteriorated beyond repair. Refer to treatment recommendations for historic materials included in *Appendix E* to these design guidelines.
- c. If a door, door surround, sidelight, or transom is deteriorated beyond repair and a replacement is necessary, the style, materials, and finish of the replacement shall reflect the style and period of the building. Refer to the *Architectural Character* section of these design guidelines. Solid steel or hollow-wood doors are not appropriate for main entries for resources in Margaret Place Historic District.

## Chimneys



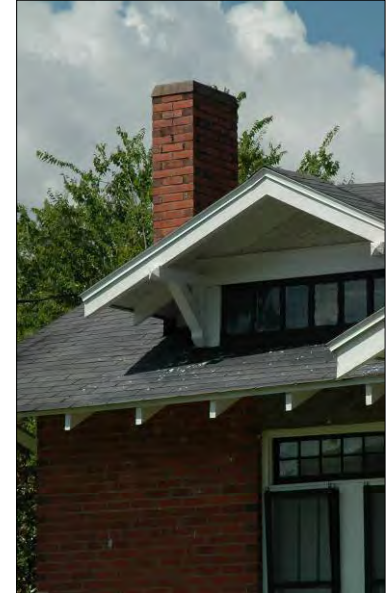
*Note the placement of multiple chimneys on the roof of this house.*



*Ranch Style houses feature broad, wide chimneys.*



*The terracotta flues are character-defining features of this chimney.*



*Note the relationship between the height of the chimney and the height of the roof.*

- a. Maintain and repair original chimneys. Refer to treatment recommendations and repair methods for historic materials included in *Appendix E* to these design guidelines.
- b. If new chimneys are added, they shall not be visible on the front of the building as seen from the street.



## Mechanical Equipment



*Here, mechanical features are mounted on a side façade.*

- a. Locate all new mechanical equipment out of view from the public right-of-way, to the rear or side of the building.
- b. When mechanical equipment must be attached to the exterior wall of the building, do not damage the original exterior wall material. For masonry walls, all attachments shall anchor into the mortar rather than the masonry unit.



*Original windows are maintained despite the installation of new HVAC units.*

- c. Whenever possible, locate heating, ventilating, and air conditioning (HVAC) units, solar panels, satellite dishes, communication towers, antenna, and wind-powered energy systems so that they are not visible from the street. Appropriate locations may include the back of the roof, the ground, or the roof of an outbuilding.

## Landscape and Streetscape Features



*Infrastructural elements, such as culverts, are character-defining features of the streetscape of historic districts.*



*Note the spatial relationship between the landscaping, walkways, sidewalks, and street.*



*The architectural style and features, such as this perimeter wall often reflect the style and material(s) of the main building(s) on the property.*

- a. Vegetation is not regulated by these design guidelines unless the historic district nomination report specifically calls out historic plantings as character-defining features.
- b. Landscape features that are not visible from the public right-of-way are not regulated by these design guidelines.
- c. Do not remove or destroy any built historic landscape or streetscape feature that is visible from the public right-of-way unless deteriorated beyond repair.
- d. Maintain and/or repair damaged landscape and streetscape elements in-kind whenever possible. If replacement is necessary, replace only those elements deteriorated beyond repair. The replacement element shall match the original in design, profile, finish, and texture. Do not add elements that were not historically present.
- e. If original landscape or streetscape features that are visible from the public right-of-way are missing, then they may be accurately restored using historic photographs, historic architectural drawings, or physical evidence. If no documentation exists, refrain from speculatively reconstructing landscape or streetscape elements. For instance, do not add reproduction “historic” street lamps if there is no documentation supporting their historic presence.
- f. Design new landscape or streetscape features so that they reflect the materials and architectural character of the associated historic resource or historic district. For example, if front yards historically were open, then they should not be enclosed with new fences. Similarly, if chain link fences were not historically present in a historic district, then new fences should not be chain link.
- g. Surface parking lots shall not be constructed between the front façade of a historic building and the public right-of-way unless present historically. Surface parking lots may be appropriate at the side or rear of a historic building, provided that they do not damage or destroy any character-defining landscape features that are visible from the public right-of-way. If a surface parking lot is constructed at the rear or side of a historic building, vegetative screening shall shield the view of the parking lot from the public right-of-way.

## **ADDITIONS TO CONTRIBUTING BUILDINGS**

### **Preservation of the Original Building**

- a. All character-defining features on exterior façades that are visible from the public right-of-way shall remain intact.
- b. Retain as much of the historic building fabric as possible in the construction of the addition.
- c. Do not partially demolish exterior walls that are visible from the public right-of-way to accommodate an addition.

### **Location and Height**

Locate additions as inconspicuously as possible. Consider the effect that the addition will have on the existing and neighboring buildings. Large additions may be constructed as separate buildings and connected to the existing building with a linking element such as a breezeway.

- a. Locate all additions toward the rear of the building.
  - i. Never locate an addition flush with the original front façade or projecting beyond the original front façade.
  - ii. Whenever possible, additions shall be located behind the original rear façade of the historic building.
  - iii. The minimum setback between the original façade and the addition shall be complimentary to the proportion and scale of the original building.
- b. Minimize the height of the addition.
  - i. Design one-story additions to one-story buildings whenever possible.
  - ii. Roof heights of new additions shall respect adjacent properties and conform to all City of Lake Charles Zoning and Building codes.

- iii. Within a historic district, the roof height of the addition shall not be taller than the tallest contributing building on a similarly sized lot within the district.

Whenever possible, the roof form of the new addition shall not be visible above the ridgeline of the original roof when the front of the historic building is viewed from the street. Refer to the illustration of pedestrian sight lines on page 47.

### **Massing and Roof Form**

Design new additions so that they do not visually overpower the existing building, compromise its historic character, or destroy any significant historic features or materials. Additions shall appear subordinate to the existing building.

- a. Design the addition to complement the scale, massing, and roof form of the original historic building. The massing of the addition shall respond to the massing of the original building.
  - i. If the roof of the addition is visible from the public right-of-way, the roof form and pitch shall reflect the form and pitch of the roof on the original building.
- b. Minimize the appearance of the addition from the public right-of-way facing the front façade.
  - i. The building's overall shape as viewed from the street shall appear relatively unaltered.
  - ii. Whenever possible, additions shall be no wider than the original building.
  - iii. Design side additions to minimize visual impact and maintain the pattern of side setbacks on the street.



***Appropriate Examples of Massing and Roof Forms on Additions to Residential Buildings***



To accommodate the addition, the roof has been elevated slightly and a dormer window has been added, but the original roof form is maintained. The scale of the original building is maintained.



The addition is set back from the front façade and does not destroy or detract from character-defining features of the original building. The roof form from the original building is reflected in the roof form of the addition.



The addition is set back behind the original rear façade and does not destroy or detract from the character-defining features of the original building. The materials and windows used are in keeping with the original building.

***Inappropriate Examples of Massing and Roof Forms on Additions to Residential Buildings***



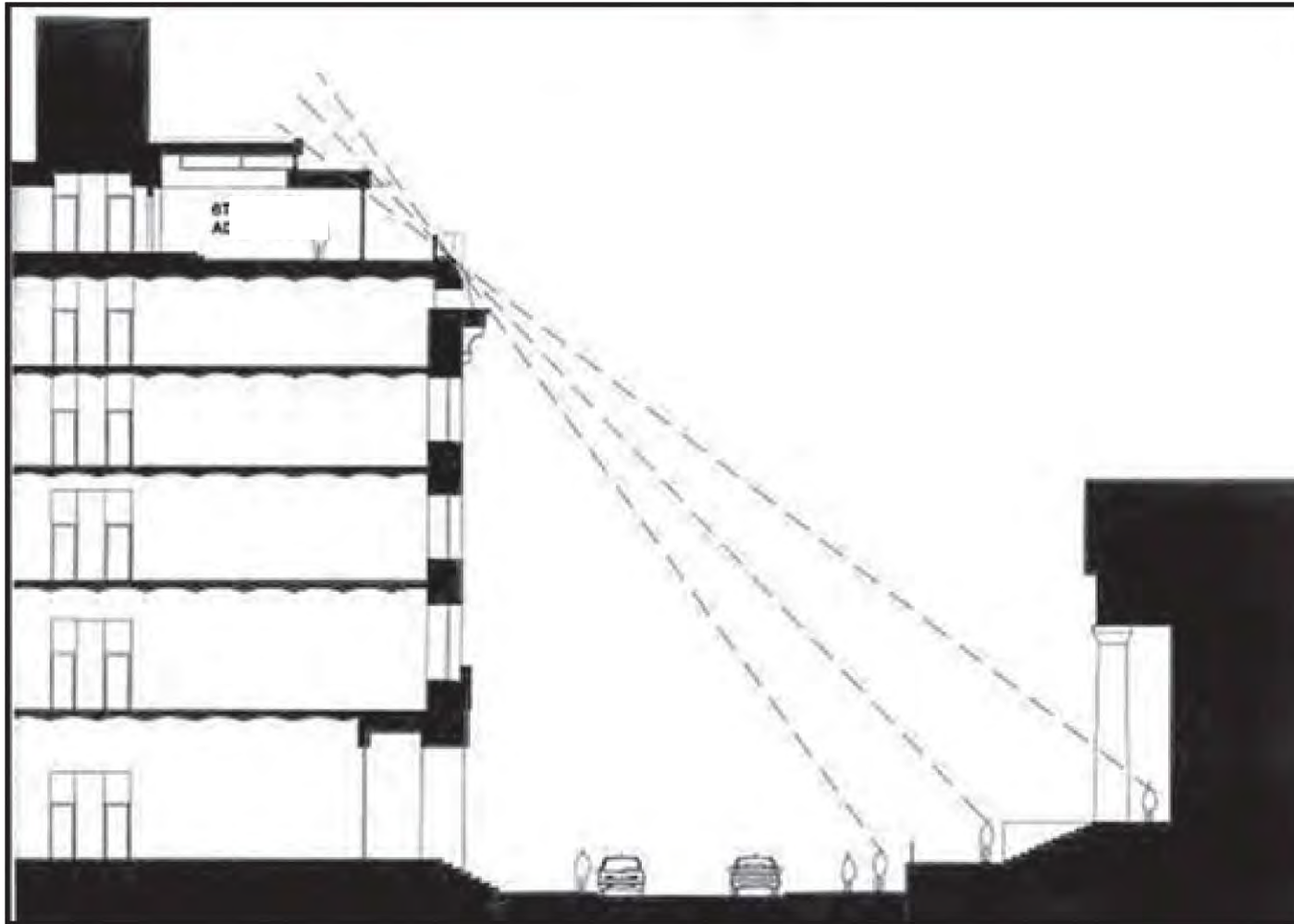
The addition is set forward flush with the front façade. The three-story scale overwhelms the original building. The roof form and fenestration pattern do not reflect the character of the original building.



Although the scale of the addition is small, the roof form does not reflect the character of the original building. Because the form of the original building is so simple, the addition visually competes with the original building.



The addition is set forward almost flush with the front façade of the original building. The flat roof is not compatible with the character of the original building. Modern or Contemporary design may be appropriate for an addition, provided that it is not visible from the street.



*Illustration of pedestrian sight lines guiding the set back and height of a rooftop addition. (Source: National Park Service.)*



### **Design and Style**

- a. Additions shall be compatible with the historic building, but also differentiated so as not to give a false sense of history.
- b. Additions do not necessarily need to mimic the architectural style of the original historic building, and decorative details that may be confused as historic shall not be added. A contemporary design for an addition is appropriate when the addition is not visible from the street, or if the addition does not overwhelm or obliterate the historic building or its architectural features.
- c. If an addition will be visible from the street (either from the front or from the side), design the addition to complement the overall proportions and fenestration patterns of the original part of the building. For instance, additions that are visible from the street shall have window-to-wall area ratios, floor heights, fenestration patterns, and bay divisions compatible with those on the existing building.
- d. Avoid windowless walls unless they are a character-defining feature found on the original building.
- e. For buildings with a side-gabled or hipped original roof form, creation of usable upstairs space by constructing upstairs dormers on a side or back roof is appropriate provided that it does not affect the appearance of the building from the street. Dormers should be added only if they are appropriate for the original building form and style. Minimize the appearance of new dormers from the public right-of-way.

### **Exterior Walls**

- a. If an addition will be visible from the street (either from the front or from the side), design the addition to complement the exterior wall materials of the original part of the building, as well as the collective character of a historic district.
- b. Differentiate the exterior wall materials of the addition from the existing building by means of a hyphen or joint using a

different material, varying trim boards, slightly varying dimension of materials, varying orientation of materials, or other means.

### **Roofs**

- a. Whenever possible, the roof form of the new addition shall not be visible above the ridgeline of the original roof when the front of the building is viewed from the street.
- b. If visible from the street, an addition shall use a simple roof style and slope that complements the roof on the existing building.
- c. Use materials for the roof that match or are compatible with the roof on the existing building.
- d. Locate solar panels on the back of the roof whenever possible so that they are not visible from the street.

### **Windows and Screens**

- a. If an addition will be visible from the street (either from the front or from the side), use windows that complement those on the existing building in terms of fenestration pattern, size, configuration, profile and finish.
- b. For windows on additions, avoid false muntins attached to or inserted between the glass in windows.
- c. Metal screens may be appropriate for windows in additions. Use anodized or coated metal screens to minimize their visual presence.

### **Doors**

- a. If an addition will be visible from the street (either from the front or from the side), use doors that complement those on the existing building, yet are a simpler design so that they do not detract from the original main entrance.

## **NON-CONTRIBUTING BUILDINGS**

- a. Alterations to a building that is noncontributing to a historic district because of its age or because it has received unsympathetic restorations shall be compatible with the architectural style of the building as well as the overall character of a historic district. The standards provided in the next section (*New Construction in Historic Districts*) for new construction may serve as a guide for alterations to non-contributing buildings.
- b. Alterations to historic non-contributing buildings are encouraged to attempt to return them to their historic appearance based upon physical or photographic evidence. The status of a noncontributing building may be changed to contributing by amending the historic district nomination using the designation process set forth in the Margaret Place Historic District ordinance.

## NEW CONSTRUCTION IN HISTORIC DISTRICTS

New construction within the district shall reflect building forms, materials, massing, proportions, roof forms, fenestration patterns, and architectural styles historically present within the district. All current City of Lake Charles codes and ordinances regulating compatibility of new construction shall be followed. New construction in historic districts is specifically dealt with in the *City of Lake Charles Zoning Ordinance* at Article V, Part 3, Section 5-307.

### Orientation, Set-backs and Height

- a. New or moved structures shall be positioned on their lot to maintain the existing patterns of the street.
- b. Front and side-yard setbacks shall equal the prevalent setback of the contributing buildings on the same side of the street. When the historic street pattern is irregular, new construction shall respond to an adjacent contributing property.
- c. The height of new construction shall respond to the streetscape and the dimensions of the lot. The height of new construction shall not exceed the height of the tallest contributing building on a similarly sized lot on the block.
- d. New construction shall respect adjacent properties and conform to all City of Lake Charles Zoning and Building codes.

### Design and Style

- a. Quality of construction and materials shall always be prioritized over applied stylistic detailing.
- b. Design new buildings so that they are compatible with the historic character of the district, yet discernible from historic buildings in the district.
- c. The building forms and architectural styles that historically were present within the district may serve as a model for new construction. Refer to the inventory of historic properties and the *Architectural Character* section of these design guidelines to determine which building types and styles historically were present within the district. Historical styles that were not present during the district's period of significance shall not be used as a basis for new construction.
- d. Contemporary design and style is appropriate for new construction in the historic district if the building respects the scale, massing, proportions, patterns, and materials prevalent among contributing buildings within the district.
- e. It may be appropriate to incorporate compatible architectural features from existing buildings on the street, such as columns or transoms, but avoid architectural features that do not appear on contributing buildings in the district.
- f. Character-defining features from different architectural styles shall not be combined eclectically unless such eclectic buildings were prevalent in the district historically.

