



## Instructions & Guidelines for Proposed Alterations of Easement Properties

In general, contact Restore Oregon prior to any alterations of the elements protected by the easement. This can include: windows, doors, siding material, architectural details and can even include paint color and/or landscape features.

Please provide the following information to Restore Oregon. The Easement Committee will present their decision on any proposed alterations within 30 days.

1. Provide a brief written description of the project, including intended materials. Submit it with representative “before” photographs, including exterior, interior, and detail shots of areas where work will occur.
2. Provide elevation drawing(s) showing a description of the proposed work.
3. Provide a timeline for the project.
4. Provide a detailed plan on the actions taken to protect elements protected by the easement.

Please be advised that Restore Oregon has adopted the Secretary of Interior’s Standards for Preservation. The Preservation standard “places a high premium on the retention of all historic fabric through conservation, maintenance and repair. It reflects a building’s continuum over time, through successive occupancies, and the respectful changes and alterations that are made.” For further information, please see:

<http://www.nps.gov/tps/standards/four-treatments/treatment-preservation.htm>

*Specific information for window replacement and rooftop mechanical installation follows.*

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## Window Replacement Approval Procedure

The following document is intended as a general procedural guideline for reviewing requests to alter or replace historic windows, or add new windows, within easement properties. The procedures do not imply “rules” that if met automatically convey approval. Each request will be reviewed on its own merits.

The materials provided to Restore Oregon should document both the existing conditions and the proposed conditions. Restore Oregon will have a higher level of scrutiny for proposals to replace historic windows, since those proposals may affect a building’s integrity. A higher level of documentation may therefore be needed for proposals affecting significant features.

The following types of proposals must be accompanied by supporting documentation as listed below.

- A.** Replacement of windows significant to a building (typically, original historic windows).
- B.** Replacement of windows not significant to a building, or new windows in previously closed openings.
- C.** New window openings.

Required Documentation to be submitted with requests for review:

1. Brief written evaluation of the significance of the affected windows, based on factors such as whether the windows are original, reflect the original design intent for the building, reflect period or regional styles or building practices, reflect changes to the building resulting from major periods or events, or are examples of exceptional craftsmanship or design. **(A, B)**
2. Provide several overall façade photographs and a drawn elevation to scale at each affected façade, showing both existing and proposed conditions. **(A, B, C)**
3. Window Survey/Assessment **(A)**
  - a. Document the existing conditions of existing windows, including any that are non-original to the building. Documentation should cover no less than 70% of the total windows per facade.
  - b. Number all windows on all facades, and provide photographs tied to window numbers. Provide a minimum documentation for each façade of 80% of all windows on each façade.
  - c. Provide a window matrix indicating percentage of windows evaluated and degree of deterioration, if any. (see example)
  - d. Indicate variations in window types and operation.
  - e. Show special shapes and conditions.
  - f. If non-original windows are present, provide information if available regarding the date the windows were installed, the window manufacturer, what was removed, and any other relevant data.
4. Window Profiles **(A)**
  - a. Provide existing jamb, head, muntin, and sill profile drawings including brick molding, jamb pockets, and hardware locations.
  - b. Provide new jamb, head, muntin, and sill profile drawings illustrating conditions specific to the building.
5. Material description **(A)**
  - a. For replacement proposals, provide specific manufacturer Series and Model information
  - b. Provide existing window sash components / materials.
  - c. Provide new window sash components / materials.
  - d. Provide existing glass components / materials.
  - e. Provide new glass components / materials.
6. Coordinate site visit with Restore Oregon representative prior to and during review process.
7. Optional - Provide window mock-up

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## Policy and Guidelines for Rooftop Installations on Buildings

Subject to Restore Oregon review and approval, as well as adherence with applicable local regulations, a property owner may install or alter rooftop features such as mechanical equipment, cellular antennae, solar panels, skylights, or other similar installations if:

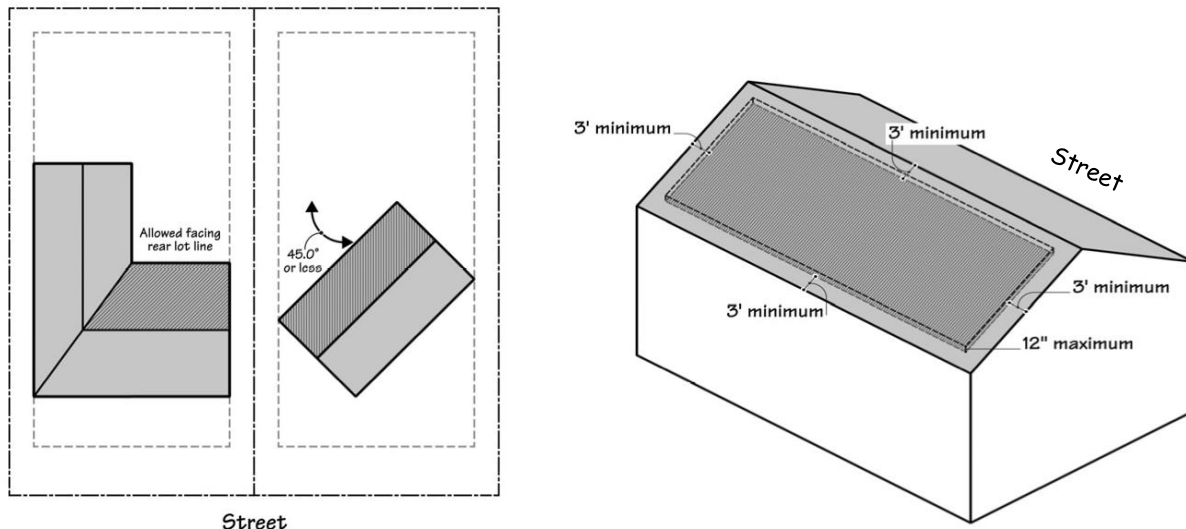
1. The design and location of the rooftop installation is subordinate to the overall roofline when viewed from a public right-of-way;
2. The color of the rooftop installation is similar to, and compatible with, the color of the existing roof;
3. The rooftop installation is removable and the removal of the addition will not harm the historic features protected by the conservation easement;
4. This policy does not apply to rooftop decks or green roofs. Restore Oregon's change request application form and standard review is required for these modifications.

When seeking approval for placement or modification of rooftop installations, a property owner may provide either the Restore Oregon easement modification form or the form provided by the Oregon State Historic Preservation Office (SHPO) used to comply with Section 106 of the National Historic Preservation Act.

Restore Oregon recommends that property owners consider and incorporate the following performance standards relating to rooftop installations:

- 1) Rooftop mechanical equipment.
  - a) The area where the equipment will be installed must have a pitch of 1/12 or less;
  - b) The proposed rooftop installation should be set back at least 4 feet from the edge of the roof for every 1 foot of height of the equipment above the roof surface or top of parapet; and
  - c) The proposed rooftop installation must have a matte finish or be painted to match the roof.
- 2) Vents.
  - a) Rooftop vents on flat roofs and shed roofs behind a parapet (i.e., western false front). The rooftop vent and associated features, such as pipes and covers, must:
    - i) Not be more than 30 inches high and no larger than 18 inches in width, depth, or diameter;
    - ii) Set back from the perimeters of the building at least 4 feet for every 1 foot of height; and
    - iii) Painted to match the adjacent surface.
  - b) Wall vents. The wall vent and associated features, such as pipes and covers, must:
    - i) Be on a non-street facing façade;
    - ii) Project no more than 12 inches from the wall;
    - iii) Be no more than 1 square foot in area, where the area is width times height. The cumulative area of all proposed vents may be up to 2 square feet;
    - iv) Be at least 1 foot away from architectural features such as windows, doors, window and door trim, cornices, ornamental features, or other elements protected by the conservation easement except when located at or below finish first floor framing; and
    - v) Be painted to match the adjacent surface.
  - c) Rooftop, ridge, and eave vents on residential roofs or non-flat roofs.
    - i) Standard, attic ventilation vents will be allowed if each vent is no more than 3.0 ft. in width or diameter. Must be accompanied by letter from contractor stating necessity or be in replacement of existing vents.
    - ii) Painted to match surrounding materials

- 3) Solar Energy (including photovoltaic and heating systems).
  - a) Flat roof. (This standard also applies to the horizontal portion of a mansard roof, or roofs surrounded by a parapet that is at least 12 inches higher than the highest part of the roof surface).
    - i) The solar energy system must be mounted flush or on racks, with the system or rack extending no more than 5 feet above the top of the highest point of the roof.
    - ii) Solar energy systems must also be screened from the street by:
      - (1) An existing parapet along the street-facing façade that is as tall as the tallest part of the solar energy system, or
      - (2) Setting the solar energy system back from the roof edges facing the street 4 feet for each foot of solar energy system height.
  - b) Pitched roof.
    - i) Solar energy systems may be on a pitched roof facing a rear lot line or on a pitched roof surface facing within 45 degrees of the rear lot line.
    - ii) The system must be mounted flush, with the plane of the system parallel with the roof surface, with the system no more than 12 inches from the surface of the roof at any point, and set back 3 feet from the roof edge and ridgeline. (See diagrams)
  
- 4) Cellular Antennae.
  - a) Restore Oregon understands that a National Programmatic Agreement exists for installations of cellular equipment with special procedures for complying with Section 106 of the National Preservation Act. Applicants must furnish such Section 106 documents to Restore Oregon for Board approval of antenna installations.



Diagrams for Solar Energy Rooftop Installations.