

5/19/00 Jacquie Kuchte Came by for S/Hes-TO COM. + refush in 1 week ABIN 1.



MONTGOMERY COUNTY DEPARTMENT OF PARK AND PLANNING

THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION

8787 Georgia Avenue Silver Spring, Maryland 20910-3760

Date: Fdo. 25 1999

# **MEMORANDUM**

- TO: Robert Hubbard, Director Department of Permitting Services
- FROM: Gwen Wright, Coordinator Historic Preservation

SUBJECT: Historic Area Work Permit

The Montgomery County Historic Preservation Commission has reviewed the attached application for an Historic Area Work Permit. This application was:

$\nearrow$	Approved	 Denied		
/	Approved with Conditions:	 		
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and HPC Staff will review and stamp the construction drawings prior to the applicant's applying for a building permit with DPS; and

THE BUILDING PERMIT FOR THIS PROJECT SHALL BE ISSUED CONDITIONAL UPON ADHERENCE TO THE APPROVED HISTORIC AREA WORK PERMIT (HAWP).

Applicant:	Dave	* Jackie	hachter		
Address:	6809	Westmi	reland Avenue	Takoma Park	MD. 20912

and subject to the general condition that, after issuance of the Montgomery County Department of Permitting Services (DPS) permit, the applicant arrange for a field inspection by calling the DPS Field Services Office at (301)217-6240 prior to commencement of work <u>and</u> not more than two weeks following completion of work.

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Tex Account No .:		· .	Dayume Phone No.: 0-0		100
	or Dave Vachter	Jackie Kuch	Laytime Phone No.: 301/	589-8303 ent	4. 204
Address: 680	1 Westmorela.	A Ave, To	Koma Park, M	D 204/2	•
	treet Number IRE TOILIC		Store / Phone No.: (301)		
	n.Na.: 33839		Prione No.: (301/)	<u> 200-2711</u>	
Agent for Owner:	· · · · · · · · · · · · · · · · · · ·		Ostime Phone No -		
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House Number:			Westmorela	nd Avenue	
	koma Park	··· •			
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Liber.	Folio: Pa	rcst		······································	
PART ONE: TYPE O	FPERMIT ACTION AND USE		······································	<u></u>	•
IA. CHECK ALL APPL		CHECK ALL	APPLICABLE:		
Construct	DExtend Alter/Renovets		Steb Conform Addition	🖸 Porch 🛛 Deck 💭 Shed	
🛈 Move	( ] Install [ ] Wreck/Raze	[] Solar I	J Fireplace U Woodburning Stav	a 🔄 Single Family	
	Repair     Revocable	E Fence/	Anti (complete Section 4) 🛛 Oth	er:	
18. Construction cost	estimate: \$ 50 000.			· · · · · · · · · · · · · · · · · · ·	
1C. If this is a revision	) of a previously approved active perm	iit, see Permit #		· · · · · · · · · · · · · · · · · · ·	
PART TWO: COMP	LETE FOR NEW CONSTRUCTION	AND EXTEND/ADDITI	DNS		
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28. Type of water su	pply: 01 🕵 WSSC	02 🗆 Well	03 (1) Other:		
PART THREE: COM	PLETE ONLY FOR FENCE/RETAIN				• .
3A. Height	feet inches				
	the fance or retaining wall is to be c	anstructed on one of the h	tiowing locations:		
C On party line/	•	on land of owner	On public right of way/easem	hit	
	· · · ·			······································	
	have the authority to make the lorego ies listed and I hereby acknowledge				
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Jachi	, Justa		2/	12/99	
	Signature of owner or authorized egent	· · · · · · · · · · · · · · · · · · ·	······································	Date	
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Approved:		FogCheirp	erson rustone Preseption Commiss	1/24/aa	
Disapproved: '	Signature:		2/3/9	and the second s	
Application/Permit No.	TUQUUU	Oate R		BG: ,	$\frown$
	SEE REV	ERSE SIDE FOR	INSTRUCTIONS		(4)
				37/2-99	
				5112-44	н



# MONTGOMERY COUNTY DEPARTMENT OF PARK AND PLANNING

THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION

8787 Georgia Avenue Silver Spring, Maryland 20910-3760

Date: Feb. 25, 1997

# MEMORANDUM

TO:	Historic Area Work Permit Applicants
FROM:	Gwen Wright, Coordinator DL Historic Preservation Section
SUBJECT:	Historic Area Work Permit Application - Approval of Application/Release of Other Required Permits

Enclosed is a copy of your Historic Area Work Permit application, approved by the Historic Preservation Commission at its recent meeting, and a transmittal memorandum stating conditions (if any) of approval.

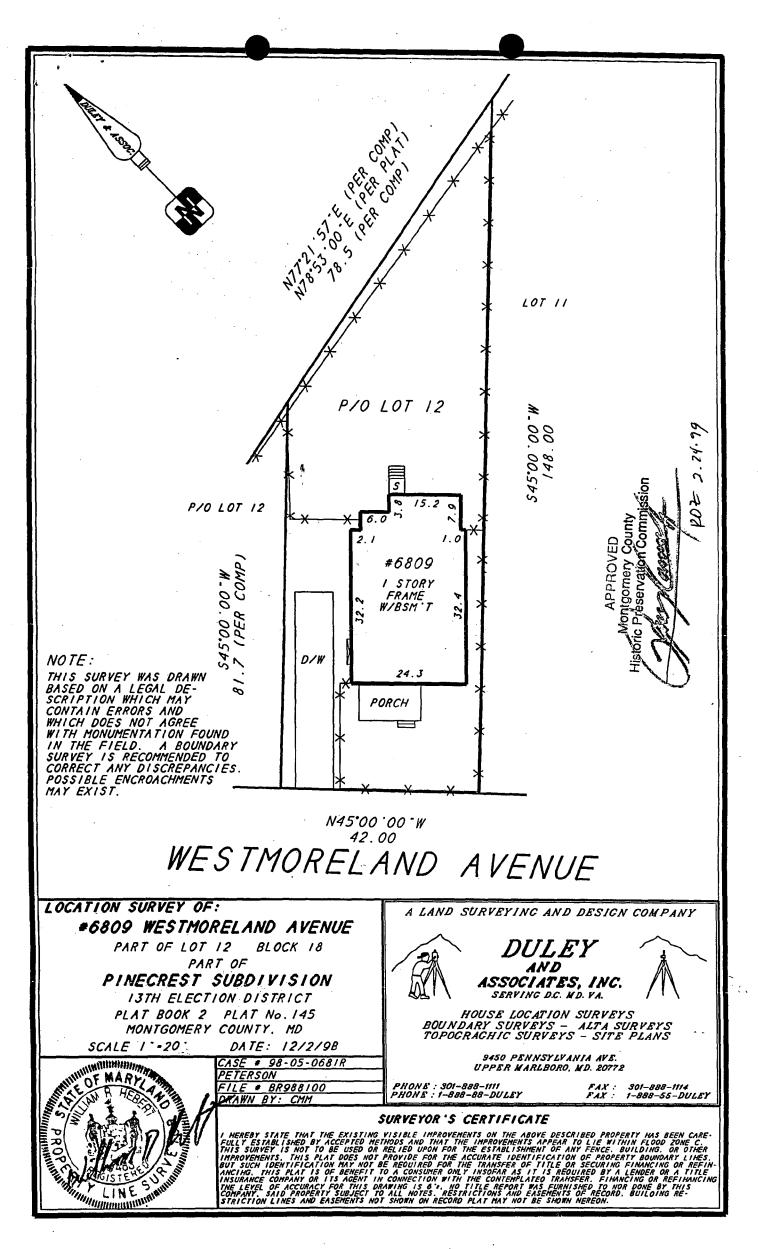
You may now apply for a county building permit from the Department of Permitting Services (DPS) at 250 Hungerford Drive, second floor, in Rockville. Please note that although your work has been approved by the Historic Preservation Commission, it must also be approved by DPS before work can begin.

When you file for your building permit at DPS, you must take with you the enclosed forms, as well as the Historic Area Work Permit that will be mailed to you directly from DPS. These forms are proof that the Historic Preservation Commission has reviewed your project. For further information about filing procedures or materials for your county building permit review, please call DPS at 301-217-6370.