*Examples of New Construction in a Residential Historic District*



Example *may be appropriate, depending on surrounding context.* The front-gabled porch and complex massing of the building reflect patterns found in many historic districts, but not all. The scale is appropriate for a district that includes large-scale original buildings, like the Margaret Place Historic District.



Example *may be appropriate, depending on surrounding context.* Modern or Contemporary design may be appropriate for districts that include historic examples of these styles, or for districts with a very eclectic character. The scale of the building may be too large for some historic districts.



*Inappropriate.* Projecting front garages typically are not consistent with the building forms found in Margaret Place.

### **Exterior Walls**

- a. Exterior wall materials used in new construction shall be compatible with the collective character of the district in scale, type, size, finish, and texture.
- b. The pattern and arrangement of secondary materials shall be compatible with the overall character of the district.
- c. Exterior materials shall correspond to the building form and architectural style of the new building in a way that responds to historical trends. Refer to the *Architectural Character* section of these design guidelines.

### **Porches**

- a. If porches are a common character-defining feature among contributing buildings within the district, new construction is encouraged to have a front porch. If all of the contributing buildings immediately surrounding the new building include porches, then the new building shall include a porch.
- b. Porch posts/columns, railings, and detailing shall correspond to the building form and architectural style of the new building in a way that responds to historical trends. Refer to the *Architectural Character* section of these design guidelines for further details.
- c. In general, do not add false historical architectural elements, such as brackets or gingerbread, to a new porch. The HPC may approve exceptions to this standard if the overall design of the new building accurately interprets the appearance of a historical style present within the district.

### **Roofs**

- a. Roofs shall be simple in form, reflecting the character of the roofs on contributing buildings within the district.
- b. Roof forms shall correspond to the building form and architectural style of the new building in a way that responds

to historical trends. Refer to the *Architectural Character* section for further details.

- c. Roof details such as dormers, eave detailing, and bargeboards shall correspond to the building form and architectural style of the new building in a way that responds to historical trends. Refer to the *Architectural Character* section for further details.
- d. Roof covering materials shall reflect the character of the roofs on contributing buildings within the district, as well as the historic character of buildings with a similar building form and architectural style.

### **Windows and Screens**

- a. Windows and screens in new construction shall reflect the proportions, configuration, and patterns of windows and screens in historic buildings within the district.
- b. Windows and screens in new construction shall correspond to the building form and architectural style of the new building in a way that responds to historical trends. Refer to the *Architectural Character* section of these design guidelines for further details.
- c. Avoid false muntins attached to or inserted between the glass panes in windows.

### **Doors**

- a. Front doors shall be visible from the street.
- b. Match the style, proportions, materials, and finish of the door to the overall style and design of the building.

### **Chimneys**

- a. Chimneys in new construction shall reflect the configuration and patterns of chimneys in historic buildings within the district.

- b. Chimneys in new construction shall correspond to the building form and architectural style of the new building in a way that responds to historical trends. Refer to the *Architectural Character* section of these design guidelines for further details.

#### **Garages and Accessory Buildings**

- a. Locate detached garages and accessory buildings at the side or rear of new residential structures within the district.
- b. Design garages and accessory buildings so that their scale is compatible with the associated main building, and so that they have an appropriate site relation to the main structure as well as surrounding structures.
- c. Garages shall be attached only if attached garages historically were appropriate to the building form and architectural style of the new construction. For instance, an attached garage may be appropriate on a new building with a Ranch form, but not a new building with a center-passage form. Refer to the *Architectural Character* section of these design guidelines for more information.
- d. The materials and finish used for new garages and outbuildings, including garage doors, shall correspond to the overall character of the district, as well as the building form and style of the new building

#### **Independent Fences and Walls**

- a. Avoid constructing new walls where they were not historically present on the lot or within the historic district.

- b. Fences and walls may not obscure the front elevation of the primary structure on the property.
- c. Fence materials, scale, and finish shall reflect historic trends visible on other contributing buildings within the district.

#### **Landscaping**

- a. Attempt to preserve existing trees.
- b. Do not obscure the front or primary façade of the building with vegetation.
- c. When constructing a two-story new building or rear addition, consider the use of vegetative screening at the back and side property lines to diminish the visibility of the new construction and respect the privacy of your property and that of your neighbors.
- d. Within a historic district, surface parking lots shall not be constructed between the front façade of a new building and the public right-of-way. If a surface parking lot is constructed on an empty lot or at the rear or side of a new building, vegetative screening shall shield the view of the parking lot from the public right-of-way, if appropriate.
- e. When constructing new landscape or streetscape features in a historic district, follow patterns established elsewhere in the district. For instance, when new sidewalks are constructed, expansion, control, and construction joints should be spaced and located so as to relate to the existing divisions and proportions of the existing sidewalks.



## APPENDIX A: GLOSSARY

---

### **Abut**

To adjoin at an end; to be contiguous.

### **Arch**

A curved and sometimes pointed structural member used to span an opening.

### **Awning**

A projecting roof-like structure sheltering a door or window, often canvas.

### **Balcony**

A railed projecting platform found above ground level on a building.

### **Bargeboard**

A board, sometimes decorative, that adorns the gable-end of a gabled roof.

### **Battered Foundation**

A foundation that is inclined, so that it appears to slope inward as it rises upward.

### **Bead Board**

Wood paneling with grooves.

### **Board and Batten**

Wood siding with wide boards, placed vertically, and narrow strips of wood (battens) covering the seams between the boards.

### **Boxed Eaves**

Eaves that are enclosed with a fascia and panels under the soffit.

### **Bracket**

A projecting support used under cornices, eaves, balconies, or windows to provide structural or visual support.

### **Brick**

A building or paving unit made of fired clay, usually rectangular in shape.

### **Canopy**

A projection over a niche or doorway; often decorative or decorated.

### **Capital**

The uppermost part, or head, of a column or pilaster.

### **Casement Window**

A window sash that swings open along its entire length; usually on hinges fixed to the sides of the opening into which it is fitted.

### **Column**

A round, vertical support; in classical architecture, the column has three parts: base, shaft, and capital.

### **Concrete Block**

A hollow or solid concrete masonry unit consisting of cement and suitable aggregates combined with water.

### **Concrete Slab**

A flat, rectangular, reinforced concrete structural member; especially used for floors and roofs.

**Concrete**

Made by mixing cement or mortar with water and various aggregates such as sand, gravel, or pebbles.

**Contributing**

A building, site, structure, or object within a historic district that adds to the values or qualities of that district because it was present during the period of significance and possesses historical integrity, or it independently meets NRHP Criteria.

**Coping**

The protective uppermost course of a wall or parapet.

**Corbelling**

Pattern in a masonry wall formed by projecting or overhanging masonry units.

**Cornice**

A projecting, ornamental molding along the top of a building, wall, etc., finishing or crowning it.

**Crenelation**

A parapet with alternating solid and void spaces, originally used for defense; also known as battlement.

**Dormer**

A vertically set window on a sloping roof; also the roofed structure housing such a window.

**Dentils**

A series of closely spaced, small, rectangular blocks, used especially in classical architecture.

**Double-Hung Window**

A window with two (or more) sashes, or glazed frames, set in vertically grooved frames and capable of being raised or lowered independently of each other.

**Eaves**

The lower edges of a roof that project beyond the building wall.

**Engaged Column**

A column that is partially attached to a wall.

**Eyebrow Dormer**

A low dormer with a wavy line over the lintel, resembling an eyebrow.

**Façade**

An exterior wall.

**Fanlight**

An arched window with muntins that radiate like a fan; typically used as a transom.

**Fenestration**

An opening in a surface.

**Fixed Sash**

A window, or part of a window, that does not open.

**Flat Roof**

A roof that has only enough pitch so that water can drain.

**Gabled Roof**

A roof having a single slope on each side of a central ridge; usually with a gable at one or both ends of the roof.

**Gambrel Roof**

A roof having a double slope on two sides of a building; the most common example is a barn roof.

**Half-Timbered**

Heavy timber framing with the spaces filled in with plaster or masonry.

**Hipped Roof**

A roof having adjacent flat surfaces that slope upward from all sides of the perimeter of the building.

**Historic District**

A concentrated and cohesive grouping of historic resources that retain a significant amount of their historic character; historic resources that add to the district's overall sense of time and place are classified as Contributing elements; severely altered historic properties and resources of more recent construction are classified as Non-contributing elements.

**Hood**

A protective and sometimes decorative cover over doors, windows, or chimneys.

**Integrity**

Condition or description of a property that is physically unaltered or one that retains enough of its historic character, appearance, or ambiance to be recognizable to the period when the property achieved significance.

**Jalousie Window**

A window composed of angled, overlapping slats of glass, arranged horizontally like a shutter in order to tilt open for ventilation.

**Leaded Glass Window**

A window composed of pieces of glass that are held in place with lead strips; the glass can be clear, colored, or stained.

**Lintel**

The piece of timber, stone, or metal that spans above an opening and supports the weight of the wall above it.

**Lites**

Window panes.

**Mansard Roof**

A roof having two slopes on all four sides; the lower slope is much steeper than the upper.

**Mortar**

A mixture of cement, lime, sand, or other aggregates with water; used in plastering and bricklaying.

**Masonry**

A construction method that stacks masonry units, such as stones or bricks, and binds them with mortar to form a wall.

**Mullion**

A large vertical member separating two casements or coupled windows or doors.

**Muntin**

One of the thin strips of wood used to separate panes of glass within a window.

**Non-Contributing**

A building, site, structure, or object within a historic district that does not add to the values or qualities of that district because it was not present during the period of significance or because it no longer retains integrity.

**Paneled Door**

A door constructed with recessed rectangular panels surrounded by raised mouldings.

**Parapet**

A low wall or protective railing, usually used around the edge of a roof or around a balcony.

**Pediment**

A triangular section framed by a horizontal moulding on its base and two sloping mouldings on each side.

**Pier and Beam Foundation**

Foundation consisting of vertical piers that support horizontal beams.

**Pilaster**

A rectangular column or shallow pier attached to a wall.

**Porch**

A covered entrance or semi-enclosed space projecting from the façade of a building; may be open sided, screened, or glass enclosed.

**Porte Cochere**

A roofed structure attached to a building and extending over a driveway, allowing vehicles to pass through.

**Preservation**

The act or process of applying measures to sustain the existing form, integrity, or material of a building or structure; the NHPA, Section 303[8] defines the term as “identification, evaluation, recordation, documentation, curation, acquisition, protection, management, rehabilitation, restoration, stabilization, maintenance, research, interpretation, conservation, and education and training regarding the foregoing activities or any combination of the foregoing activities.”

**Pyramidal Roof**

A pyramid-shaped roof with four sides of equal slope and shape.

**Quoins**

Large or rusticated stone blocks at the corners of a masonry building.

**Rafter**

One of a series of structural members spanning from the ridge of the roof to the eaves, providing support for the covering of a roof.

**Reconstruction**

Treatment that “establishes limited opportunities to recreate a non-surviving site, landscape, building, structure, or object in all new materials.”

**Rehabilitation**

The act or process of returning a cultural resource to a state of utility through repair or alteration that makes possible an efficient, contemporary use while preserving those portions or features of the property that are significant to its historical, architectural, or cultural values.

**Restoration**

The act or process of accurately recovering the form and details of a property and its setting as it appeared at a particular time by means of the removal of later work or by the replacement of missing earlier work.

**Repointing**

The act of repairing the joints of brickwork, masonry, etc., with mortar or cement.

**Shed Roof**

A roof containing only one sloping plane.

**Side Light**

A vertical window flanking a door.

**Side-Gabled Roof**

A gable whose face is on one side (or part of one side) of a house, perpendicular to the façade.

**Sill**

Horizontal member at the bottom of a window or door opening.

**Soffit**

The underside of an overhanging element, such as the eaves of a roof.

**Storm Window**

A secondary window installed to protect and/or reinforce the main window.

**Stucco**

Exterior finish material composed of either Portland cement or lime and sand mixed with water.

**Transom**

A horizontal window over a door or window.

**Wing Wall**

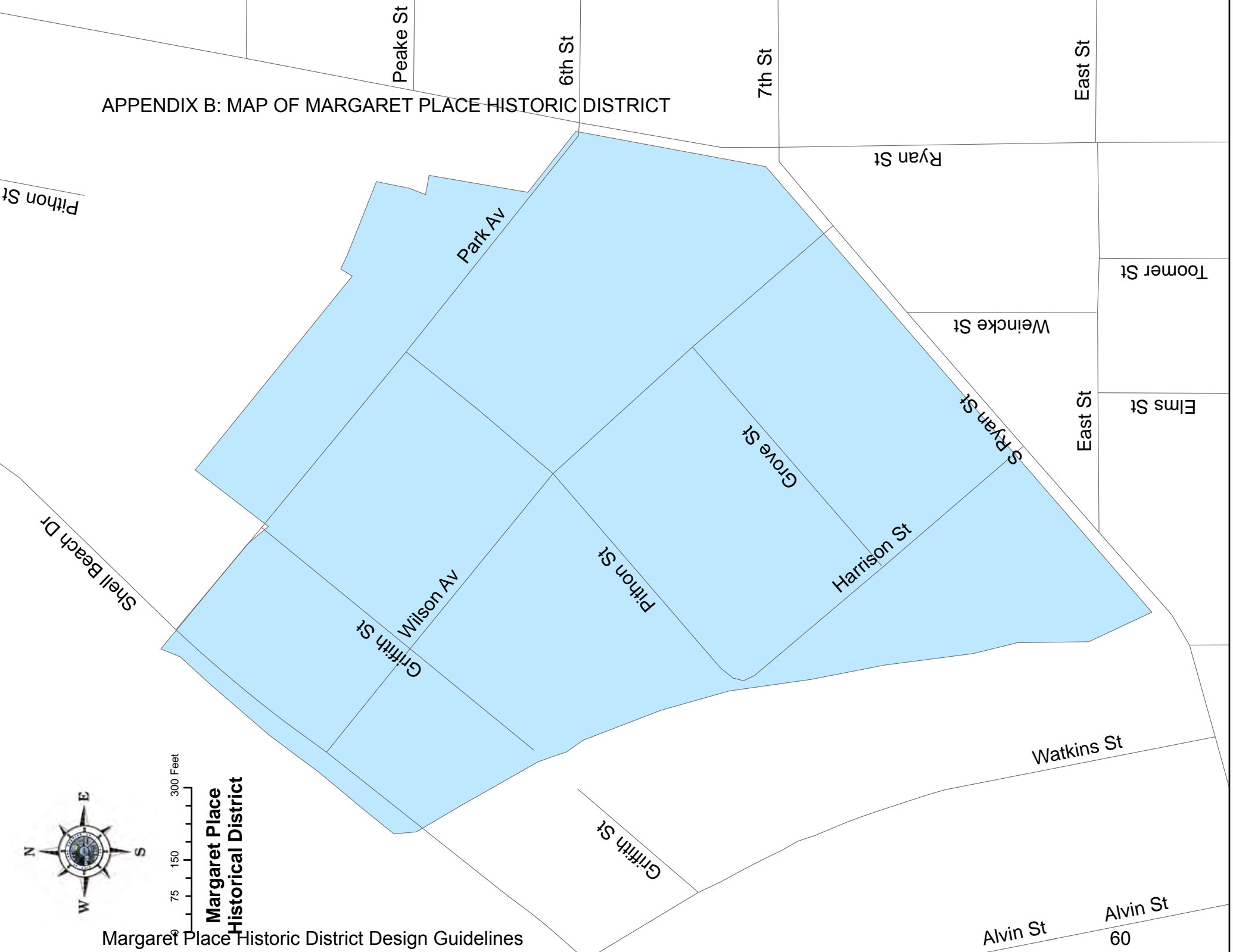
A portion of the front façade extending past the side façade, often sloping down from the eaves to the ground at an angle; a subordinate wall, one end of which is built against an abutment.



