

Recommendations

Introduction

The survey should serve to enhance the overall historic preservation ethic in the Village of Allouez. It gives a brief history of the Village, identifies historic resources, and can serve as a basis for decision-making activities regarding those resources. This report can be used to create interest and awareness and promote historic resources and preservation issues in the Village of Allouez. This chapter outlines the many benefits of and economic incentives for historic preservation and provides preliminary recommendations for future preservation actions in the village.

Community Strategies for Historic Preservation

A historic preservation program can be one of the most effective forms of economic development that a municipality can support. Preservation stimulates both public and private investment in the community and supports major components of the local economy: tourism, construction, and real estate. Historic buildings attract customers and are often sought after, desirable pieces of real estate.

There are many benefits of historic preservation:

- Enjoyment of the community's heritage
- Improved property values
- Increased property tax receipts
- Investment in older & historic properties
- Increased tourism
- Greater flexibility in meeting Americans with Disabilities Act (ADA) in historic buildings
- More flexibility in meeting state building codes
- Greater community pride and an increased sense of belonging
- Increased attractiveness to new businesses
- Decreased crime and vandalism in historic areas
- Increased conservation of materials and natural resources
- Improved overall quality of life

In order to achieve these benefits, many incentives for historic preservation have been developed. There are several different types of tax incentives. Property owners who undertake a certified historic restoration or rehabilitation of their property are eligible for income tax credits. Certain historic buildings are also exempt from property taxes, and tax deductions can

be utilized for historic façade easements. Additionally, there are several building code incentives. Buildings listed in the National Register of Historic Places or buildings that are eligible for listing qualify for the International Existing Building Code's Historic Buildings Chapter which is slightly more lenient than the standard building code. There is also a greater flexibility in meeting the building requirements of the Americans with Disabilities Act (ADA). Further information regarding these incentives has been included in the Chapter 19 Appendix.

Recommendation for the Registration & Protection of Resources

Historic Preservation Ordinance

Before any of the above mentioned benefits of preservation can continue in the Village of Allouez, it is imperative that a formal village-wide historic preservation program be established. In 1994, an act of the Wisconsin Statutes was passed that required all municipalities, like the Village of Allouez, which have buildings listed in the National Register of Historic Places to “enact an ordinance to regulate any place, structure or object with a special character, historic, archaeological or aesthetic interest, or other significant value, for the purpose of preserving the place, structure or object and its significant characteristics.” Ordinances serve to protect extant historic resources and officially establish a Historic Preservation Committee. Such an ordinance was enacted by the Village of Allouez in 2008. This was a great step forward in protecting the city's historic structures.

Historic Preservation Committee

A group of individuals has been appointed for the committee. In the future, consideration should be given during appointments to ensure commission members possess knowledge, experience, and interest in the areas of history, historic preservation, historic architecture, real estate, and law. This committee should be commended on their ongoing efforts. They hold regular public meetings in order to tackle the tasks that lie ahead. It is their duty to establish planning policies, educate the community, and carry out the program. These tasks are imperative given the high profile threats and losses that the community has recently faced, such as the demolition of the Bishop Joseph John Fox Residence, St. Joseph Home for Children, and the State Reformatory Farm. If or when the budget permits, some consideration may be given to hiring a staff preservation consultant to keep the commission organized, set policies, and carry out the day-to-day operations of the program.

Certified Local Government

This survey was funded by a grant through the Wisconsin Historical Society. In the future, that same grant money could be used for preparation of an official village-wide preservation plan, public education, or National Register Nominations. The committee should continue their efforts as a Certified Local Government so that it may receive future grant monies. Several documents that discuss this matter are published by the Wisconsin Historical Society have been included in the Chapter 19 Appendix.

Local Landmarking of Historic Resources

It is hoped that this report will enliven the efforts of the Allouez Historic Preservation Committee to continue to identify and landmark historic resources in the village. Priority should be given to locally landmarking resources identified in this report to build commission credibility and community awareness. Other resources, not identified in this report, should be considered afterwards. Care should be taken that future landmarking efforts of resources not identified in this report maintain a degree of consistency with regards to the resource's level of architectural integrity and historical significance so as not to dilute the uniqueness of the previously landmarked properties.

National Register Nominations

This report has outlined many individual historic properties and three historic districts that are potentially eligible for listing in the National Register of Historic Places. An effort should be made to follow through with National Register nominations for these properties and districts. The Historic Preservation Committee should continue to apply for grants from the Wisconsin Historical Society to fund such nominations. The information contained in this survey report will act as a springboard for further research for these nominations.

Threats to Resources

Changes in modern conveniences and increasing public expectations have brought a great deal of pressure on older homes. This has resulted in the demolition or relocation of a number of buildings, as well as, unsympathetic additions and the replacement of original windows and siding with more modern materials which obscure unique historic details on hundreds of buildings throughout the village. These trends are expected to continue into the future. The Historic Preservation Committee should keep abreast of upcoming projects at historic properties.

Public Education

In order to gain public support for preservation activities, it is important that the public be educated about the issues. It is also important to remind the community of the buildings that have already been lost as a means to protect historic buildings in the future. This can be accomplished in a variety of ways. Media, such as local television, radio, newspapers, and brochures, can spread the word to many. Site markers and displays in public buildings, such as the local library or historical society, can also bring awareness to the community. Tourism publications can educate visitors about the Village of Allouez's history. Self-guided or guided tours and tours of historic homes are often popular and can showcase the Village's historic buildings to those within the community and interested visitors. Avenues currently being pursued by the Historic Allouez Society, such as further research into buildings and subdivisions which were outside of the parameters of this project, should be encouraged by the Allouez Historic Preservation Committee for their educational opportunities.

Lectures and workshops on preservation issues can also be useful. Historically appropriate maintenance, window replacement, residing, painting, and porch replacement should be promoted at these types of events.

A set of design guidelines for historic preservation can be developed and distributed to local architects, building owners, contractors, and others in the community. The City of Milwaukee's series of guides: *As Good as New: A Guide for Rehabilitating the Exterior of Your Old Milwaukee Home*; *Good for Business: A Guide to Rehabilitating the Exteriors of Older Commercial Buildings*; and *Living with History: A Guide to the Preservation Standards for Historically Designated Homes in Milwaukee* are excellent resources for any community and any preservation project.

Future Survey & Research Needs

This is not a complete history of the Village of Allouez. It is hoped that this survey will be periodically updated and expanded upon. This report is subject to change. Additional research and clarifications should be incorporated and added to this report in the future. This is a living document and the beginning of an ongoing historic preservation effort that will continue for years to come in this community.

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Appendix

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Preservation Information

How to Gain Commission Credibility

Be accountable: adhere to the legal requirements of your local preservation ordinance.

Your local ordinance should specify what procedures the historic preservation commission must follow when meeting to decide upon proposed designations. Commissions unsure of the procedures should consult their local city or county attorneys.

Hold public meetings.

Historic preservation commissions are local governmental bodies and must conduct their business according to procedures that will satisfy Wisconsin's Open Meetings Law and due process requirements. All public hearings must be preceded by public notice.

Maintain accurate records.

Local preservation commissions should take and retain minutes of all meetings and hearings, maintain files containing significant information on all designated landmarks and historic districts, keep files on all applications for designations and certificates of appropriateness. After the local commission reaches a conclusion about a proposed designation, it must complete and retain a written report of its final decision.

Cultivate annual funding.

Local historic preservation commissions should seek annual budget appropriations. Even if they contain only small amounts of money, inclusion in local budgets can help commissions gain acceptance and support from their local governments.

Be able to show results.

Receipt of annual budgets can also aid commissions in establishing professional reputations. Local commissions will find municipal leaders more willing to allocate funding for special projects if preservation commissioners have responsibly administered funds and successfully completed

projects in the past. And, used widely, even small amounts of money can help commissions increase their productivity and effectiveness.

Adopt standard meeting procedures.

Local preservation commissions should adopt bylaws or rules of procedure to regulate their affairs. By adhering to their bylaws, commissions can better ensure that their actions do not appear arbitrary.

Develop good relationships.

Local historic preservation commissions must develop constructive working relationships with other municipal bodies such as planning boards, community development offices, city and town councils, local zoning administrators, building inspector and building department.

Be proactive rather than reactive.

It is often too late to save a building once a demolition permit has been used or once another municipal agency takes an action that adversely affects a historic property. By keeping themselves informed of other agency decisions and informing others of their own decisions, local preservation commissions can avoid, or at least anticipate, many problems.

Use a positive approach.

If the commission does not approve a project, it should explain in writing why the project is unacceptable and indicate a willingness to work with the applicant to revise the project. Constructive advice to improve projects should be offered.

Adhere to consistent standards.

Systematic enforcement of local ordinances and attention to legal requirements will enable local preservation commissions to decrease their chances of becoming involved in legal or political entanglements.

Publish preservation plans and design guidelines.

Historic preservation commissions should develop local historic preservation plans and work to see that such plans are integrated into the overall planning process in their communities. Historic preservation plans are management tools that help communities protect and enhance their historic properties and districts. Published design guidelines may be the single most helpful pamphlet produced by a commission.

Know your community's history.

A comprehensive knowledge of their communities' histories will help local commissions identify properties worthy of preservation.

Solicit public opinion.

When developing community preservation plans, local commissions should not forget to solicit public opinion. At hearings, commissions should allow property owners and other interested parties to express their views and present evidence. Involving residents and property owners can prove invaluable in gaining citizen support.

Know your local government.

By promoting the inclusion of historic preservation in traditional community planning, local commissions can heighten their communities' awareness of local history and simultaneously ensure that preservation receives attention along with other planning concerns. With the passage of the Comprehensive Planning & Smart Growth Law, it has become even more important for commissioners to work with community planners. The law requires that comprehensive plans attend to "cultural resources," which include historic places, such as historic buildings or archaeological sites.

Broaden public awareness.

- Run a series of articles on local historic properties in local newspapers.
- Develop a local architecture and preservation resource shelf at the local public library, including information about locally designated landmarks and copies of the local community's entries in the National Register of Historic Places and the Wisconsin Register of Historic Places.
- Create brochures, publications, slide programs and newsletters about historic properties and historic preservation in the community.
- Sponsor events and contests, such as neighborhood walking tours and poster contests in which local school children create posters depicting local landmarks.
- Organize workshops and special award presentations.
- Cooperate with local educational institutions and programs to integrate historic preservation into their curriculums.

More information on historic preservation commissions is available from the Division of Historic Preservation, Wisconsin Historical Society, 816 State St., Madison WI 53706.

*Contact Geoffrey Gyrisco
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*Visit the
Wisconsin Historical Society
Web site:
www.wisconsinhistory.org*



WISCONSIN HISTORICAL SOCIETY

816 State Street • Madison, Wisconsin 53706 • (608) 264-6500

Division of Historic Preservation

Preservation Information

Building Support for Local Historic Preservation

Preparing to Preserve: Changing Attitudes

Historic preservation programs try to prevent the loss of community memory and the destruction of community accomplishments. They help retain a sense of belonging and a sense of place, here and now, as well as for the future. Preservation programs help provide answers to overwhelming questions such as who we are, where we came from, where we're going, and why. Historic preservation also tries to answer simpler questions such as what have we accomplished in our communities, what is our inheritance and what will be our legacy? Historic preservation is also fun and profitable.

In fact, a local historic preservation program may be the simplest and most cost-effective economic development program a community can establish.

But first a local historic preservation program has to be created and supported.

Establishing a preservation program is generally not difficult to do, although it definitely takes persistence, patience and sometimes pestering. Making the program effective takes a lot more of the same.

Establishing a historic preservation program often requires a change in old notions, habits, and attitudes about the built environment and its value to the community. Sometimes it takes a thorough discussion of the rights and responsibilities of the community and its members in preserving the community's historical heritage for the well-being of all its citizens. Whose responsibility is it, after all, to ensure the continued existence of a community's irreplaceable historical heritage? Who will be the caretakers and the stewards of society's cultural accomplishments if not the members of that society?

Why Preserve?

Often, however, before those community responsibilities are recognized and accepted, before changes in attitude can occur, and before new programs can be established to address specific community issues, a strong and compelling case must be made for making those changes and instituting new programs.

Certainly this is true when advocating the establishment of a local historic preservation program, especially the

enactment of a local historic preservation ordinance, which is designed to protect the otherwise defenseless historic places in a community. Too often, the historic buildings and structures of a community are viewed as simply "old" or "decrepit" or "run-down" with little or no value, economically or aesthetically. At the same time, a well-meaning and well-crafted municipal preservation program designed to oversee the fate of a community's heritage is sometimes viewed as burdensome government intrusion.

Both of these attitudes—that old, historic buildings have little value and that local preservation programs somehow interfere with property rights—have to be examined and adjusted, if not substantially altered, for an effective local historic preservation program to be established and administered.

A Valuable Inheritance

Historic places—buildings, districts, sites—have great value to the community, as well as to individual property owners. They have great potential for continued use, re-use, and new uses.

In fact, historic properties may be the most valuable properties within the community. Their value lies in their rareness—historic properties are unique creations and can never be replaced—and in their special associations as familiar landmarks and worthy achievements that are comforting, pleasing and meaningful. Their value lies in the educational message they convey and in the continuity they provide between the past, present and the future. Finally, the value of historic properties lies in the pocket-book: historic properties are tourism assets, they attract customers, visitors and permanent residents, they are very desirable real estate because of their special character and central locations, and they are frequently eligible for special financial incentives and special building code treatment.

So valuable are historic and cultural properties to our society that local governments are strongly encouraged and supported by the state and federal government, including the U.S. Supreme Court, in their efforts to preserve, protect and ensure the continued existence of these important resources.

In short, there are many compelling reasons for establishing and carrying out an effective local preservation program, from improving the quality of life to increasing the economic base of the community to simply enjoying the accomplishments of those who preceded us.

Recognizing the benefits of a local preservation program and communicating those benefits to others in the community will help create a positive attitude toward historic preservation.

Gaining Support

An important early step in establishing a local historic preservation program, especially through the enactment of a local preservation ordinance, is to organize a group of like-minded citizens. Working in a political system to effect change or create new programs requires numbers, and in numbers lies political strength.

The new organization may be an informal group of concerned citizens or it may be a long-established, incorporated local organization. It may also be a brand new entity with the specific purpose of promoting historic preservation. Whatever the type of organization, the shared commitment of the members is very important, as is obtaining support of elected officials and community leaders at the very beginning of the effort.

Broad-based Backing

Informing the community about the new organization's existence and about the need for support to address the issue of preservation is very important. Also important is input from different sectors of the community: their ideas and assistance will provide a broad base of local support that will help to ensure success.

Overcoming the inevitable inertia in a community and changing old-fashioned attitudes can take time and patience, so it is important to maintain a strong and on-going base of supportive, enthusiastic and committed members to ensure the necessary continuity.

Identifying Issues

Identifying specific preservation-related issues needing attention is an important and obvious early undertaking. The more specific the issue, the more easily it can be addressed.

Threats of demolition, on-going deterioration due to neglect, recent losses of cultural resources, inappropriate zoning that might encourage destructive uses, lack of knowledge about appropriate design for historic buildings, lack of appreciation of the community's heritage—all are some of the issues that may need to be identified. The clear and urgent articulation of the issues will greatly strengthen the need for a preservation program and will assist in gaining further support.

Generate Interest in Issues

Attracting attention to the issues and generating interest is also vital. The media can be very helpful, as can special programs for the general public or special events designed to get the message out and attract additional support.

Photo displays of the "lost resources" of the community can be very effective; contests in the local newspaper to identify unusual architectural elements are fun; awards for recent well-done preservation or renovation projects help get the message out; and lectures and workshops on various preservation topics are always useful.

Strategies and Goals

The ultimate objective of a local historic preservation program is, of course, to ensure the continued existence of a community's heritage.

However, a number of short-term goals might be selected, along with the necessary strategies to reach those goals.

For instance, an immediate goal might be to save a threatened historic building or an endangered Indian mound where urgency is required. The strategy or strategies to reach this goal will be different from the strategies devised to obtain the goal of developing a long-range preservation plan for a local historic district or a plan for the entire community, which might take months of meetings and discussions and re-draftings of proposals.

An appropriate goal at an early stage in a preservation program might be to educate the community, especially elected officials, about the community's history and the historical places that still exist—and to remind them of the irreplaceable heritage that has been lost already.

Other goals might be to create heritage tourism materials that attract visitors and attention to the community's heritage or to prepare design guidelines that promote appropriate maintenance and rehabilitation of historic neighborhoods. Frequently, goals also include efforts to nominate properties and districts to the National Register of Historic Places and the State Register of Historic Places, which makes them eligible for the income tax credits and other benefits of the state and federal programs.

Reaching for Goals

When the local preservation issues have been identified and reasonable goals have been formulated, specific strategies should be developed to reach those goals. There may be several goals (or short-term objectives) that have been identified, such as increasing the awareness, appreciation and knowledge of local cultural resources, producing a self-guided walking-tour brochure, and conducting an annual "tour of historic homes." Or there may be one major goal: the enactment of a local historic preservation ordinance for the protection of the remaining historical resources in the community.

Strategies to achieve the goals must be formulated. One strategy might be to conduct a survey to identify, document and evaluate the community's historical resources and to publish the information in attractive formats. This would help educate the community about its history and its heritage. Another strategy might be to conduct workshops or informational meetings on historic preservation topics, which would help to increase preservation skills in the community. Or another strategy might be to conduct discussion sessions on the subject of protecting cultural resources or to draft a local historic preservation ordinance.

Many Strategies Exist

Many educational strategies or techniques have proven effective in raising an awareness of both the value of historic resources and their vulnerability to destruction. Historic house tours, weekend archeological digs, slide presentations at local service clubs, contests to identify little-

noticed historic architectural details in the community, restoration awards and recognition ceremonies, and workshops to learn about income tax credits for rehabilitating historic buildings or property tax exemptions for archeological sites are some reliable and effective techniques.

Benefits of Preservation

Reaching the goal of establishing an effective local historic preservation program through the enactment and administration of a local preservation ordinance brings with it many short-term, as well as long-term, benefits to individual property owners and the community as a whole.

Some of these benefits include:

- enjoyment of the community's heritage
- improved property values
- increased property tax receipts
- more investment in older and historic properties
- increased tourism
- limited protection from state or federally funded projects that threaten historic properties or neighborhoods, such as highway expansions
- greater flexibility in meeting Americans with Disabilities Act (ADA) in historic buildings
- more flexibility in meeting state building codes
- greater community pride and an increased sense of belonging
- increased attractiveness to new businesses

- consideration by assessors of historic designations that limit “highest and best use” development
- decreased crime and vandalism in historic areas
- increased conservation of materials and natural resources
- improved overall quality of life

None of the benefits of having a local historic preservation program can be attained without a strong commitment to the principles of preservation on the part of the citizens of the community. Like the basis for many successful and beneficial local programs, a historic preservation program requires a willingness to cooperate and to compromise, as well as a firm belief in the value of the program.

Building a Future

To appreciate, protect and celebrate the inheritance from the past is to have faith and confidence in the future. At its best, historic preservation recognizes and honors significant human accomplishments from the past and at the same time encourages people to create and enjoy their own contributions to our collective heritage.

**For more information, contact
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or visit our Web site
www.wisconsinhistory.org**



WISCONSIN HISTORICAL SOCIETY

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Division of Historic Preservation

Preservation Information

Creating A Preservation Ethic in Your Community

For the historic preservation movement to succeed at the local, state or national level, a preservation ethic must exist, to some degree, in members of our society.