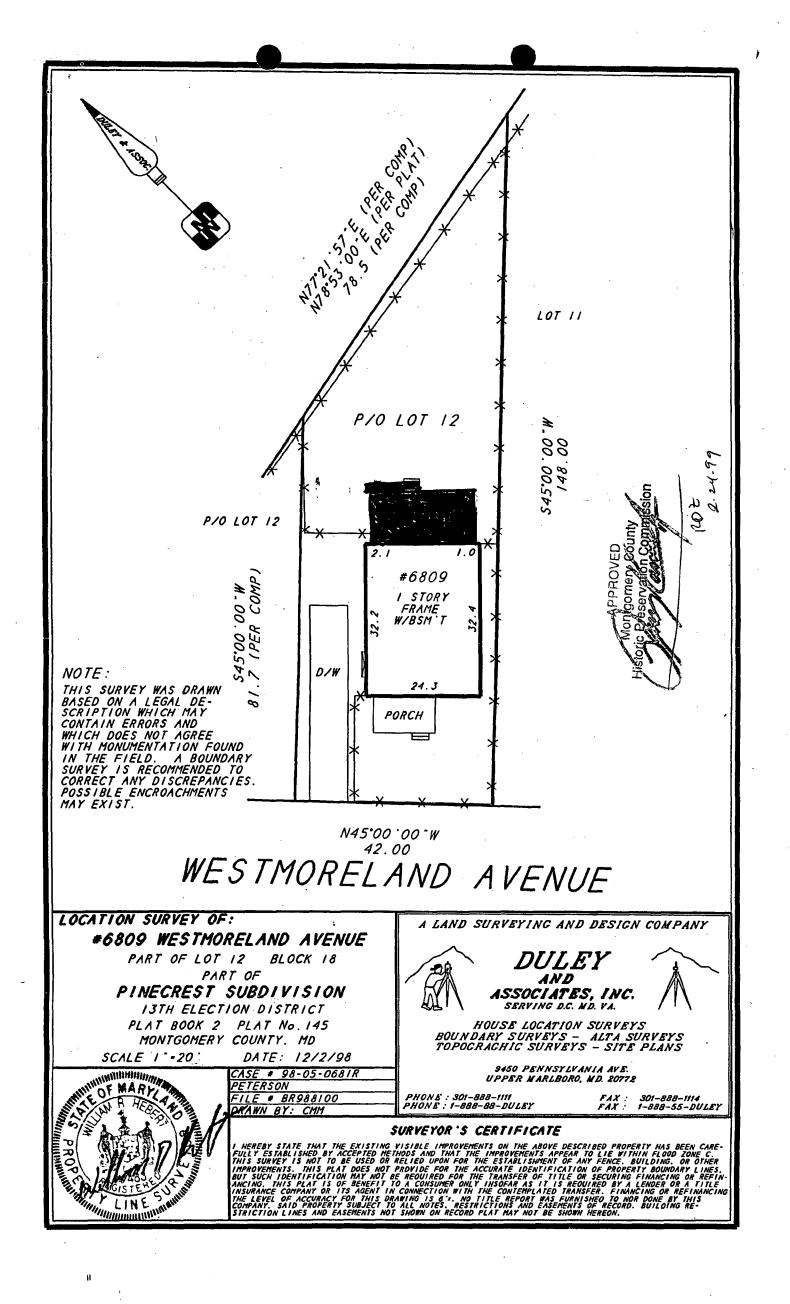
If your project changes in any way from the approved plans, either before you apply for your building permit or even after the work has begun, please contact the Historic Preservation Commission staff at 301-563-3400.

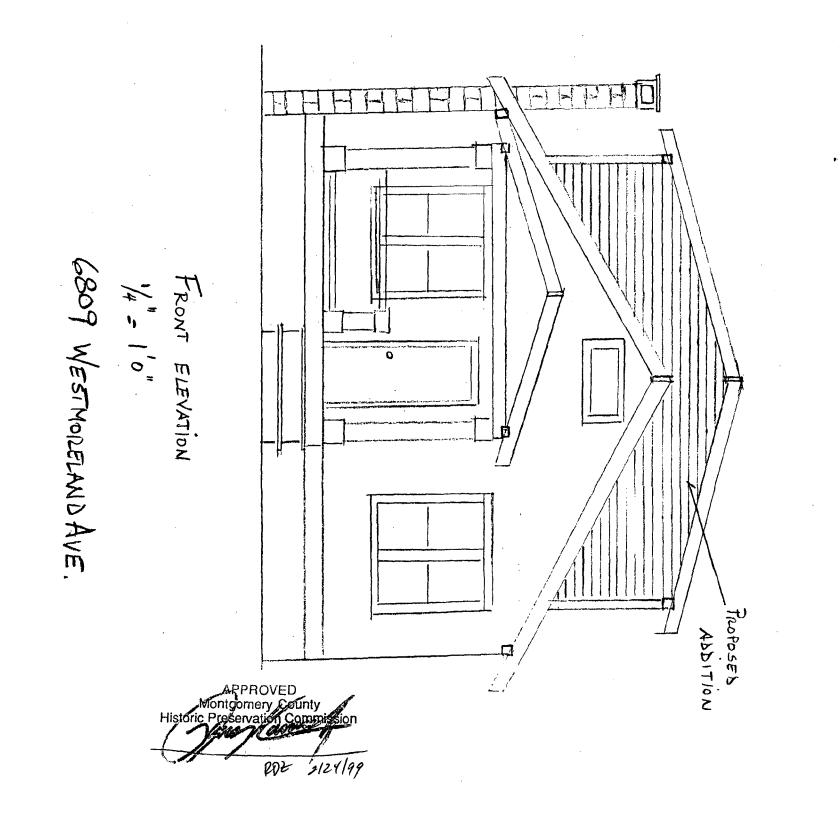
Please also note that you must arrange for a field inspection for conformance with your approved HAWP plans. Please inform DPS/Field Services at 301-217-6240 of your anticipated work schedule.

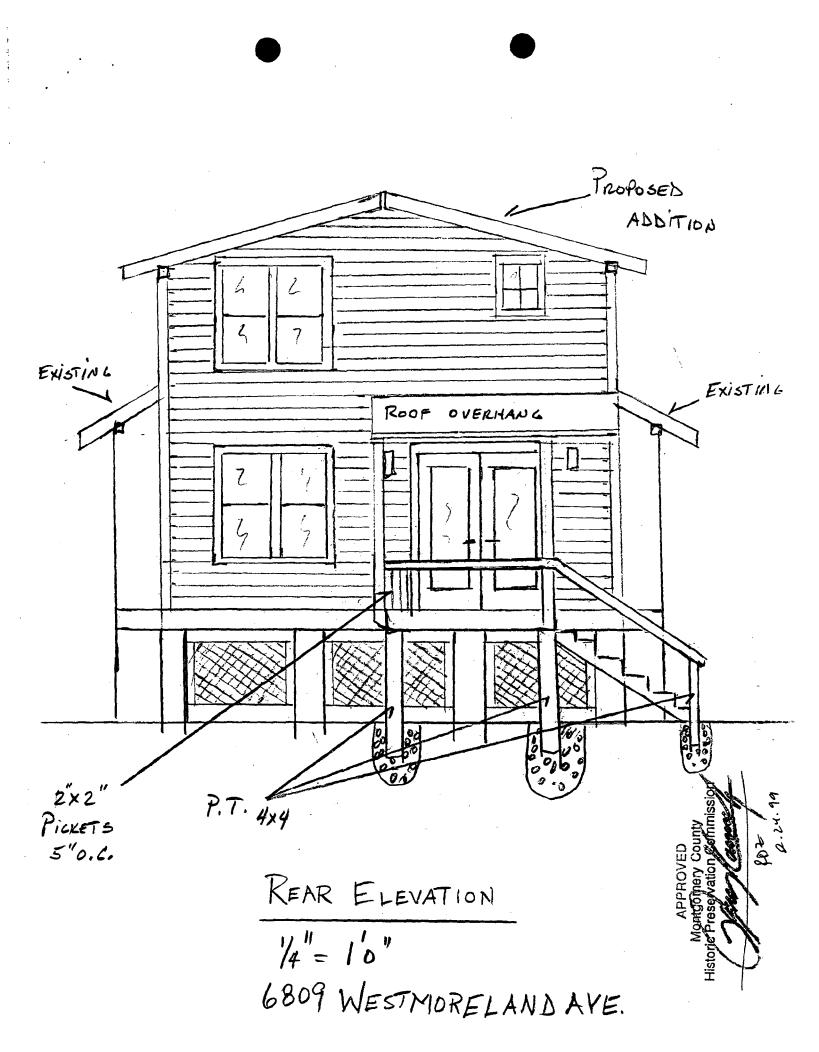
Thank you very much for your patience and good luck with your project!