## APPENDIX B: MAP OF MARGARET PLACE HISTORIC DISTRICT



# APPENDIX B: MAP OF MARGARET PLACE HISTORIC DISTRICT



**Margaret Place  
Historical District**

## APPENDIX C: INVENTORY OF MARGARET PLACE HISTORIC DISTRICT AND CALCASIEU HISTORICAL PRESERVATION SOCIETY LANDMARKS (AS OF JANUARY 2012)

Address	Historic Name/Use	Calcasieu Historical Preservation Society Landmark
107 Shell Beach Drive		
117 Shell Beach Drive		
205 Shell Beach Drive	Stockwell House	X
1505 Griffith Street	Dr. H. B. White House	X
1518 Griffith Street		
1520 Griffith Street		
1605 Griffith Street		
1607 Griffith Street		
1501 Pithon Street #1		
1501 Pithon Street #2		
1501 Pithon Street #3		
1501 Pithon Street #4		
1501 Pithon Street #5		
1501 Pithon Street #6		
1501 Pithon Street #7		
101 Pithon Street	James Clooney House	X
105 Pithon Street		
109 Pithon Street		
110 Pithon Street		
114 Pithon Street		
116 Pithon Street		
117 Pithon Street		
120 Pithon Street		
124 Pithon Street		
129 Pithon Street		

Address	Historic Name/Use	Calcasieu Historical Preservation Society Landmark
101 Grove Street	John A. Texada, Jr. House	X
105 Grove Street		
106 Grove Street	John R. Stevens House	X
107 Grove Street		
108 Grove Street		
109 Grove Street		
110 Grove Street		
111 Grove Street		
112 Grove Street		
113 Grove Street		
114 Grove Street		
115 Grove Street		
117 Grove Street		
122 Grove Street		
100 S. Ryan Street		
106 S. Ryan Street		
112 S. Ryan Street		
120 S. Ryan Street		
130 S. Ryan Street		
200 S. Ryan Street		
202 S. Ryan Street		
204 S. Ryan Street		
206 S. Ryan Street		
208 S. Ryan Street		
210 S. Ryan Street		
210A and 210B S. Ryan Street		
210D and 210C S. Ryan Street		
212 S. Ryan Street		
1222 Ryan Street		
1312 Ryan Street		

Address	Historic Name/Use	Calcasieu Historical Preservation Society Landmark
1314 Ryan Street		
1318 Ryan Street		
1322 Ryan Street		
1400 Ryan Street		
1424 Ryan Street		
1536 Ryan Street		
103 Park Avenue		
111 Park Avenue		
114 Park Avenue		
115 Park Avenue		
116 Park Avenue		
121 Park Avenue	Margaret Manor	X
122 Park Avenue		
200 Park Avenue		
203 Park Avenue		
207 Park Avenue		
209 Park Avenue		
210 Park Avenue		
216 Park Avenue		
220 Park Avenue		
222 Park Avenue	Brulet Apartments	X
224 Park Avenue	Brulet Apartments	X
226 Park Avenue		
116 Wilson Street		
210 Wilson Street		
212 Wilson Street	Cullen Liskow House	X
216 Wilson Street		
220 Wilson Street	Henry Managan House	X
222 Wilson Street		
302 Wilson Street		



Address	Historic Name/Use	Calcasieu Historical Preservation Society Landmark
303 Wilson Street		
306 Wilson Street		
310 Wilson Street		
317 Wilson Street		
321 Wilson Street		
329 Wilson Street		
330 Wilson Street	Leon Locke Home	X
335 Wilson Street		
120 Harrison Street		
124 Harrison Street		
131 Harrison Street		
231 Harrison Street		

## APPENDIX D: SECRETARY OF THE INTERIOR'S STANDARDS FOR REHABILITATION

---

1. A property shall be used for its historic purpose or be placed in a new use that requires minimal change to the defining characteristics of the building and its site and environment.
2. The historic character of a property shall be retained and preserved. The removal of historic materials or alteration of features and spaces that characterize a property shall be avoided.
3. Each property shall be recognized as a physical record of its time, place, and use. Changes that create a false sense of historical development, such as adding conjectural features or architectural elements from other buildings, shall not be undertaken.
4. Most properties change over time; those changes that have acquired historic significance in their own right shall be retained and preserved.
5. Distinctive features, finishes, and construction techniques or examples of craftsmanship that characterize a property shall be preserved.
6. Deteriorated historic features shall be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature shall match the old in design, color, texture, and other visual qualities and, where possible, materials. Replacement of missing features shall be substantiated by documentary, physical, or pictorial evidence.
7. Chemical or physical treatments, such as sandblasting, that cause damage to historic materials shall not be used. The surface cleaning of structures, if appropriate, shall be undertaken using the gentlest means possible.
8. Significant archaeological resources affected by a project shall be protected and preserved. If such resources must be disturbed, mitigation measures shall be undertaken.
9. New additions, exterior alterations, or related new construction shall not destroy historic materials that characterize the property. The new work shall be differentiated from the old and shall be compatible with the massing, size, scale, and architectural features to protect the historic integrity of the property and its environment.
10. New additions and adjacent or related new construction shall be undertaken in such a manner that if removed in the future, the essential form and integrity of the historic property and its environment would be unimpaired.

## APPENDIX E: TREATMENT GUIDELINES FOR HISTORIC BUILDING MATERIALS

---

The *Secretary of the Interior's Standards* provide important guidelines and recommendations to establish a framework for responsible caretaking of the nation's cultural resources. They allow owners of historic properties, as well as architects, engineers, and others to make informed decisions regarding the conservation and protection of important building features in order to preserve the unique qualities and architectural character of historic buildings. The proper treatment of specific building materials provides the foundation for the continued preservation of this character. What follows is a brief summary of typical building materials that are utilized in the landmarks and historic districts in Lake Charles, along with guidelines for the proper maintenance of these materials. The recommendations were developed using the *Secretary of the Interior's Standards* and are generalized to address the most common issues encountered in the ongoing maintenance of a historic property. The introductory paragraph of each section also provides a recommendation on the preferred treatment of the element. The Technical Preservation Services Department of the National Park Service provides numerous publications that describe in greater detail accepted practices in the continued upkeep of historic building materials. Refer to the following website for a complete list of relevant Preservation Briefs and Technical Notes:

<http://www.nps.gov/index.htm>

### MASONRY

Many historic buildings and structures feature masonry exterior walls. The masonry walls of these properties contribute significantly to the overall architectural integrity of the historic district. It is important to maintain this significant feature through

the Preservation and Rehabilitation of the existing exterior building materials.

Recommendations to protect and maintain masonry are provided below:

1. Due to effects of the natural environment, most building surfaces require periodic cleaning. This cleaning can occur as part of a routine maintenance program, but should be undertaken on a very limited basis to prevent unnecessary deterioration and damage to exterior surfaces. It is most likely that cleaning will occur only prior to scheduled repainting of exterior materials. Tests must be conducted to ensure that the proposed method to clean the masonry surface does not contribute to the deterioration of the building element. The selected cleaning process must represent the gentlest method available to complete the task.
2. Some masonry walls within the historic district are painted, although this is likely not the historic finish. If painted, the painted surfaces must be properly maintained to protect the building element. Painting projects for the masonry exterior surfaces should include removal of damaged paint to the next sound layer using the gentlest technique available. This would include removal by hand-scraping or other accepted preservation techniques (chemical stripping). Techniques must be tested for compatibility with the building material to ensure that the process does not introduce unnecessary damage. New paint must be tested for its compatibility with the material to ensure a proper bond to the exterior

wall surface. The removal of paint from a historically painted masonry wall is not recommended.

3. Repair areas of damage as necessary. Cracks often occur through mortar joints, and it is important to conduct repairs using acceptable preservation techniques. Damaged mortar must be raked by hand and repointed as necessary using mortar of comparable strength, texture, and composition. Cracked masonry units can be consolidated using recognized conservation processes or replaced in-kind when damage is extensive. Replacement must use materials of similar size, scale, material composition, and profile to the original masonry unit.
4. When possible, damaged masonry units should be repaired by patching or consolidating the unit. Replacement of entire sections of masonry is not appropriate. If individual masonry units are damaged beyond repair, limited in-kind replacement of missing or damaged units can be undertaken. Replacement units must be similar in size, scale, composition, and color so that the masonry façade continues to convey a consistent architectural character.
5. Masonry buildings require periodic repointing to address the deterioration of mortar. When repointing, mortar must be raked by hand and repointed as necessary using mortar of comparable strength, texture, and composition. Lime-based mortar must not be replaced with Portland cement, which is significantly harder and can lead to the cracking of the adjacent masonry units. The new mortar joint must match the color, width, and depth of the original.

**Hazardous materials.** *Any finish removal must consider the possibility that the finish to be removed could contain lead-based paint. State and Federal laws on lead paint abatement must be carefully considered and followed.*

## WOOD

Most historic buildings utilize some form of wooden elements in their construction. Significant decorative wood features include wood doors, windows, and trim. When used, they are significant, character-defining features that contribute to the overall historic character and architectural integrity of the resources. It is important to maintain these elements since they enhance the ability of the property to convey its significance and sense of the past.

Specific recommendations to maintain the architectural integrity of wood elements as part of a rehabilitation project include:

1. Maintain all painted surfaces. It is fortunate that most wood surfaces of buildings within the historic district feature a historically painted finish. Paint coatings help protect the wood from moisture infiltration and accelerated weathering caused by extensive sun exposure. Recommended pre-painting procedures include the following:
  - a. Remove peeling paint coatings when necessary, using the least invasive technique possible,
  - b. Sand (by hand) damaged paint coats to the next sound layer, and
  - c. Feather rough edges to ensure a clean and effective bond when repainting as part of a routine maintenance program.

2. Repair wood features as necessary, using accepted preservation techniques. This includes using epoxy, if possible, to repair deteriorated members, or replacing either missing or severely deteriorated wood elements with in-kind materials to match the historic element. Replacement elements must match the design and detailing of the original or historic feature as closely as possible, and they must be replicated using similar elements at the site as a template or through the use of historic photographs.
3. For wood elements that cannot be effectively repaired using the methods stated above, or if the existing element is missing, in-kind replacement is appropriate. The replacement of historic elements must be as compatible as possible with the existing wooden elements. When existing examples are available, reproduction to match historic features is possible.

**Hazardous materials.** Any finish removal must consider the possibility that the finish to be removed could contain lead-based paint. State and Federal laws on lead paint abatement must be carefully considered and followed.

## STUCCO

A number of historic properties feature historic stucco as an exterior wall finish. This coating is a type of exterior plaster that is applied directly to a masonry wall, or wood or metal lathe in wood-frame buildings. The existing historic plaster consists of a three-coat system, applied directly to the exterior wall. The recommendations provided below conform to the *Secretary of the Interior's Standards* as well as *Preservation Brief 22: The Preservation and Repair of Historic Stucco*, provided by the National Park Service. Note that it is not appropriate to install

stucco to masonry buildings that did not feature this finish historically.

Portland/lime plaster: A plaster used until the early 1900s, consisting of two base coats (known as the scratch coat and the brown coat) of lime putty, sand, water, and a fibrous binder (usually animal hair) and a finish layer containing a higher proportion of lime putty and minimal aggregate. Lime plaster has a slow curing time and can take up to a year to cure. Typical job-mixed formulas are available; however, existing plaster composition should be verified prior to patching with a new plaster system.

Gypsum plaster: A plaster that gained prominence in the early twentieth century due to its quick curing time (it dries completely in two to three weeks). Gypsum plaster consists of gypsum combined with a variety of different additives and sand as the base-coat aggregate. Gypsum plaster does not require a fibrous binder in the base coat. The finish coat consists of lime putty and gypsum. Gypsum plaster must be protected from moisture and as a result, must be applied to masonry surfaces on top of furring strips to create an air space. Typical job-mixed formulas are available; however, existing plaster composition should be verified prior to patching with a new plaster system.

To determine the exact composition of the existing historic plaster, it is recommended that a sample of the plaster be sent to a testing agency. If this approach is not feasible, then a craftsman experienced with historic stucco could identify and recommend a suitable plaster to repair the existing finish. Proper repair of large areas of historic stucco must be conducted by a tradesman experienced in the art of plastering. A key task in the continued preservation of historic stucco is the upkeep of paint coatings



such as whitewashing, paraffin, or oil mastics. The continued installation of a surface coating will prolong the life for several reasons, such as offering additional stability for the stucco and filling cracks before they expand and damage an entire wall surface. Other key elements in the upkeep of historic stucco are as follows:

1. Assessing the specific causes of damage to the stucco surface before it causes significant deterioration. Deterioration can be caused by leaky gutters, vegetation, ground settlement and other issues, most of which involve the infiltration of water through the stucco surface. The cause of the damage must be repaired prior to any work involving the stucco.

2. When repair of the surface is required, testing must be done to determine the extent of repair necessary. Patching deteriorated areas of stucco is preferred to replacement of an entire stucco surface. Patching must follow accepted practices to ensure a proper bond with the existing stucco. New stucco must match the historic stucco in strength, composition, color, and texture.
3. Clean historic stucco by the gentlest means possible. Most surfaces can be adequately cleaned using a low-pressure water wash.

**T**his booklet describes the Federal Historic Preservation Tax Incentives in general terms only. Every effort has been made to present current information as of the date given below. However, the Internal Revenue Code is complex and changes frequently. Furthermore, the provisions of the tax code regarding at-risk rules, passive activity limitation, and alternative minimum tax can affect a taxpayer's ability to use these tax credits. *Readers are strongly advised to consult an accountant, tax attorney, or other professional tax advisor, legal counsel, or the Internal Revenue Service for help in determining whether these incentives apply to their own situations.* For more detailed information, including copies of application forms, regulations, and other program information, contact one of the offices listed on pages 26-29.

Department of the Interior regulations governing the procedures for obtaining historic preservation certifications are more fully explained in Title 36 of the Code of Federal Regulations, Part 67. The Internal Revenue Service regulations governing the tax credits for rehabilitation are contained in Treasury Regulation Section 1.48-12. These sets of regulations take precedence in the event of any inconsistency with this booklet.

## Technical Preservation Services

National Park Service  
2009

Cover: German Bank, Dubuque, Iowa (1901). After rehabilitation for continued commercial and residential use. Courtesy State Historical Society of Iowa. Photograph: John Zeller.