Simply defined, a preservation ethic is a moral principle that instills a positive attitude toward the conservation of cultural resources in the face of forces that would diminish or destroy them.

A preservation ethic accepts the fact that people are caretakers and stewards of their historical heritage and reminds them that they are custodians as well as grateful beneficiaries of that inheritance. It is an attitude that believes, as Thomas Jefferson said, "the earth belongs *in usufruct* to the living," with the phrase "in usufruct" admonishing people to use and enjoy the world but not to harm it because it belongs to others, to all humankind.

Whether this attitude toward preserving our historic environment is called an "ethic" or a "responsibility" or an "attitude," it is important to encourage its growth and to instill this ethic in fellow citizens, civic leaders, decision-makers, and property owners.

What practical steps can be taken to encourage this positive attitude toward preservation?

Here are a few suggestions.

Set Examples.

One of the best ways to illustrate a "preservation ethic" for others is by example. By completing a preservation project (the rehabilitation of a historic building or the preservation of an Indian mound) or by reminding decision-makers, when a historic property is endangered, that a community's heritage is irreplaceable, the principles of preservation can be demonstrated and shared with others. By establishing and carrying out a local preservation program, which might include photographic exhibits of historic places, slide presentations and creation of educational publications, the general public will begin to appre-

ciate the concept—and the need—for preservation in their community. By exciting the imagination of the community with their unique heritage and irreplaceable architecture, preservationists can begin to impress on others the need for preservation.

A preservation ethic is defined by the choices that private individuals and public officials make regarding historic resources. To rehabilitate or not to rehabilitate; to demolish or not to demolish; to investigate and evaluate before decisions are made or to proceed without sufficient information; to plan for the long term or to succumb to short-term exigencies; to evaluate the consequences before the action is taken or to attempt to do so when it's too late: these are often the choices. And the choices made will indicate the existence of a preservation ethic—or the lack of one. Hopefully, the examples set will be positive ones.

Successful preservation undertakings are powerful, tangible examples of the preservation ethic "at work." And, almost without exception, historic preservation projects are universally praised and admired. As John Kenneth Galbraith, the economist, said, "Preservationists are the only people in the world who are invariably confirmed in their wisdom after the fact."

Get Organized.

By establishing an organized effort, no matter how small or informal, or by utilizing an existing organization, it is easier to promote a preservation ethic. Gathering like-minded people together promotes a sharing of concerns and commitment, and can establish a shared course of action to pursue preservation goals. A group is better able to request decisions that are positive for preservation at governmental meetings. There is strength in numbers.

The group might be citizens concerned about proposed changes in a neighborhood, or the group may have questions about the general course of community planning or land-use. The organization may be responding to a

specific threat to a historic or prehistoric property or to the realization that preservation is not a high priority in the community. The organizing effort may take advantage of an existing organization, such as a local historical society or other cultural group, by setting up a special committee within that group to address specific preservation issues.

The organizational effort may concentrate on using private resources, or it may focus on creating a public body, such as a landmarks or historic preservation commission established by the local government. Having both may be the most useful.

The point is, an organized group presents a more focused, more visible point of view, which helps when advocating a preservation ethic.

Establish Public Policies.

At some stage in promoting a preservation ethic, an effort must be made to create a public commitment to preservation: a "government ethic." This should include articulating a public policy within the local government and its agencies that encourages and supports the preservation of the community's historical heritage whenever possible. Just as the federal and state governments have such policies to help guide decision-making, local governments and agencies should formally recognize the value of historic preservation and establish policies and procedures to incorporate preservation into their programs. This could be accomplished through the incorporation of historic preservation into local comprehensive plans and into the zoning code, with the establishment of a commission, committee or board to carry out a public policy of historic preservation.

Likewise, the policies of private historical and cultural organizations should formally acknowledge that the preservation of cultural resources is an important goal. The efforts of private organizations should include promotion of a preservation ethic among its members and in the community at large.

Take Action.

"Preserve" is an active verb. The act of historic preservation is a series of actions. It is a process that depends on the involvement of people who will determine the fate of cultural resources. To help instill a preservation ethic, preservationists must be willing to take action, to take the first step, to stand up and make the case for preservation

whenever necessary, and to oppose ill-conceived proposals. Taking such actions not only sets good examples but inspires others to take similar actions.

Historic preservation demands action. Neglect or delay or inaction tends toward loss. To attempt to ensure the preservation of significant elements of the historic environment requires active personal involvement in local meetings and the sharing of ideas with elected officials; it requires attendance at educational workshops and conferences; it often requires an investment of time, labor and money; and it requires publicity and visibility. In short, active involvement as an individual or as part of a group brings the preservation ethic to life in a way that makes preservation meaningful and understandable to others.

Share the Philosophy.

Ask a preservationist why historic preservation is important, and undoubtedly many different, albeit related, reasons will be given. Some will relate to economic benefits of reusing resources; some will refer to the economic attractiveness of historic properties to buyers, investors and visitors; others will recount the esthetic benefits of preserving cultural landscapes and neighborhood architecture; others the knowledge that can be gained from the archeological evidence of the past. High on the list will also be the improved quality of life, heightened community pride, maintenance of a sense of place, and establishment of cultural continuity. There are many reasons why preservation is a meaningful and deeply satisfying activity.

A firm philosophical commitment to historic preservation on the part of individuals and organizations and a willingness to articulate and share that vision with others are important elements in how a preservation ethic becomes established.

Educate the Community.

Underlying any discussion of the establishment of a preservation ethic is the constant need for education. Without an understanding of the value of history, the benefits of preserving our patrimony, the consequences of the loss of our heritage, and the ways that preservation can be accomplished, our society will not embrace, let alone put into practice, a preservation ethic. Education must be on-going. An awareness and an appreciation of the cultural environment is essential. Education should involve the use of printed materials, special programs,

community events, workshops and seminars, the media, and discussions with elected officials. It should especially take place in the classrooms of our children.

Explaining the goals of preservation, the methods to attain those goals, the advantages to the community and to individual property owners, and addressing misconceptions and misinformation regarding preservation are all part of an educational program. Using educational resources that already exist makes this job much easier than ten years ago.

Much of what historic preservation has to offer is the result of common sense: recycling, cost-savings, visual attractiveness, quality environment, and an increased sense of belonging. Most people readily understand those goals. That's why historic preservation has been a very compelling social movement in the past twenty-five years. Educational efforts can be based on those past successes.



North Grand Boulevard Historic District
Milwaukee

As more people realize the advantages to their communities and to society in general of a comprehensive commitment to historic preservation, the task of instilling a preservation ethic will become easier. Not only will such an ethic help create a richer, more meaningful life for humankind in the present time, but it will enable society to bequeath as good or better to the next generation to enjoy. §

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Preservation Information

Planning a Local Historic Preservation Program

The best way to preserve a community's historical and archaeological resources is through a local historic preservation program, organized and administered by the citizens of the community. The organization may be established by a local ordinance, which can provide the best protection, or set up as a private, nonprofit group; most likely the effort will begin as an informal, ad hoc group of interested citizens. The overall effort should result in an organization with short-term goals, long-term objectives and a general plan of action.

The following is a list of important steps to take in setting up a local historic preservation program. The chronological sequence will vary in each community

1. Define the historic preservation **Goals.**

Objectives

- What tasks need doing?
- What needs attention in your community?
- What are your short-term and long-term goals?

Identify issues.

- Are there threats to the community's historical heritage, such as ill-conceived development, general deterioration or threatened demolitions?
- Is there a lack of appreciation for you community's heritage?

Seek assistance and education.

- From other area organizations, such as you local historical society
- From the Division of Historic Preservation of the Wisconsin Historical Society
- From the National Trust for Historic Preservation and the Wisconsin Trust for Historic Preservation
- Determine what programs and agencies at the local, state and federal level exist to help you.

2. Get **Organized.**

A public or a private group

- Will the city, village, town or county establish by ordinance an official historic preservation body, such as a historic preservation commission?
- Or will a private, nonprofit organization be useful?

- Is a temporary ad hoc committee sufficient to begin with?

Some early steps

- Join and communicate with the Wisconsin Historical Society, whose director of Historic Preservation is also the state Historic Preservation Officer.
- Join the National Trust for Historic Preservation, the private, nationwide preservation organization, and the Wisconsin Trust for Historic Preservation, Inc., the statewide private organization.
- Solicit key members for your local organization.
- Create the organization's bylaws, procedures, committees, etc.
- Educate interested citizens about your goals and plans.

3. Obtain **Support.**

Communicate with your community.

General public acceptance and awareness is essential.

Conduct public informational meetings.

Educate your community about the value of its historic resources.

Get support of public officials, local historical society, and other groups, as well as support of private citizens.

- Attend their meetings to explain your program.

Publicize your efforts.

- New stories, media interviews, and special events
- Historic tours, workshops and displays
- Brochures, flyers and booklets to inform the public

4. Conduct a **Survey**.

- *Identify and evaluate your community's historic and prehistoric resources.*
- What is significant and worthy of preservation?
- Establish an inventory of historic properties.
- Seek survey assistance from the Division of Historic Preservation.
- Will your community fund such a survey?

Publicize the survey results.

5. Prepare a **Plan**.

Create a public planning document and record of historic properties.

- Provides basis for decisions concerning development
- Provides basis for official designation of historic properties
- Provides basis for future preservation efforts

Integrate the preservation of historic properties into the community's planning process, into the master plan and into project plans.

Monitor local plans and projects to assure that historic properties are taken into account and are not overlooked or jeopardized.

6. Enact a local **Historic Preservation Ordinance**.

Establish a local historic preservation commission empowered to designate, and regulate changes to historic properties and districts.

- Legal techniques are the best preservation protection tools, through review of building and demolition permits.
- Is the community receptive to a historic preservation ordinance?
- Are public officials and private citizens aware of the benefits of historic preservation ordinance?

Join the Wisconsin Association of Historic Preservation Commissions (WAHPC).

7. **Designate** historic properties.

- Local designation, by local historic preservation commission

National Register of Historic Places and the State Register of Historic Places designation

- The state's and the nation's official listings.
- Properties are nominated through the Division of Historic Preservation of the Wisconsin Historical Society.

Designation provides:

- Official recognition
- Owner prestige
- Preservation benefits and protection

Certificates and plaques can be awarded.

8. Establish **Financial** and **Technical** resources for historic property owners.

Designed to encourage and assist the preservation of historic properties.

- A grant, loan, or revolving fund program may be set up.
- Publicize the state and federal rehabilitation investment tax credits.

Technical assistance

- "How to" advice and information on restoration and renovation
- Set up local library section on historic preservation and "how to" publications.
- Conduct fund-raising activities, apply for grants, etc.

9. Continue to carry out the **Preservation Program**.

An on-going program of historic preservation is essential.

- Continue public education and community activities.
- Continue involvement in community planning decisions.
- Celebrate your heritage.

For further information, contact Geoffrey Gyrisco, Local Preservation Coordinator, Division of Historic Preservation, Wisconsin Historical Society, 816 State Street, Madison, WI 53706, telephone (608) 264-6510.

Visit the Wisconsin Historical Society's Web site: <http://www.shsw.wisc.edu>



WISCONSIN PRESERVATION INFORMATION

GUIDELINES FOR PLANNING HISTORIC PRESERVATION TAX CREDIT PROJECTS

WISCONSIN SUPPLEMENT TO THE SECRETARY OF THE INTERIOR'S STANDARDS FOR REHABILITATION

INTRODUCTION

State and federal tax programs require that all tax-credit-related work must meet the Secretary of the Interior's Standards for Rehabilitation (or, simply, the Standards). The information contained in this pamphlet is designed to provide you with guidance about how the Standards are interpreted for various types of preservation work; however, because there are a wide variety of historic properties, it is impossible to provide a complete set of guidelines to address every situation. This pamphlet is directed to the most common preservation problems. To resolve issues not discussed here, you should refer directly to the Standards or to the brochures listed on page 10.

It is important that applicants understand some underlying principles about how the Standards are applied to the tax certification program:

1. Many historic buildings have been altered unsympathetically in the past. Under these circumstances, there is no requirement that you remove these alterations. The tax credit program allows you to leave the alterations in place and to "work around them." For example, if your intention is to rehabilitate the interior, you are not required to restore the exterior as part of the project. On the other hand, if you do elect to remove any alterations, the Standards require that the work be designed to restore the building's original features to the extent practical.

2. The public should not be given a false impression of what is, and is not, historic. For that reason, if new features are to be added to a historic building or property, they should not be made to look historic; however, they should be sympathetic in design and materials to the historic property. (See page 7: "Construction of New Additions")

3. The long and short-term structural effect of any proposed work must be taken into consideration. Some types of work performed commonly on older buildings, such as sandblasting, lead to accelerated deterioration and should not be performed.

NOTE

This publication is not intended to be a substitute for the Secretary of the Interior's "Standards for Rehabilitation" and the suggestions below carry no legal authority. In planning work, you should refer first to the "Standards" and their guidelines. Copies of the "Standards" are available on request from the Division of Historic Preservation (a copy should be included in the packet in which you received this pamphlet.) The "Standards" are also available on the web at <http://www.nps.gov/history/hps/tps/tax/rhb/stand.htm>

SITE WORK

GENERAL DISCUSSION: Most types of site work are allowable, as long as:

- the work does not destroy significant archeological remains or landscape features;
- does not encroach on any historic buildings; and
- does not introduce incompatible new features to the site.

NOTE

The term "archeological remains" is used in this publication to denote any **prehistoric or historic** archeological **deposits or features** that may exist. These include not only burial sites and effigy mounds, but also a wide variety of prehistoric habitation sites, deposits of historic and prehistoric artifacts, cemeteries, rock art, and cave sites. Technically speaking, any federally funded or subsidized undertaking that involves ground disturbance should be analyzed for its effect on significant archeological remains, including, when necessary, archeological excavation and analysis. Under most circumstances, the tax credit program does not require you to conduct an archeological investigation unless your site contains archeological remains. However, if during the course of a project, archeological remains are discovered, you are **required** to cease work immediately and to contact the Office of the State Archeologist at 608/264-6496.

REGRAIDING, LANDSCAPING, AND CONSTRUCTION OF SIDEWALKS AND PARKING AREAS

Regrading should be limited to areas away from, or at the rear of, the historic building. You should avoid changes in the ground level near the historic building. New plantings and sidewalks are usually not a problem as long as the character of the site is not changed. Parking areas should, to the extent possible, be located at the rear of a site and in most cases should not abut the historic building.

If the site contains significant archeological remains or landscape features, any regrading, landscaping, or construction on-site should be designed to leave these features intact.

DEMOLITION OF EXISTING BUILDINGS INCLUDING THOSE ON ADJACENT LOTS

Buildings on, or adjacent to, the site of a historic building may be demolished if they do not contribute to the significance of the historic building or its context. On the other hand, just because a building or addition is not original to a property does not always mean that it can be demolished; it may be historically significant nonetheless.

Evidence of whether a building is considered to be significant is often found in the National Register or State Register nomination for the property or district. You should contact Joe DeRose, staff historian, at 608/264-6512 for a determination of significance on any building proposed for demolition.

NEW CONSTRUCTION ON-SITE OR ON ADJACENT PARCELS OF LAND

All new construction must be described in the application. Even when new construction is to be carried out by someone other than the applicant, it will be considered part of the project if there will be a physical connection between the new structure and the historic building or if the new construction is to take place on property that has been divided from the historic property.

SITE EXCAVATION

Generally, no additional documentation is required for excavation work unless that work is to be performed at a known archeological site, in which case an archeological investigation will be required to determine that no significant remains will be disturbed as a result of the project. If the work is to take place in an area suspected to contain significant archeological remains, you may be required to conduct archeological testing before excavation can begin. If, during the course of the work you discover archeological remains, you will be required to cease work immediately and to contact the Office of the State Archeologist at 608/264-6496.

NOTE

If human remains are discovered, state law **requires** that you cease work **immediately** and contact the Division's Burial Sites office at 608/264-6507 or toll-free in Wisconsin at 800/342-7834.

BUILDING EXTERIOR

GENERAL DISCUSSION: The extent to which you can change a building's exterior appearance depends on the visibility of the area in which the changes are to take place. Generally, the less visible the side of a building is, the more changes that can be made. For purposes of the discussion below, a **primary facade** is one that is highly visible and, in most cases, has significant architectural detailing. A **secondary facade** is one that is generally visible from public rights-of-way, but may not contain any distinguishing architectural features. A **rear facade** is one that is generally not seen by the public and contains no architectural decoration. As a rule, primary facades should be left as intact as possible, while rear facades can be altered more substantially.

EXTERIOR BUILDING CLEANING

If you plan to remove paint or dirt from the outside of your building, the methods to be used should be specified in the application. Below are some things to be aware of are discussed.

In most cases, removal of dirt or paint is unnecessary in order to preserve a building. Dirt and paint are rarely harmful to building materials and, in fact, may serve as a protective layer that shields the surfaces of the buildings from the elements. Also, because every method of exterior cleaning carries with it some risk of damage to the building materials, you should consider carefully whether to clean the building at all. If you do elect to remove dirt or paint, you should proceed very cautiously.

The Standards specifically prohibit sandblasting in any form (except to clean cast iron, as discussed below). Sandblasting is sometimes referred to by other names, such as abrasive blasting or "featherblasting." When the sand is mixed with water, it is usually called waterblasting. **If any of these methods are used, your project will be denied certification because of the damage that these methods cause.** Equally damaging is high-pressure water blasting, even when no sand or other aggregate is added to the water. High water pressures can be damaging to most building materials. Older, softer material may be damaged at lower pressures. If you intend to use water to clean your building, you must specify that the pressure will be tested (see below).

If you intend to chemically clean your building, please be aware that no chemical or chemical manufacturer is "pre-approved" for use in this program. Building materials vary widely in composition and chemicals that may be applied safely to one building can result in severe damage to another. In addition, some chemical companies specify that the chemicals be washed from the building at high water pressures that, in itself, can damage the building. For these reasons, it is required that a cleaning test patch, typically four foot square, be performed on an inconspicuous part of the building prior to cleaning the entire building. This test patch should be inspected for possible damage to the building materials, including mortar joints, and should be used as a standard by which the rest of the cleaning is evaluated.

In cleaning metal elements, you should determine whether the metals are ferric or non-ferric. Ferric metals contain iron and are prone to rusting. Non-ferric metals, such as brass, bronze, copper, and aluminum, are non-rusting. (The simplest way to determine whether a metal is ferric is to use a magnet. Ferric metals will attract a magnet; non-ferric metals will not.)

If exterior metal elements are ferric (iron-based) it should be determined whether those elements are cast iron or coated metal. Generally, cast iron is used in storefront

columns and trim; otherwise, any metal trim is likely to be terne or zinc coated steel. Cast iron may be sandblasted to remove dirt or paint but coated steel should be hand-scraped to remove only the loose paint before repainting. Sandblasting coated steel will remove the protective coating and will ultimately lead to severe rusting.

In general, because most non-ferric metals do not corrode, they do not require cleaning and, in fact, can be damaged through the cleaning process. We recommend strongly that non-ferric metals not be cleaned.

Regardless of the methods used to clean your building's exterior, they must be specified in the application along with your intention to apply and inspect a test patch. If you plan to clean all or part of your building, you must submit with the application clear, close-up photographs of the parts of the building to be cleaned before the cleaning takes place. When the test patch is applied, you should photograph it for submission with the Request for Certification of Completed Work.