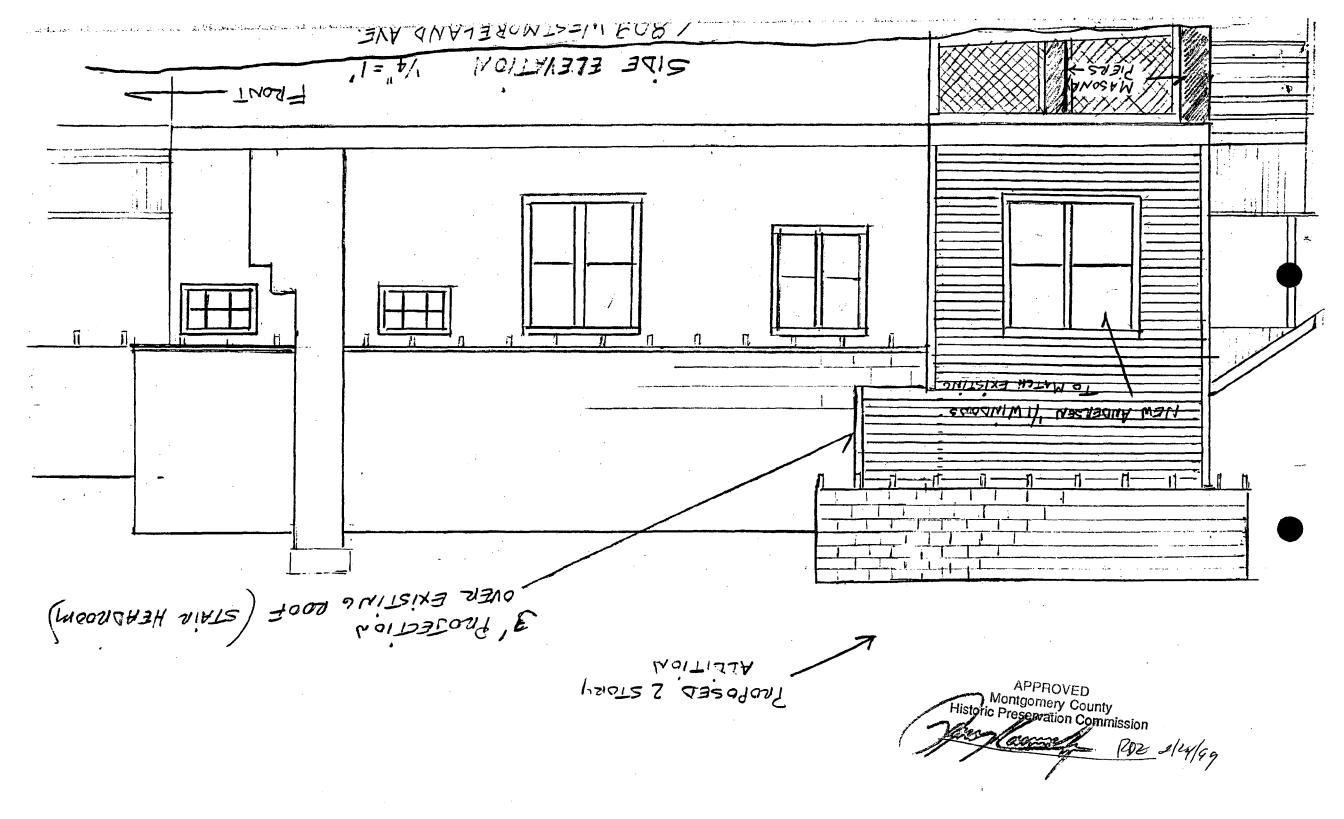


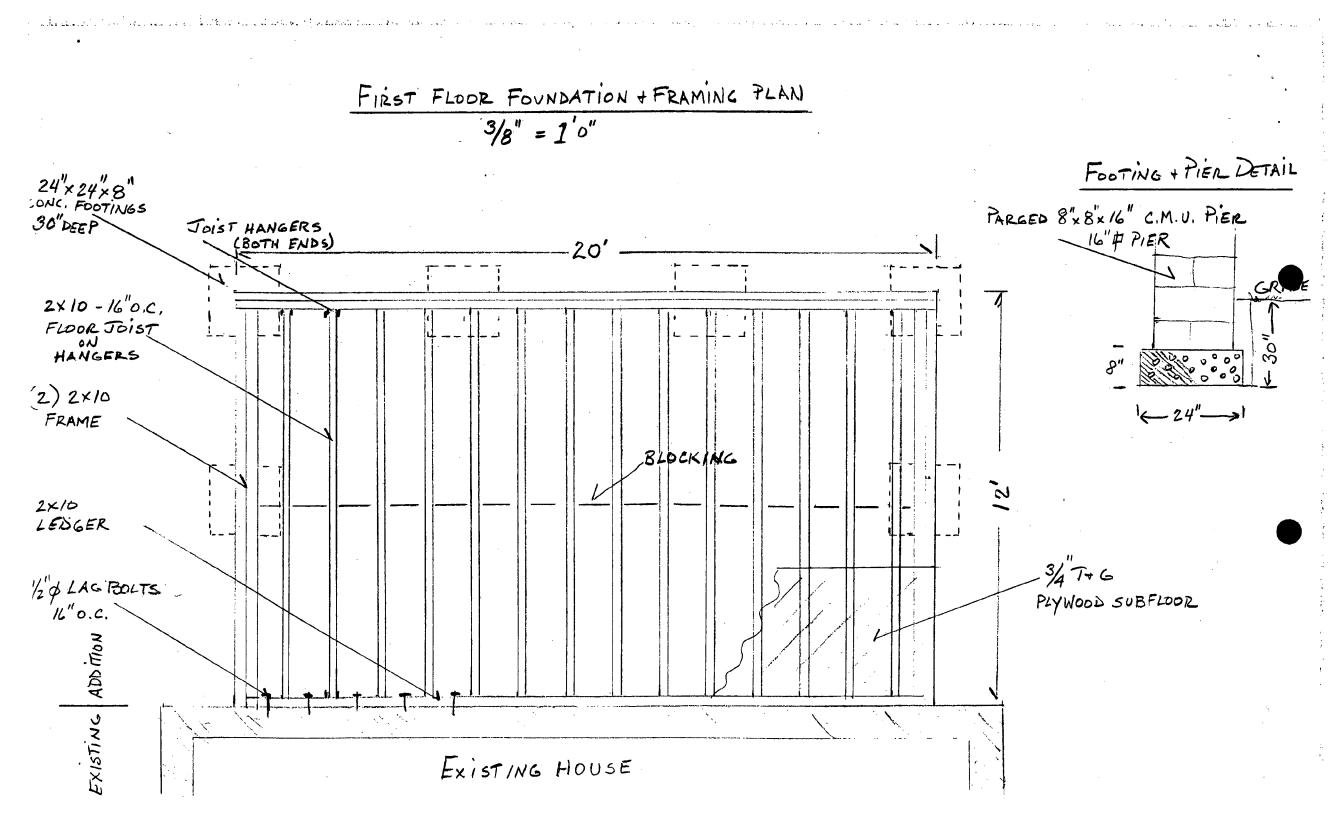
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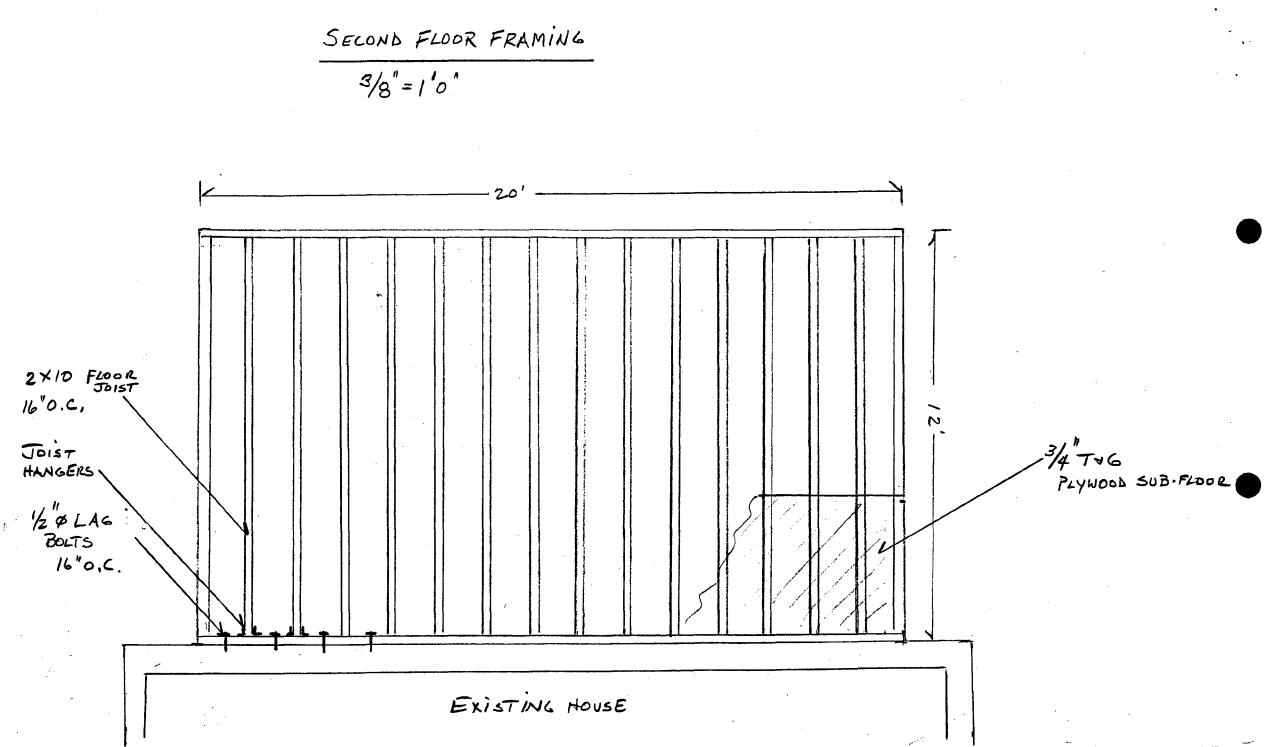