## Quick Reference

Preservation Tax Incentives .....	2
What Is a Tax Credit? .....	3
20% Rehabilitation Tax Credit .....	4
Rehabilitation Tax Credits: Who Does What? .....	14
10% Rehabilitation Tax Credit .....	16
The 10% or 20% Credit: Which One Applies? .....	17
Other Tax Provisions Affecting Use of Preservation Tax Incentives .....	17
Rehabilitations Involving Governments and Other Tax-Exempt Entities .....	21
Other Tax Incentives for Historic Preservation .....	21
The Secretary of the Interior's Standards for Evaluating Significance Within Registered Historic Districts .....	23
The Secretary of the Interior's Standards for Rehabilitation .....	24
For More Information National Park Service, Internal Revenue Service and State Historic Preservation Offices .....	26

# Historic Preservation Tax Incentives



National Park Service  
U.S. Department of the Interior  
Technical Preservation Services

4

## 20% Rehabilitation Tax Credit

The Federal historic preservation tax incentives program (the 20% credit) is jointly administered by the U.S. Department of the Interior and the Department of the Treasury. The National Park Service (NPS) acts on behalf of the Secretary of the Interior, in partnership with the State Historic Preservation Officer (SHPO) in each State. The Internal Revenue Service (IRS) acts on behalf of the Secretary of the Treasury. Certification requests (requests for approval for a taxpayer to receive these benefits) are made to the NPS through the appropriate SHPO. Comments by the SHPO on certification requests are fully considered by the NPS. However, approval of projects undertaken for the 20% tax credit is conveyed *only in writing* by duly authorized officials of the National Park Service. For a description of the roles of the NPS, the IRS and the SHPO, see “Tax Credits: Who Does What?” on pages 14 -15.

The 20% rehabilitation tax credit applies to any project that the Secretary of the Interior designates a *certified rehabilitation of a certified historic structure*. The 20% credit is available for properties rehabilitated for commercial, industrial, agricultural, or rental residential purposes, but it is not available for properties used exclusively as the owner's private residence.

### What is a “certified historic structure?”

A *certified historic structure* is a building that is listed individually in the National Register of Historic Places —OR— a building that is located in a *registered historic district* and certified by the National Park Service as contributing to the historic significance of that district. The “structure” must be a building—not a bridge, ship, railroad car, or dam. (A *registered historic district* is any district listed in the National Register of Historic Places.

Hanny's Building, Phoenix, Arizona (1947). After rehabilitation of this department store for restaurant and other commercial use. Photograph: Ryden Architects, Inc.



5

A State or local historic district may also qualify as a *registered historic district* if the district and the enabling statute are certified by the Secretary of the Interior.)

### Obtaining Certified Historic Structure Status

Owners of buildings within historic districts must complete Part 1 of the Historic Preservation Certification Application—Evaluation of Significance. The owner submits this application to the SHPO. The SHPO reviews the application and forwards it to the NPS with a recommendation for approving or denying the request. The NPS then determines whether the building contributes to the historic district. If so, the building then becomes a *certified historic structure*. The NPS bases its decision on the Secretary of the Interior's “Standards for Evaluating Significance within Registered Historic Districts” (see page 23).

Buildings individually listed in the National Register of Historic Places are already certified historic structures. Owners of these buildings need not complete the Part 1 application (unless the listed property has more than one building).

Property owners unsure if their building is listed in the National Register or if it is located in a National Register or certified State or local historic district should contact their SHPO.

2

## Preservation Tax Incentives

Historic buildings are tangible links with the past. They help give a community a sense of identity, stability and orientation. The Federal government encourages the preservation of historic buildings through various means. One of these is the program of Federal tax incentives to support the rehabilitation of historic and older buildings. The Federal Historic Preservation Tax Incentives program is one of the Federal government's most successful and cost-effective community revitalization programs.

The National Park Service administers the program with the Internal Revenue Service in partnership with State Historic Preservation Offices. The tax incentives promote the rehabilitation of historic structures of every period, size, style and type. They are instrumental in preserving the historic places that give cities, towns and rural areas their special character. The tax incentives for preservation attract private investment to the historic cores of cities and towns. They also generate jobs, enhance property values, and augment revenues for State and local governments through increased property, business and income taxes. The Preservation Tax Incentives also help create moderate and low-income housing in historic buildings. Through this program, abandoned or underused schools, warehouses, factories, churches, retail stores, apartments, hotels, houses, and offices throughout the country have been restored to life in a manner that maintains their historic character.



3

Current tax incentives for preservation, established by the Tax Reform Act of 1986 (PL 99-514; Internal Revenue Code Section 47 [formerly Section 48(g)]) include:

- » a 20% tax credit for the *certified rehabilitation of certified historic structures*.
- » a 10% tax credit for the rehabilitation of *non-historic, non-residential buildings* built before 1936.

From time to time, Congress has increased these credits for limited periods for the rehabilitation of buildings located in areas affected by natural disasters. For more information, see the instructions on IRS Form 3468, Investment Credit, or contact your State Historic Preservation Office.

In all cases the rehabilitation must be a *substantial* one and must involve a *depreciable* building. (These terms will be explained later.)

## What Is a Tax Credit?

A tax credit differs from an income tax deduction. An income tax deduction lowers the amount of income subject to taxation. A tax credit, however, lowers the amount of tax owed. In general, a dollar of tax credit reduces the amount of income tax owed by one dollar.

- » The 20% rehabilitation tax credit equals 20% of the amount spent in a *certified rehabilitation of a certified historic structure*.
- » The 10% rehabilitation tax credit equals 10% of the amount spent to rehabilitate a *non-historic building* built before 1936.

Armstrong Cork Company Plant, Pittsburgh, Pennsylvania (1901-1913). After rehabilitation for retail and housing. Photograph: Charles Uhl.

## APPENDIX F: FEDERAL REHABILITATION TAX CREDIT

8

After the rehabilitation work is completed, the owner submits Part 3 of the Historic Preservation Certification Application—Request for Certification of Completed Work to the SHPO. The SHPO forwards the application to the NPS, with a recommendation as to certification. The NPS then evaluates the completed project against the work proposed in the Part 2—Description of Rehabilitation. Only completed projects that meet the Standards for Rehabilitation are approved as “certified rehabilitations” for purposes of the 20% rehabilitation tax credit.

### Before



### After



Carleton Place (historic name: Simmons Manufacturing Company), St. Paul, Minnesota (1909). Before and after rehabilitation for residential use. Courtesy Hess, Roise and Company.

9

### Processing Fees

The NPS charges a fee for reviewing applications, except where the total rehabilitation cost is under \$20,000. Fees are charged according to a two-tiered system: a preliminary fee and a final fee. The \$250 preliminary fee covers NPS review of proposed work. The final fee covers NPS review of completed projects. The final fee depends on the rehabilitation costs, according to the fee schedule below. The preliminary fee is deducted from the final fee. Payment should not be sent until requested by NPS. The NPS will not issue a certification decision until payment has been received. Fees—current as of this printing—may change. See the NPS website on page 26 for any fee changes.

Fee	Cost of Rehabilitation
\$500	\$20,000 to \$99,999
\$800	\$100,000 to \$499,999
\$1,500	\$500,000 to \$999,999
\$2,500	\$1,000,000 or more

### IRS Requirements

To be eligible for the 20% rehabilitation tax credit, a project must also meet basic IRS requirements:

- » The building must be *depreciable*. That is, it must be used in a trade or business or held for the production of income. It may be used for offices, for commercial, industrial or agricultural enterprises, or for rental housing. It may not serve exclusively as the owner's private residence.
- » The rehabilitation must be *substantial*. That is, during a 24-month period selected by the taxpayer, rehabilitation expenditures must exceed the greater of \$5,000 or the adjusted basis of the building and its structural components. The adjusted basis is generally the purchase price, minus the cost of land, plus improvements already made, minus depreciation already taken. Once the substantial rehabilitation test is met, the credit may be claimed for all qualified

6

### What if my building is not yet listed in the National Register?

Owners of buildings that are not yet listed individually in the National Register of Historic Places or located in districts that are not yet registered historic districts may use the Historic Preservation Certification Application, Part 1, to request a *preliminary determination of significance* from the National Park Service. Such a determination may also be obtained for a building located in a registered historic district but that is outside the period or area of significance of the district. A preliminary determination of significance allows NPS to review Part 2 of the application describing the proposed rehabilitation. Preliminary determinations, however, are not binding. They become final only when the building or the historic district is listed in the National Register or when the district documentation is amended to include additional periods or areas of significance. It is the owner's responsibility to obtain such listing through the State Historic Preservation Office in a timely manner.

### What is a “certified rehabilitation?”

The National Park Service must approve, or “certify,” all rehabilitation projects seeking the 20% rehabilitation tax credit. A *certified rehabilitation* is a rehabilitation of a *certified historic structure* that is approved by the NPS as being consistent with the historic character of the property and, where applicable, the district in which it is located. The NPS assumes that some alteration of the historic building will occur to provide for an efficient use. However, the project must not damage, destroy, or cover materials or features, whether interior or exterior, that help define the building's historic character.

### Application Process

Owners seeking certification of rehabilitation work must complete Part 2 of the Historic Preservation Certification Application—Description of Rehabilitation. Long-term lessees may also apply if their remaining lease period is at least 27.5 years for residential property or 39

7

years for nonresidential property. The owner submits the application to the SHPO. The SHPO provides technical assistance and literature on appropriate rehabilitation treatments, advises owners on their applications, makes site visits when possible, and forwards the application to the NPS, with a recommendation.

The NPS reviews the rehabilitation project for conformance with the “Secretary of the Interior's Standards for Rehabilitation,” and issues a certification decision. The entire project is reviewed, including related demolition and new construction, and is certified, or approved, only if the overall rehabilitation project meets the Standards. These Standards appear on pages 24-25. Both the NPS and the IRS strongly encourage owners to apply *before* they start work.



58 B Street, Virginia City, Nevada (1875). Rehabilitated as a bed and breakfast. Courtesy Chris Eichin.



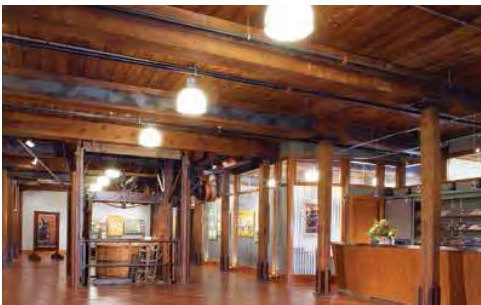
12

- » Photograph the building inside and outside—before and after the project. “Before” photographs are especially important. Without them, it may be impossible for the NPS to approve a project.
- » Read and follow the “Secretary of the Interior’s Standards for Rehabilitation” and the “Guidelines for Rehabilitating Historic Buildings.” If you are unsure how they apply to your building, consult with the SHPO or the NPS.
- » Once you have applied, alert the SHPO and the NPS to any changes in the project.

## Claiming the 20% Rehabilitation Tax Credit

Generally, the tax credit is claimed on IRS form 3468 for the tax year in which the rehabilitated building is placed in service. For phased projects, the tax credit may be claimed before completion of the entire project provided that the substantial rehabilitation test has been met. If a building remains in service throughout the rehabilitation, then the credit may be claimed when the substantial rehabilitation test has been met. In general, unused tax credit can be “carried back” one year and “carried forward” 20 years.

The IRS requires that the NPS certification of completed work (Application Part 3) be filed with the tax return claiming the tax credit. If final certification has not yet



been received when the taxpayer files the tax return claiming the credit, a copy of the first page of the Historic Preservation Certification Application—Part 2 must be filed with the tax return, with proof that the building is a *certified historic structure* or that such status has been requested. The copy of the application filed must show evidence that it has been received by either the SHPO or the NPS (date-stamped receipt or other notice is sufficient). If the taxpayer then fails to receive final certification within 30 months after claiming the credit, the taxpayer must agree to extend the period of assessment. If the NPS denies certification to a rehabilitation project, the credit will be disallowed.

## Recapture of the Credit

The owner must hold the building for five full years after completing the rehabilitation, or pay back the credit. If the owner disposes of the building within a year after it is placed in service, 100% of the credit is recaptured. For properties held between one and five years, the tax credit recapture amount is reduced by 20% per year.

The NPS or the SHPO may inspect a rehabilitated property at any time during the five-year period. The NPS may revoke certification if work was not done as described in the Historic Preservation Certification Application, or if unapproved alterations were made for up to five years after certification of the rehabilitation. The NPS will notify the IRS of such revocations.



Prizery/R.J. Reynolds Tobacco Warehouse, South Boston, Virginia (1900). Rehabilitated for commercial use. Photographs: Ian Bradshaw.

13

10

expenditures incurred before the measuring period, during the measuring period and after the measuring period through the end of the taxable year that the building is placed in service.

- » Phased rehabilitations—that is, rehabilitations expected to be completed in two or more distinct stages of development—must also meet the “substantial rehabilitation test.” However, for phased rehabilitations, the measuring period is 60 months rather than 24 months. This phase rule is available only if: (1) a set of architectural plans and specifications outlines and describes all rehabilitation phases; (2) the plans are completed before the physical rehabilitation work begins, and (3) it can reasonably be expected that all phases will be completed.
- » The property must be placed in service (that is, returned to use). The rehabilitation tax credit is generally allowed in the taxable year the rehabilitated property is placed in service.
- » The building must be a *certified historic structure* when placed in service. If the building or the historic district is not listed in the National Register, the owner must have requested that the SHPO nominate the building or the district to the National Register before the building is placed in service. If the building is located in a historic district that is listed in the National Register, the owner must submit Part 1 of the application before the rehabilitated building is placed in service.
- » Qualified rehabilitation expenditures include costs of the work on the historic building, as well as architectural and engineering fees, site survey fees, legal expenses, development fees, and other construction-related costs, if such costs are added to the property basis and are reasonable and related to the services performed. They do not include acquisition or furnishing costs, new additions that expand the building, new building construction, or parking lots, sidewalks, landscaping, or other related facilities.



114 NW Main Street, Rocky Mount, North Carolina (1928). Photograph: William Ferguson.

11

## Getting your project approved, or “certified”

Tens of thousands of projects have been approved for the historic preservation tax credit. Observing the following points will make approval of your project easier:

- » Apply as soon as possible—preferably before beginning work. Consult with the SHPO as soon as you can. Read carefully the program application, regulations, and any other information the SHPO supplies. Submit your application early in the project planning. Wait until the project is approved in writing by the NPS before beginning work. Work undertaken prior to approval by the NPS may jeopardize certification. In the case of properties not yet designated certified historic structures, apply before the work is completed and the building is placed in service.

16

## 10% Rehabilitation Tax Credit

The 10% rehabilitation tax credit is available for the rehabilitation of *non-historic buildings* placed in service before 1936.

As with the 20% rehabilitation tax credit, the 10% credit applies only to buildings—not to ships, bridges or other structures. The rehabilitation must be substantial, exceeding either \$5,000 or the adjusted basis of the property, whichever is greater. And the property must be *depreciable*.

The 10% credit applies only to buildings rehabilitated for *non-residential* uses. Rental housing would thus not qualify. Hotels, however, would qualify. They are considered to be in commercial use, not residential.

A building that was moved after 1935 is ineligible for the 10% rehabilitation credit. (A moved *certified historic structure*, however, can still be eligible for the 20% credit.) Furthermore, projects undertaken for the 10% credit must meet a specific physical test for retention of external walls and internal structural framework:

- » at least 50% of the building's external walls existing at the time the rehabilitation began must remain in place as external walls at the work's conclusion, and
- » at least 75% of the building's existing external walls must remain in place as either external or internal walls, and
- » at least 75% of the building's internal structural framework must remain in place.

### Claiming the 10% Rehabilitation Tax Credit

The tax credit must be claimed on IRS form 3468 for the tax year in which the rehabilitated building is placed in service. There is no formal review process for rehabilitations of non-historic buildings.

