

MEMORANDUM

TO: Trey Akers, Senior Planner, Town of Davidson
FROM: Leigh Anne King, Director
DATE: March 6, 2019
RE: Considerations for Development of a Historic Preservation Plan

This memorandum outlines considerations for developing a historic preservation plan for the Town of Davidson and includes examples of historic preservation plans.

Background

In 2018, the Town of Davidson's Board of Commissioners adopted a Strategic Plan that set out nine strategic goals with tactical priorities and action steps to implement each goal. The Historic Preservation Goal states that "*The Town of Davidson will preserve our historically significant structures to retain our authenticity as a historic, small college town.*"

The strategic plan includes three main strategies for reaching this goal: (1) create/expand the local historic district, (2) investigate historic preservation tools, and (3) create a new historic preservation plan. This memorandum addresses strategy #3 and provides guidance for development of a new historic preservation plan for Davidson.

Considerations for Developing a Historic Preservation Plan

There are several key considerations for developing a historic preservation plan. These are organized here as concepts to consider prior to initiating a planning process to develop a historic preservation plan, and concepts to consider as part of the planning process.

Part 1: What to Consider Prior to Initiating the Planning Process

Prior to initiating development of a historic preservation planning process, the Town should consider three main choices: (1) the structure of the preservation plan, (2) the content to include in the plan, and (3) the community stakeholders to engage in the planning process.

1. **Structure of Preservation Plan.** Many historic preservation plans are designed as stand-alone documents that are focused entirely on historic preservation goals. These plans are typically either project focused (focus on action items) or operationally focused (focus on process for implementation). Stand-alone historic preservation plans, while often highly thorough in setting out a framework for achieving historic preservation objectives, may also set out policy direction that is not well-integrated with other community planning goals. Incorporation of a historic preservation plan into a comprehensive plan offers an opportunity to integrate historic preservation objectives with other, related community planning goals as part of an overarching policy framework for the Town. Another benefit of this approach is that comprehensive plans are usually

updated more frequently, allowing for consideration of changing historic preservation goals as more properties become eligible for historic designations. The Town could consider developing the historic preservation plan so that once it is prepared it could be easily incorporated into the Town's comprehensive plan that is currently being updated.

2. **Content for Historic Preservation Plan.** Before developing the plan, it is important to consider the content it should include. Contents for a stand-alone plan are typically more thorough, whereas content for a historic preservation chapter in a comprehensive plan will need to align with the policy framework approach of the overall plan. Content to consider for inclusion in a historic preservation plan includes:
 - a. Description of benefits of historic preservation
 - b. History of and legal basis for historic preservation efforts
 - c. Inventory of historic properties and assets
 - d. Explanation and diagnosis of existing preservation approach
 - e. Trends affecting historic preservation properties
 - f. Historic preservation goals and policies
 - g. Historic preservation implementation toolbox
 - h. Strategies for improving education and outreach for historic preservation
 - i. Linkages between historic preservation goals/policies and other community goals/policies, including reconciling any conflicts
 - j. List of preservation resources and partner organizations
3. **Stakeholders to Engage.** The planning process should be designed to engage members of the community that have a stake in the preservation of Davidson's historic structures and properties. This includes property owners of historic properties, local historians, real estate and development professionals, and members of the Historic Preservation Commission. There should also be opportunities during the process for all residents of the community to share their thoughts on the future of historic preservation in Davidson.

Part 2: Considerations During the Planning Process

During the development of the historic preservation plan, there are three main questions to consider and answer.

1. **How does our existing historic preservation system work and is it working well?**

Davidson should consider including an audit of the current historic preservation system and process that focuses on what is working well and what is not. This could include an evaluation of the outcomes of historic preservation projects that have resulted in changes to the property or a certificate of appropriateness (COA) to demolish a structure, and a diagnosis of what regulations or aspects of the process for approval could be improved. This evaluation might also consider whether it is working well to have the Design Review Board serve as the Historic Preservation Commission, or whether a separate dedicated advisory board is more appropriate. It could also consider the current roles of the Town of Davidson and Mecklenburg County in managing and regulating historic preservation efforts and any changes that may improve the historic preservation process.