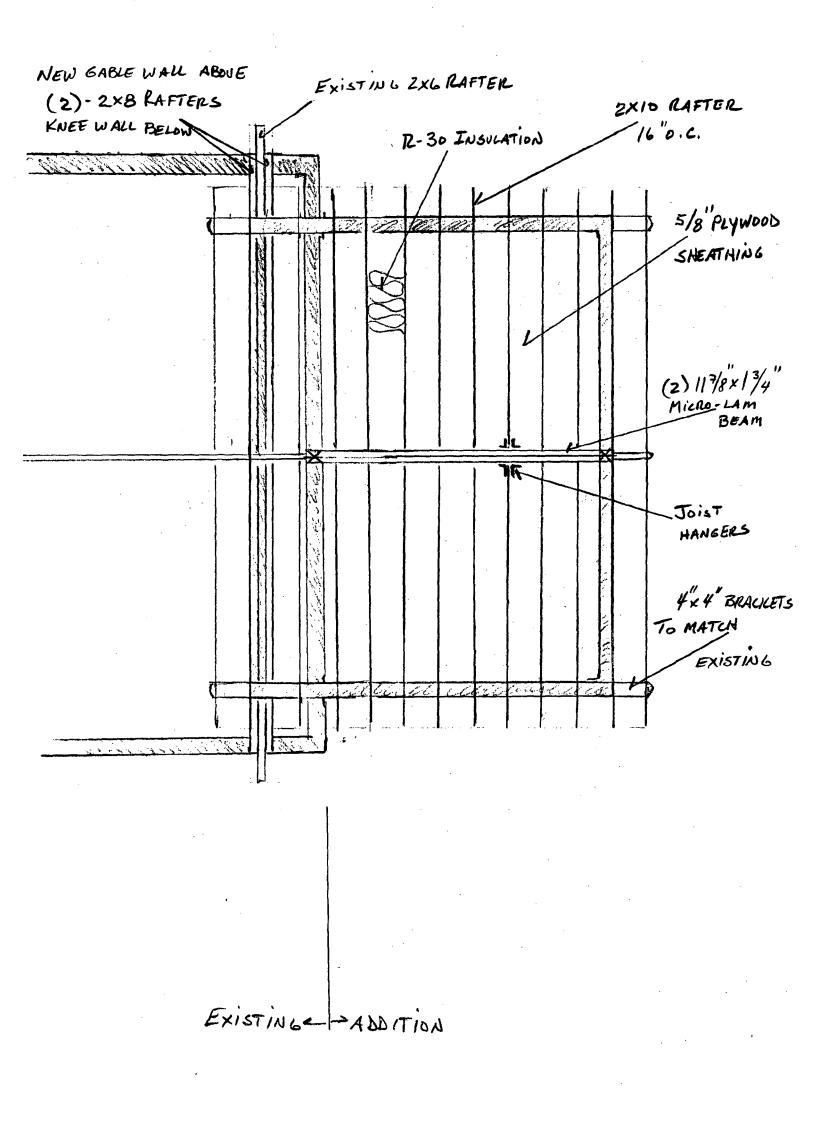




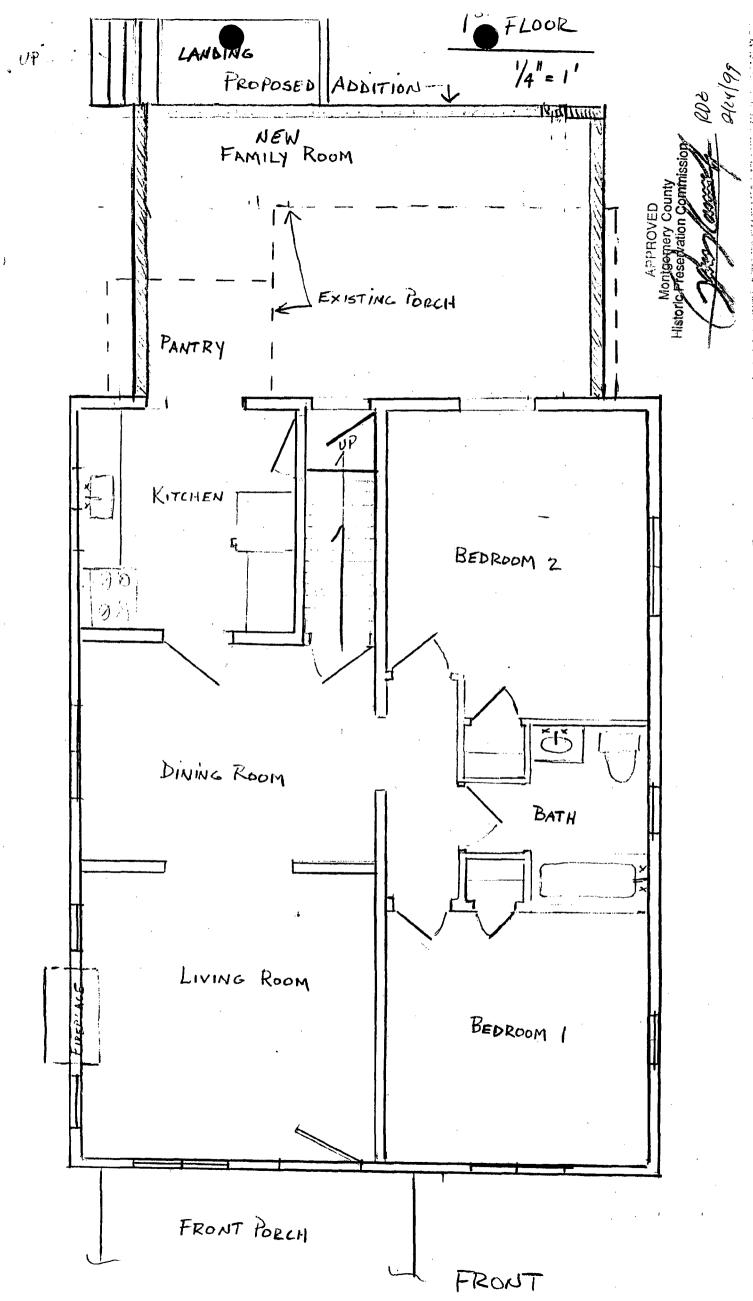


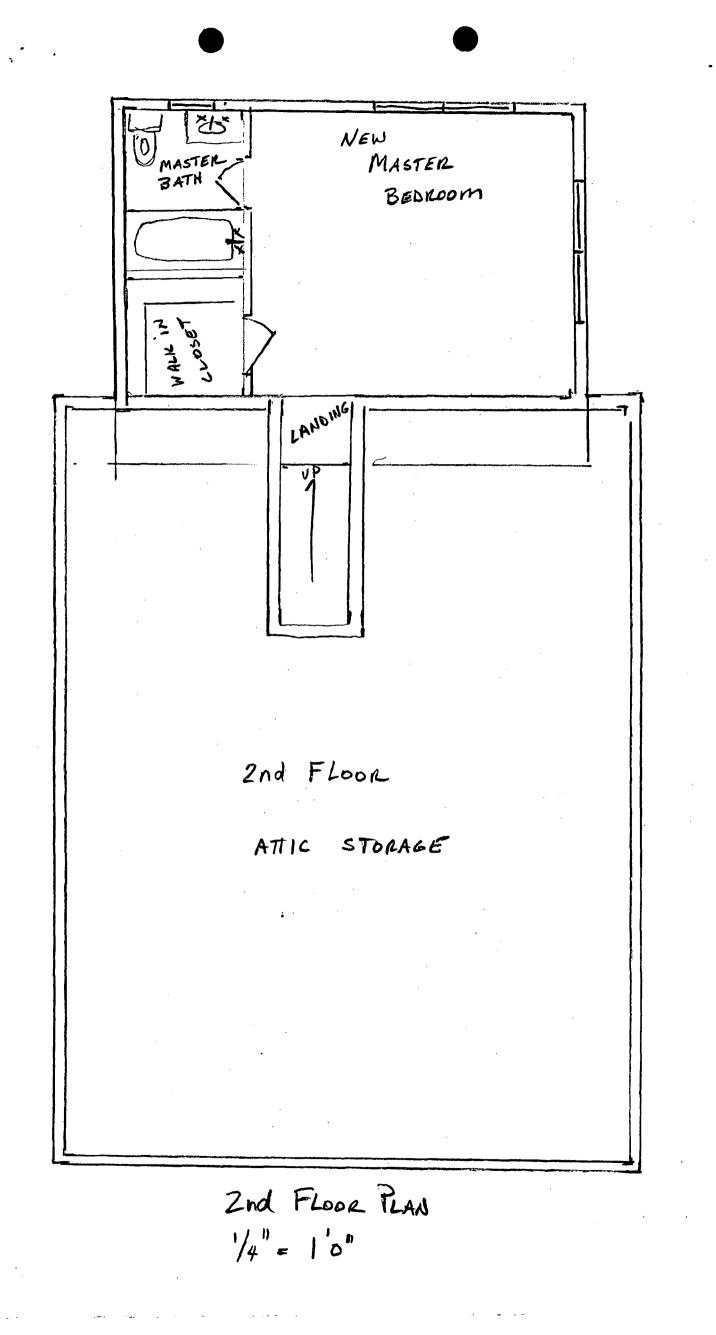
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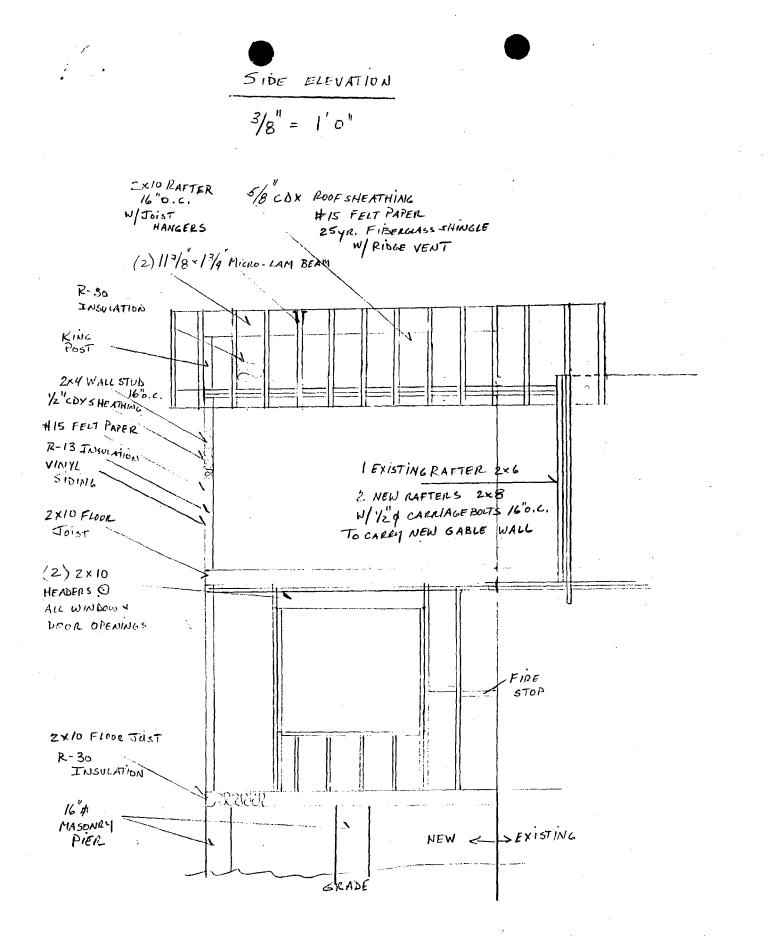
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## **HISTORIC PRESERVATION COMMISSION STAFF REPORT**

Address: 6809 Westmoreland Avenue	Meeting Date: 2/24/99
Resource: Takoma Park Historic District	Review: HAWP
Case Number: 37/3-99A	Tax Credit: Partial
Public Notice: 2/10/99	Report Date: 2/17/99
Applicant: Dave & Jackie Wachter	Staff: Robin D. Ziek
PROPOSAL: Rear Addition	RECOMMENDATIONS: APPROVAL

#### **PROJECT DESCRIPTION**

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RESOURCE: Contributing Resource in the Takoma Park Historic District STYLE: Bungalow DATE: c1910s-1920s

The applicants came to the HPC for a Preliminary Consultation on February 10, 1999. At that time, they presented a proposal for a small addition to their house. The HPC endorsed their overall strategy and discussed alternatives for the proposal. At the end of the discussion, the HPC endorsed the revised proposal which is essentially being submitted now for a HAWP.

The subject property is an odd shaped lot with 42' street frontage. The 1-1/2 story bungalow (c780 sf. footprint) has an asymmetrical front porch and a cast-stone concrete block chimney. The house is currently sided with painted shingles (non-wood); the original siding may have been pebble-dashed stucco. There is a small rear glassed-in porch supported by block piers, and a small vestibule. The windows include paired 1/1 double-hung wood windows, single 1/1 double-hung, and smaller multi-light casement windows as well.

This house has suffered from deferred maintenance for a lengthy period of time during which it was a rental property. The current owners (and the applicant) are the current occupants. They are undertaking numerous repairs to the interior, the roof, porch, etc., much of which will qualify for the county tax credit, while also proposing to increase the size of the living space by the amount of the proposed addition (240 sf footprint).