17

## The 10% or 20% Credit: Which One Applies?

The 10% rehabilitation tax credit applies only to non-historic buildings first placed in service before 1936 and rehabilitated for non-residential uses. The 20% rehabilitation tax credit applies only to *certified historic structures*, and may include buildings built after 1936. The two credits are mutually exclusive.

Buildings listed in the National Register of Historic Places are not eligible for the 10% credit. Buildings located in National Register listed historic districts or certified State or local historic districts are presumed to be historic and are therefore not eligible for the 10% credit. In general, owners of buildings in these historic districts may claim the 10% credit *only* if they file Part 1 of the Historic Preservation Certification Application with the National Park Service before the physical work begins and receive a determination that the building does *not* contribute to the district and is not a certified historic structure.

## Other Tax Provisions Affecting Use of Preservation Tax Incentives

A number of provisions in the Internal Revenue Code affect the way in which real estate investments are treated generally. These provisions include the “*at-risk*” rules, the *passive activity limitation*, and the *alternative minimum tax*. What these provisions mean, in practice, is that many taxpayers may not be able to use tax credits earned in a certified rehabilitation project.

A brief discussion of these matters follows. Applicants should seek professional advice concerning the personal financial implications of these provisions.

### At-Risk Rules

Under Internal Revenue Code Section 465, a taxpayer may deduct losses and obtain credits from a real estate

14

### Depreciation

Rehabilitated property is depreciated using the straight-line method over 27.5 years for residential property and over 39 years for nonresidential property. The depreciable basis of the rehabilitated building must be reduced by the full amount of the tax credit claimed.

## Rehabilitation Tax Credits: Who Does What?

The Federal historic preservation tax incentives program is a partnership among the National Park Service (NPS), the State Historic Preservation Officer (SHPO), and the Internal Revenue Service (IRS). Each plays an important role.

### SHPO

- » Serves as first point of contact for property owners.
- » Provides application forms, regulations, and other program information.
- » Maintains complete records of the State's buildings and districts listed in the National Register of Historic Places, as well as State and local districts that may qualify as registered historic districts.
- » Assists anyone wishing to list a building or a district in the National Register of Historic Places.
- » Provides technical assistance and literature on appropriate rehabilitation treatments.
- » Advises owners on their applications and makes site visits on occasion to assist owners.
- » Makes certification recommendations to the NPS.

### NPS

- » Reviews all applications for conformance to the *Secretary of the Interior's Standards for Rehabilitation*.

15

- » Issues all certification decisions (approvals or denials) in writing.
- » Transmits copies of all decisions to the IRS.
- » Develops and publishes program regulations, the *Secretary of the Interior's Standards for Rehabilitation*, the Historic Preservation Certification Application, and information on rehabilitation treatments.

### IRS

- » Publishes regulations governing which rehabilitation expenses qualify, the time periods for incurring expenses, the tax consequences of certification decisions by NPS, and all other procedural and legal matters concerning both the 20% and the 10% rehabilitation tax credits.
- » Answers public inquiries concerning legal and financial aspects of the Historic Preservation Tax Incentives, and publishes the audit guide, *Market Segment Specialization Program: Rehabilitation Tax Credit*, to assist owners.
- » Insures that only parties eligible for the rehabilitation tax credits utilize them.



Odd Fellows Building, Raleigh, North Carolina (c. 1880). Rehabilitated for continued commercial use. Courtesy Empire Properties.



20

## General Passive Loss Rules

Taxpayers with incomes less than \$100,000 (generally, adjusted gross income with certain modifications) may take up to \$25,000 in losses annually from rental properties.

This \$25,000 annual limit on losses is reduced for individuals with incomes between \$100,000 and \$150,000 and eliminated for individuals with incomes over \$150,000.

## Passive Credit Exemption

Individuals, including limited partners, with modified adjusted gross incomes of less than \$200,000 (and, subject to phase out, up to \$250,000) investing in a rehabilitation credit project may use the tax credit to offset the tax owed on up to \$25,000 of income. Thus, a taxpayer in the 33% tax bracket could use \$8,250 of tax credits per year ( $33\% \times \$25,000 = \$8,250$ ).

This \$25,000 amount is first reduced by losses allowed under the general “passive loss” rule above for taxpayers with incomes less than \$150,000.

## Alternative Minimum Tax

For purposes of the rehabilitation tax credit, the alternative minimum tax does not apply to qualified rehabilitation expenditures “properly taken into account for periods after December 31, 2007.”

However, for qualified rehabilitation expenditures taken into account for periods before January 1, 2008, taxpayers who are not required to pay tax under the regular tax system may still be liable for tax under the alternative minimum tax laws. Alternative minimum taxable income is computed from regular taxable income with certain adjustments and the addition of all appropriate tax preference items.

Nonrefundable credits, such as the rehabilitation tax credit, may not be used to reduce the alternative minimum tax. If a taxpayer cannot use the tax credit because of the alternative minimum tax, the credit can be carried back or forward.

21

## Rehabilitations Involving Governments and Other Tax-Exempt Entities

Property used by governmental bodies, nonprofit organizations, or other tax-exempt entities is not eligible for the rehabilitation tax credit if the tax-exempt entity enters into a disqualified lease (as the lessee) for more than 50% of the property. A disqualified lease occurs when:

- » Part or all of the property was financed directly or indirectly by an obligation in which the interest is tax-exempt under Internal Revenue Code Section 103(a) and such entity (or related entity) participated in such financing; or,
- » Under the lease there is a fixed or determinable price for purchase or an option to buy which involves such entity (or related entity); or,
- » The lease term is in excess of 20 years; or,
- » The lease occurs after a sale or lease of the property and the lessee used the property before the sale or lease.

## Other Tax Incentives for Historic Preservation

Other Federal and State tax incentives exist for historic preservation. They may be combined with the rehabilitation tax credit.

## Charitable Contributions for Historic Preservation Purposes

Internal Revenue Code Section 170(h) and Department of the Treasury Regulation Section 1.170A-14 provide for income and estate tax deductions for charitable contributions of partial interests in historic property (principally easements). Generally, the IRS considers that a donation of a qualified real property interest to preserve a *historically important land area* or a

18

## Before



investment only to the extent that the taxpayer is “at-risk” for the investment. The amount that a taxpayer is “at-risk” is generally the sum of cash or property contributions to the project plus any borrowed money for which the taxpayer is personally liable, including certain borrowed amounts secured by the property used in the project. In addition, in the case of the activity of holding real property, the amount “at-risk” includes qualified non-recourse financing borrowed from certain financial institutions or government entities.

## Passive Activity Limitation

The passive activity limitation provides that losses and credits from “passive” income sources, such as real estate

19

## After



John Harvey House, Detroit, Michigan (1875). (opposite) Before rehabilitation; (above) After rehabilitation as a bed and breakfast. Courtesy: Marilyn Nash-Yazbeck. Photograph: Steven C. Flum, Inc.

limited partnerships, cannot be used to offset tax liability from “active” sources such as salaries. This passive activity limitation does not apply to:

- » Most regular corporations.
- » Real estate professionals who materially participate in a real property trade or business and who satisfy eligibility requirements regarding the proportion and amount of time spent in such businesses.

For other taxpayers, two exceptions apply: a general exception and a specific exception for certified rehabilitations.

24

## The Secretary of the Interior's Standards for Rehabilitation

Rehabilitation projects must meet the following Standards, as interpreted by the National Park Service, to qualify as "certified rehabilitations" eligible for the 20% rehabilitation tax credit. The Standards are applied to projects in a reasonable manner, taking into consideration economic and technical feasibility.

The Standards (36 CFR Part 67) apply to historic buildings of all periods, styles, types, materials, and sizes. They apply to both the exterior and the interior of historic buildings. The Standards also encompass related landscape features and the building's site and environment as well as attached, adjacent, or related new construction.

1. A property shall be used for its historic purpose or be placed in a new use that requires minimal change to the defining characteristics of the building and its site and environment.
2. The historic character of a property shall be retained and preserved. The removal of historic materials or alteration of features and spaces that characterize a property shall be avoided.
3. Each property shall be recognized as a physical record of its time, place, and use. Changes that create a false sense of historical development, such as adding conjectural features or architectural elements from other buildings, shall not be undertaken.
4. Most properties change over time; those changes that have acquired historic significance in their own right shall be retained and preserved.
5. Distinctive features, finishes, and construction techniques or examples of craftsmanship that characterize a historic property shall be preserved.

6. Deteriorated historic features shall be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature shall match the old in design, color, texture, and other visual qualities and, where possible, materials. Replacement of missing features shall be substantiated by documentary, physical, or pictorial evidence.
7. Chemical or physical treatments, such as sandblasting, that cause damage to historic materials shall not be used. The surface cleaning of structures, if appropriate, shall be undertaken using the gentlest means possible.
8. Significant archeological resources affected by a project shall be protected and preserved. If such resources must be disturbed, mitigation measures shall be undertaken.
9. New additions, exterior alterations, or related new construction shall not destroy historic materials that characterize the property. The new work shall be differentiated from the old and shall be compatible with the massing, size, scale, and architectural features to protect the historic integrity of the property and its environment.
10. New additions and adjacent or related new construction shall be undertaken in such a manner that if removed in the future, the essential form and integrity of the historic property and its environment would be unimpaired.



Van Allen and Son Department Store, Clinton, Iowa (1913-1915). Courtesy Community Housing Initiatives, Inc.

25

22

*certified historic structure* meets the test of a charitable contribution for conservation purposes. For purposes of the charitable contribution provisions only, a *certified historic structure* need not be depreciable to qualify, and may include the land area on which it is located.

A facade easement on a building in a registered historic district must preserve the entire exterior of the building (including its front, sides, rear, and height) and must prohibit any change to the exterior of the building that is inconsistent with its historic character. The easement donor must enter into a written agreement with the organization receiving the easement contribution, and must provide additional substantiation requirements. If the deduction claimed is over \$10,000, the taxpayer must pay a \$500 filing fee. For additional information, see IRS publication 526.

## State Tax Incentives

A number of States offer tax incentives for historic preservation. They include tax credits for rehabilitation, tax deductions for easement donations, and property tax abatements or moratoriums. The SHPO will have information on current State programs. Requirements for State incentives may differ from those outlined here.

## Tax Credit for Low-Income Housing

The Tax Reform Act of 1986 (IRC Section 42) also established a tax credit for the acquisition and rehabilitation, or new construction of low-income housing. The credit is approximately 9% per year for 10 years for projects not receiving certain Federal subsidies and approximately 4% for 10 years for projects subsidized by tax-exempt bonds or below market Federal loans. The units must be rent restricted and occupied by individuals with incomes below the area median gross income. The law sets a 15-year compliance period. Credits are allocated by State housing credit agencies. The tax credit for low-income housing can be combined with the tax credit for the rehabilitation of certified historic structures.

23

## The Secretary of the Interior's Standards for Evaluating Significance Within Registered Historic Districts

The following Standards govern whether buildings within a historic district contribute to the significance of the district. Owners of buildings that meet these Standards may apply for the 20% rehabilitation tax credit. Buildings within historic districts that meet these Standards *cannot* qualify for the 10% credit.

1. A building contributing to the historic significance of a district is one which by location, design, setting, materials, workmanship, feeling and association adds to the district's sense of time and place and historical development.
2. A building not contributing to the historic significance of a district is one which does not add to the district's sense of time and place and historical development; or one where the location, design, setting, materials, workmanship, feeling and association have been so altered or have so deteriorated that the overall integrity of the building has been irretrievably lost.
3. Ordinarily buildings that have been built within the past 50 years shall not be considered to contribute to the significance of a district unless a strong justification concerning their historical or architectural merit is given or the historical attributes of the district are considered to be less than 50 years old.

**KENTUCKY**, Kentucky Heritage Council, 300 Washington Street, Frankfort, KY 40601, 502-564-7005. **LOUISIANA**, Office of Cultural Development, PO Box 44247, Baton Rouge, LA 70804, 225-342-8160. **MAINE**, Maine Historic Preservation Commission, 55 Capitol Street, Station 63, Augusta, ME 04333-0065, 207-287-2132. **MARYLAND**, Maryland Historical Trust, 100 Community Place, Crownsville, MD 21032-2023, 410-514-7600. **MASSACHUSETTS**, Massachusetts Historical Commission, Massachusetts Archives Facility, 220 Morrissey Boulevard, Boston, MA 02125, 617-727-8470. **MICHIGAN**, State Historic Preservation Office, Michigan Historical Center, Department of History, Arts and Libraries, PO Box 30740, 702 W. Kalamazoo Street, Lansing, MI 48909-8240, 517-373-1630. **MINNESOTA**, Minnesota Historical Society, State Historic Preservation Office, 345 Kellogg Boulevard West, St. Paul, MN 55102, 651-259-3450. **MISSISSIPPI**, Department of Archives and History, PO Box 571, Jackson, MS 39205, 601-576-6850. **MISSOURI**, Department of Natural Resources, PO Box 176, Jefferson City, MO 65102, 573-751-7858. **MONTANA**, Montana Historical Society, 1410 8th Avenue, PO Box 201202, Helena, MT 59620-1202, 406-444-7715. **NEBRASKA**, Nebraska State Historical Society, 1500 R Street, PO Box 82554, Lincoln, NE 68501-2554, 402-471-4746. **NEVADA**, State Historic Preservation Office, Department of Cultural Affairs, 100 No. Stewart Street, Capitol Complex, Carson City, NV 89701, 775-684-3448. **NEW HAMPSHIRE**, Division of Historical Resources, 19 Pillsbury Street, 2nd Floor, Concord, NH 03301, 603-271-6435. **NEW JERSEY**, Department of Environmental Protection, Historic Preservation Office, PO Box 404, Trenton, NJ 08625-0404, 609-292-2023. **NEW MEXICO**, State Historic Preservation Division, Office of Cultural Affairs, Villa Rivera Building, 3rd floor, 228 E. Palace Avenue, Santa Fe, NM 87503, 505-827-6320. **NEW YORK**, Office of Parks, Recreation and Historic Preservation, Bureau of Historic Preservation, Peebles Island, PO Box 189, Waterford, NY 12188-0189, 518-237-8643. **NORTH CAROLINA**, Office of Archives and History, 4617 Mail Service Center, Raleigh, NC 27699-4617, 919-807-6585. **NORTH DAKOTA**, State Historical Society of North Dakota, ND Heritage Center, 612 East Boulevard Ave., Bismarck, ND 58505, 701-328-2666.