Detailed information is available in "Preservation Briefs 1: The Cleaning and Waterproof Coating of Masonry Buildings" and "Preservation Briefs 2: Dangers of Abrasive Cleaning to Historic Buildings." To request a free copy, see page 10.

REPOINTING

Repointing (also referred to as "tuckpointing") refers to the replacement of deteriorated mortar in brick and stone buildings. If done improperly, it can cause structural as well as visual damage.

The method used to remove loose mortar is an important consideration. Hand chiseling of deteriorated joints is the method least likely to cause damage to the brickwork; however, it is sometimes difficult to find contractors willing to hand-chisel the joints. Cutting the mortar out with saws and removing it with power chisels can sometimes be performed without damaging the bricks, but when these methods are employed carelessly, they can cause permanent structural damage to the masonry. It is important in the case of saw-cutting that the bricks not be sawed into and in power-chiseling that the corners not be chipped away. Regardless of the method used to remove loose mortar, we recommend that a test patch be specified, as discussed below.

In addition to the method used to remove the mortar, it is equally important that the composition of the new mortar match that of the building. Too often, especially in brick walls, mortar joints are repointed with Portland cement compounds that are harder than the bricks themselves. Then, when the building experiences thermal contraction and expansion, the faces of the bricks crack and fall off. New mortar should contain sufficient quantities of hydrated lime to make it softer than the bricks. A reasonably soft mortar should contain at least as much hydrated lime as

Portland cement, and preferably two or three times as much. (A useful rule of thumb is that mortar used in pre-1875 buildings should contain 3 times as much lime as Portland cement; buildings built between 1875 and 1900 should contain a 2 to 1 ratio of lime to Portland cement, and post-1900 buildings should contain equal parts of lime and Portland cement.)

Because of the potential damage that can result from any type of tuckpointing, it is strongly recommended that only those joints that are deteriorated be repointed. If done properly, the repointed joints will match those of the rest of the building. This is the most economical procedure, as well as the best historic preservation practice.

It is extremely important that the appearance of the new joints match those of the rest of the building, especially when only the deteriorated joints are to be repointed. Mismatched mortar joints can result in the building taking on a "patchwork quilt" appearance. The primary concerns here are the color of the replacement mortar and the tooling. With respect to color, if the mortar mix contains Portland cement, we recommend that white Portland cement be used. This will better reproduce the color of the older high lime content mortars. Along with the use of aggregate (sand) in the mix that matches the original and appropriate coloring agents (if necessary), a good overall match can be achieved. Standard, gray Portland cement generally results in joints too dark to match the original color. In addition, if the tooling of the new mortar joints does not match the original, the new joints may appear to be wider than the rest.

Ultimately, you will be responsible for the work of the contractor. If the completion photos that you submit show mortar joints that do not match the width, color, or appearance of the original joints, you may be denied final certification of your project. Therefore, we require that you specify in your contract with the mason that a test patch (a sample area of repointed joints, typically a four-foot square area,) be carried out. After the test patch is applied, it must be inspected to make sure that the appearance of the new joints matches that of the rest of the building and that the masonry units have not been damaged. The repointing contract should specify that all of the repointed joints will match the appearance of the approved test patch.

Your description of the work in the application should indicate the mortar formula to be used, the method of removing loose mortar, and that a test patch will be performed. In addition, you should photograph the approved test panel before and after repointing and submit

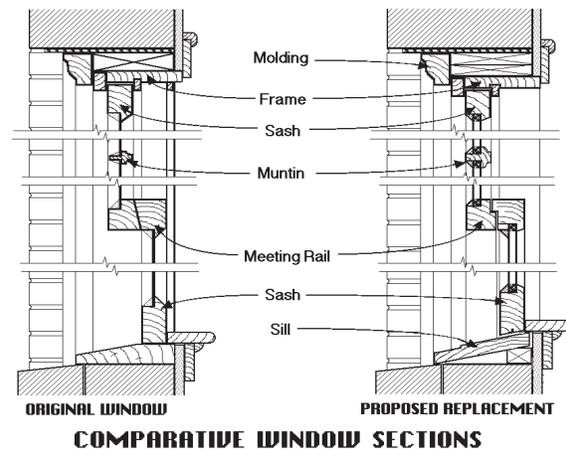
the photographs along with the Request for Certification of Completed Work.

Detailed information is available in "Preservation Briefs 2: Repointing Mortar Joints in Historic Brick Buildings." To request a free copy, see page 10.

WINDOW REPLACEMENT

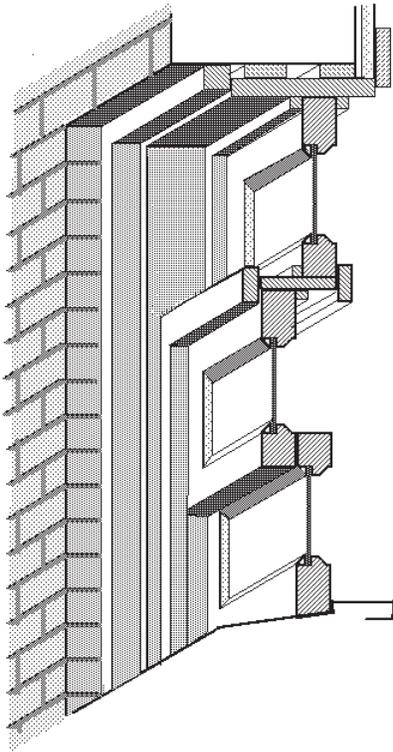
In many tax applications, the applicants propose to replace original windows with energy-efficient, "maintenance free" units. In most cases, these units do not duplicate the historical appearances of the windows they are designed to replace. The use of inappropriate new windows will result in denial of your project for the tax incentives. Inappropriate window replacement is one of the major reasons for project denial in the tax credit program. If you plan to replace windows as part of your project, please consider the comments below.

In preparing your application, you should demonstrate that the existing windows have deteriorated beyond repair. If you claim that the existing windows cannot be saved, you should back that statement up with clear detail photographs of a number of the windows and a "window inventory" to indicate the conditions of all of the windows in the building.



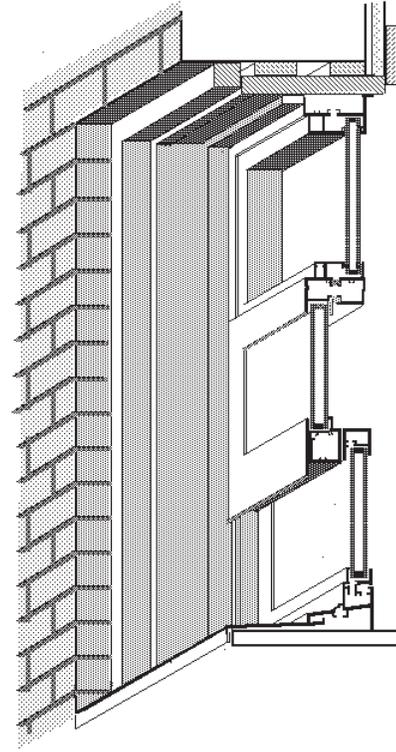
If windows are to be replaced, the replacement windows must duplicate in every respect the appearances of the original windows, including the appearances of the muntins (dividing bars), the proportions of the original windows, the thickness of the sash elements, and the window finishes. The material of the old windows should be duplicated as well, if at all possible. To change materials, you must be able to demonstrate that using the historic material would be technically or financially infeasible. If the wood windows are a significant element of an important historic interior, using another material may not be acceptable. To demonstrate that the new windows match the old, you must submit comparative window section drawings, showing the head, sill, jamb, and muntin sections of the old and the new windows.

If you are replacing wooden windows with new aluminum units, the new windows must have a painted or baked-on finish, rather than an anodized finish. Anodized finishes, particularly bronze-colored finishes, have a distinctly metallic appearance that is inappropriate when aluminum windows are being substituted for wooden windows.



TYPICAL WOOD WINDOW CONSTRUCTION

Note the heavy modeling created by the thicknesses of the wooden members and the distance that the glass is set back from the front of the window sash.



UNACCEPTABLE ALUMINUM REPLACEMENT WINDOWS

Even though this window's proportions approximate those of the wooden window, the framing members have almost no depth and there is almost no setback between the glass and the sash.

Another requirement when aluminum windows are used as substitutes for wooden windows is that the glass be set back from the faces of the frames by approximately the same distance as in wooden windows which, typically, would have a "putty line." To illustrate this concept, the glazing in wooden windows is held in place with either putty or wooden stops which sets the glass approximately 1/2" back from the face of the window frame. On the other hand, the glazing in many aluminum windows is held in place by a metal flange. The result is that the glass is set back from the frame by only about 1/8" which causes the window sashes to look "flat" and out-of-character with most buildings.

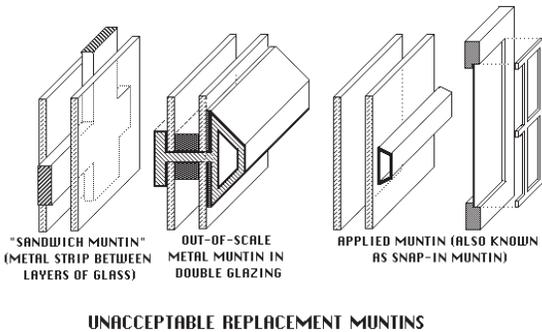
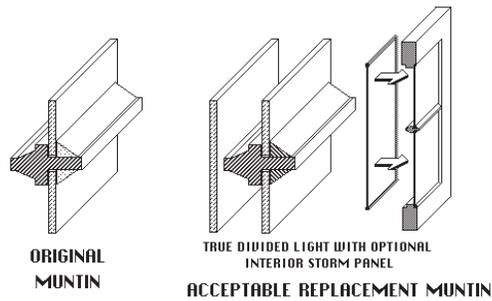
In addition, the use of tinted and reflective glass, including most "Low-E" glass, (which under many lighting conditions appears as reflective glass) is not allowed. Historic windows should be glazed with clear glass. If low-E glass is used a one foot square sample should be submitted to demonstrate it is not overly tinted or reflective.

For purposes of maintenance and energy efficiency you may wish to install interior or exterior storm windows instead of replacing the original windows. Exterior storm windows can be aluminum combination windows as long as the window tracks are mounted so as not to protrude from the

face of window openings and the proportions of the storm windows match those of the original windows. If you plan to install storm windows, you should include with your application large-scale head, jamb, and sill details of the storm window assembly. You should also describe the type of finish to be used. As in the case of aluminum primary windows, the finishes should be painted or baked-on, rather than anodized.

If you plan to use panning (metal covering) over the outside window framing, it must conform in shape to the existing window moldings, it must be applied tightly to the moldings, and it should not have an anodized finish.

Muntin duplication is a major problem in replacement windows. In nearly all cases, artificial muntins are unacceptable, including those that are applied on the exterior, those applied on the interior (sometimes called "snap-in" muntins), and those sandwiched between the layers of double glazing. Replacement windows must incorporate true muntins -- that is, muntins that actually divide the panes of glass. Furthermore, the appearances of the new muntins must duplicate substantially those of the original windows.



Detailed information is available in "Preservation Briefs 9: The Repair of Historic Wooden Windows" and "Preservation Briefs 13: The Repair and Thermal Upgrading of Historic Steel Windows." To request a free copy, see page 10.

CLOSING-UP WINDOW OPENINGS OR ADDING NEW WINDOWS

Original window patterns should not be changed on primary facades. On secondary facades, changes should be in keeping with the overall window patterns of those sides of the building. On rear facades with limited visibility, significant changes can usually be made; however, they must be in character with the rest of the building. On masonry buildings, when original windows are closed-in, the infill material should match those of the wall and should be inset from the face of the wall at least two inches. Non-original windows can usually be closed flush to the wall surfaces with matching materials. For new windows, the application should contain drawings similar to those specified in the window replacement section.

STOREFRONT ALTERATION AND RESTORATION

Rehabilitation of storefronts, either original storefronts or those that have been altered in the past, should be based on the historic appearances of the buildings. Treatments such as installation of wood or metal awnings, installation of solid panels in the transoms (which, typically, were glazed), and removal or alteration of original entrances should be avoided. In addition, projects that result in removing doorways, such that there are no apparent entrances into the storefront will likely be denied. Even if existing or original

doors are not necessary to the operation of the building, they should be left in-place and, if necessary, made inoperative. If storefront windows are to be replaced, the new windows should duplicate the materials and proportions of the originals, including any muntins (divisions between panes of glass) that may have existed.

Detailed information is available in "Preservation Briefs 11: Rehabilitating Historic Storefronts." To request a free copy, see page 10.

ROOF REPLACEMENT

Generally, flat roofs that are not visible from the street require only a brief description of the proposed roof treatment. For pitched roofs, the application must state the type of replacement material to be used. As a general rule, if a roof was originally wood shingled, the replacement shingles may either be replacement wood shingles or standard 3-tab shingles in a shade of gray that resembles weathered wood. You should avoid using artificially rustic-looking wood, asphalt, or fiberglass shingles that purport to look like wood shakes.

Slate or tile roofs should be repaired, if possible, rather than replaced. If replacement is necessary, these roofs should be replaced in-kind; however, in the case of slate, we will usually accept replacement with slate-gray, standard 3-tab shingles if it can be shown that the slates have deteriorated beyond repair. Generally, it is not appropriate to use substitute materials, such as concrete shingles, to replace slates or tiles; however, there are situations where these materials may be allowed. If you propose to use substitute materials, you should discuss your plans with us in advance to avoid denial of your project.

Detailed information is available in "Preservation Briefs 4: Roofing for Historic Buildings." To request a free copy, see page 10.

REPLACEMENT OR REPAIR OF ORIGINAL FEATURES

Repair, rather than replacement, of any feature -- such as wood trim, siding, entry steps, a dormer or a porch -- is always strongly encouraged. If replacement is necessary, documentation of the deteriorated condition of the feature should be submitted. Only those portions of any feature that are deteriorated should be replaced.

For example, if only the lower clapboards of a building's siding have decayed, then only those boards and no other historical material should be replaced. Replacement boards should match the existing in size, design and material. Artificial siding in aluminum or vinyl is almost never seen as an appropriate replacement for wood. The use of

substitute materials, in some cases, may be acceptable if the new material would resolve difficult structural, economic or maintenance issues, and duplicate the original material's appearance.

Detailed information is available in "Preservation Briefs 16: The use of Substitute Materials on Historic Building Exteriors" To request a free copy, see page 10.

REMOVAL OF LATER BUILDING ADDITIONS OR FEATURES

Later additions or features may be removed if they do not contribute to the significance of the building and if the area from which they are removed is to be restored or rehabilitated sympathetically.

Even if an addition is not original to a building, it may still be historically significant. Evidence of whether an addition is considered to be significant is often found in the National Register or State Register nomination for the property. Likewise, if the property is located within a district, you should check the district nomination to see if the feature or addition was added during the period of significance of the district. If so, you should not remove it. For example, removing a porch constructed in 1910 from an 1875 house, to rebuild the original porch may not meet the "Standards". If the house were significant as the residence of an important historical figure who resided in the house until 1930, then his 1910 alteration of the porch would be considered important historically and should not be changed. When planning demolition, you should contact the Division of Historic Preservation (see page 9) for a determination of significance of any feature proposed for removal.

For further information about how to treat an area after removal of later elements, see the comments regarding construction of new additions.

CONSTRUCTION OF NEW ADDITIONS

It is impossible to develop a hard-and-fast set of rules for new construction that will apply to every situation and every historic building **The following remarks are to be used as general guidance only.** Each project is reviewed on a case-by-case basis.

In general, the degree to which new construction can take place on a historic building, and the design of the new construction, is determined by the visibility of the area in which the construction is proposed. Additions to historic buildings should be constructed on the least visible elevation such that the historic building remains the most prominent element from the public right-of-way. In some

cases, particularly when a building is freestanding and visible from all points (in other words, when it has four primary facades), it may not be possible to construct any additions. New additions should be limited to rear facades and should, generally, be contemporary in design, as opposed to historic-looking replicas of the building to which they are attached. Contemporary work may utilize the same materials and patterns of the original construction but should not attempt to look like part of the original construction. Certain contemporary materials, such as unpainted wood, mill finished aluminum, tinted or reflective glass and some concrete block, are not compatible with most historic buildings. Generally, additions are most successful that match the historic building's materials, attempt to minimize the link to the historic building, mimic the rhythm and proportions of the original building's features and simplify historic design motifs.

Detailed information is available in "Preservation Briefs 14: New Exterior Additions to Historic Buildings..." To request a free copy, see page 10.

BUILDING INTERIOR

GENERAL DISCUSSION: It is a common misconception that this program is only concerned with the outside appearance of buildings undergoing rehabilitation and, therefore, applicants may omit any description of the proposed interior work that they plan to carry out. Below are some remarks that you should consider in planning and describing interior work.

In reviewing interior work, we try to determine whether the work will have an effect on significant interior features and spaces. We determine significance from the content of the National or State Register nomination, the Part 1 application, and from the photographs that are submitted with the application. If the National or State Register nomination or Part 1 application cites significant interior features and spaces, these should be respected and preserved whenever possible. Where interior work is proposed, it is important that clear photographs of the building's interior be submitted with the application. There should be a sufficient number of photographs to illustrate the condition of all representative interior spaces prior to demolition or construction. In addition, the photos should document the appearance of any potentially significant interior elements that will be affected by the project.

If you do not plan to carry out interior work, it is helpful if you say so in the application. Then, when the application is reviewed, the reviewer will know that interior work has not been inadvertently omitted.

In describing the new interior features, it is important that you tell what the new interior finishes will be. You should describe, generally, the wall, floor, and ceiling treatments.

REMOVAL OR ADDITION OF INTERIOR WALLS

If a building contains significant interior spaces, you should work within the existing floor plan to the extent possible. The Standards do not usually allow total gutting of a building unless the interior has been completely altered in the past and possesses no significant features or spaces. Significant interior spaces include both those that are highly decorated and original (such as hotel lobbies) and those that are characteristic of the buildings in which they are contained (such as school auditoriums and corridors).

In evaluating which spaces can be changed on an interior, you should determine which spaces are primary and which are secondary. Primary spaces are those that are important to the character of a building and should always be preserved. Unfortunately, because there are a wide variety of historic buildings, each with its own type of significance, there are no absolute rules for identifying primary spaces.

In dealing with buildings other than single family houses, a general rule-of-thumb in determining which spaces are primary (and, therefore, should not be altered extensively) is whether the spaces are "public" or "non-public." In general, "public" spaces should be preserved largely intact whereas "non-public" spaces may be altered more radically. For example, the "public" spaces in a school building would include the corridors, entrance lobbies, stairwells, and auditoriums. These should be left intact. On the other hand, the "non-public" spaces, such as classrooms and offices, can be altered more extensively, provided that there are no highly significant features present. In office buildings, the "public" spaces would include the hallways, lobbies, and any decorative stairways. "Public" spaces in churches would include most of the interior features. On the other hand, there may be few or no "public" spaces in many warehouses and factories.

When interior walls are to be changed, you will be required to submit "before" and "after" floor plans. Combined before and after floor plans drawn primarily to indicate the location of new partitions and where the existing partitions are shown as dotted lines (indicating demolition) are not acceptable for this purpose.

Detailed information is available in "Preservation Briefs 18: Rehabilitating Interiors in Historic Buildings." To request a free copy, see page 10.