### **PROJECT PROPOSAL**

The applicant proposes to add a two-story addition to the rear of their 1-1/2 story bungalow (see Circle  $9_{10}$ ). The addition would measure 12' x 20' and replace the existing rear porch and vestibule. The addition will be centered on the back of the house. In order to provide adequate headroom at the landing of the stair at the 2nd floor level, the new roof will project over the existing roof 3'. The addition will provide room for a family room on the first floor, and a master bedroom with bath on the second floor. The applicant proposes to use vinyl siding and vinyl-clad wood windows with thermal glazing on the addition; they also propose to install storm windows on the original windows, preserving them in place.

## **STAFF DISCUSSION**

This proposal is a modest addition to a typical 1-story bungalow. This is a difficult task and the applicant's proposal is successful, in part, due to its small scale. The ridgeline of the rear addition will project 2-1/2' above that of the existing house. Due to the distance from the street, and the use of inset corners at the rear, this addition should have a minimal effect on the house or the District.

Westmoreland Avenue is a showcase for rear additions to bungalows, and every house uses a different approach. This proposal appears suitable because it attempts to work with the existing small house rather than change it into something else.

Vinyl siding, which is proposed, is generally considered an incompatible material in the historic district. As noted in the *Takoma Park Guidelines*, vinyl is discouraged where visible from the public right-of-way. The HPC has approved vinyl siding on a case-by-case basis, such as when the house already had artificial siding, or when the addition was totally out of view from the public right-of-way. The HPC discussed this with the applicant at the Preliminary Consultation and did not voice any strong objection to the proposal. Staff feels that this is due to the lack of prominence on the street of the proposed addition. Staff notes that other materials would be more compatible with the overall historic district, such as wood clapboard siding, wood shingles, or stucco.

The proposed use of new vinyl-clad wood windows in the rear addition would have no adverse effect on the historic district. Staff notes that there are no proposed windows facing the street, and that the side windows in the proposed rear addition will be hardly visible (if at all) from the public right-of-way.