**OHIO**, Historic Preservation Office, Ohio Historical Society, 1982 Velma Avenue, Columbus, OH 43211-2497, 614-298-2000. **OKLAHOMA**, State Historic Preservation Office, Oklahoma History Center, 2401 North Laird Avenue, Oklahoma City, OK 73105-7914, 405-521-6249. **OREGON**, Oregon Historic Preservation Office, 725 Summer St. NE, Suite C, Salem OR 97301, 503-986-0688. **PENNSYLVANIA**, Pennsylvania Historical and Museum Commission, Bureau for Historic Preservation, Commonwealth Keystone Building, 400 North Street, 2nd floor, Harrisburg, PA 17120-0093, 717-787-0772. **COMMONWEALTH OF PUERTO RICO**, State Historic Preservation Office, La Fortaleza, PO Box 82, San Juan, PR 00901, 787-721-3737. **RHODE ISLAND**, Rhode Island Historical Preservation and Heritage Commission, Old State House, 150 Benefit Street, Providence, RI 02903, 401-277-2678. **SOUTH CAROLINA**, Department of Archives and History, 8301 Parklane Road, Columbia, SC 29223-4905, 803-896-6196. **SOUTH DAKOTA**, South Dakota State Historical Society, 900 Governors Drive, Pierre, SD 57501-2217, 605-773-3458. **TENNESSEE**, Tennessee Historical Commission, 2941 Lebanon Road, Nashville, TN 37243-0442, 615-532-1550. **TEXAS**, Texas Historical Commission, PO Box 12276, Austin, TX 78711-2276, 512-463-6094. **UTAH**, Utah State Historical Society, 300 S. Rio Grande, Salt Lake City, UT 84101-1106, 801-533-3500. **VERMONT**, Vermont Division for Historic Preservation, National Life Building, Drawer 20, Montpelier, VT 05620-0501, 802-828-3056. **VIRGIN ISLANDS**, Virgin Islands State Historic Preservation Office, Kongens Gade 17, Charlott Amalie, St. Thomas, VI 00802, 340-776-8605. **VIRGINIA**, Department of Historic Resources, 2801 Kensington Avenue, Richmond, VA 23221, 804-367-2323. **WASHINGTON**, Department of Archaeology and Historic Preservation, PO Box 48343, Olympia, Washington 98504-8343, 360-586-3065. **WEST VIRGINIA**, Division of Culture and History, 1900 Kanawha Boulevard East, Capitol Complex, Charleston, WV 25305-0300, 304-558-0240. **WISCONSIN**, Division of Historic Preservation - Public History, Wisconsin Historical Society, 816 State Street, Madison, WI 53706, 608-264-6490. **WYOMING**, State Historic Preservation Office, Division of Cultural Resources, Wyoming State Parks and Cultural Resources, 3rd Floor Barrett, 2301 Central Avenue, Cheyenne, WY 82002, 307-777-7697.

## For More Information

For more information on tax incentives for historic preservation, contact the NPS, the IRS, or one of the SHPOs listed below. Available information includes:

- » A *Catalog* of NPS publications on appropriate methods to preserve historic buildings. These include *Guidelines for Rehabilitating Historic Buildings*, *Preservation Briefs*, and many others.
- » The Historic Preservation Certification Application (a 3-part form: Part 1—Evaluation of Significance; Part 2—Description of Rehabilitation; Part 3—Request for Certification of Completed Work).
- » Department of the Interior, National Park Service, regulations on “Historic Preservation Certifications.” [36 CFR Part 67].
- » Department of the Treasury, Internal Revenue Service, regulations on “Investment Tax Credit for Qualified Rehabilitation Expenditures.” [Treasury Regulation Section 1.48-12].
- » *Market Segment Specialization Program: Rehabilitation Tax Credit* (available only from the IRS).

## National Park Service

Preservation Tax Incentives  
Technical Preservation Services  
National Park Service  
1849 C St., NW (org code 2255)  
Washington, DC 20240

**tel:** 202-513-7270  
**email:** nps\_hps-info@nps.gov  
**web:** www.nps.gov/history/hps/tps/tax/

## Internal Revenue Service

**web:** www.nps.gov/history/hps/tps/tax/IRS.htm

**Additional IRS website:** www.irs.gov/businesses/small/industries/article/0,id=97599,00.html

## State Historic Preservation Offices

Websites for the State Historic Preservation Offices listed below can be found at: **www.ncshpo.org**

**ALABAMA**, Alabama Historical Commission, 468 South Perry Street, Montgomery, AL 36130-0900, 334-242-3184. **ALASKA**, History and Archeology, Department of Natural Resources, Division of Parks and Outdoor Recreation, 550 W. 7th Avenue, Suite 1310, Anchorage, AK 99501-3565, 907-269-8721. **ARIZONA**, Office of Historic Preservation, Arizona State Parks, 1300 W. Washington, Phoenix, AZ 85007, 602-542-4009. **ARKANSAS**, Arkansas Historic Preservation Program, 1500 Tower Building, 323 Center Street, Little Rock, AR 72201, 501-324-9880. **CALIFORNIA**, Office of Historic Preservation, Department of Parks and Recreation, PO Box 942896, Sacramento, CA 94296-0001, 916-653-6624. **COLORADO**, Colorado Historical Society, Colorado History Museum, 1300 Broadway, Denver, CO 80203-2137, 303-866-3355. **CONNECTICUT**, Connecticut Commission on Culture and Tourism, History and Museums Division, One Constitution Plaza, 2nd Floor, Hartford, CT 06103, 860-256-2800. **DELAWARE**, Division of Historical and Cultural Affairs, 21 The Green, Dover, DE 19901, 302-736-7400. **DISTRICT OF COLUMBIA**, Historic Preservation Office, D.C. Office of Planning, 801 North Capitol Street, NE, 3rd floor, Washington, DC 20002, 202-442-8800. **FLORIDA**, Division of Historical Resources, Department of State, R.A. Gray Building, 500 S. Bronough Street, Tallahassee, FL 32399-0250, 850-245-6333. **GEORGIA**, Department of Natural Resources, Historic Preservation Division, 34 Peachtree Street, NW, Suite 1600, Atlanta, GA 30303, 404-656-2840. **HAWAII**, Hawaii Historic Preservation Office, 1151 Punchbowl Street, Honolulu, HI 96813, 808-587-0401. **IDAHO**, Idaho State Historic Preservation Office, 210 Main St., Boise, ID 83702-7264, 208-334-3861. **ILLINOIS**, Illinois Historic Preservation Agency, Preservation Services Division, One Old State Capitol Plaza, Springfield, IL 62701, 217-782-4836. **INDIANA**, Department of Natural Resources, 402 West Washington Street, Room W 274, Indianapolis, IN 46204, 317-232-4020. **IOWA**, State Historical Society of Iowa, 600 East Locust Street, Des Moines, IA 50319-0290, 515-281-4137. **KANSAS**, Kansas State Historical Society, Cultural Resources Division, 6425 SW 6th Avenue, Topeka, KS 66615-1099, 785-272-8681, ext. 240.

## State of Louisiana Residential Rehabilitation Tax Credit RS 47:297.6

### Program Guidance

Effective January 1, 2006, homeowners may qualify for a 25% tax credit against their individual State income taxes when they rehabilitate their historic home. Owners of vacant and blighted property will be eligible for a 50% credit. The property must be (or become) the owner's primary residence. The State Residential Rehabilitation Tax Credit Program encourages taxpayers to preserve and improve their homes by offering a tax credit on rehabilitation costs associated with residences which meet Program requirements. It has been authorized at \$10 million in total credits per year and is effective through December 31, 2015. The credit will be granted on a first come, first served basis.

The Program is administered by the Louisiana Division of Historic Preservation (Division) and the Louisiana Department of Revenue. It is the responsibility of the Division Director to determine which buildings qualify for the Program, if the planned rehabilitation work meets the U.S. Secretary of the Interior's Standards for Rehabilitation, if the rehabilitation work was carried out in accordance with the approved scope of work, and if other Program requirements have been met. All work must be approved for rehabilitation and not primarily remodeling.

While the Division determines if the building qualifies for the credit, the Department of Revenue handles all fiscal matters. The credit is earned only after the rehabilitation work is completed and the qualifying expenditures are finalized.

#### **THE CREDIT**

A tax credit is a direct, dollar for dollar reduction in the amount of money a taxpayer must pay in state income taxes for a given year. The tax credit for qualifying rehabilitation expenditures will be divided into five equal portions, with the first portion being used in the taxable year in which the rehabilitated building is placed in service, and the remaining four portions used once a year for the next four years. For the purposes of this program, the "placed in service" date is the project completion date. To obtain the full credit, the taxpayer who initially earned the credit must continue to own and occupy the building as the taxpayer's primary residence. If the building is sold during the five-year credit period, all unused credit will immediately become void. The credit award is capped at \$25,000 per structure.

For further guidance and information regarding the State Residential Historic Rehabilitation Tax Credit, please contact: Tax Act Staff, Louisiana Division of Historic Preservation, P.O. Box 44247, Baton Rouge, LA 70804; Phone (225) 342-8160; Fax (225) 342-8173; [www.louisianahp.org](http://www.louisianahp.org)

#### **HOW IS THE VALUE OF THE CREDIT CALCULATED?**

For this Program, the Credits are calculated as a percentage of the Eligible Rehabilitation Expenditures. If the residential structure is owned and occupied by two or more individuals, the credit will be divided between the owner-occupants in proportion to their contribution to the eligible costs and expenses, unless they agree to an alternate division. Owners are responsible for maintaining accurate records to show contribution amounts.

If the credit is claimed on only a portion of the building, as in the case of a mixed-use structure, only those Eligible Rehabilitation Expenditures that are properly allocable to this portion may be included as part of the estimate and actual accounting of project expenditures. This is allocated on a square foot percentage basis.

## HOW ARE THE CREDITS AWARDED?

Each year, beginning January 1, 2006 and ending December 31, 2015, \$10 million in tax credits is made available for rehabilitation projects which meet the Program guidelines and have an approved State Residential Tax Credit Certificate of Completion. Once all available funds for credits have been assigned, the Division of Historic Preservation will not assign any additional credits until January 1 of the following year. If the total amount of credit applied for (to Revenue) in any particular year exceeds the aggregate amount of tax credits allowed for that year, the excess will be treated as having been applied for on the first day of the subsequent year. Any credits forfeited due to non-compliance with the Program requirements will be re-assigned to eligible projects. The Department of Revenue will not award credits until the Division of Historic Preservation approves the Certificate of Completed Work.

## WHICH PROPERTIES QUALIFY FOR TAX CREDITS?

For the purposes of the State Residential Rehabilitation Tax Credit Program, a Louisiana building meets the criteria for a Qualified Residence if it is:

- A contributing element to a National Register District, as determined by the Division Director;
- A contributing element to a locally designated historic district, as determined by the Division Director;
- A contributing element to a Main Street District, as determined by the Division Director;
- A contributing element to a Cultural District, as determined by the Division Director;
- A contributing element to a Downtown Development District, as determined by the Division Director;
- A residential structure that has been listed or that is eligible for listing on the National Register of Historic Places, as determined by the Division Director; or,
- A vacant and blighted building at least 50 years old.

## WHICH PROPERTIES ARE CONSIDERED VACANT AND BLIGHTED?

A building is considered vacant and blighted if it has been unoccupied for six months, and if at least one of the following conditions exists:

- The building conditions pose a danger to the community;
- The building is not being properly maintained;
- The building is becoming dilapidated;
- The building is attracting illegal activity;
- The building is a fire hazard; or,
- The building is a factor in depreciating property values in the neighborhood due to its poorly maintained state.

## WHICH PROPERTIES DO NOT QUALIFY FOR THE PROGRAM?

- Condos
- Secondary homes



- Corporate housing
- Buildings that are not the owner's primary residence
- Buildings that are solely commercial
- Buildings that are less than 50 years old (unless individually listed or eligible for listing in the National Register)

### **HOW DOES A REHABILITATION PROJECT QUALIFY FOR TAX CREDITS?**

A rehabilitation project qualifies for tax credits if:

- the work is carried out on a building which has been determined to be a Qualified Residence;
- if it is rehabilitated according to the Secretary of the Interior's Standards for Rehabilitation (Standards), as determined by the Division of Historic Preservation;
- if the rehabilitation work has not been completed prior to the submission of the Part A application
- if the costs of the rehabilitation exceed ten thousand dollars (\$10,000);
- if the rehabilitated building is the owner's primary residence; and,
- if the work is primarily rehabilitation and not remodeling.

Only one State Residential Historic Rehabilitation Tax Credit is allowed per building.

### **WHAT ARE ELIGIBLE REHABILITATION EXPENDITURES?**

Any expenditure for a structural component of a building will qualify for the rehabilitation tax credit. Structural components include walls, partitions, floors, ceilings, permanent coverings such as paneling or tiling, windows and doors, components of central air conditioning or heating systems, plumbing and plumbing fixtures, electrical wiring and lighting fixtures, chimney and fireplace repair, stairs, elevators, sprinkling systems, fire escapes, and other components related to the operation and maintenance of the building.

In addition to the above-named "hard costs," there are "soft costs" which also qualify. These include construction period interest and taxes, architect fees, engineering fees, and construction management costs.

### **WHAT ARE INELIGIBLE EXPENSES?**

Ineligible expenses include: acquisition costs, appliances, cabinets, carpeting (if tacked in place and not glued), decks, demolition costs (removal of a building on property site), enlargements costs (increasing total volume), fencing, financing fees, furniture, landscaping, cost of moving building (if part of acquisition), outdoor lighting remote from building, parking lots, paving, porches and porticos (not part of original building), retaining walls, sidewalks, signage, storm sewer construction costs, and window treatments.

### **REHABILITATION VS. REMODELING**

Rehabilitation and remodeling are seemingly interchangeable terms. For the purposes of the State Residential Historic Rehabilitation Program, however, they are quite distinct. Rehabilitation is defined as "the process of returning a property to a state of utility, through repair or alteration, which makes possible an efficient contemporary use while preserving those portions and features of the property which are significant to its historic, architectural, and cultural values."



Remodeling is defined as “giving a new shape to something.” For Program purposes, this means alterations that are primarily cosmetic in nature or that enhance a property that is for the most part already in good condition.

Example 1: Rewiring the entire house or a portion thereof to meet Code (rehabilitation) instead of solely adding high-speed Internet access, and wiring for cable and audio systems (remodeling).

Example 2: Repairing an existing fireplace and chimney (rehabilitation) instead of adding them to a building that never had them (remodeling).

The entire project must consist primarily of rehabilitation work or it will not qualify for this program.

## THE APPLICATION PROCESS AND FEES

The Louisiana Division of Historic Preservation will maintain all application files for this program. Certain information within the files will be kept confidential. The confidential information will include, but is not limited to, social security numbers and copies of personal checks.

### WHAT ARE THE FEES?

At the time of the Proposed Rehabilitation Application submission, the applicant must forward to the Division a required \$250.00 fee for processing. The Division accepts payment in the form of personal checks, cashiers checks, money orders, or certified checks. Proposed Rehabilitation applications not accompanied by the required fee payment will be held by the Division for up to 60 days or until payment is received, whichever comes first. Only upon receipt of the fee will the Division process the Proposed Rehabilitation application. The Division may return the Proposed Rehabilitation application after 60 days if no fee is received. The Proposed Rehabilitation Application fee is for review and handling only, and in no way determines the outcome of the review and the approval process.

### PRELIMINARY APPLICATION-A

In order to establish initial eligibility for this Program, a completed Preliminary Application must be submitted. A determination regarding the Preliminary Application is usually rendered in writing by the Division of Historic Preservation within thirty (30) days of receipt of an adequately documented application.

### PROPOSED REHABILITATION APPLICATION-B

To determine if the proposed rehabilitation work will meet the Secretary of the Interior’s Standards for Rehabilitation, a completed Proposed Rehabilitation Application must be submitted for review. The Proposed Rehabilitation Application contains general information about the project as well as a description of each of the features which will be impacted by the project, their existing conditions, and the nature and estimated cost of the proposed work.

If, after review of the Proposed Rehabilitation Application, the proposed work is determined to be consistent with the Standards, the Division Director will approve the Proposed Rehabilitation Application. If the proposed work is found to be inconsistent with the Standards, the applicant is provided with an opportunity to revise the project to bring it into compliance with the Standards.

Although it is not required that the Proposed Rehabilitation Application be submitted before the start of rehabilitation work, it is *strongly* recommended. Applicants who proceed with rehabilitation work without an approved Proposed Rehabilitation Application are proceeding at their own risk. Certain requirements, known as Conditions, may be placed on a project by the Division as part of the approved Proposed Rehabilitation Application. Documentation of satisfaction of these conditions must be provided when the project is completed. A determination regarding the Proposed Rehabilitation Application is usually rendered in writing by the Division of Historic Preservation within thirty (30) days of receipt of an adequately documented Proposed Rehabilitation Application.