REMOVAL OR RELOCATION OF INTERIOR TRIM OR FEATURES

As in the case of interior spaces, whether interior door and window trim, baseboard or other features, such as doors, fireplace surrounds, stair rails, or decorative plaster, can be removed depends on the significance of those features. The Standards consider both highly decorated features (such as grand staircases) and characteristic features (such as original window trim) to be significant and, to the extent possible, these should remain intact. If original features have to be removed during construction, they should be re-installed (or, if this is impossible, reproduced) in their original locations. Avoid moving original decorative elements to new locations. A project may be denied certification if the effect of the interior work is to create a new, "historic" interior -- that is, an interior that looks to be original, but is actually a collection of original building artifacts applied in non-original locations over new construction. Likewise, interior trim for *new* walls should be generally of the same type and proportion as the original trim, but should not duplicate it exactly, unless the original trim is relatively unornamented.

CHANGES IN ROOM FINISHES

For most interior walls, the choice of finishes is not a problem. We are likely to question the covering over of original decoration (such as stenciling), the removal of plaster or wooden elements (such as cornices or wainscoting), or the application of textured wall paints on original plaster. A modern popular treatment, the removal of plaster to expose brick or stone is *not* appropriate. Historically, brick would be left exposed only in utilitarian structures such as mills, factories, or warehouses. In the area of floor finishes, you should avoid removing or permanently damaging decorative flooring; otherwise, most types of treatments are allowable.

Ceiling treatments are the cause of some concern in this program. We are likely to question the lowering of ceilings, particularly those in public spaces. If you propose to lower ceilings, they should not be dropped below the level of the tops of the windows unless they are revealed upward at the windows for a distance of at least three feet from the outside walls. We will not accept the installation of plywood panels, spandrel panels, or opaque glazing in the upper portions of windows to hide suspended ceilings. In spaces where the ceilings are to be lowered or repaired, and the original ceiling was plastered, you should install suspended gypsum drywall (or plaster) in lieu of suspended acoustical tile. If room finishes are to change significantly, the application materials should contain a room finish schedule or some similar indication of the room finishes.

REMOVING OR INSERTING FLOORS

In most cases, the removal or insertion of floors in a historic building will result in denial of tax credits; however, there are situations where these treatments may be considered. Removal of floors may be considered in buildings where "gutting" would be permitted: buildings in which the affected areas possess no significant spaces or features. Even under these circumstances, floor removal should be limited to less than 1/3 of the building's area per floor. In addition, floor removal will not be allowed if it makes the building appear to be a hollow shell from any direction.

New floors may be inserted only when they will not destroy the spatial qualities and decorative features of significant larger spaces. The insertion of intermediate loft levels in a warehouse, for example, is likely to be approved if it does not involve changing the outside window patterns. The insertion of an intermediate floor in a theater or the worship area of a church, on the other hand, will nearly always result in denial of a project.

WALL INSULATION

Typically, we review three types of wall insulation: insulation of wall cavities, insulation applied to the inside surfaces of exterior walls, and insulation applied to the outside surfaces of buildings. With respect to insulation installed in cavity walls, because of the potential moisture damage problems that can result, we encourage applicants to apply other energy-saving measures elsewhere on historic buildings and to leave the wall cavities uninsulated. If you plan to install blown-in insulation, we will require at the very least an indication that a sufficient vapor barrier exists to prevent future damage to the structure. If the wall cavity is to be opened up during construction, it is strongly suggested that fiberglass insulation and an adequate vapor barrier be installed.

With respect to insulation applied to the inside surfaces of exterior walls, it will not be allowed in cases where decorative interior features (such as ornate plasterwork) will be destroyed or covered over. Such work may be allowed, however, if the original moldings and trim are reinstalled in their original locations on the insulated walls.

Application of insulation over the exterior surfaces of walls is generally prohibited except, in some cases, on rear facades.

INSTALLATION OF NEW MECHANICAL SYSTEMS, ELECTRICAL WIRING, AND PLUMBING

In most cases, mechanical, electrical, and plumbing work will have no effect on the historic qualities of a rehabilitated building; however, these items should be addressed in the application. Of these, the installation of new mechanical systems should be described in the most detail. If, for

example, an existing hot water heating system is to be replaced by a new forced-air system, the changes necessary to install heating ducts may be of concern. Also, in the installation of mechanical cooling systems, the location of the condenser is an important consideration. Condensers should not be installed in visible locations on roofs or, at ground level, on primary facades. If unit air conditioners (window units) are to be installed, the Standards do not allow sleeve holes to be cut into primary and secondary facade walls and does not allow windows on these facades to be blocked-in to receive such sleeves.

FOR FURTHER INFORMATION...

For answers to specific questions concerning information published in this pamphlet, call or email the Wisconsin Historical Society staff or visit our website.

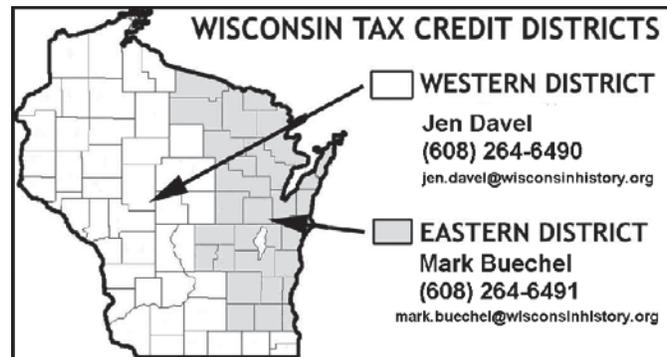
General information:

Visit our website at:

www.wisconsinhistory.org/hp

Preservation Architects:

For questions concerning appropriate rehabilitation, find the architect in the district the historic property is located:



Historian:

For questions concerning historic significance of a building or addition:

Joe DeRose 608-264-6512
joe.derose@wisconsinhistory.org

Office of the State Archeologist:

For questions concerning archeological deposits or features:

John Broihahn 608-264-6496
john.broihahn@wisconsinhistory.org

Burial Sites Office:

For questions concerning burial or human remains:
800-342-7834

The Division of Historic Preservation has a number of technical publications available for distribution. Chief among these are the "Preservation Briefs" series, published by the National Park Service. The following titles have been published to-date:

- ◇ Preservation Briefs 1: The Cleaning and Waterproof Coating of Masonry Buildings
- ◇ Preservation Briefs 2: Repointing Mortar Joints in Historic Brick Buildings
- ◇ Preservation Briefs 3: Conserving Energy in Historic Buildings
- ◇ Preservation Briefs 4: Roofing for Historic Buildings
- ◇ Preservation Briefs 6: Dangers of Abrasive Cleaning to Historic Buildings
- ◇ Preservation Briefs 7: The Preservation of Historic Glazed Architectural Terra-cotta
- ◇ Preservation Briefs 8: Aluminum and Vinyl Siding on Historic Buildings
- ◇ Preservation Briefs 9: The Repair of Historic Wooden Windows
- ◇ Preservation Briefs 10: Exterior Paint Problems on Historic Woodwork
- ◇ Preservation Briefs 11: Rehabilitating Historic Storefronts
- ◇ Preservation Briefs 12: The Preservation of Historic Pigmented Structural Glass
- ◇ Preservation Briefs 13: The Repair and Thermal Upgrading of Historic Steel Windows
- ◇ Preservation Briefs 14: New Exterior Additions to Historic Buildings: Preservation Concerns
- ◇ Preservation Briefs 15: Preservation of Historic Concrete: Problems and General Approaches
- ◇ Preservation Briefs 16: The use of Substitute Materials on Historic Building Exteriors
- ◇ Preservation Briefs 17: Architectural Character: Identifying the Visual Aspects of Historic Buildings and an Aid to Preserving the Character
- ◇ Preservation Briefs 18: Rehabilitating Interiors in Historic Buildings
- ◇ Preservation Briefs 19: The Repair and Replacement of Historic Wooden Shingle Roofs
- ◇ Preservation Briefs 20: The Preservation of Historic Barns
- ◇ Preservation Briefs 21: Repairing Historic Flat Plaster - Walls and Ceilings
- ◇ Preservation Briefs 22: The Preservation and Repair of Historic Stucco
- ◇ Preservation Briefs 23: Preserving Historic Ornamental Plaster
- ◇ Preservation Briefs 24: Heating, Ventilating, and Cooling Historic Buildings: Problems and Recommended Approaches
- ◇ Preservation Briefs 25: The Preservation of Historic Signs
- ◇ Preservation Briefs 26: The Preservation and Repair of Historic Log Buildings
- ◇ Preservation Briefs 27: The Maintenance and Repair of Architectural Cast Iron

- ◇ Preservation Briefs 28: Painting Historic Interiors
- ◇ Preservation Briefs 29: The Repair, Replacement, and Maintenance of Historic Slate Roofs
- ◇ Preservation Briefs 30: The Preservation and Repair of Historic Clay Tile Roofs
- ◇ Preservation Briefs 31: Mothballing Historic Buildings
- ◇ Preservation Briefs 32: Making Historic Properties Accessible
- ◇ Preservation Briefs 33: The Preservation and Repair of Historic Stained and Leaded Glass
- ◇ Preservation Briefs 34: Applied Decoration for Historic Interiors: Preserving Composition Ornament
- ◇ Preservation Briefs 35: Understanding Old Buildings: The Process of Architectural Investigation
- ◇ Preservation Briefs 36: Protecting Cultural Landscapes: Planning, Treatment and Management of Historic Landscapes
- ◇ Preservation Briefs 37: Appropriate Methods for Reducing Lead-Paint Hazards in Historic Buildings
- ◇ Preservation Briefs 38: Removing Graffiti from Historic Masonry
- ◇ Preservation Briefs 39: Holding the Line: Controlling Unwanted Moisture in Historic Buildings
- ◇ Preservation Briefs 40: Preserving Historic Ceramic Tile Floors
- ◇ Preservation Briefs 41: Seismic Retrofit of Historic Buildings
- ◇ Preservation Briefs 42: The Maintenance, Repair and Replacement of Historic Cast Stone

These Preservation Briefs are available through the Internet at:

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

For free, single copies of any of these materials, please check those desired, provide your complete mailing address in the box below, and mail this sheet to:

**Division of Historic Preservation
Wisconsin Historical Society
816 State Street
Madison, WI 53706**

NAME		

STREET ADDRESS		

CITY	STATE	ZIP CODE



HISTORIC PRESERVATION TAX INCENTIVES FOR INCOME-PRODUCING HISTORIC BUILDINGS

INTRODUCTION

Federal tax incentives for the rehabilitation provide a 20% investment tax credit to owners who substantially rehabilitate their income-producing certified historic structures. These tax incentives have been in effect since 1976 and have been substantially amended several times; this pamphlet reflects the latest changes, the Tax Reform Act of 1986.

This nation-wide program is managed by the National Park Service and administered in Wisconsin by the Division of Historic Preservation (Division) of the Wisconsin Historical Society.

In planning a tax credit project, you should be aware that the Tax Reform Act of 1986 established "passive income" and transition rules that may affect your ability to claim tax credits, depending on the nature of your investment, your total income, and when your project was carried out. Interpretation of these rules is beyond the scope of this summary. For further information, you should contact the IRS, a tax attorney, or an accountant.

THE ROLE OF THE DIVISION OF HISTORIC PRESERVATION

The Division of Historic Preservation does not have the power to approve historic tax credit applications. The authority to approve or deny rests solely with the National Park Service. The role of the DIVISION consists of:

- informing the public about this program's procedural requirements;
- advising applicants of missing information or uncertifiable work contained in proposals and applications;
- forwarding applications to the National Park Service along with the Division's recommendations; and
- maintaining a complete duplicate file on all project applications and amendments.

WISCONSIN 5% SUPPLEMENTAL CREDIT

In 1989 the State of Wisconsin created a 5% supplement to the already established 20% federal income tax credit. An additional 5% credit can be deducted from Wisconsin income taxes by persons who qualify for the 20% federal program; and receive National Park Service approval **before** any physical work (including demolition) is begun on the project.

(Also established in 1989 was a Wisconsin 25% Historic Rehabilitation Tax Credit for **non-income-producing historic buildings**. Information about that program can be obtained by contacting the Division at 608/264-6491 or 608/264-6490.)

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THE TAX INCENTIVES

Current law provides the following percentages of investment tax credits for rehabilitation of income-producing buildings:

	NON-RESIDENTIAL	RESIDENTIAL
Built before 1936	10% Federal	None
Certified Historic Structure	20% Federal plus 5% State*	20% Federal plus 5% State*

*(Subject to rules regarding Wisconsin 5% credit. See "Wisconsin 5% Supplemental Credit.")

These instructions pertain to the tax incentives for rehabilitating Certified Historic Structures. Unlike the 20% credit for certified historic buildings, the 10% tax credit is not available to contributing or significant buildings within a National Register Historic District. For more information about the incentives available for non-historic structures built before 1936, you should consult a tax attorney or accountant.

The tax credits described in this summary apply only to expenditures made to the exterior or the interior of certified historic structures. The costs of site work, acquisition, and construction of additions are not eligible for the credits.

In addition to the tax credit, you may also claim depreciation on your building. The depreciation schedule as of January 1, 1990, is 27.5 years for residential income-producing properties and 31.5 years for other income-producing properties.

APPLICATION REQUIREMENTS SUMMARY

TYPE OF BUILDING	Part 1 required?	Part 2 required?	Part 3 required?	Additional Action Required
Listed in the National Register of Historic Places	No	Yes	Yes, after work is done	None
Located in a National Register Historic District	Yes	Yes	Yes, after work is done	None
Located in NPS-certified local historic district	Yes	Yes	Yes, after work is done	None
None of the above	Yes	Yes	Yes, after work is done	Must formally nominate the property to the National Register. Property must be listed in the Register within 30 months of your taking the credit, or you must repay the credit to the IRS and the Wisconsin Department of Revenue

The historic preservation tax credits allow you to extend the period over which you must meet the "substantial rehabilitation" requirements from two to five years; however, you must formally apply for this option before work begins. For further information, see "Applying for five-year certification."

If the building is sold after the tax credits are claimed, the IRS and the Wisconsin Department of Revenue will recapture all or part of the credit. The amount of recapture is reduced by 20% per year and after five years there is no recapture. During this period, you are required to obtain NPS approval of any significant additional work that you undertake.

In addition to the owners of a building, a **lessee** may also be eligible for the tax credits if the lease runs for at least 18 years beyond the completion of the rehabilitation project and if the lessee carries out the work.

As with any tax incentives, there are subtleties in the law that go beyond the scope of this summary. Any questions that relate to your own tax situation should be addressed to the IRS or a professional tax specialist.

For assistance in proceeding through the certification process, contact Jen Davel at 608-264-6490 or jennifer.davel@wisconsinhistory.org

BASIC PROGRAM REQUIREMENTS SUMMARY

In order to take advantage of the historic preservation tax incentives, you must:

1. Own (or lease, as described earlier) a "Certified Historic Structure."
2. Use the building for the production of income, according to IRS regulations.
3. "Substantially Rehabilitate" the building.
4. Design and carry out work in conformance with the "Secretary of the Interior's Standards for Rehabilitation."
5. Formally apply to the National Park Service, through the Division for certification of your project. (The NPS charges a fee for its portion of the review. See "National Park Service fee schedule".) See the "contents" on page 1 for the location of each of these topics.

APPLICATION PROCESS OVERVIEW

Tax credit applications are the blue forms in the information packet. Applications in electronic form are available on the web at <http://www.nps.gov/history/hps/tps/tax/hpcappl.htm>. To take advantage of the historic preservation tax credits, you must submit three applications to this office:

1. A Part 1 application, the purpose of which is to determine that the building is historically significant. (The Part 1 application is not required for buildings already *individually* listed in the National Register of Historic Places.)
2. A Part 2 application in which you describe the work that you intend to carry out. The purpose of this application is to demonstrate to the NPS that your project will not destroy the historic qualities of the building.
3. A Request for Certification of Completed Work (usually referred to as the "Part 3 application") that you must submit after completion of the work.

In addition, owners of buildings that are preliminarily certified (see "Certified Historic Structures,") must submit National Register nominations for their buildings. A summary of the application requirements is given at the top of this page.

CERTIFIED HISTORIC STRUCTURES

The term "Certified Historic Structure" as defined in the tax codes means:

- a building that is individually listed in the National Register of Historic Places; **or**
- a building that is located within the boundaries of a National Register historic district and which is determined by the National Park Service to contribute to that district; **or**
- a building that is located within the boundaries of a locally designated historic district whose ordinance and boundaries have been certified by the National Park Service -- and where the building has been determined by the NPS to contribute to the district.

If your building does not fall into one of the three categories above, you may still take advantage of the tax credits by submitting a Part 1 application to obtain a preliminary certification of significance. You would then proceed through the certification process; however, within 30 months of the date in which you file your tax return claiming the

credit, the building must be listed in the National Register of Historic Places.

As indicated in the summary of application requirements, Part 1 applications are also required for projects located within historic districts to establish the building is "contributing". Not all buildings within a district are considered contributing to the historic character of the district, because of age or alterations. Once the Part 1 is approved, the property is considered to be a "certified historic structure." **Properties listed individually in the National Register are already considered to be "certified historic structures" and, therefore, Part 1 applications are not required.** For further information about completing Part 1 applications, see "Part 1 Application Instructions."

INCOME-PRODUCING REQUIREMENTS

The Federal historic preservation tax credits, and the Wisconsin 5% supplemental credit, apply only to buildings that are income-producing. All certified historic income-producing properties, including residential rental properties, are eligible for the credits. One key to determining whether your property is considered income-producing is whether you can depreciate all or part of it under IRS rules.

If only part of your building is income-producing, you may pro-rate the tax credit over that portion of the building. Contact a tax specialist or the IRS for further information.

For information on the State historic rehabilitation credit for non-income-producing properties, contact the Division of Historic Preservation at 608/264-6490 or 608/264-6491 for an information packet.

SUBSTANTIAL REHABILITATION REQUIREMENTS

To claim any credit, the IRS requires that you "substantially rehabilitate" your historic building. This means that the amount of money that you spend on the historic rehabilitation (that is, the money that you may claim for purposes of the tax credit) must equal at least \$5,000 or the "adjusted basis" of the building, whichever is greater. The adjusted basis is generally the price that you paid for the building (not including land costs), plus any capital improvements that you have made, minus any depreciation that you have already taken.

IRS regulations specify that you must meet the "substantial rehabilitation" requirements within a two-year period (at your option, you may choose any two-year period during which you spend the most money on qualified rehabilitation work). If you cannot meet this requirement, you may formally apply as a phased project which allows a five-year period to "substantially rehabilitate" your building. See "Applying for Five-year Certification".

NATIONAL PARK SERVICE (NPS) FEE SCHEDULE

The NPS charges the following fees for reviewing applications:

COST OF WORK	NPS FEE
less than \$20,000	No fee
\$20,000 - \$99,999	\$500
\$100,000 - \$499,999	\$800
\$500,000 - \$999,999	\$1,500
more than \$1,000,000	\$2,500

Applicants are billed directly by the NPS in the following manner:

- For all projects with more than \$20,000 worth of work, only \$250 of the fee is charged at the time of Part 2 review. This is normally billed when the NPS receives your Part 2. They will review your project when they receive this initial fee. Do **not** send a check before being billed. However, if review of your application is urgent, the NPS can charge the review fee to your credit card. You must complete the "Fee Payment" form in the application packet to provide credit card authorization.
- If, however, your project is estimated to cost less than \$20,000, the NPS **not** charge a review fee.
- When your Part 3 application is received by the NPS, you will be charged the remaining fee, based on the schedule above.