2. **What are the community's historic preservation goals?** Community's undertake historic preservation efforts for a variety of reasons. Most communities value the physical expressions of history that these properties provide. Some communities are focused on the economic benefits of historic preservation as it relates to tourism and other local economic development efforts. Other communities support historic preservation efforts as a way to protect the natural environment and build more sustainably. Many communities are seeking to preserve community character and maintain strong neighborhoods. Clearly articulating the goals for historic preservation will create a better framework for identifying appropriate tools and implementation strategies.
3. **What are we lacking?** The historic preservation plan can identify information and tools that are currently lacking and that can be foci for plan implementation. A survey of historic resources within the Town of Davidson's planning area was updated by the Charlotte-Mecklenburg Landmarks Commission in early 2018. In the future, there will be need to update this inventory as every year there is the potential that more properties are becoming eligible for historic landmark status. Additional staff capacity to adequately advance historic preservation efforts and any new goals may be needed. New tools could be considered that better address the Town's historic preservation goals. The planning process offers an opportunity to fully explore what information, tools, or capacities are missing or need enhancement to help advance historic preservation efforts in Davidson.

Examples of Historic Preservation Plans

To assist in the planning for and development of a historic preservation plan, we provide here several plans for review. This first in the list is a North Carolina community - Cary, NC. The Cary Historic Preservation Master Plan was ultimately incorporated into the Town's new Cary Community Plan and could serve as a model for how to incorporate a stand-alone plan into a comprehensive plan. The other plans provide an example of different approaches for developing a historic preservation plan. Clarion Associates helped Salt Lake City, Utah, develop the Community Preservation Plan linked below.

- **Cary, North Carolina, Historic Preservation Master Plan** provides an overview of Cary's historic preservation goals and objectives while also detailing an action plan and implementation schedule. The first link below is to the full Historic Preservation Master Plan. The second link is to the Cary Community Plan that incorporates the Historic Preservation Master Plan into Chapter 5: Engage.

<https://www.townofcary.org/projects-initiatives/project-updates/general-government-projects/historic-preservation/historic-preservation-master-plan>

<https://www.townofcary.org/home/showdocument?id=14043>

- **Charleston, South Carolina, Historic Preservation Plan** details stewardship principles, Charleston's growth projectory, conservation districts, potential preservation opportunities, and descriptions of all neighborhoods.

<https://www.charleston-sc.gov/index.aspx?NID=891>

- **Montclair, New Jersey, Historic Preservation Master Plan** provides reviews of public policies, the town's historic resources, successes and issues related to historic

preservation, as well as historic preservation goals and objectives coupled with an action plan.

https://www.montclairnjusa.org/UserFiles/Servers/Server_5276204/File/Government/Departments/Planning%20&%20Community%20Development/Master%20Plan/2016%20Historic%20Preservation%20Plan%20Element.pdf

- **Salt Lake City, Utah, Community Preservation Plan** (prepared by Clarion) details the town's policies and an implementation action plan. It also provides a Comprehensive Preservation Toolbox.

<http://www.slcdocs.com/Planning/MasterPlansMaps/presplan.pdf>

- **Sandwich, Massachusetts, Historic Preservation Plan** describes the different historic districts, individual properties, and historic resources as well as providing an action plan.

<https://www.sandwichmass.org/DocumentCenter/View/527/Historic-Preservation-Plan-PDF>

Conclusion

The Town of Davidson has several considerations for preparing for and conducting a planning process to develop a historic preservation plan. While the considerations for the process listed in this memo are not exhaustive, they do provide guidance on the most critical aspects that will need to be considered for developing the plan. The examples of historic preservation plans also provide ideas for consideration in terms of the plan content that is included and the issues that are addressed. Developing a “plan for the plan” that identifies the Town’s approach to plan making will most likely result in a more successful historic preservation planning effort.