## **CERTIFICATE OF COMPLETION-C**

After completion of the project, the applicant must submit a State Residential Tax Credit Application Certificate of Completion. Upon receipt of this application, the owner is then placed provisionally in line for the credit. Provided that the application is complete, the review period is usually 30 days. During the review period, the Division determines if the project was completed according to the approved Proposed Rehabilitation Application and the Secretary's Standards for Rehabilitation. A site inspection may be required.

If the Program requirements have been met as determined by the Division, then the Certificate of Completion is approved and the applicant qualifies for the tax credit, and his or her place in line for the credit is then confirmed.

However, if the completed project does not meet Standards and all other program requirements, then the project is denied and the provisionally awarded place in line is forfeited.

An accounting of the Eligible Rehabilitation Expenditures for the project must be submitted with the Certificate of Completion. As part of their review, the Department of Revenue may ask applicants to provide further information on project costs.

## **APPEALS**

Applicants whose submissions, at any of the three application stages, have been officially denied by the Director may appeal to the Assistant Secretary, Louisiana Office of Cultural Development.

Written notice of the intent to appeal must be received by the Office of Cultural Development within ten business days following the date that the Director's official denial is mailed. The full appeal must be received no later than 30 calendar days following the end of the period to file a notice of appeal. Appeals must be in writing and must detail specific reasons the Director's findings should be partially or completely reconsidered or overturned. At his or her discretion, the Assistant Secretary may hold a hearing in connection with the appeal.

The Assistant Secretary may:

- Sustain the Director's findings,
- Overturn part or all of those findings,
- At his or her discretion, mediate between the Director and the applicant to arrive at a mutually satisfactory resolution, or
- Decline to consider the appeal.

The Assistant Secretary's final response to any appeal must be issued no later than 90 days after receiving the full appeal. There are no further administrative appeal mechanisms past the Assistant Secretary's final response.

Each building is considered unique due to its construction and location. Therefore, no previous decision(s) rendered by the Division Director or the Assistant Secretary of the Office of Cultural Development may be precedent setting.

**WHERE CAN FURTHER INFORMATION BE OBTAINED?**

Application forms can be requested from the Tax Act Staff, Louisiana Division of Historic Preservation, P.O. Box 44247, Baton Rouge, LA 70804; Phone (225) 342-8160; Fax (225) 342-8173; [www.louisianahp.org](http://www.louisianahp.org). The Division will also provide copies of the Secretary of the Interior's Standards for Rehabilitation and Guidelines for Rehabilitating Historic Buildings at no cost.

The National Park Service's website features a wide variety of preservation-related articles and guides. <http://www.nps.gov/history/hps/tps/index.htm>

## National Trust for Historic Preservation

1785 Massachusetts Ave,  
NW  
Washington, DC 20036  
(202) 588-6000  
(202) 588-6462 (fax)  
info@nthp.org  
[www.PreservationNation.org](http://www.PreservationNation.org)

This tip sheet on historic wood windows was developed as part of the National Trust for Historic Preservation's [Sustainability Initiative](http://www.PreservationNation.org).

**About the Initiative:** Historic preservation can – and should – be an important component of any effort to promote sustainable development. The conservation and

improvement of our existing built resources, including reuse of historic and older buildings, greening the existing building stock, and reinvestment in older and historic communities, is crucial to combating climate change.

**Learn more about Preservation and Sustainability on the web:**  
[www.preservationnation.org/issues/sustainability](http://www.preservationnation.org/issues/sustainability)

**For more information, contact:**

**Patrice Frey, Director of Sustainability Research**  
(202) 588-6255  
Patrice\_Frey@nthp.org

**Barbara A. Campagna, AIA, LEED AP, Graham Gund Architect**  
(202) 588-6291  
Barbara\_Campagna@nthp.org

**Rebecca Williams (author of this publication), Field Representative, Northeast Office**  
(617) 523-0885  
Rebecca\_Williams@nthp.org

© 2009 National Trust for Historic Preservation. All rights reserved.

## Introduction

There is an epidemic spreading across the country. In the name of energy efficiency and environmental responsibility, replacement window manufacturers are convincing people to replace their historic wood windows. The result is the rapid erosion of a building's character, the waste of a historic resource, and a potential net loss in energy conservation. Typically replacement windows are vinyl, aluminum, or a composite with wood, and none will last as long as the original window. Repairing, rather than replacing, wood windows is most likely to be the “greener option” and a more sustainable building practice.

Research shows that most traditionally designed wood-frame buildings lose more heat through the roof and un-insulated walls than through the windows.<sup>1</sup> A historic wood window, properly maintained and fitted with a storm window, can be just as energy efficient as a new window.<sup>2</sup> Replacing a historic single-pane window also may not save you much money in the long run. While the exact figure will vary depending on the type of window installed and whether or not a storm window is used, studies have found that it could take 100 years or more for a replacement window to pay for itself in energy savings.<sup>3</sup> According to information published in a recent *Old House Journal* article, it could take 240 years to recoup the cost of replacing a single-pane window-storm window combination with a low-e glass double-pane thermal replacement window.<sup>4</sup> Also, a historic wood window can easily last more than 100 years, while a new window may not last 25.

Not every wood window can be repaired and there are situations where replacement is appropriate. However, many historic wood windows can and should be repaired, especially if the windows were manufactured before about 1940. Wood windows made before this



Historic windows are among the most important elements of a building. Simple repairs and routine maintenance coupled with storm windows make for energy efficiency that in most cases matches, if not exceeds, the efficiency of replacement windows. Workshops throughout the region have taught building owners easy ways to care for their historic windows. At the Woodlawn Museum in Ellsworth, ME, a grant from the National Trust for Historic Preservation helped fund a window repair workshop. Photo courtesy of the Woodlawn Museum

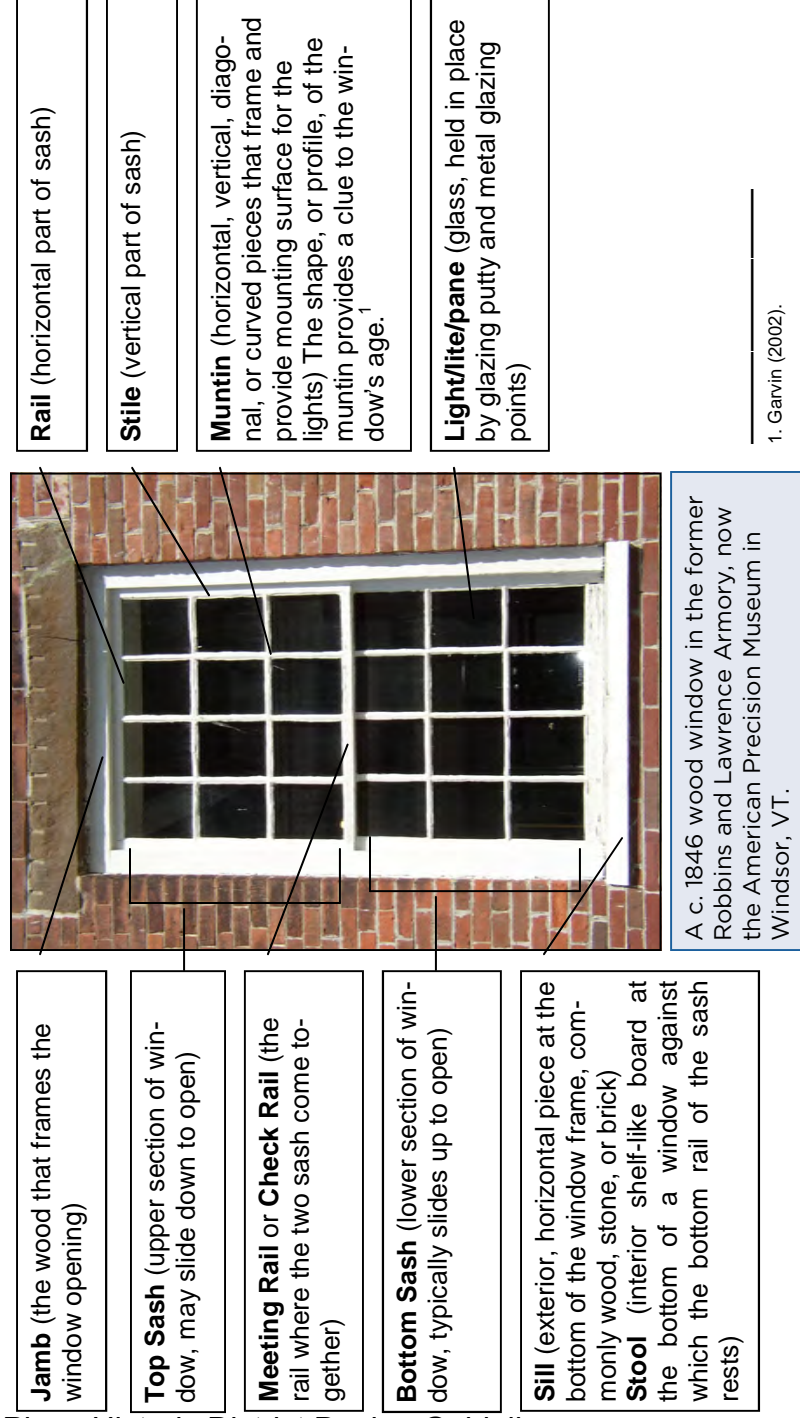
time were constructed with individual parts, each of which can be repaired or replaced. The wood itself is denser and of higher quality than what is grown today, and it is generally more rot- and warp-resistant than modern wood.

These are just some of the practical reasons to repair rather than replace historic wood windows. In addition, repairing the historic window helps maintain a building's authenticity. Once original material is removed from a building, it is gone forever. There are many more benefits to repairing your wood windows, so keep reading.

1. Rypkema (2006); James et al (1996); Klems (2002).
2. James et al (1996); Klems (2002).
3. Sedovic (2005); e.g. research by Keith Heberern, calculations available at [www.historichomeworks.com/hhw/education/windowshandout/windowenergyanalysis.pdf](http://www.historichomeworks.com/hhw/education/windowshandout/windowenergyanalysis.pdf).
4. “Let the Numbers Convince You: Do the Math.” *Old House Journal* 35 no. 5 (September/October 2007).

## Wood Window Basics

Using this 12-over-12, double-hung wood window as our example, here are the basic terms used for wood window parts. This window is called 12-over-12 because there are 12 panes of glass in each sash. Both sashes are moveable so it is called double-hung. If only the bottom sash moves, it is called single-hung.



1. Garvin (2002).

## APPENDIX H: 2009 WINDOW TIP SHEET

### My Windows Are Old and Drafty, Why Shouldn't I Buy New Ones?

1. **More heat is typically lost through your roof and un-insulated walls than through your windows.** Adding just 3 and 1/2 inches of insulation in your attic can save more energy than replacing your windows.<sup>1</sup>
2. **Replacement windows are called "replacement" for a reason.** Manufacturers often offer lifetime warranties for their windows. What they don't make clear is that 30% of the time, a replacement window will be replaced within 10 years.<sup>1</sup>
3. **Replacement windows that contain vinyl or PVC are toxic to produce and create toxic by-products.** Installing these in your house is not a 'green' approach.<sup>2</sup>
4. **If your wood windows are 60 years old or older, chances are that the wood they are made of is old growth—dense and durable wood that is now scarce.** Even high-quality new wood windows, except for mahogany, won't last as long as historic wood windows.
5. Studies have demonstrated that **a historic wood window, properly maintained, weatherstripped and with a storm window, can be just as energy efficient as a new window.**<sup>2</sup>

6. According to studies, it can take 240 years to recoup enough money in energy savings to pay back the cost of installing replacement windows.<sup>3</sup>
7. **Each year, Americans demolish 200,000 buildings.** That is 124 million tons of debris, or enough waste to construct a wall 30 feet high and 30 feet thick around the entire U.S. coastline.<sup>4</sup> Every window that goes into the dump is adding to this problem.
8. With a little bit of practice, it can be easy—and inexpensive—to repair and maintain your wood windows.<sup>5</sup>
9. Not a DIY-er? There are people near you who can do it for you. **Hiring a skilled tradesperson to repair your windows fuels the local economy and provides jobs.**<sup>1</sup>
10. **Historic wood windows are an important part of what gives your older building its character.**

1. Rypkema (2006). 2. Sedovic (2005). 3. e.g. Calculations by Keith Heberern available at [www.historichomeworks.com/hhw/education/windowshandout/windowenergyanalysis.pdf](http://www.historichomeworks.com/hhw/education/windowshandout/windowenergyanalysis.pdf). 4. Hadley (2006). 5. e.g. [www.historichomeworks.com](http://www.historichomeworks.com)



## Basic Maintenance

There are many good, practical books and magazine articles to guide a handy person in the basic maintenance of wood windows. Several publications are listed in the references section of this tip sheet. To get you started, here are some of the keys to many years—and generations—of life with older wood windows.

1. Keep the exterior surfaces painted, including the glazing putty. Paint protects the wood and putty from water and extends their service life. Be especially attentive to horizontal surfaces where water may collect.
2. Glazing putty will eventually dry out and is meant to be periodically replaced. You can do spot repairs initially, but eventually it will be easier to re-glaze the whole sash.
3. Keep movable surfaces, such as the inside jamb, free of paint buildup so that the sash can slide freely.
4. If your sashes are hung with cord, keep the rope free of paint. This will improve the window's operability. Cord will eventually dry out and break but can be replaced. When replacing the cord you can also re-hang the weights so that the sash will be balanced.

## Winter Tips

Most of the heat transfer occurs around the perimeter of the sash rather than through the glass. So the tighter the seal around the window and between the upper and lower sash, the more energy efficient the window will be. Here are some tips to help you save on your heating bills.

**Check the lock.** Most people think the sash lock is primarily for security. It does help with security, but the lock's most important job is to

ensure that the meeting rails are held tightly together. A tight fit greatly reduces air infiltration.

**Weather stripping**—add it or re-new it. Adding weather stripping to your window can increase the window's efficiency by as much as 50%. It's an inexpensive way to boost your window's efficiency. There are many different kinds from which to choose. Refer to the articles listed at the end of this tip sheet. The staff at your local hardware store should also be able to assist you.

**Storm windows**—use them!

There are many styles from which to choose, including storms that can be fitted on the interior of the window. Many studies have shown that a wood window in good condition fitted with a storm window can be just as energy efficient as the more expensive replacement window. Due to the thermal exchange properties of wood, there is also a growing interest in traditional wood-framed storm windows as they transfer less heat than metal-framed storms.

**Condensation.** If you find condensation on the inside of your primary window, cold air leaking through the storm window is likely the culprit. If the condensation is forming on the inside surface of the storm window, warm air from the building interior is leaking in around the primary window. When warm and cold air are present on opposite sides of glass, condensation forms (think of a cold glass of lemonade on a hot day). When condensation forms on your window glass, water can collect on the horizontal wood parts of the rails, muntins, and sill, which can lead to paint failure and rot. To reduce condensation, you need to limit the amount of leaking air. Add or re-

place weather stripping, make sure the sash are meeting properly and that the sash lock is tight, and check the seal around the exterior of the storm window and caulk if necessary. When caulking around the perimeter of exterior storms it is important to leave weep holes at the bottom so that any condensation or infiltration that does occur can drain out.