#### **STAFF RECOMMENDATION**

Staff recommends that the Commission find this proposal consistent with the purposes of Chapter 24A-8(b)2:

The proposal is compatible in character and nature with the historical, archeological, architectural or cultural features of the historic site, or the historic district in which an historic resource is located and would not be detrimental thereto or to the achievement of the purposes of this chapter;

and with Secretary of the Interior's Standards for Rehabilitation #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.

and with the Takoma Park Guidelines which state:

all exterior alterations, including those to architectural features and details, should be generally consistent with the predominant architectural style and period of the resource and should preserve the predominant architectural features of the resource; exact replication of existing details and features is, however, not required; and

major additions should, where feasible, be placed to the rear of existing structures so that they are less visible from the public right-of-way;

preservation of original building materials and use of appropriate, compatible new materials is encouraged.

Some non-original building materials may be acceptable on a case-by-case basis; artificial siding on areas visible from the public right-of-way is discouraged where such materials would replace or damage original building materials that are in good condition



and subject to the general condition that, after issuance of the Montgomery County Department of Permitting Services (DPS) permit, the applicant arrange for a field inspection by calling the DPS Field Services Office at (301) 217-6240 prior to commencement of work and not more than two weeks following completion of work.

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2-02-1999	9 2:49PM FROM HIST PRES / HUM RES 301 563 3412 30/ 89/	P.3
· · · · ·		2024
	RETURN TO:         DÉPARTMENT OF PERMITTING SERVICES           250 HUNGERFORD DRIVE, NOCKVILLE, MARYLAND 20850         DPS - #8           301/217-8370         DPS - #8	
	HISTORIC PRESERVATION COMMISSION	
	301/495-4570	• .
	APPLICATION FOR	
	HISTORIC AREA WORK PERMIT	
	contact Person: Jackie Kuchta	
	Daytime Phone No .: 202/ 857-0540 ent	20
	Tax Account No.:	
	Name of Property Owner: Dave Valter Jack; eKuchteDaytime Phone Na: 301/589-8303 apt.	704
	Address: 6801 Westmoreland Ave, Takama Park, MD 20912 Stront Number Zip Code	
	Conference I. LOVRE TOILIC Phone No.: (301) 588 - 5741	·
	Contractor Registration No.: <u>33839</u> Agent for Owner:	-
· · ·	LOCATION OF BUILDING/PREMISE	
	House Number: 6809 Street Westmoreland Avenue	
	Town/City: Takuma Park Nearest Cross Street: Walnut	
	Lat: 12 Block: 18 Subdivision: PINECREST	
	Liber Folio: Parcet:	
	PART ONE: TYPE OF PERMIT ACTION AND USE	
	1A. <u>CHECK ALL APPLICABLE:</u> <u>CHECK ALL APPLICABLE:</u> Construct     Deck       Construct     Deck	
	Move [] Install [] Wrect/Raze Solar [] Fireplace [] Woodburning Stove [] Single Farmity	
	Revision Repair Revocable     Fance/Wall (complete Section 4)     Other:	
·	1B. Construction cost estimate:       \$ 55 000.         1C. If this is a revision of a previously approved active permit, see Permit #	
	PART TWO:       COMPLETE FOR NEW CONSTRUCTION AND ECTEND/ADDITIONS         24.       Type of sewage disposal:       01 55 WSSC       02 □ Septic       03 □ Other;	
	28. Type of water supply: 01 🕵 WSSC 02 🗆 Well 03 (_] Other:	
	PART THREE: COMPLETE ONLY FOR FENCEMETAINING WALL	
	3A. Heightfeetinches	
	38. Indicate whether the fance or retaining wall is to be constructed on one of the following locations:	
	On party line/property line Entirely on land of owner On public right of way/easement	
	I hereby certify that I have the authority to make the foregoing application, that the application is correct, and that the construction will comply with plans approved by all agencies listed and I hereby acknowledge and accept this to be a condition for the issuence of this permit.	
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	Jack furth 2/2/97 Doto	
	Approved:For Cheirperson Historic Proscoption Commission	
	Disapproved:	
	SEE REVERSE SIDE FOR INSTRUCTIONS	(1)
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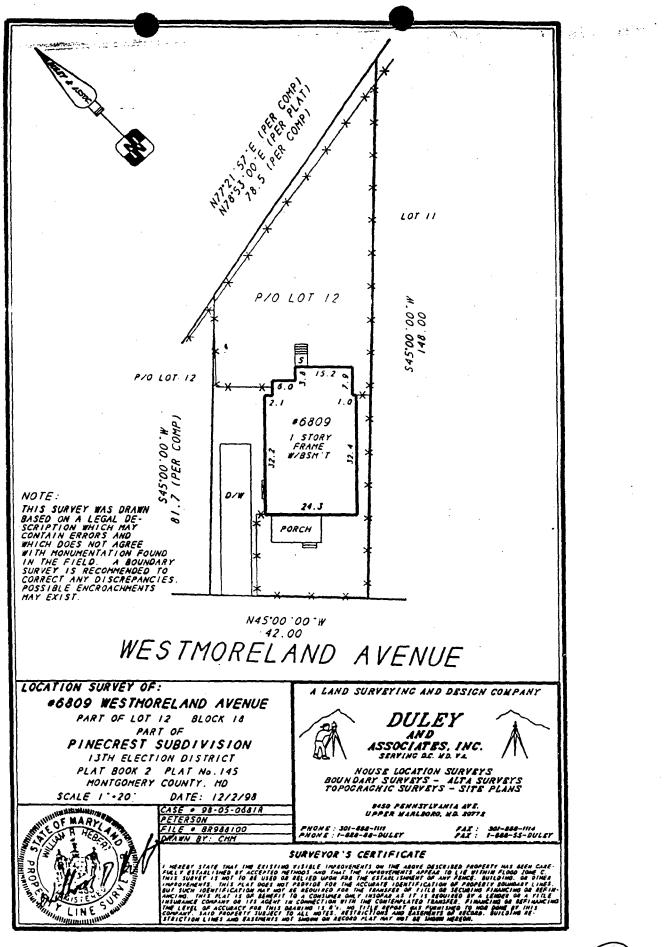
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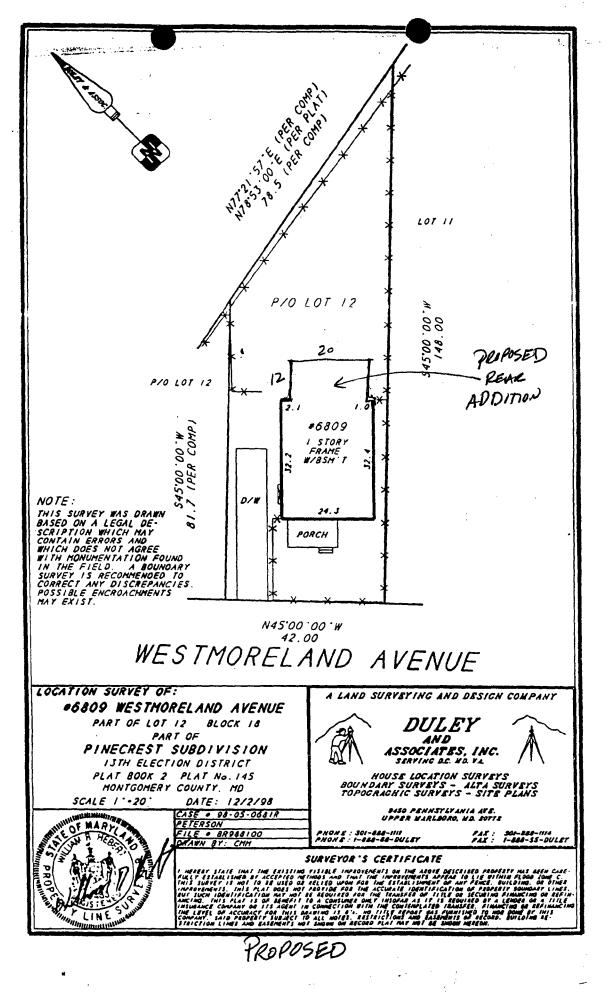
Neighbors of 6809 Westmoreland ave 6807 internet ANTONIO La Greca & Loretta Kelley 6808 internet Christine Reesor & Peter O'Driscol 6811 - Christian Holt Jordan & Cliff HUNTER 55 Parte AVE