THE APPLICATION PROCESS

To expedite the application process and to increase the likelihood of the National Park Service's tax credit approval, the Division of Historic Preservation suggests that you proceed in the following way:

1. **Contact the Division** to let us know of your intent to apply for the tax incentives. We will check to see if your building is already a "certified historic structure" and can discuss the details of your project to determine whether the work meets NPS standards.
2. **Take detailed photographs of the property.** For purposes of the Part 1 application you need to document all sides of the building and show its surroundings. In addition, you should provide representative photographs of the building's interior. For the Part 2 application, you are required to illustrate the pre-project conditions described in the application. You must send **two copies of all photographs**. Further information about photographic requirements is given in the application instructions sections.
3. **Prepare the Part 1 application** (unless your building is listed individually in the National Register). For further information, see the "Part 1 application instructions" section. While it is not required, many applicants feel the need to hire professional consultants to complete these applications. If you wish to hire a consultant, you can request from the Division a list of persons who have successfully completed National Register nominations and Part 1 applications.
4. **Prepare and submit the Part 2 application.** Further information about the documentation requirements are given in the "Part 2 application instructions" section and in the State Historical Society publication, "Guidelines for Planning Historic Preservation Tax Credit Projects". Applications that are incomplete or that describe inappropriate work will be returned for revision or augmentation. The Part 2 application may be submitted along with the Part 1 application. You can expect a response from the NPS within 60 days of the Division's receipt of your application.
5. **Carry out the work.** Once the Part 2 application has been approved by the NPS, you may begin work without jeopardizing your tax credits if the work conforms to the approved Part 2 application. It is possible to change some aspects of the project, but all changes must be submitted (along with necessary photos and drawings) to the Division. The Division will then forward them to the NPS for approval.

If your property has received only a preliminary determination of significance through the Part 1 application process, (in other words, if it is not individually listed in the National Register or certified as contributing to a National Register district), you should begin immediately to prepare a National Register nomination for

the property. Contact the Division to begin the process (see "Where to go for help").

6. **Apply for final certification.** In the calendar year you complete the work and place the building in service, you must submit a "Request for Certification of Completed Work" (also referred to as the Part 3 application). To claim your tax credit, the IRS requires you to attach a NPS-signed copy of the approved Part 3 application to your tax return. If your property is not yet a certified historic structure, the NPS cannot sign-off on your Part 3 application, although the work may be approved by letter. You may use the approval letter to claim your credit, but you are required to list your property on the National Register within 30 months of the date in which you claim your tax credits. The NPS can then sign the Part 3, which you must submit to the IRS. **Because National Register listing is a time-consuming process, begin this process early!**

THE SECRETARY OF THE INTERIOR'S STANDARDS FOR REHABILITATION

Because this program is designed to encourage sensitive rehabilitation of historic buildings, every project is evaluated against a set of standards to ensure that the proposed work will not destroy the buildings that the tax credits were designed to save. These standards, which have been adopted into the tax code, are called "The Secretary of the Interior's Standards for Rehabilitation."

A copy of the Standards and the accompanying guidelines for rehabilitation may be attached to this information package. If it is not, you may request one free of charge from the Division. Also available is a Wisconsin supplement, "Guidelines for Planning Historic Preservation Tax Credit Projects", that provides guidance on how the Standards are interpreted.

The ten Standards are as follows:

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 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.

INSTRUCTIONS FOR COMPLETING PART 1 - APPLICATIONS (EVALUATION OF SIGNIFICANCE)

To be eligible for the tax incentives, a building must be a Certified Historic Structure. As an applicant, this means that if your property is not listed *individually* in the National Register of Historic Places you must complete a Part 1 application. Generally, it must be submitted no later than the date the building is "placed in service", that is, put in use for an income-producing purpose. The majority of the application consists of information that you must provide about the building's physical appearance and the building's historic significance.

PURPOSE OF THE FORM

For properties contained within historic districts (either National Register or certified local historic districts) the form is designed to demonstrate that the properties contribute to the significance of those districts. Once a Part 1 certification form has been approved by the NPS, that property is considered to be a Certified Historic Structure.

For properties not located in historic districts and not listed individually on the National Register, the Part 1 form serves as a preliminary National Register nomination. The level of documentation for a Part 1 application is virtually the same as that for a National Register nomination (although the format is not as tightly structured and the narrative can be shorter). In completing the form, you must document that the building is eligible for listing in the Register. When the NPS approves a Part 1 application for this type of building, it states only that the building appears to be eligible for listing in the Register. Once you complete the project and take the tax credits, you will be required to formally list the property in the Register within 30 months.

DATE OF CONSTRUCTION

Under "Date of Construction," please indicate the source from which the date was obtained. Acceptable sources include cornerstones or inscription stones, city building permits, building plans, county or local histories, newspapers of the time of construction, and sometimes title abstracts, tax records, or early maps.

THE DESCRIPTION OF PHYSICAL APPEARANCE

Every Part 1 application must address the following physical aspects of the building:

1. Kind of structure (church, dwelling, etc.)
2. Overall shape or plan (rectangular, "L-shaped," etc.)
3. Number of stories
4. Construction material (brick, frame, stone, etc.)
5. Siding or exterior wall covering material

6. Roof shapes (Mansard, hipped, gabled, etc.)
7. Important decorative elements (column, porches, towers, windows, etc.)
8. Number, types, and locations of outbuildings, including dates of construction
9. Known substantial alterations or additions, including dates
10. Significant or character-defining interior features and spaces.

It is important that you describe and send photographs (2 sets) of both the exterior and the interior of the building. Applications that fail to address interior features will be returned for more information.

STATEMENT OF SIGNIFICANCE

The statement of significance is the most important aspect of the Part 1 application -- and the most technically difficult. You may wish to hire a consultant to prepare your Part 1 application, especially if your building does not lie within a registered or certified historic district. If so, the Division staff can provide you with list of consultants who have successfully prepared Part 1 applications and National Register nominations. See "Where to go for help".

If your building is located within a historic district, the information that you provide in this area must be designed to show that the building contributes to the significance of that district. Your first step should be to find out why the district is significant by checking the National Register or local district nomination form. You may obtain a copy of these nominations by contacting the Division.

If your building is not located in a historic district and is not listed in the National Register, you must show that the building is eligible for listing in the Register. The statement of significance required for this type of building is equivalent to what is required for a National Register nomination and all applications are evaluated for significance using National Register criteria. This means that you must demonstrate that your building:

1. is associated with events that have made a significant contribution to the broad patterns of our history; or
2. is associated with the lives of persons significant in our past; or
3. embodies the distinctive characteristics of a type, period, or method of construction, or represents the work of a master architect or builder, or possess high artistic values, or represents a significant or distinguishable entity whose components may lack individual distinction; or
4. has yielded, or is likely to yield, information important to prehistory or history.

The statement of significance for buildings that are less than fifty years old; moved; reconstructed; birthplaces of important individuals; primarily commemorative in nature; or owned or used by religious institutions may have to address additional criteria set forth in National Register regulations. Please consult with the Division staff if your building falls into one of these "exceptional" categories.

Sources of information used in the statement of significance, especially quotations, should be specified with proper references to documents, titles, dates, and pages. Heresy or common knowledge cannot be used to establish significance.

INSTRUCTIONS FOR COMPLETING PART 2 APPLICATIONS (DESCRIPTION OF REHABILITATION)

In order to describe a wide range of projects the Part 2 application form was designed to be very flexible. Unfortunately, this flexibility can lead to confusion, and often applications must be returned because applicants failed to describe work adequately. These instructions are intended to clarify the procedural requirements for applying for certification of your rehabilitation plans. Please refer to "Guidelines for Planning Historic Preservation Tax Credit Projects" for information on National Park Service standards and documentation requirements.

COMMON MISTAKES AND OMISSIONS

Most applications are returned to applicants for the following reasons:

1. Lack of photographic documentation. Because it is impossible to visit every tax project, we rely on photographs supplied by applicants to illustrate pre-project conditions. Each applicant is required to submit two sets of clear photographs that show all of the conditions described in the application. These need not be larger than snapshot size, but "instant" (so-called Polaroid) photographs are not acceptable. **Two sets** of photographs are required in order that the Division have a record set of photos after sending one set to the NPS. Photos should be clearly labeled by location, or keyed to a plan. Loose, unmounted photographs are preferred to simplify our filing process. High quality **color** photocopies are satisfactory for the second set -- **black and white photocopies are not.**

2. Lack of adequate plans. In most cases, in order to describe the work, plans or other drawings are required. For example, when interior work involves alteration of interior features, the NPS requires that before-and-after floor plans be submitted. If you submit plans or other drawings, please remember to submit two copies. As with the photographs, one copy is sent to the NPS and one record copy is kept in our files.

Often, applicants who have already produced complete sets of plans and specifications for a project will submit instead summary materials. In most cases, those summary materials leave out important information that we and the NPS need to review a project. If you have already prepared plans and specifications, you should send them with the application.

3. Lack of required signatures. The NPS and the Internal Revenue Service (IRS) require that applications be signed by all owners of a rehabilitated property, and that the names, addresses, and taxpayer identification numbers of those owners be indicated on the application. The IRS requires that **all partners** give their names and taxpayer identification numbers on an application. A general partner who is in the process of soliciting partners at the time of application should include a statement that the names of the remaining partners are unknown, but that they will be submitted at a later date.

4. Failure to describe significant aspects of a project. Sometimes, applicants do not describe those parts of a project that they do not feel are important, such as interior

rehabilitation. The NPS considers all parts of a project to be important and requires applicants to address all aspects of project work including interior work, new construction, demolition of nearby structures, and installation of new mechanical and electrical systems.

5. Reformatting the application. The NPS requires that applications be submitted on the standard forms, although it is possible to modify the section in which the work is described. If you feel that the blocks in the application are too small for all of the information that you need to give, you can either put the additional information on continuation sheets or create your own similar format, as on a computer. If you elect to do the latter, please include the references to photos and drawings contained at the bottom of the left-hand block.

6. Submission of unidentified application materials and amendments. Applicants often send or hand deliver plans and supplementary materials with no cover letters or project identification. Under these circumstances, it is possible for the materials to be misdirected or not acted upon. Any additional information or changes to your proposal should be described on the NPS "Continuation/Amendment Sheet," which is included in the application packet with the other blue application forms. It should be completed and signed by the owner.

APPLYING FOR FIVE-YEAR CERTIFICATION

Ordinarily, as a tax applicant, you would have two years in which to meet the "substantial rehabilitation" requirements for purposes of claiming the credits. It is possible under this program to meet those requirements in a five-year period if the project is phased. You should formally apply for this option before work begins on the project or have architectural plans that demonstrate your intention to complete the project in phases from the outset. To apply for a phased project, you should submit plans for the complete project and a signed letter with your application in which you:

- express your intent to apply for the five-year expenditure period;
- state whether the work described in the Part 2 application represents all of the work to be carried out over the five-year period; and
- present a phasing plan breaking the project down into at least two logical, discrete "phases." For each phase, you must tell what work will be accomplished, the start and completion date, and the estimated cost of that work. Many applicants elect to break the projects into annual phases.

After your Part 2 application and phasing plan are approved by the NPS, you may claim the credit as each phase of your project is completed. You should wait until the completion of the entire project before submitting to the Division a "Request for Certification of Completed Work".

WHERE TO GO FOR HELP

The Division of Historic Preservation (Division) can help the potential applicant with the following services and advice regarding the tax incentives:

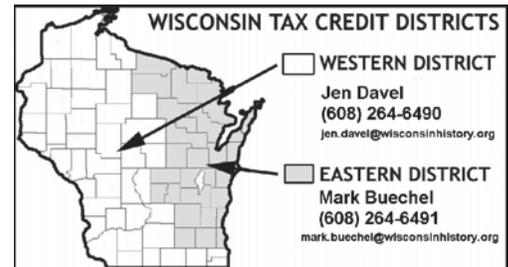
- Provide you with copies of the certification applications and instructions based on our knowledge of the tax regulations and the certification process.

- Review your project preliminarily to try to discover areas where work that you propose may not meet the Standards. (Any such requests, however, should be made in writing and should be accompanied by sufficient photographs and a description of the work to allow the division to make a reasonably good evaluation.)
- Provide you with lists of professional consultants who have successfully prepared Part I applications and National Register nominations.

For advice about completing the Part I certification application, call **Joe DeRose** at 608/264-6512 or joe.derose@wisconsinhistory.org.

For information on listing a building in the National Register of Historic Places contact **Mary Georgeff** at 608/264-6498 or mary.georgeff@wisconsinhistory.org.

All other tax certification inquiries should be made to the architect in your tax credit region. See map at right.



Certified historic buildings qualify to use the historic

building code in Wisconsin. This can be helpful in solving difficult code compliance problems. For information on the historic building code contact **Lynn Lecount**, Division of Safety and Building at the Department of Commerce, 201 W. Washington Ave., 4th fl., Madison at 608-267-2496 or llecount@commerce.state.wi.us.

For help in designing projects, we suggest that you hire an architect. The Division cannot make recommendations about which architects to hire. We suggest that you refer to the listing of architects in your telephone book or contact the **American Institute of Architects, Wisconsin** at 608-257-8477 or www.aiaaccess.com.

For advice about your tax circumstances, you should contact tax specialists, such as tax lawyers or accountants, or the Internal Revenue Service. **Colleen Gallagher** at the IRS District Office in St. Paul is available to answer tax questions as they relate to this program. She can be reached at 651-726-1480 or colleen.k.galagher@irs.gov. Also see the IRS <http://www.nps.gov/history/hps/tps/tax/irs.htm> web site. Other web sites of interest are the State Historical Society's site at www.wisconsinhistory.org and the NPS's site at <http://www.nps.gov/hps/tps/tax/index.htm>.



WISCONSIN HISTORICAL SOCIETY

Division of Historic Preservation – Public History

HISTORIC HOMEOWNERS TAX CREDIT PROGRAM APPLICATION INSTRUCTIONS

INTRODUCTION

Wisconsin homeowners can claim a 25% state income tax credit for rehabilitation of their historic personal residences. To qualify, an owner must spend at least \$10,000 on eligible work and must submit a tax credit application. The application must be approved before work begins. The maximum credit per project is \$10,000, or \$5,000 for married persons filing separately.

OVERVIEW AND PURPOSE OF THIS PROGRAM

This tax credit program was created to assist historic homeowners who are willing to use a high standard of care when specifying work and selecting materials in order to avoid harming the historic character of their houses and causing damage to their building materials. The program is administered by the Division of Historic Preservation – Public History of the Wisconsin Historical Society.

Homeowners must apply for the credit before work begins and must send photographs and a clear description of the proposed work. For each application, the Society has two primary duties: 1) to certify that the property is *historic*; and 2) to certify that the proposed work is *sympathetic* to the historic character of the house and will not cause it physical harm. The Society also certifies that completed work has been carried out as specified in the approved application.

Once their applications have been approved, homeowners may claim tax credits when they file their state income tax forms, based on money that they have spent for eligible work. When work has been completed, homeowners must send photographs and a notification that the work has been completed.

Except as mentioned above, all laws and regulations pertaining to this program are the responsibility of the Wisconsin Department of Revenue (DOR).



REQUIREMENTS

To qualify for this tax credit you must meet the following conditions:

1. Your property must be located in Wisconsin and it must be your personal residence. It cannot be used actively in a trade or business, held for the production of income, or held for sale or other disposition in the ordinary course of trade or business.
2. Your property must be historic. It must be certified to be one of the following:
 - listed in the National Register of Historic Places or the State Register of Historic Places;
 - contributing to a national register or state register historic district; or,
 - eligible for individual listing in the state register. (See "Historic Property," page 2.)
3. You must apply to receive the credit.

Before you start the work, you must submit:

 - a Part 1 application and photographs so that staff can certify that your property is historic; and
 - a Part 2 application and photographs to illustrate the proposed work so that staff can certify that it will not diminish your property's historic character. (You must receive Part 2 approval before you begin any work for which you plan to claim the tax credits.)

After the work is done, you must submit a "Request for Certification of Completed Work," along with "after" photographs to verify that work was carried out as described in the Part 2 application.
4. You must spend at least \$10,000 on eligible project work within a two-year period, which can be extended to five years. Work that does not qualify for the tax credit, such as decorative interior work, does not count toward meeting this requirement. (See "Eligible Work," page 2.)
5. All work must meet "The Secretary of the Interior's Standards for Rehabilitation," including work that may not qualify for the tax credits.
6. You must complete all work within two years of the time that you begin physical work, unless you apply to have the work phased over an extended period of up to 5 years. To qualify for 5 year phasing, you must submit a phasing plan before you begin. (See "Expenditure Period," page 3.)
7. You will be required to own and maintain the historic character of your property for a period of five years after you have taken the tax credit or pay back all, or a portion of the tax credit. (See "Recapture," page 3).

ELIGIBLE WORK

You may claim the tax credit only for the following work:

- The exterior of a building. (The building can be an addition or outbuilding if it is determined to contribute to the historical significance of the property.)
- Structural elements of the building (see Note 1 below)
- Heating, ventilating, or air conditioning systems
- Electrical systems or plumbing, excluding electrical or plumbing fixtures.
- The interior of a window sash if work is done to the exterior of the window sash.
- Architectural fees
- The cost of preparing a State Register nomination

The following are examples of work that would not qualify for the tax credit but would be reviewed for conformance with the Standards:

- Work carried out within a 12 month period prior to our receipt of the Part 2 application (see Note 2, below)
- Installation of wall or attic insulation
- Interior remodeling or decoration
- New additions
- Landscaping and site work
- Plumbing and electrical fixtures
- Work on additions or outbuildings that do not contribute to the historical significance of the property.

NOTES

1. "Structural elements" are portions of a building necessary to prevent physical collapse, including footings, beams, posts, columns, purlins, rafters, foundation walls, interior wall structures, and exterior wall structures, excluding finish materials, such as plaster, lath, and decorative trim.
2. The reason for the "12-month rule" is to prevent owners from carrying out unsympathetic work (work that would result in denial of a project) before submitting a Part 2 application.
3. **If you are unsure whether work is eligible for the credit . . .** At times, it may be difficult to determine whether a work item qualifies for a tax credit. Not all work falls neatly into the categories of eligible work listed above; therefore, judgments must sometimes be made. For example, while it may be reasonable to assume that installation of a hot water heater falls into the category of plumbing systems, refinishing a wood floor clearly does not qualify as work on a structural system. State statutes give the Society very limited authority. We are responsible for certifying that properties are historically significant and that work is compatible with the historic character of a property. The remaining authority rests with the Wisconsin Department of Revenue (DOR). Although the Society will likely notify you if work is clearly outside the scope of the program, it is up to you to determine what expenses you would like to claim as a credit. Then, as with any other claim, you should keep records and be prepared to justify your claim. DOR may consult with the Society about the eligibility of certain items of work.

EXPENDITURE PERIOD

THE STANDARD TWO-YEAR EXPENDITURE PERIOD

Ordinarily, you must spend \$10,000 on eligible work within 2 years of the date that you begin work. If you plan to carry out work over a longer period of time, you may want to extend the expenditure period to 5 years. This is particularly true if your project will not meet the \$10,000 expenditure requirement in the first 2 years, but will exceed it within a 5-year period.