## What About Lead?

If your windows retain paint that was applied prior to 1978, chances are there is lead paint on them. Just because there may be lead paint on the windows does not mean they are unsafe or that they need to be replaced. There are steps you can take to protect yourself and others if you suspect lead paint may be present. **Before beginning work, consult your local or state ordinance to determine the legal method for handling and disposing of lead paint in your area.**

- Children and pregnant women should not be allowed in the work area.
- Do not smoke or eat or drink in the area you are working in and wash your hands and face before doing so.
- Wear disposable gloves and eye protection.
- Use a respirator if there is friable paint, or if you are scraping or sanding paint.
- Use a wet sanding technique to minimize dust.
- Vacuum using a HEPA filter.
- Wash your work clothes separately from your household laundry. You can also wear a tyvek suit to protect your clothes. Take it, and your shoes, off before you leave your work area.
- Place tarps under your work surface to collect loose paint. Seal off the work space from other rooms and from HVAC systems. Cover any furniture and other items in the work area with

(Continued on page 4)



## Lead continued

- 6 mil plastic taped to the floor.  
Eating a nutritious diet rich in iron and calcium will reduce the amount of lead absorbed by your body if any does happen to be ingested.

- For more tips on how to work lead-safe, see "Lead Paint Safety: A Field Guide for Painting, Home Maintenance, and Renovation Work" available at

[www.hud.gov/offices/lead/training/LBPguide.pdf](http://www.hud.gov/offices/lead/training/LBPguide.pdf) and the

National Park Service Brief #37,

"Appropriate Methods for Reducing Lead-Paint Hazards in Historic Housing" at

[www.nps.gov/history/hps/TPS/briefs/brief37.htm](http://www.nps.gov/history/hps/TPS/briefs/brief37.htm).

- John Leeke's website [www.historichomeworks.com](http://www.historichomeworks.com) also has practical tips on lead-safer work practices.

## References

*This list is a place to start—it is not intended to be comprehensive, nor does the inclusion of a business or organization serve as an endorsement.*

American Precision Museum.  
Windows on Preservation: restoring windows at the American Precision Museum, ed. John C. Leeke. Windsor, VT: American Precision Museum, 2005. Available at [www.lulu.com](http://www.lulu.com).

Cambridge (MA) Historical Commission. "Window Guide." Available at: [www.cambridgema.gov/Historic/windowguide.html](http://www.cambridgema.gov/Historic/windowguide.html)

Garvin, James. *A Building History of Northern New England*. Hanover, NH: University Press of New England, 2002.

Hadley, James. "The Home of the Future?" *Architecture* Boston 10, no. 2 (March/April 2007): 44-47.

[www.architects.org/documents/publications/ab/marapr2007/HomeOfTheFuture.pdf](http://www.architects.org/documents/publications/ab/marapr2007/HomeOfTheFuture.pdf)

Historic Homeworks

[www.historichomeworks.com](http://www.historichomeworks.com)

James, Brad, Andrew Shapiro, Steve Flanders, and Dr. David Hemenway.

"Testing the Energy Performance of Wood Windows in Cold Climates." A Report to the State of Vermont Division for Historic Preservation. 30 August, 1996.

[www.ncptt.nps.gov/PDFfiles/1996-08.pdf](http://www.ncptt.nps.gov/PDFfiles/1996-08.pdf)

Jordan, Steve. "Strips and Storms:

Techniques for tuning up sash windows for winter." *Old House Journal* (November/December 2004): 46-51.

[www.oldhousejournal.com](http://www.oldhousejournal.com)

Leeke, John C. *Save Your Wood Windows: an alternative to vinyl*

replacement windows and vinyl windows. 2004. Sample pages available at

[www.historichomeworks.com/hhw/reports/reports.htm](http://www.historichomeworks.com/hhw/reports/reports.htm).

Klems, Joseph H. "Measured winter performance of storm windows."

University of California: *Lawrence Berkeley National Laboratory*,

August 23, 2002. Available at

<http://repositories.cdlib.org/lbnl/LB-NL-51453>

Mattinson, Bill, Ross DePaolola, and Dariush Arasteh. "What Should I Do About My Windows?" *Home Energy*

Magazine (July/August 2002): 24-31. [www.homeenergy.com/19-4.html](http://www.homeenergy.com/19-4.html)

Myers, John H. "The Repair of Historic Wooden Windows"

Preservation Brief Series # 9. The National Park Service,

[www.cr.nps.gov/hps/tps/briefs/brief09.htm](http://www.cr.nps.gov/hps/tps/briefs/brief09.htm)

National Park Service. "The Secretary of the Interior's Standards for Rehabilitation"

[www.nps.gov/history/hps/tps/tax/rhb/stand.htm](http://www.nps.gov/history/hps/tps/tax/rhb/stand.htm)

New England Window Restoration Alliance

[www.windowrestorationne.org](http://www.windowrestorationne.org)

New York Landmarks Conservancy.

Repairing Old and Historic Windows:

A Manual for Architects and

Homeowners. Washington, D.C.: The Preservation Press, 1992.

Rypkema, Donovan D. "Economics, Sustainability, and Historic Preservation.." *Forum Journal* 20, no. 2 (2006): 27-38.

## APPENDIX H: 2009 WINDOW TIP SHEET

Sedovic, Walter and Jill H. Gotthelf. "What Replacement Windows Can't Replace: The Real Cost of Removing Historic Windows." *APT Bulletin, Journal of Preservation Technology* 36, no. 4 (2005): 25-29.

[www.apti.org/publications/Past-Bulletin-Articles/Sedovic-36-4.pdf](http://www.apti.org/publications/Past-Bulletin-Articles/Sedovic-36-4.pdf)

Shapiro, Andrew and Brad James.

"Creating Windows of Energy-Saving Opportunity." *Home Energy Magazine Online* (September/October 1997).

[www.homeenergy.org/archive/hem.dis.anl.gov/eehem/97/970908.html](http://www.homeenergy.org/archive/hem.dis.anl.gov/eehem/97/970908.html)

Shapiro, Andrew and Brad James.

"Retain or Retire? A Field Study of the Energy Impacts of Window Rehab Choices." In *Window*

*Rehabilitation Guide for Historic*

*Buildings*, edited by Charles Fisher III, Deborah Slaton, and Rebecca

Shiffer. Washington, D.C.: Historic

Preservation Education Foundation, 1997.

Sullivan, James. "Preserving windows to the past. History-minded vinyl critics say wood remains the best."

*Boston Globe*, 30 July 2006. [Cited July 31, 2006.]

[www.boston.com/news/local/article/s/2006/07/30/preserving\\_windows\\_to\\_the\\_past?mode=PF7/31/2006](http://www.boston.com/news/local/article/s/2006/07/30/preserving_windows_to_the_past?mode=PF7/31/2006).

## Additional Help

With nearly half of greenhouse gas emissions attributed to the construction and operation of buildings, older and historic buildings are central to our efforts to address climate change. The **National Trust for Historic Preservation's Sustainability Initiative** promotes the reuse of existing buildings, reinvestment in existing communities, and green retrofit of older and historic buildings to help lower carbon emissions. For more information visit [www.preservationnation.org](http://www.preservationnation.org).

Additional help may be available from your **State Historic Preservation Office** (SHPO). Find your SHPO at

[www.ncshpo.org/](http://www.ncshpo.org/). Private **statewide and**

**local preservation groups** serve as the network centers and representatives of local preservation activities within their states. The nine **Regional and Field Offices of the National Trust for Historic**

**Preservation** (NTHP) bring the programs and services of the NTHP to preservationists within their regions. Find your nearest NTHP Regional Office and state and local preservation organizations at

[www.preservationnation.org/about-us/partners/statewide-local-partners/contacts.html](http://www.preservationnation.org/about-us/partners/statewide-local-partners/contacts.html)

## APPENDIX I: ADDITIONAL RESOURCES

---

### City of Lake Charles/Calcasieu Parish Resources

Lake Charles Historic Preservation Commission

(<http://www.cityoflakecharles.com/department/board.php?fDD=13-253>)

Planning and Zoning Commission

(<http://www.cityoflakecharles.com/department/board.php?fDD=13-89>)

Permit Center

(<http://www.cityoflakecharles.com/department/?fDD=18-0>)

Downtown Development

(<http://www.cityoflakecharles.com/department/?fDD=7-0>)

Smart Code

(<http://www.cityoflakecharles.com/department/division.php?fDD=7-50>)

Zoning Ordinance for the City of Lake Charles

([http://www.cityoflakecharles.com/egov/docs/1321550243\\_861602.pdf](http://www.cityoflakecharles.com/egov/docs/1321550243_861602.pdf))

Calcasieu Historical Preservation Society

([http://calcasieupreservation.com/index.php?option=com\\_content&view=article&id=26&Itemid=16](http://calcasieupreservation.com/index.php?option=com_content&view=article&id=26&Itemid=16))

Margaret Place Historic District

(<http://www.cityoflakecharles.com/department/division.php?fDD=7-51>)

### Preservation Resources

*Websites apt to change over time – as of January 2012:*

National Park Service (NPS) (<http://www.nps.gov>)

(NPS) Technical Preservation Services

(<http://www.nps.gov/history/hps/tps/index.htm>)

(NPS) The Secretary of the Interior's Standards for Rehabilitation

(<http://www.nps.gov/hps/tps/tax/rehabstandards.htm>)

(NPS) Illustrated Rehabilitation Guidelines

(<http://www.nps.gov/hps/tps/tax/rhb/index.htm>)

(NPS) Interpreting the Standards Bulletins

(<http://www.nps.gov/hps/tps/tax/ITS/itshome.htm>)

(NPS) Preservation Briefs

(<http://www.nps.gov/hps/tps/briefs/presbhom.htm>)

(NPS) Federal Rehabilitation Tax Credit

(<http://www.nps.gov/history/hps/tps/tax/incentives/index.htm>)

General Services Administration (GSA)

(<http://www.gsa.gov/portal/category/20992>)

National Trust for Historic Preservation (NTHP)

(<http://www.preservationnation.org/>)

## Public Art Resources

Project for Public Spaces (<http://www.pps.org/>)

## Historical Resources

Cormier, Adley. "A Timeline History of Lake Charles and Southwest Louisiana."  
([http://www.calcasieupreservation.org/index.php?option=com\\_content&view=article&id=2&Itemid=3](http://www.calcasieupreservation.org/index.php?option=com_content&view=article&id=2&Itemid=3))

Gremillion, John Berton. "Calcasieu Parish."  
(<http://library.mcneese.edu/depts/archive/FTBooks/gremillion-calcasieu2.htm>)

"The History of Margaret Place."  
([http://www.calcasieupreservation.org/index.php?option=com\\_content&view=category&layout=blog&id=32&Itemid=71](http://www.calcasieupreservation.org/index.php?option=com_content&view=category&layout=blog&id=32&Itemid=71))

Margaret Place Historic District Survey (Proposed). November 20, 1998.  
([http://www.cityoflakecharles.com/egov/docs/1318268714\\_974914.pdf](http://www.cityoflakecharles.com/egov/docs/1318268714_974914.pdf))

## Books and Publications

"Reviewing New Construction Projects in Historic Areas."  
Information Series No. 62. Washington, D.C.: National Trust for Historic Preservation, 1992.

Bowsher, Alice Meriwether. *Design Review in Historic Districts*. Washington, D.C.: The Preservation Press, 1980.

Ching, Francis D. K. *Building Construction Illustrated*. New York: Van Nostrand Reinhold Company, 1975.

Fricker, Jonathan, Donna Fricker, and Patricia L. Duncan. *Louisiana Architecture: A Handbook on Styles*. Lafayette: Center for Louisiana Studies, 1998.

Harris, Cyril, ed. *Dictionary of Architecture and Construction*. New York: McGraw-Hill, 2000.

Longstreth, Richard. *The Buildings of Main Street: a guide to American commercial architecture*. Washington: Preservation Press, 1987.

National Trust for Historic Preservation. *Repair or Replace Old Windows: A Visual Look at the Impacts*.  
([http://www.preservationnation.org/issues/weatherization/windows/additional-resources/nthp\\_windows\\_repair\\_replace.pdf](http://www.preservationnation.org/issues/weatherization/windows/additional-resources/nthp_windows_repair_replace.pdf))

*Old & new architecture: design relationship: from a conference sponsored by National Trust for Historic Preservation, Latrobe Chapter, Society of Architectural Historians and the Washington Metropolitan Chapter, American Institute of Architects*. Washington, D.C.: Preservation Press, National Trust for Historic Preservation, 1980.

Saylor, Henry H. *Dictionary of Architecture*. New York: John Wiley & Sons, 1952.

University of New Orleans, Center for Economic Development. *The Economic Benefits of Historic Preservation in Louisiana: measuring the impacts of a local economic development strategy*. New Orleans: Center for Economic Development, 1999.

Urban Design Associates. *Louisiana Speaks: Pattern Book*.  
([http://www.cityoflakecharles.com/egov/docs/1258672241\\_63659.pdf](http://www.cityoflakecharles.com/egov/docs/1258672241_63659.pdf))

Weeks, Kay D. and Anne E. Grimmer. *The Secretary of Interior's Standards for the Treatment of Historic Properties with Guidelines for Preserving, Rehabilitating, Restoring and Reconstructing Historic Buildings*. Washington, D.C.: U.S. Department of the Interior, National Park Service, Cultural Resource Stewardship and Partnerships, Heritage Preservation Services, 1995.



RANDY ROACH  
MAYOR

**CITY OF LAKE CHARLES**

326 Pujio St. – P.O. Box 900  
Lake Charles, LA 70602-0900  
(337) 491-1542 – FAX (337) 491-9187

PLANNING DEPARTMENT  
OFFICE OF ZONING & LAND USE

**ITEMS NECESSARY FOR PLANNING COMMISSION/CONDITIONAL USE PERMIT APPLICATION**

1. **Scaled Site Plan:** 1" = 10' or 1" = 20'  
Site Plan should address the following:
    - a. Dimensions of structure(s) – proposed & existing
    - b. Dimensions of parcel
    - c. Setbacks of structure(s) from each property line
    - d. Proposed and/or existing curb cuts, parking facilities, & buffering
    - e. Adjacent property land uses
- \*\*If site plan is larger than 11" x 17", fifteen (15) copies are required\*\***  
(We do not have the equipment to copy large plans. Please draw plans on regular white paper or blue line----no cardboard, etc.)

**Vicinity Plan** – (can normally be found in abstract) – Must be included in all new construction applications.

2. **Current legal description of property**

3. **Letter of Intent by Applicant**

Letter should include the following:

- a. Name and address of applicant
- b. Location and description of development and/or proposed establishment
- c. Signature of applicant

4. **Verification of Ownership and/or Owner's Consent Letter**

5. **Names and addresses** of property owners within **500 feet** of proposed establishment and/or development. (This can be obtained from the Calcasieu Parish Tax Assessors Office for a fee.)

**NOTE: Required for Major Permits or Planned Developments only.**

6. **Filing Fees:**

A.	Conditional Use Permits:	Minor -	\$ 75.00
		Major -	\$250.00
B.	Planned Developments:	Minor -	\$200.00
		Major -	\$250.00
C.	Variances		\$200.00
D.	Special Exceptions		\$200.00
E.	Appeals		\$100.00
F.	Amendments (Rezoning)		\$500.00 up to 5 acres
			\$ 50.00 for each successive acre up to \$2,000.00

**All items are to be filed with our office before the cut-off date:**

**Cut-Off Date:** \_\_\_\_\_  
**Meeting Date:** \_\_\_\_\_

Should you have any questions or require additional information, please contact the Office of Zoning and Land Use at: Phone: (337) 491-1542 Fax: (337) 491-9187.