Marcia Deprow

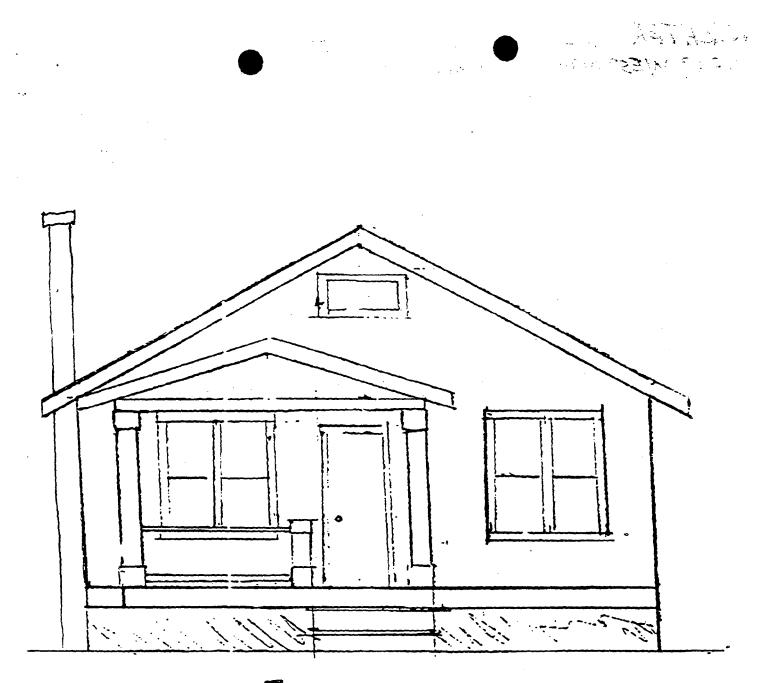
9753 Pine Ave MRS. Reidy



EXIBTING



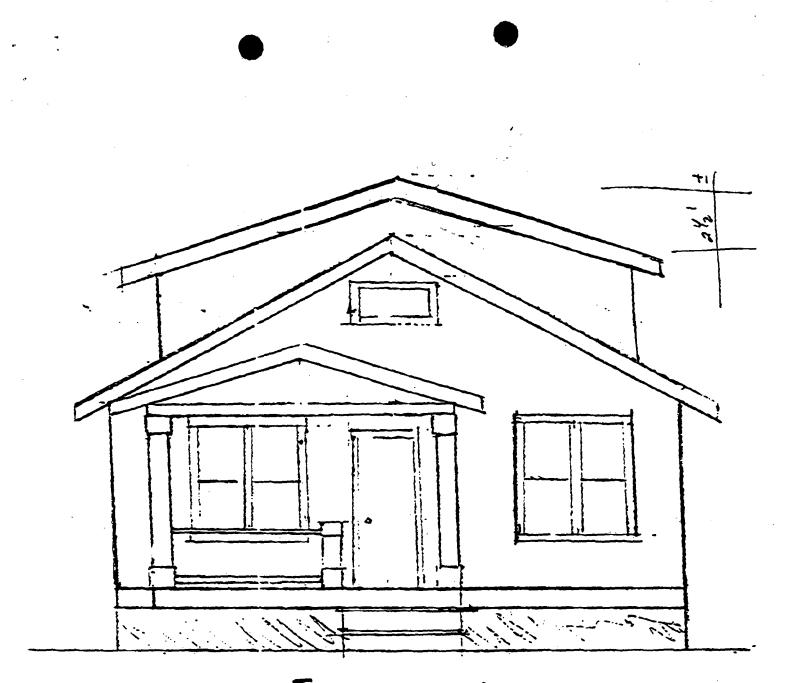
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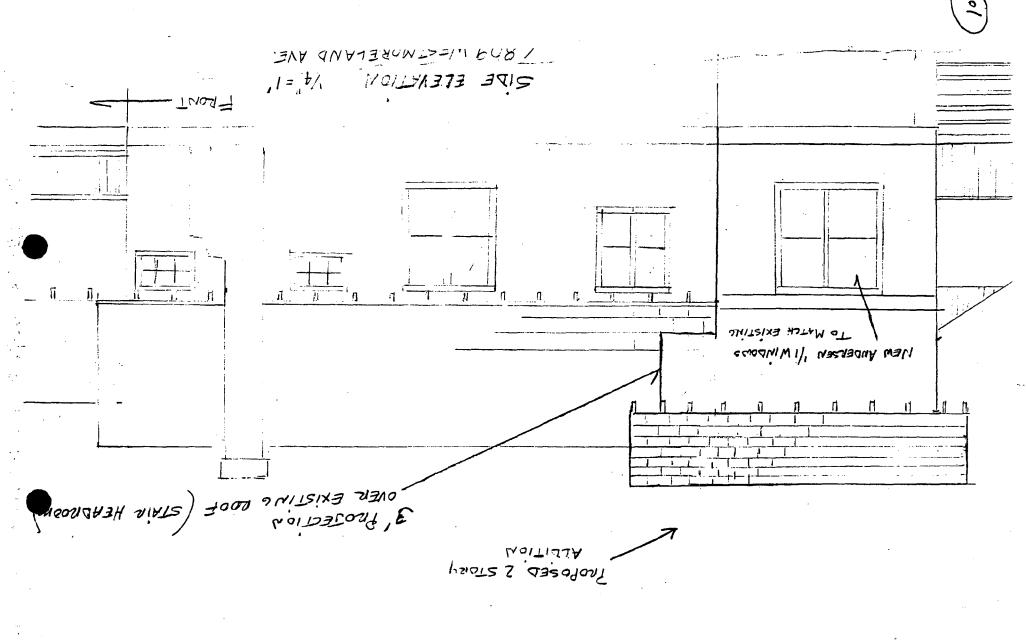
FRONT ELEVATION

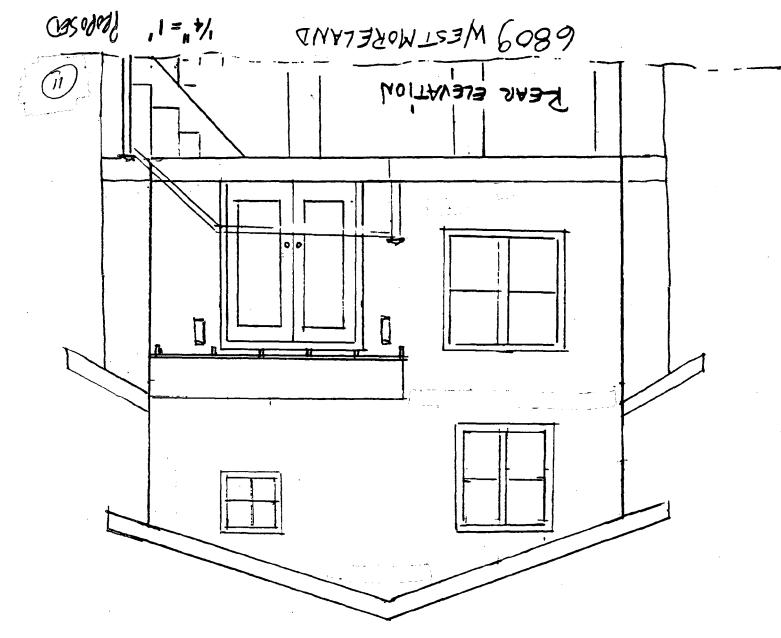
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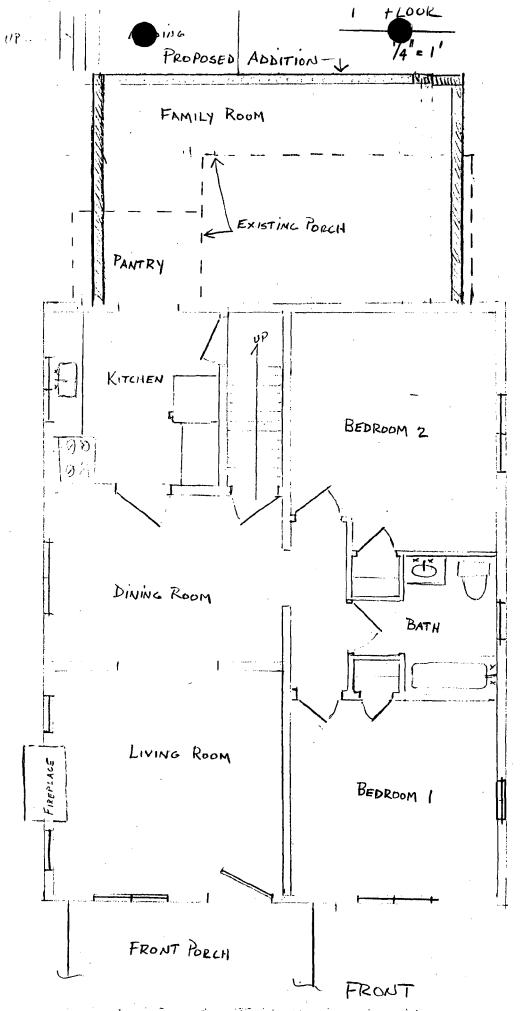
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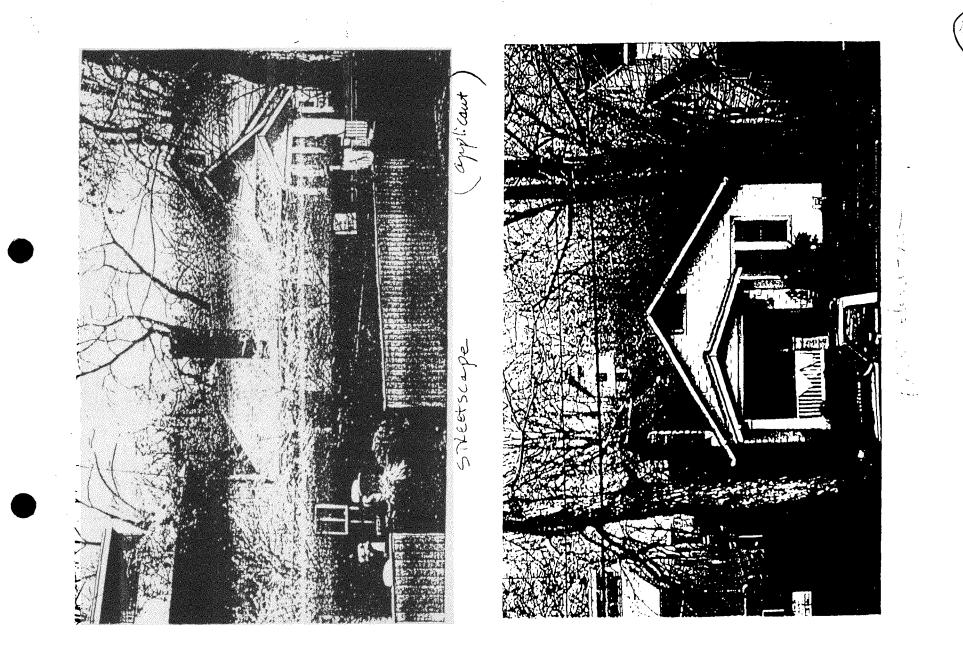