HOW TO APPLY FOR A FIVE-YEAR EXPENDITURE PERIOD

To extend the expenditure period from 2 to 5 years, you need to submit a "Request for Five-Year Project Phasing" (WTC:004) *along with your Part 2 application*. The application package contains a copy of the form. When filling out this form, remember to list all of the work in the Part 2 application and then to break it down into annual phases for the five-year phasing plan.

NOTE You may submit a phasing plan for an expenditure period less than five years. For example, if you expect your project to continue for only 3 years, simply leave years 4 and 5 blank.



COMPLETING THE PART 1 APPLICATION

1. NAME OF PROPERTY

If your house is individually listed on the national register or state register, use that name; otherwise, use the street address. If your project involves work on outbuildings, include them in the property name. For example, “The Samuel Smith House, Barn, and Silo” or “1341 Main Street - House and Carriage House.” Be sure to check the type of certification that you are requesting and give the name of the historic district name, if applicable.

2. OWNER

Give the names and Social Security numbers of all of the house’s owners.

3. PROJECT CONTACT

Complete this only if there is another person to whom inquiries should be made about the Part 1 application, such as an architect or a consultant.

4. PHOTOGRAPHS

All applications require clear photographs of the current appearance of all sides of the building and its surroundings. If you are applying for preliminary certification, you need to send interior and other detail photographs, as indicated in item 8 below.

5. OWNER'S CERTIFICATION

All owners must sign and date the application.

ONLY COMPLETE THE BACK SIDE OF THE PART 1 APPLICATION IF YOU ARE APPLYING FOR PRELIMINARY CERTIFICATION. The purpose of items 6-8 is to give Division staff enough information to determine that your property is individually eligible for listing in the State Register of Historic Places. If your property is already listed in the state or national registers, or is contained within a historic district, you do not have to complete items 6-8.

6. BUILDING DATA

Indicate the date that the building was constructed and your source for that date. Indicate dates when the building was altered or moved.

The following features require written descriptions or drawings (for your house and all outbuildings):

- Overall shape or plan, such as rectangular or L-shaped. (Drawings or sketches may be necessary.)
- Known substantial alterations or additions, including dates.
- If outbuildings exist, the number, types, and locations should be shown on a site map.

You do not have to describe the following features (of your house and all outbuildings) if they are evident from your photos:

- Number of stories
- Construction materials (brick, frame, stone, etc.)
- Siding or exterior wall covering materials
- Roof shapes (Mansard, hipped, gabled, etc.)
- Important decorative elements.
- Significant interior features and spaces.

7. STATEMENT OF SIGNIFICANCE

To preliminarily certify your house for the tax credit, Division staff needs to be able to determine that it is eligible for listing in the State Register of Historic Places. A property’s historical significance is more than a matter of age. It must be significant for specific reasons -- that is, it must meet criteria for listing in the state register. Also, it must have physical integrity; it cannot have been severely altered.

Staff uses the information and photographs that you provide to determine whether your building meets State Register criteria. In your application, you must demonstrate that your building:

- Is associated with events that have made a significant contribution to the broad patterns of our history; or
- Is associated with the lives of persons significant in our past; or
- Embodies the distinctive characteristics of a type, period, or method of construction, or represents the work of a master architect or builder, or possesses high artistic values, or represents a significant or distinguishable entity whose components may lack individual distinction; or
- Has yielded, or is likely to yield, information important to prehistory or history.

If you use quotations or other documented references in the statement of significance, you should refer to document titles, dates, and pages. Hearsay or “common knowledge” is not acceptable to establish a house’s significance.

The statement of significance is the most important aspect of the Part 1 application -- and the most technically difficult. You may wish to hire a consultant to prepare your Part 1 application. If so, our staff can provide you with a list of consultants who have successfully prepared Part 1 applications and State Register nominations.

8. ADDITIONAL PHOTOGRAPHS

In completing items 6-8, you must send photographs of both the exterior and interior of the building, as well as the site and outbuildings. You must include enough photographs to show the appearance of your house, its site, and outbuildings to our staff. Photographs should be keyed to floor plans and site plans. Applications with insufficient photographs to demonstrate your house’s appearance will be returned for more information.

COMPLETING THE PART 2 APPLICATION

The Part 2 application is where you list and describe the work that you intend to carry out so that our staff can determine whether it will be sympathetic with the historic character of your property. It also serves as a list of approved work that you may present to the DOR if your expenses are questioned. You must complete both sides of the Part 2 application.

ITEMS 1-4 NAME OF PROPERTY; OWNER; PROJECT CONTACT; OWNER'S CERTIFICATION

Repeat the information that you gave on the Part 1 application.

5. PROJECT DATA

This section is divided into two parts: **Section 5 - Eligible Work** asks for information about work for which you plan to claim the tax credit. If you have questions about whether work is eligible for the credit, see Note 3 under "ELIGIBLE WORK" on page 2, or contact our office to discuss specific work items. **Section 5b - Ineligible Work** asks for similar information about additional work that you may be undertaking, or have already carried out as part of a continuing project.

In addition to a listing of proposed work, sections 5a and 5b ask for the following:

Estimated costs

You must give an estimated cost for each of the work items and give a total cost at the bottom of the column. You do not have to obtain firm bids or sign contracts to fill out this section. These are only estimates. You give actual costs at the end of the project when you submit the "Request for Certification of Completed Work."

Start date

Estimate when work will begin for each item.

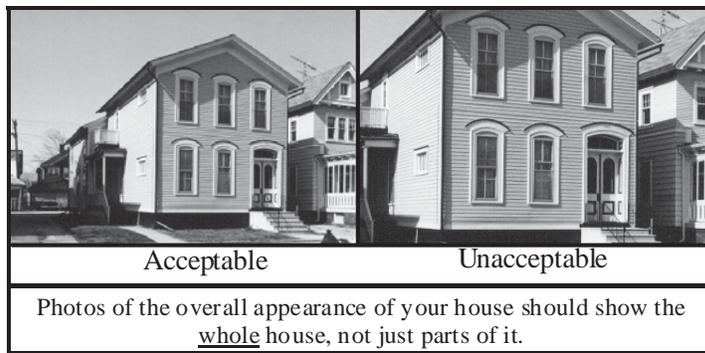
Completion date

Estimate when each work item will be completed. Remember that you only have 2 years to complete the eligible work. If the last completion date is more than 2 years after your earliest start date, you should consider submitting a five-year phasing plan.

6. PHOTOGRAPHS AND DRAWINGS

All applications must be adequately documented. Refer to the "Documentation Requirements" publication that was included with your application package.

Because staff cannot visit every tax credit project, approvals are made on the basis of your photographs. You must include pre-project photos of the overall appearance of all four sides of your house (these can be the Part 1 application photos) and also detail photographs of those areas where you plan to carry out work, both interior and exterior. (see example at right)



- These photographs should be color and a minimum of 3" x 5" in size. Digital photographs are acceptable if they are printed on quality paper at a high resolution and meet the 3 x 5 size requirement. Xerox copies are not acceptable.
- If necessary in order to understand your application, you should give a brief description of what is being shown.
- Send photographs "loose"; that is, not mounted on cardboard or in photo holders.
- Photographs are not returnable.

Drawings and manufacturers' literature

As indicated in the "Documentation Requirements" publication, you must send drawings or sketches of certain alterations, such as window replacement, changes in floor plan, and new construction. These do not have to be prepared by an architect, but they must be adequate to illustrate what you are trying to achieve. If possible, drawings and other materials should be in 8-1/2" x 11" format.

7. DESCRIPTION OF WORK TO BE PERFORMED

In this section, we ask that you describe the work that you plan to perform, including both the eligible work in Section 5a and the ineligible work in Section 5b. The "Documentation Requirements" publication lists information that you need to send for various types of work. You may include contractors' bids, but only if they include all required information. Projects that are not adequately described will be returned without action.



AMENDMENTS

As you carry out your project, you may want to amend its details. You may amend at any time until the completed project is certified. Typical amendments would involve adding work items or revising construction details. To amend, you must send a written amendment and all changes must be approved in writing **and in advance**.

To amend your project, send us a letter. There is no amendment form. The letter must contain the following:

1. Your name and the address of the property.
2. A statement making it clear that you want to amend your project.
3. The following documentation:
 - If you are adding work to the project. Send a description, an estimate of the costs, the dates in which the work is to be carried out and, when necessary, send photographs.
 - If you are deleting work from the project. Indicate the work you would like to remove.
 - If you are changing the details of work already approved. Send a description of how the work is to be amended, and indicate how the costs or dates will be affected.
4. Your signature

NOTE A project needs to be formally amended so that there will be a clear indication of what is, and is not, included in the application in the event that a project is examined by the Wisconsin Department of Revenue (DOR).

CLAIMING THE CREDIT

Once your Part 2 application is approved, the Wisconsin Department of Revenue (DOR) allows you to claim the credit “as you go,” beginning in the tax year that you begin to spend money on approved eligible work. You claim the credit when you fill out your state income tax forms by completing Schedule HR (available from the DOR) and attaching either a copy of the signed Part 2 application or, after your project has been completed, a copy of the approved “Request for Certification of Completed Work.” If your tax credit is greater than your tax liability, you can carry unused portions of the credit forward until you use it up, or for 15 years, whichever comes first.

PRORATION OF TAX CREDITS

If part of your house is also used for the production of income, you may be able to claim this tax credit for the portion that is your residence. You may also be able to claim federal and state tax credits for rehabilitation of the income-producing portion. Proration is made on a square footage basis. The rules for prorating the credit are complicated. Contact Mark Buechel at 608-264-6491 or Jen Davel at 608-264-6490 for additional information. You may also contact the DOR at 608-266-2772 for further information about the proration of credits.

RECAPTURE

You are responsible for maintaining the historic character of your property for five years after you claim the tax credit. If, during that time, you sell the property or carry out additional work that diminishes its historical significance, you will be required to pay back a prorated portion of the tax credit. If you carry out additional work during the recapture period, you must request and receive the written approval of the State Historic Preservation Officer (SHPO) before beginning the work.

The proration schedule works as follows: If recapture is triggered within the first year, you must pay back the entire credit. During the second year, you pay 80%. During the third year, 60%, During the fourth year, 40%. During the fifth year, 20%. After the end of the fifth year, there is no payback requirement.

COMPLETING THE REQUEST FOR CERTIFICATION OF COMPLETED WORK

The Request for Certification of Completed Work has three purposes:

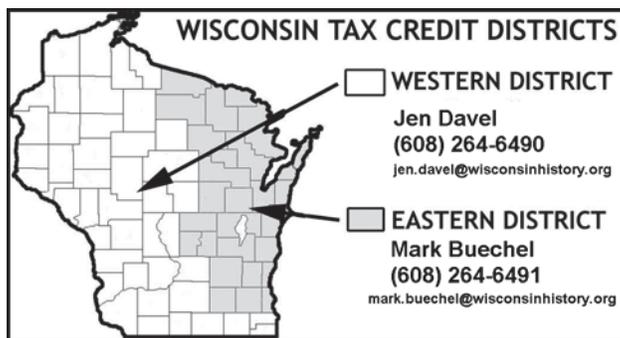
- To demonstrate to the Society that you have carried out the work as stated in your Part 2 application
- To establish for DOR the actual, final cost of your project for purposes of calculating your tax credit.
- To close-out your project.

You must send a "Request for Certification of Completed Work" within 90 days of the completion date for tax credit-eligible work. If we do not receive an acceptable form, the credit may be rescinded or recaptured.

You must supply photographic documentation including photos of the overall appearance of all four sides of your house, as well as “after” photos corresponding to the pre-project photos that you sent with the Part 2 application.

WHERE TO SEND COMPLETED APPLICATIONS

Homeowners Tax Credit
Division of Historic Preservation – Public History
Wisconsin Historical Society
816 State Street
Madison, WI 53706



THE 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 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.

You can request a copy of the "Secretary of the Interior's Standards for Rehabilitation" and guidelines for rehabilitating historic buildings by calling the Division of Historic Preservation – Public History.

PLEASE NOTE THAT...

1. The rules governing this program are subject to legislative change. If you plan to apply, please contact either Mark Buechel or Jen Davel to discuss your project and to make certain that the forms and instructions are current.
2. Society staff cannot answer questions about your specific tax situation. You should refer these questions to a tax lawyer or accountant, or to the Wisconsin Department of Revenue (DOR).
3. Although the statutes allow a maximum \$10,000 tax credit per project, they do not define the term "project." Owners may submit applications for more than one project, thereby claiming as much as \$10,000 in tax credits for each project.
4. Applicants under this program may still be subject to the Wisconsin Alternative Minimum Tax (AMT). This may affect your ability to claim a credit.
5. By statute, only "natural" persons may claim the credit. Corporate entities are ineligible.
6. Projects that involve state or federal funds, license, or permit may be required to undergo a separate review to ensure that they will have no adverse effect on significant historic or prehistoric resources. This review is separate from, and not binding on, the tax program review.
7. Projects involving locally landmarked properties may need to be reviewed under local statutes, which is a process separate from reviews carried out under this program; furthermore, design decisions made by local commissions are not binding on this program.

APPROVAL AUTHORITY

This program is jointly overseen by the Wisconsin Historical Society and the Wisconsin Department of Revenue (DOR). By statute, the Society's responsibilities are limited to certifying the historical significance of properties and certifying that work meets the Secretary of the Interior's Standards for Rehabilitation. All other aspects of the program are the responsibility of the DOR, including the interpretation of tax-related laws.

WHERE TO GO FOR HELP

- For additional copies of this application form, contact Mary Georgeff at 608-264-6498.
- For advice about completing the Part 1 application, call Joe DeRose at 608-264-6512.
- Questions about application process or specific questions about your project? Call either Mark Buechel or Jen Davel. Please note that, as a state agency, we cannot prepare plans and specifications for your project and we cannot recommend architects or contractors.
- Questions about hiring an architect? Contact the Wisconsin Chapter of the American Institute of Architects at <http://aiaw.org> for a listing of architects experienced and interested in undertaking historic rehabilitation work. When interviewing architects, we suggest that you ask for lists of preservation projects that they have completed, and that you follow up on any references.
- Questions about tax laws relating to this program, contact the Wisconsin Department of Revenue (DOR) at 608-266-2772.



Division of Historic Preservation – Public History
HISTORIC HOMEOWNERS INCOME TAX CREDIT PROGRAM

**DOCUMENTATION REQUIREMENTS
AND GUIDELINES FOR MEETING REHABILITATION STANDARDS**

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INTRODUCTION

Under this program, all work that you carry out, including work that may not qualify for the tax credits, must meet the Secretary of the Interior's Standards for Rehabilitation (or, simply, the Standards). This pamphlet describes the most common types of work, whether the work qualifies for the tax credit, and the documentation that you need to send with your tax credit application.

Here are three things that to keep in mind when you plan your project:

1. This program does not require you to restore your house. If your house has been changed in the past, you are not required to remove the alterations. You can leave the alterations in place and "work around them." For example, if you plan to replace your furnace, you are not required to rebuild your missing front porch. On the other hand, if you are working on features that have been altered, you will need to design the work to be sympathetic to your house's original features. If, for example, you plan to replace a later porch from the 1970s, the new porch must match the original, historic porch.
2. You must not create a false impression of what is, and is not, historic. You should not add features that never existed historically.
3. You must consider the long and short term structural effect of any proposed work that you carry out. Some types of work, such as sandblasting, waterproof sealing of masonry, and installation of artificial siding can lead to accelerated deterioration and should not be performed. Other types of work, such a blowing-in wall insulation, should be designed to avoid future damage.

BUILDING EXTERIOR

The extent to which you can change a building's exterior appearance depends on the visibility of the area in which the changes are to take place. Generally, the less visible the side of a building, the more changes that can be made. For purposes of the discussion below, a primary facade is one that is highly visible from public rights of way and, in most cases, has significant architectural detailing. A secondary facade is one that is generally visible from public rights-of-way, but may not contain any distinguishing architectural features. A rear facade is one that is usually not seen by the public and contains no architectural decoration. As a rule, primary facades should be left as intact as possible, while rear facades can be altered more substantially.

REPAIR OR REPLACEMENT OF ORIGINAL FEATURES

Eligibility: Repair or re-creation of original exterior features qualifies you for the tax credit.

REQUIRED DOCUMENTATION

Photographs:

() Clear photographs of the feature to be repaired or replaced

Narrative:

() State the condition of the feature and describe why it is being replaced

() In the case of repair, describe briefly, the methods to be used

() In the case of replacement state whether the feature will be replaced in-kind or, if not, describe how the replacement will differ from the original

"Feature" refers to everything from wood trim to larger items, such as porches.

Repair of exterior features is the most common type of exterior work. It is nearly always acceptable for purposes of this program as long as the method of repair does not cause damage to the surrounding materials.

Closely related to repair is the re-creation of original elements. This, too, is allowable if the application materials demonstrate that:

- the original feature cannot be repaired satisfactorily;
- the new feature will accurately replicate the original; and
- the amount of replacement is not excessive (For example, an entire cornice is replaced because a small section has deteriorated.)

Sound, original materials are part of the history of the house and should be left in-place while the deteriorated sections are repaired or replicated.



EXTERIOR PAINTING

Eligibility: Exterior painting qualifies for the tax credit.

REQUIRED DOCUMENTATION

Photographs:

() Clear photographs of all side of the building to be painted

Narrative:

() If the project involves paint removal, describe the methods to be used. See "Exterior Building Cleaning" for guidance in documenting paint removal

Exterior painting does not require a lengthy description of the methods or colors. Nearly all colors are acceptable. We suggest that you use colors that are appropriate to your house's design and that you not use more than four colors in your paint scheme.

Exterior painting is likely to be denied under the following circumstances:

- The method used to remove existing paint may damage the building materials;
- Plans call for painting previously unpainted brick or masonry;
- The proposed color placement is out-of-character with the historic building, such as a mural or other novelty paint scheme.

Your method of paint removal or preparation must be described in the application. Several paint removal methods are usually acceptable, including wet or dry scraping, chemical paint removal, and use of a high pressure water spray, if the water pressure is carefully controlled so that it does not damage the wood. Sandblasting and similar abrasive blasting techniques, wet or dry, are not acceptable and will result in the denial of your project.

Please note that, because premature paint failure is usually the result of poor preparation or use of improper paint, we suggest that you hire experienced contractors or consult with a paint dealer or specialist before undertaking the job. The Society can send you free published information on this topic. See the "For Further Information..." section.



EXTERIOR MASONRY CLEANING

Eligibility: Removal of dirt or paint from exterior brick or stone qualifies for the tax credit if it does not harm the building materials.

REQUIRED DOCUMENTATION

Photographs:

() Close-up photographs of the building surfaces prior to cleaning

Narrative:

() Describe cleaning method in detail, including types of chemicals to be used and water wash pressure

() Indicate whether a test panel is to be applied and, if so, on what part of the building

If you plan to remove paint or dirt from the outside of your building, the methods to be used should be specified in the application. Below are some things that you should consider.

In most cases, removal of dirt or paint is unnecessary in order to preserve a building. Dirt and paint are rarely harmful to building materials and, in fact, may serve as a protective layer that shields the surfaces of the buildings from the elements. Also, because every method of exterior cleaning carries with it some risk of damage to masonry materials, you should consider carefully whether to clean the building at all. If you choose to remove dirt or paint, you should proceed very cautiously.



The Standards specifically prohibit sandblasting in any form (except to clean cast iron, as discussed below). Sandblasting is sometimes referred to by other names, such as abrasive blasting or "featherblasting." When the sand is mixed with water, it is usually called waterblasting. If any of these methods are used, your project will be denied certification because of the damage that these methods cause. Equally damaging is high-pressure water blasting, even when no sand or other aggregate is added to the water. Water pressures above 1000 p.s.i. (pounds of pressure per square inch) can be damaging to most building materials. If you intend to use water to clean your building, you must specify in the application the pressure to be used.

If you intend to clean your building chemically, please be aware that no chemical or chemical manufacturer is "pre-approved" for use in this program. Building materials vary widely in composition and chemicals that may be applied safely to one building can result in severe damage to another. In addition, some chemical companies specify that the chemicals be washed from the building at water pressures in excess of 1000 p.s.i. which, in itself, can damage a building. For this reason, it is a requirement that a cleaning test patch be applied to an inconspicuous part of the building prior to cleaning the entire building. The owner should inspect the test patch for possible damage to the building materials, including mortar joints in masonry walls, and should be used as a standard by which the rest of the cleaning is evaluated. Damage to the masonry from inappropriate cleaning will disqualify your project from the tax credit program.

In cleaning metal elements, you should determine whether the metals are ferric or non-ferric. Ferric metals contain iron and are prone to rusting. Non-ferric metals, such as brass, bronze, copper, and aluminum, are non-rusting. (The simplest way to determine whether a metal is ferric is to use a magnet. Ferric metals will attract a magnet; non-ferric metals will not.)

If exterior metal elements are ferric (iron-based) it should be determined whether those elements are cast iron or coated metal. Generally, cast iron is used in storefront columns and trim; otherwise, any metal trim is likely to be terne or zinc coated steel. Cast iron may be sandblasted to remove dirt or paint but coated steel should be hand-scraped to remove only the loose paint before repainting. Sandblasting coated steel will remove the protective coating and will ultimately lead to severe rusting.

In general, because most non-ferric metals do not corrode, they do not require cleaning and, in fact, can be damaged through the cleaning process. We recommend strongly that non-ferric metals not be cleaned.

Regardless of the methods used to clean your building's exterior, they should be specified in the application along with your intention to create and inspect a test patch. If you plan to clean all or part of your building, you must submit clear, close-up photographs of the parts of the building to be cleaned before the cleaning takes place.

TUCKPOINTING

Eligibility: Tuckpointing and other masonry repair qualifies for the tax credit.

REQUIRED DOCUMENTATION

Photographs:

() Close up photos of the masonry surfaces prior to tuckpointing

Narrative:

() Describe the methods to be used in removing loose mortar

() Specify the replacement mortar mix

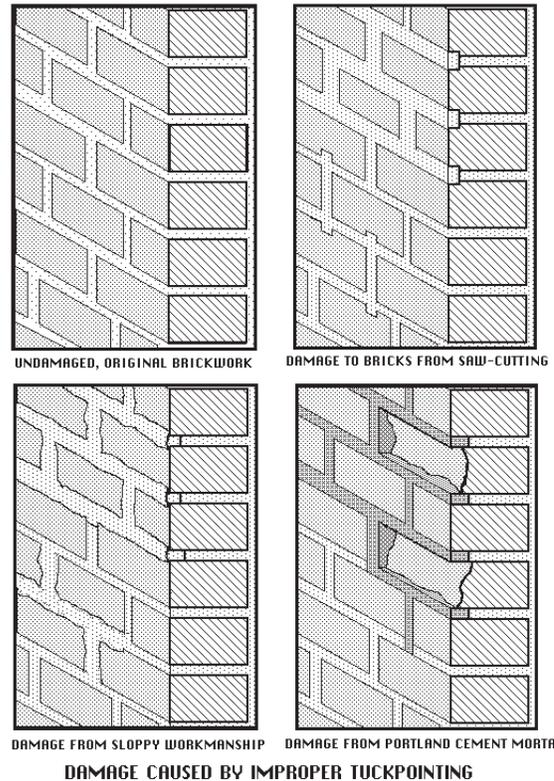
() Indicate whether a test panel is to be applied and, if so, on what part of the building

Tuckpointing (also referred to as "repointing") refers to the replacement of deteriorated mortar in brick and stone buildings. If done improperly, it can cause structural as well as visual damage. The method used to remove loose mortar is an important consideration. Hand chiseling of deteriorated joints is the method least likely to cause damage to the brickwork; however, it is sometimes difficult to find contractors willing to hand-chisel the joints. Removing mortar with saws, grinders, or power chisels can sometimes be performed without damaging the bricks, but when these methods are employed carelessly, they can cause permanent structural damage to the masonry. It is important in the case of saw-cutting or grinding that the bricks not be cut into and in power-chiseling that the corners not be chipped away. Regardless of the method used to remove loose mortar, we recommend that a test patch be specified, as discussed below.

In addition to the method used to remove the mortar, it is equally important that the composition of the new mortar match that of the building. Too often, especially in brick walls, mortar joints are repointed with Portland cement compounds that are harder than the bricks themselves. Then, when the building experiences thermal contraction and expansion, the faces of the bricks crack and fall off. New mortar should contain enough hydrated lime to make it softer than the bricks. (A useful rule of thumb is that mortar used in pre-1875 buildings should contain at least 3 times as much lime as Portland cement; buildings built between 1875 and 1900 should contain at least a 2 to 1 ratio of lime to Portland cement, and post-1900 buildings should contain at least one part hydrated lime to each part Portland cement.)

Because of the potential damage that can result from any type of tuckpointing, we recommend strongly that only those joints that are deteriorated be repointed. If done properly, the repointed joints will match those of the rest of the building. This is the most economical procedure, as well as the best historic preservation practice. Mortar joints that appear to be sound can be expected to last well into the future.

The appearance of the new joints should match those of the rest of the building, especially if only the deteriorated joints are to be tuckpointed. Mismatched mortar joints can result in the building taking on a "patchwork quilt" appearance. The primary concerns here are the color of the replacement mortar and the tooling. With respect to color, if the mortar mix



DAMAGE CAUSED BY IMPROPER TUCKPOINTING

contains Portland cement, we recommend that white Portland cement be used along with appropriate coloring agents. Standard, gray Portland cement usually results in joints that do not match the original color. In addition, if the tooling of the new mortar joints does not match the original, they may appear to be wider than the rest.

Ultimately, you will be responsible for the work of the contractor. If the completion photos that you submit show mortar joints that do not match the width, color, or appearance of the original joints, you may be denied final certification of your project. Therefore, we require that you specify in your contract with the mason that a test patch (a sample area of repointed joints) be carried out. After the test patch is applied, it must be inspected by the owner to make sure that the appearance of the new joints matches that of the rest of the building and that the masonry units have not been damaged. The repointing contract should specify that all of the repointed joints will match the appearance of the approved test patch.

Your description of the work in the application should indicate

ASTM STANDARD MORTAR MIXES

Type of Mortar	Portland Cement	Hydrated lime	Sand	Strength p.s.i.
M	1	1/4	3	2500
S	1	1/2	4 1/2	1800
N	1	1	6	750
O	1	2	9	350
K	1	4	15	75

Notes: Type "N" is standard, pre-packaged masonry cement.

Types "M" and "S" are generally too hard for historic brick

the mortar formula to be used, the method of removing loose mortar, and that a test patch will be performed.

WINDOW REPLACEMENT

Eligibility: Window replacement qualifies for the tax credit; however the standards for this work are applied very strictly. Please read this section carefully.

REQUIRED DOCUMENTATION

Photographs:

- () Close-up representative photos of existing windows

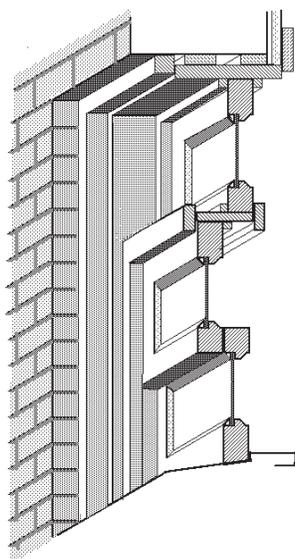
Narrative:

- () Describe the condition of the windows to be replaced
- () Described the reasons for the replacement
- () If the new window is to be aluminum, indicate whether it will have a baked or anodized finish
- () Indicate whether the glass is to be single- or double-glazed
- () Indicate whether the glass will be clear, tinted, or "Low-E." In the case of "Low-E" glass, you will be required to submit a sample along with your application.

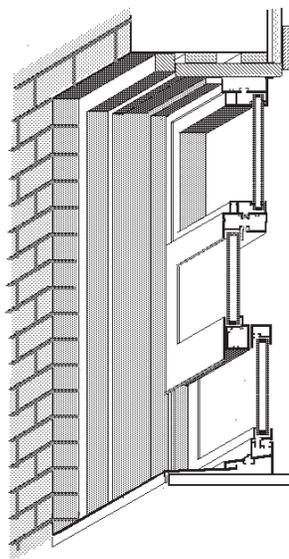
Drawings:

- () Head, jamb, sill, and muntin scale drawings of both the existing and the new windows. (For windows with no muntins, we will accept manufacturers literature in lieu of scale drawings.)

In planning your project, we recommend strongly that you repair existing windows, rather than replacing them. Usually, these windows can be made energy efficient by installing weatherstripping, and at a far lower cost than installation of replacements. Tax applicants often propose to replace original windows with energy-efficient, "maintenance free" units. Often these units do not duplicate the historical appearance of the windows they are designed to replace. The use of



TYPICAL WOOD WINDOW CONSTRUCTION
Note the heavy modeling created by the thicknesses of the wooden members and the distance that the glass is set back from the front of the window sash.



UNACCEPTABLE ALUMINUM REPLACEMENT WINDOWS
Even though this window's proportions approximate those of the wooden window, the framing members have almost no depth and there is almost no setback between the glass and the sash.

inappropriate new windows will result in denial of your project. If you plan to replace windows, please consider the comments below.

When you prepare your application, you must document photographically that the existing windows have deteriorated beyond repair. Your application should state the nature of the deteriorated and should include close-up photographs of a number of the windows clearly showing the damage.

If windows are to be replaced, the replacements must duplicate in every respect the appearance of the original windows, including the appearance of the muntins (dividing bars), the proportions of the original windows, the thickness of the sash elements, and the window finishes. To demonstrate that the new windows match the old, the you must either submit comparative window sections, such as those illustrated. If your windows have no muntins, we will usually accept manufacturers literature in lieu of custom drawings, if the proposed windows are illustrated clearly.

Another requirement when aluminum windows are used as substitutes for wooden windows is that the glass be set back from the faces of the frames by approximately the same distance as in wooden windows which, typically, would have a "putty line." The glazing in wooden windows is held in place with either putty or wooden stops which sets the glass approximately 1/2" back from the face of the window frame. On the other hand, the glazing in many aluminum windows is held in place by a metal flange. The result is that the glass is set back from the frame by only about 1/8" which causes the window sashes to look "flat" and out-of-character with most buildings.

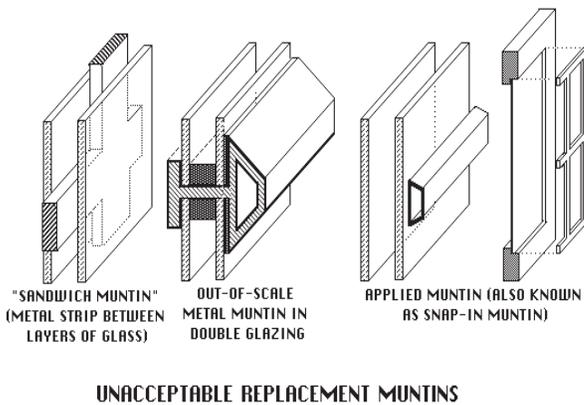
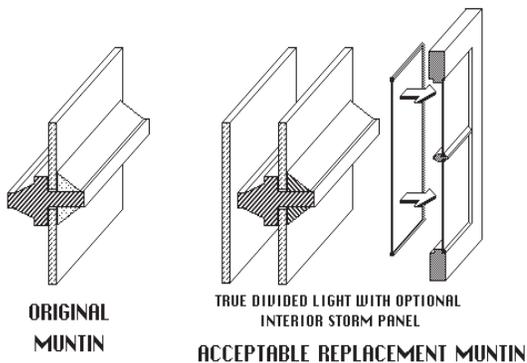
Muntin (window divider) duplication is a significant problem in replacement windows. In most cases, artificial muntins are unacceptable, including those that are applied on the exterior, those applied on the interior (sometimes called "snap-in" muntins), and those sandwiched between the layers of double

glazing. Replacement windows that incorporate true muntins (that actually divide the panes of glass) are usually acceptable if the appearances of the new muntins substantially replicate those of the original windows. Because window manufacturers routinely change and improve their products, Society staff are willing to consider new muntin replacement techniques; however, to be acceptable, the new muntins must accurately replicate the originals and must be permanent parts of the windows. If you are replacing wooden windows with new aluminum units,

the new windows must have a painted or baked-on finish, rather than an anodized finish. Anodized finishes, particularly bronze-colored finishes, have a distinctly metallic appearance that is inappropriate when aluminum windows are being substituted for wooden windows.

The use of tinted and reflective glass is not allowed. If you propose using Low-E glass, which can be reflective, depending on the manufacturer, you must demonstrate that the new glass will not be reflective. Usually, this is done by including a glass sample (provided by the window supplier) along with the Part 2 application.

If you plan to use panning (metal covering) over the outside window framing, it must conform in shape to the existing window moldings and it should not have an anodized finish.



STORM WINDOWS

Eligibility: Storm window installation qualifies for the tax credit.

REQUIRED DOCUMENTATION

Photographs:

- () Close-up representative photos of existing windows

Narrative:

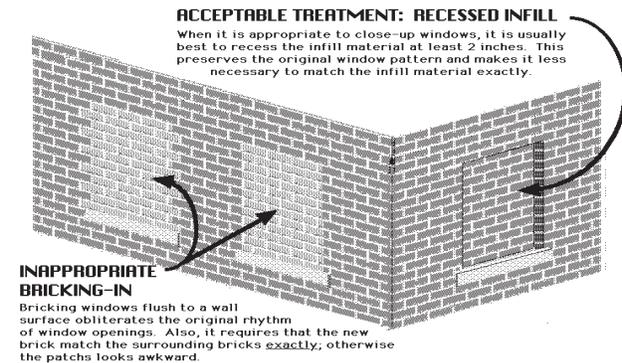
- () If the storm windows are to be aluminum, indicate whether they will have a baked or an anodized finish
- () Indicate whether the glass will be clear, tinted, or "Low-E." In the case of tinted or "Low-E" glass, you will be required to submit a sample along with your application

Drawings:

- () Manufacturer's literature that shows clearly the appearance of the new storm -- or scale drawings.

For purposes of maintenance and energy efficiency you may wish to install interior or exterior storm windows instead of replacing the original windows. Exterior storm windows can be made of wood or metal. Aluminum combination windows are acceptable as long as the window tracks are mounted so as not to protrude from the face of window openings and the

proportions of the storm windows match those of the original windows. If you plan to install storm windows, you should include manufacturer's literature or drawings (head, jamb, and sill details). You should also describe the type of finish to be used. As in the case of aluminum primary windows, the finishes should be painted or baked-on, rather than anodized. Storm window glass should be clear and "Low-E" glass should follow the guidelines for replacement windows.



CLOSING-UP WINDOW OPENINGS OR ADDING NEW WINDOWS

Eligibility: Adding and removing windows is discouraged, except to reverse later window alterations or where the changes have limited visibility. If acceptable, this work qualifies for the tax credit. Please read this section carefully.

REQUIRED DOCUMENTATION

Photographs:

- () The sides of building where windows will be added or removed

Narrative:

- () For infilled windows, describe the type of infill and tell whether the infill will be flush with the surface of the building or set-back (and, if so, the depth of the setback)
- () For new windows, refer to the documentation for window replacement.

Drawings:

- () Drawings of the sides of the building showing the locations of added or removed windows

Original window patterns should not be changed on primary facades. On secondary facades, minor changes may be made, but these must be in keeping with the overall window patterns of those sides of the building. On rear facades with limited public visibility, significant changes can usually be made; however, they must be in character with the rest of the building. (See the "General Discussion" remarks above for a discussion of primary, secondary, and rear facades.)

On masonry buildings, when original windows are closed-in, the infill material should match those of the wall and should be inset from the face of the wall at least two inches. Non-original windows can usually be closed flush to the wall surfaces with matching materials. For new windows, the application should contain drawings similar to those specified in the window replacement section.

ROOF REPLACEMENT

Eligibility: Roof replacement is eligible for the tax credit.

REQUIRED DOCUMENTATION

Photographs:

() Clear photos of the existing roofing

Drawings:

() Manufacturer's literature or samples of roofing materials other than standard 3-tab asphalt shingles or standard wood shingles

Generally, flat roofs that are not visible from the street require only a brief statement of the proposed roof treatment.

For visible, pitched roofs, the application must state the type of replacement material to be used. As a rule, if a roof was originally wood shingled, the replacement shingles may either be replacement wood shingles or standard 3-tab shingles in a shade of gray that resembles weathered wood. In most cases, thick wood "shakes" are not appropriate for buildings in Wisconsin and you should avoid using artificially rustic-looking asphalt, or fiberglass shingles that purport to look like wood shakes.



Slate or tile roofs should be repaired, if possible, rather than replaced. If replacement is necessary, these roofs should be replaced in-kind; however, in the case of slate, we will usually accept replacement with slate-gray, standard 3-tab shingles if it can be shown that the slates have deteriorated beyond repair. It may be appropriate to use substitute materials, such as concrete shingles, to replace slates or tiles; but the new materials must match the originals closely. If you propose to use substitute materials, you should discuss your plans with Society staff before ordering materials.



SKYLIGHTS AND DORMERS

Eligibility: Although skylights are tax credit-eligible, dormer construction is considered to be new construction and not eligible for the tax credit. Skylight and dormer proposals will still be reviewed so that we can determine that they will not diminish the historic character of your house.

REQUIRED DOCUMENTATION

Photographs:

() Clear photos of the roof from sides of the building affected by the changes

Narrative:

() A description of where the skylights, vents, or dormers will be installed.

Drawings:

() Drawings to indicate the appearance of any dormers

Skylights, dormers, and rooftop additions are reviewed on a case-by-case basis. Here are some principles:

Skylights located on non-visible parts of a roof are generally acceptable. Skylights should not be installed on roof slopes facing the street. On visible roofs that do not face the street, skylights should be kept to a minimum and should be flat, rather than domed. Their curbs should be low.

Non-original dormers should be located on non-visible portions of a roof.

ARTIFICIAL SIDING

Eligibility: Installation of artificial siding is not allowed under this program. If carried out as part of your project, it will result in denial of the tax credits for your entire project. The term "artificial siding" refers primarily to aluminum, vinyl, cement board and steel siding, and may also include synthetic stucco, if your house was not originally stucco-covered.

REMOVAL OF ADDITIONS

Eligibility: As long as the additions are later, non-contributing features, demolition of additions qualifies for the tax credit.

REQUIRED DOCUMENTATION

Photographs:

- () Clear photos of the addition

Narrative:

- () Give the condition of the addition and its date of construction

Drawings:

- () If removal will result in re-exposing original walls, provide drawings of how the exposed wall will be treated, or any new construction that will take place where the addition was removed.

Later additions or features may be removed if they do not contribute to the significance of the historic property and if the area from which they are removed is to be restored or rehabilitated sympathetically.

Even if an addition is not original to a building, it may still be historically significant. Evidence of whether an addition is considered to be significant is often found in the National Register or State Register nomination for the property. Likewise, if the property is located within a district, you should check the district nomination to see if the feature or addition was added during the period of significance of the district. If so, you must not remove it. When planning demolition, you should contact our staff for a determination of significance of any feature proposed for removal.

For further information about how to treat an area after removal of later elements, see "Construction of New Additions."

CONSTRUCTION OF NEW BUILDINGS ON-SITE OR ON ADJACENT LAND

Eligibility: Detached new construction is not eligible for the tax credit; however, it must be described in the Part 2 application.

REQUIRED DOCUMENTATION

Photographs:

- () That part of the site where the new construction will be located

Drawings:

- () Before-and-after site plans showing the new construction
- () Plans and elevation drawings of the new construction

All new construction must be described in the application. Even when a new building is to be constructed by someone else, it will be considered to be part of the project if it will be located on property that has been divided from the historic property within one year of the start of rehabilitation work.



CONSTRUCTION OF NEW ADDITIONS

Eligibility: Construction of a new addition is not eligible for the credit; however its design must be reviewed as part of the project.

REQUIRED DOCUMENTATION

Photographs:

- () Clear photos of the portion of the building to which the addition will be attached

Drawings:

- () Construction drawings of the addition

It is impossible to develop a hard-and-fast set of rules for new construction that will apply to every situation and every historic building. Each project is reviewed on a case-by-case basis. Consider the following remarks to be general guidance.

Location. The appropriateness of a new addition to a historic building is determined largely by its size and location. An addition should be constructed on the least visible side, such that the historic building remains the most prominent element from the public right-of-way. In some cases, particularly when a building is free-standing and visible from all points (in other words, when it has four primary facades), it may not be possible to construct an addition and claim the tax credit.

Historic details. New additions should not be historic-looking replicas of the building to which they are attached. The design may incorporate the existing materials and some patterns of the original construction but should not attempt to look like part of the original construction.

Connection to historic building. The physical connection between the historic building and the addition should be made as small and least physically disruptive as possible. This creates a visual break between the historic building and the addition. It also, makes the process reversible. If, at some point, a future owner wanted to remove the addition, it would allow them to do so with minimal damage to the historic building.

BUILDING INTERIOR

The rules for this program require that we review all work, including interior work. In reviewing interior work, we try to determine whether the work will have an effect on significant interior features and spaces. We determine significance features from the content of the National or State Register nomination and from the photographs that you include with the application. Significant interior features should be respected and, whenever possible, preserved.

We determine whether spaces are significant by examining whether the spaces are "primary" or "secondary." Primary spaces are those that are important to the character of a building and should always be preserved. Secondary spaces can usually be altered. In single family houses, primary spaces usually include living rooms, dining rooms, foyers, main stairways, corridors, and parlors. Secondary spaces may include bathrooms, bedrooms, kitchens, rear stairways, basements, and other spaces normally used only by family members.

Where interior work is proposed, you must include enough clear photographs of the interior to illustrate the "before" condition of the affected spaces and significant features.

If you do not plan to carry out interior work, it is helpful if you say so in the application. Then, when the application is reviewed, the reviewer will know that interior work has not been accidentally omitted.

STRUCTURAL REPAIRS

Eligibility: Structural repairs qualify for the tax credit; however, this type of work is narrowly defined.

REQUIRED DOCUMENTATION

Photographs:

- () Clear photographs of that portion of the exterior, or of the interior spaces, affected by the structural work
- () Details of any significant features affected by the alterations

Narrative:

- () A description of the structural problems that require correction and how these problems are to be solved, including the effect that the work will have on interior or exterior features and finishes
- () If structural problems are major, include the report of a licensed architect or structural engineer

Drawings:

- () Before-and-after floor plans

While repair of structural elements is an eligible tax credit activity, interior remodeling is not. Because these two types of work are closely associated, the following definition applies:

"Structural elements" are portions of a building necessary to prevent physical collapse, including footings, beams, posts, columns, purlins, rafters, foundation walls, interior wall structures and exterior wall structures, excluding finish materials, such as plaster, lath, and decorative trim.

To avoid confusion about whether you may take the credit for structural work that might be construed as decorative interior work, you should make clear in the application that the work

is structural and provide documentation, including photographs, of the problem to be corrected.

If structural work involves removal of some finish materials, such as plaster, drywall, or wood trim, you should be able to include repair or replacement of those materials as part of the eligible tax credit work. Each project will be examined on a case-by-case basis to ensure that any decorative interior work is part of, and incidental to, needed structural repairs.

Specific guidelines for various types of structural work are found elsewhere in this document. (For example, if the project involves brick repair, consult the section on "Tuckpointing." If the repair involves adding interior walls, see the section on "Removal or Addition of Interior Walls.") If your project is unusually complex and you would like to know if it meets the Standards, or if you have questions about whether your project qualifies for the tax credit, call Society staff Mark Buechel at 608-264-6491 or Jen Davel at 608-264-6490.

REMOVAL OR ADDITION OF INTERIOR WALLS

Eligibility: Interior wall removal or construction is not eligible for the tax credit, except as described under "Structural Repairs." All demolition must be described in the Part 2 application.

REQUIRED DOCUMENTATION

Photographs:

- () Photographs of the spaces affected by the changes
- () Details of any significant features affected by the alterations

Narrative:

- () A description of the new interior finishes
- () A statement about whether any walls to be removed are original

Drawings:

- () Before-and-after floor plans

If a building contains significant interior spaces, you should work within the existing floor plan when possible. The Standards do not usually allow total gutting of a building unless the interior has been completely altered in the past and possesses no significant features or spaces.

In evaluating which spaces can be changed, you should determine which spaces are primary and which are secondary. Generally, walls should not be inserted in, or removed from, primary spaces. Secondary spaces can usually be altered. (See "General Discussion," above, for discussion of primary and secondary spaces.)

When your plans calls for changes to interior walls, you will be required to submit "before" and "after" floor plans.

REMOVAL OR RELOCATION OF INTERIOR TRIM OR FEATURES

Eligibility: Work performed in this area is not eligible for the tax credit; however, it must be described in the Part 2 application.

REQUIRED DOCUMENTATION

Photographs:

() Details of existing trim and features that may be affected

Narrative:

() A description of the new materials, if any, that will replace the originals

() If applicable, indicate where existing features will be relocated

Whether interior trim or features can be removed depends on the significance of those features. The Standards consider both highly-decorated features (such as grand staircases) and characteristic features (such as original window trim) to be significant and, whenever possible, these should remain intact. If original features have to be replaced during construction, they should be re-installed (or, if this is impossible, reproduced) in their original locations. Avoid moving original decorative elements to new locations. A project may be denied certification if the effect of the interior work is to create a new, "historic" interior -- that is, an interior that looks to be original, but is actually a collection of building artifacts applied in non-original locations over new construction. Likewise, interior trim for new walls should generally be of the same type and proportion as the original trim, but should not duplicate it exactly, unless the original trim is relatively plain.

CHANGES IN ROOM FINISHES

Eligibility: Work performed in this area is not eligible for the tax credit; however, it must be described in the Part 2 application.

REQUIRED DOCUMENTATION

Photographs:

() Representative photos of rooms affected by the change

Narrative:

() Describe the new finishes

Walls. Most types of wall treatments are acceptable. In primary spaces, we are likely to question the covering over of original decoration (such as stenciling), the removal of plaster or wooden decorative features (such as cornices or wainscoting), the installation of wood paneling, or the application of textured wall paints on original plaster.

Floors. You should avoid removing or permanently damaging decorative flooring or hardwood floors in good condition; otherwise, most types of treatments are allowable.

Ceilings. Suspended ceilings should not be installed in primary spaces.

INSULATION AND ATTIC VENTILATION

Eligibility: Most types of insulation are not eligible for the tax credit; however, all proposals to install insulation will be evaluated to ensure that they will not result in visual or moisture damage to the house.. Some types of insulation qualify for the tax credit. Attic ventilation qualifies for the credit, but must not diminish the historical qualities of your house.

REQUIRED DOCUMENTATION

Photographs:

() Depending on the type of insulation to be installed, photographs of affected interior spaces or portions of the exterior

Narrative:

() Describe the types of insulation to be installed and the methods of installation

() Describe what kind of vapor barrier, if any, is to be installed.

() If attic vents are to be added, describe the kinds of vents and their locations.

Attic insulation. Owners are encouraged to install attic insulation; however, the cost of this work does not qualify for the tax credit.

Wall insulation.

We discourage blowing insulation into cavity walls because it can lead to moisture damage. If you plan to install blown-in insulation, we will need to know if a vapor barrier exists . If you plan to open up a wall cavity during construction, we suggest strongly that you install an adequate vapor barrier.

Insulation applied to the inside surfaces of exterior walls, will not be approved when decorative interior features will be destroyed or covered over. This work may be approved if the original decoration is reinstalled in original locations on the insulated walls.

Application of insulation over exterior wall surfaces does not meet program standards except, in some cases, on rear facades or below ground.

Roof-top insulation on flat roofs qualifies for the tax credits, and is acceptable if it does not substantially change the dimensions of the cornice. Typically, rigid roof-top insulation is tapered at the cornice to avoid any changes in dimensions.

Roof-top insulation on sloped roofs also qualifies for the tax credit but, to be acceptable, it cannot increase the dimensions of the cornice, particularly on the ends of roof gables.

Attic ventilation: The use of shingle-over ridge vents, soffit vents, and mushroom vents applied to portions of the roof not visible from public rights of way are generally acceptable. Triangular gable vents, standing metal ridge vents, and ventilating systems visible to the public are generally not acceptable. Mushroom vents should be painted to match the adjacent roof color.



INSTALLATION OF NEW MECHANICAL SYSTEMS

Eligibility: Work performed in this area, including related work such as water heater and water softener replacement qualifies you for the tax credit.

REQUIRED DOCUMENTATION

Photographs:

- () Photos of the existing boiler, furnace, or other device to be replaced.
- () If applicable, the proposed location of the cooling condenser or unit air conditioner

Narrative:

- () Indicate whether the heat distribution system will be altered and, if so, how

Heating systems. In most cases, furnace or boiler replacement will have no effect on the historic qualities of a rehabilitated building, unless the heat distribution system is changed. If, for example, an existing steam heating system is to be replaced by a new forced-air system, the changes necessary to install heating ducts may be of concern. These changes should be explained in terms of their effects on room finishes and features, as described above.

Air conditioning, including heat pumps. Installation of new mechanical cooling systems or heat pumps requires additional documentation. The location of the condenser is an important consideration and should be indicated in the application. Condensers should not be installed in visible locations on roofs. Ground level condensers should not be visible from public rights-of-way.

Unit (window-type) air conditioners. The cost of unit air conditioners is not an eligible expense. If you plan to install these, the Standards do not allow sleeve holes to be cut into walls visible to the public. Similarly, windows on visible facades may not be blocked in to receive air conditioner sleeves.

INSTALLATION OF NEW ELECTRICAL WIRING, AND PLUMBING

Eligibility: Installation or repair of electrical wiring and plumbing lines qualifies for the tax credit. Electrical and plumbing fixtures are not eligible for the tax credit.

REQUIRED DOCUMENTATION

Photographs:

- () Photograph the situation to be corrected as best you can
- () If work will have an effect on interior features, send clear photos of those features

Narrative

- () Give a brief description of the work. No special narrative is necessary unless project will have an effect on interior features or finishes

Replacement of electrical wiring and plumbing is nearly always approved. If the rewiring or plumbing will have an effect on interior features, it should be described as indicated in the above sections.

If the plumbing or electrical work involves removal of some finish materials, such as plaster, drywall, or wood trim, you should be able to include repair or replacement of the damaged materials as part of the eligible tax credit project. Each project will be examined on a case-by-case basis to ensure that any decorative interior work is part of, and incidental to, the plumbing and electrical work.



SITE WORK

EXCAVATION

Eligibility: Excavation to uncover building materials so they can be repaired is eligible for the tax credits; other site excavation is not. All excavation work must be described in the Part 2 application.

REQUIRED DOCUMENTATION

Photographs:

- () The area of the site to be excavated

Narrative or drawings:

- () Describe the site work in application
- () If digging is extensive, send site drawings or sketches showing where it will take place.

When carrying out excavation, please note that you must **stop work immediately** and contact the appropriate offices if: 1) you discover archeological materials; or 2) you uncover any suspected human burials.

Treatment of archeological materials. The term "archeological materials" is used to denote any prehistoric or historic archeological deposits or features that may exist. These include not only burial sites and effigy mounds, but also a wide variety of prehistoric habitation sites, deposits of historic and prehistoric artifacts, cemeteries, rock art, and cave sites. You will not be required to perform an archeological investigation unless your site contains known archeological materials and you are likely to disturb them. If, however, you discover archeological materials as you carry out the work, you must cease work immediately and contact the Society at 608-264-6496.

Discovery of human remains. If human remains are discovered, state law requires that you cease work immediately and contact the Society at 608-264-6503 or 1-800-342-7834. **Persons who fail to report burial disturbances are subject to fines and prosecution.**

REGRADEING, LANDSCAPING, AND CONSTRUCTION OF SIDEWALKS AND PARKING AREAS

Eligibility: This work is not eligible for the tax credit; however, it must be described in the Part 2 application.

REQUIRED DOCUMENTATION

Photographs:

- () Shots of the site and surrounding area from at least two different angles

Drawings:

- () Site plans or sketches showing the changes that you plan to make.

Regrading. You should not change the ground level near your house, except for relatively minor changes to promote better drainage. Regrading away from the house is usually allowed unless it: 1) changes the historic character of the site; or 2) creates chronic water drainage problems that may affect the historic buildings.

Landscape plantings. New plantings are almost always acceptable unless they change the character of site or are located so close to historic buildings that they may cause water damage by not allowing building materials to dry out. Removal of plantings is not a problem unless the historic character of the site will be affected. (e.g., clear-cutting a historically wooded site.)

Parking and driveways. New parking areas are usually acceptable if they are located at the rear of the site and out of public view. In most cases, parking areas should not abut historic buildings, for reasons of historical integrity and to prevent potential water drainage problems. Where driveways exist and are important site features, they should be maintained in their original locations.

Sidewalks and walkways. Sidewalks and walkways in visible locations, such as the front of a house, should maintain traditional shapes and paving materials. For example, a curving, brick-paved front walkway would likely not be appropriate for a Prairie-style house. A greater variety of non-traditional paving materials and designs can be usually be used at the rear of a property.

Patios and decks. Surface-level patios and raised decks are not appropriate at the fronts of historic houses, unless they were part of an original design. Raised decks should be limited to areas of little or no visibility from public rights of way.

DEMOLITION OF EXISTING BUILDINGS, INCLUDING THOSE ON ADJACENT LOTS

Eligibility: Building demolition is not eligible for the tax credit; however, it must be described in the Part 2 application.

REQUIRED DOCUMENTATION

Photographs:

- () Views of the exterior of the building to be demolished from all sides

Narrative:

- () Discussion of the building's original use
- () Provide the building's date of construction

Buildings on, or adjacent to, the site of a historic building may be demolished if they do not contribute to the significance of the historic building or its context. On the other hand, just because a building or addition is not original to a property does not always mean that it can be removed; it may still be historically significant. Evidence of whether a building is historically significant is often found in the National Register or State Register nomination for the property or district. You must indicate clearly in your tax credit application any plans to demolish structures on your property.

FOR FURTHER INFORMATION...

If you have questions, contact:

Mark Buechel

608-264-6491 mark.buechel@wisconsinhistory.org

Jen Davel jen.davel@wisconsinhistory.org

608-264-6490

In addition, the Division of Historic Preservation has several technical publications for distribution to the public. Chief among these are the "Preservation Briefs" series, published by the National Park Service. The following titles have been published to-date:

- Brief 1: The Cleaning and Waterproof Coating of Masonry Buildings
- Brief 2: Repointing Mortar Joints in Historic Brick Buildings
- Brief 3: Conserving Energy in Historic Buildings
- Brief 4: Roofing for Historic Buildings
- Brief 6: Dangers of Abrasive Cleaning to Historic Buildings
- Brief 7: The Preservation of Historic Glazed Architectural Terra-Cotta
- Brief 8: Aluminum and Vinyl Siding on Historic Buildings
- Brief 9: The Repair of Historic Wooden Windows
- Brief 10: Exterior Paint Problems on Historic Woodwork
- Brief 11: Rehabilitating Historic Storefronts
- Brief 12: The Preservation of Historic Pigmented Structural Glass
- Brief 13: The Repair and Thermal Upgrading of Historic Steel Windows
- Brief 14: New Exterior Additions to Historic Buildings: Preservation Concerns
- Brief 15: Preservation of Historic Concrete: Problems and General Approaches
- Brief 16: The use of Substitute Materials on Historic Building Exteriors
- Brief 17: Architectural Character: Identifying the Visual Aspects of Historic Buildings and an Aid to Preserving the Character
- Brief 18: Rehabilitating Interiors in Historic Buildings
- Brief 19: The Repair and Replacement of Historic Wooden Shingle Roofs
- Brief 20: The Preservation of Historic Barns
- Brief 21: Repairing Historic Flat Plaster - Walls and Ceilings
- Brief 22: The Preservation and Repair of Historic Stucco
- Brief 23: Preserving Historic Ornamental Plaster
- Brief 24: Heating, Ventilating, and Cooling Historic Buildings
- Brief 25: The Preservation of Historic Signs
- Brief 26: The Preservation and Repair of Historic Log Buildings
- Brief 27: The Maintenance and Repair of Architectural Cast Iron
- Brief 28: Painting Historic Interiors

- Brief 29: The Repair, Replacement, and Maintenance of Historic Slate Roofs
- Brief 30: The Preservation and Repair of Historic Clay Tile Roofs
- Brief 31: Mothballing Historic Buildings
- Brief 32: Making Historic Properties Accessible
- Brief 33: The Preservation and Repair of Historic Stained and Leaded Glass
- Brief 34: Preserving Composition Ornament - Applied Decoration for Historic Interiors
- Brief 35: Understanding Old Buildings: The Process of Architectural Investigation
- Brief 36: Protection Cultural Landscapes: Planning, Treatment, and Management of Historic Landscapes
- Brief 37: Appropriate Methods for Reducing Lead-Paint Hazards in Historic Housing
- Brief 38: Removing Graffiti from Historic Masonry
- Brief 39: Controlling Unwanted Moisture in Historic Buildings
- Brief 40: Preserving Historic Ceramic Tile Floors
- Brief 41: Seismic Retrofit of Historic Buildings
- Brief 42: The Maintenance, Repair and Replacement of Historic Cast Stone
- Brief 43: The Preparation and Use of Historic Structure Reports
- Brief 44: The use of Awnings on Historic Buildings: Repair, Replacement, and New Design
- Brief 45: Preserving Historic Wood Porches
- Brief 46: The Preservation & Reuse of Historic Gas Stations

Each of these briefs is available at the following website:

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

Or, you can obtain free, printed copies by contacting Mark Buechel or Jen Davel (see district map), or by writing to the address below:

**Division of Historic Preservation
Wisconsin Historical Society
816 State Street
Madison, WI 53706**