FRONT ELEVATION PROPOSED



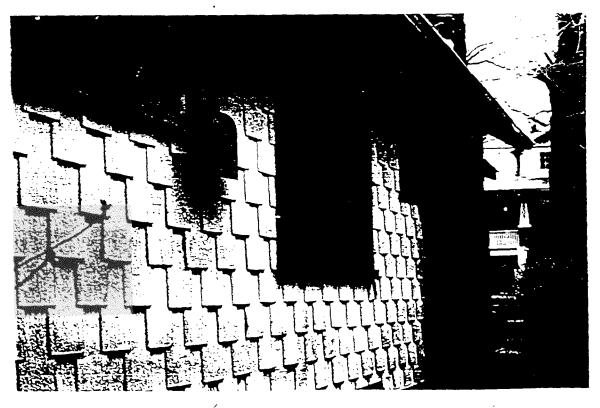








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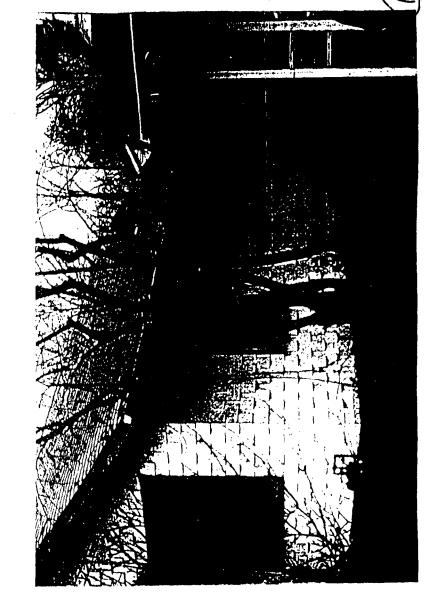


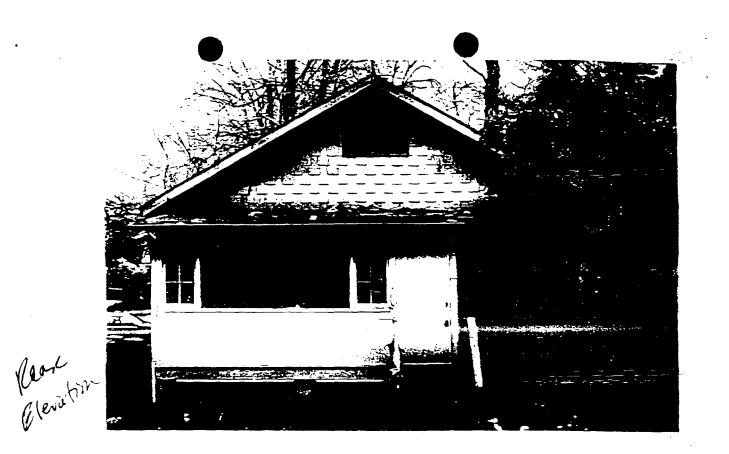
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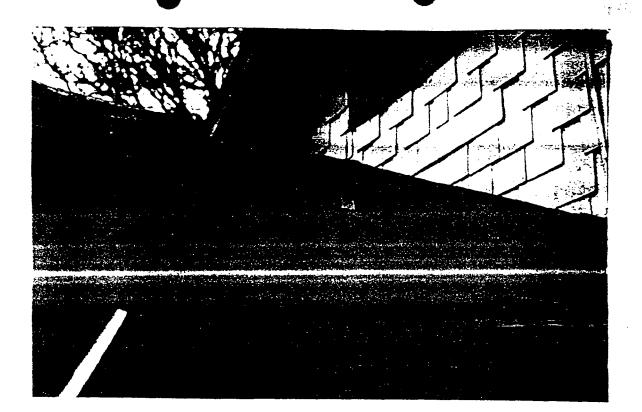






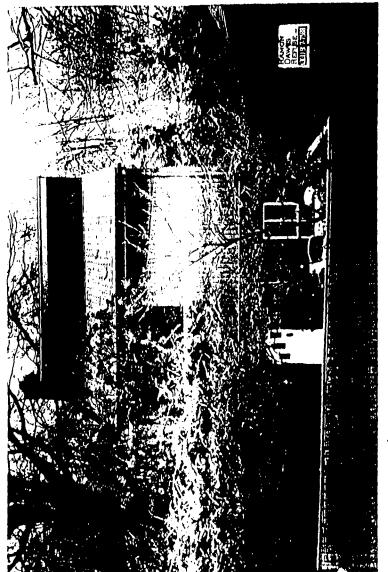


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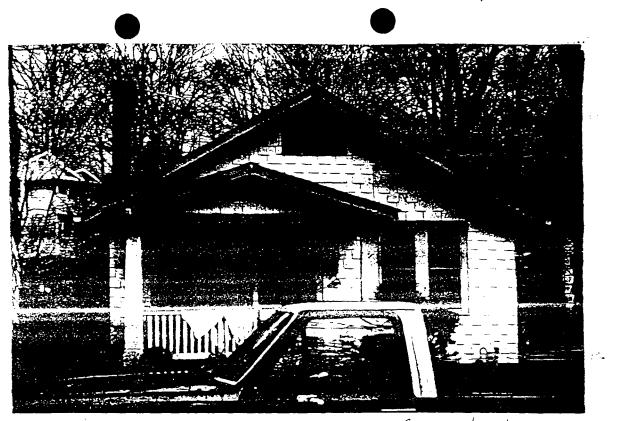




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front elevation from street



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February 2, 1999

Department of Permitting Services 250 Hungerford Drive Rockville, MD

To whom it may concern:

Attached is an application for Historic Area Work Permit (HAWP) for the February 24, 1999 meeting. We have already turned in the required documents for the application to Historical Preservation and we are already on the agenda for the preliminary meeting on February 10, 1999. As per Robin Ziek's recommendation, we are applying to be on the agenda for the February 24<sup>th</sup> meeting for approval of our plans. If for some reason there are too many changes required of our plans at the February 10<sup>th</sup> meeting, we will pool our application for the February 24<sup>th</sup> meeting and apply for the March 10<sup>th</sup> meeting.

Please call me at (W) 202/857-0540 or (H) 301/270-5935 if you have any questions. It may be helpful for you to call Robin Ziek of the Historical Preservation Section of the Department of Park and Planning. Thank you very much.

Sincerely,

Jachie Kuchta

Jackie Kuchta 6809 Westmoreland Takoma Park, MD 20912

Sincerely,

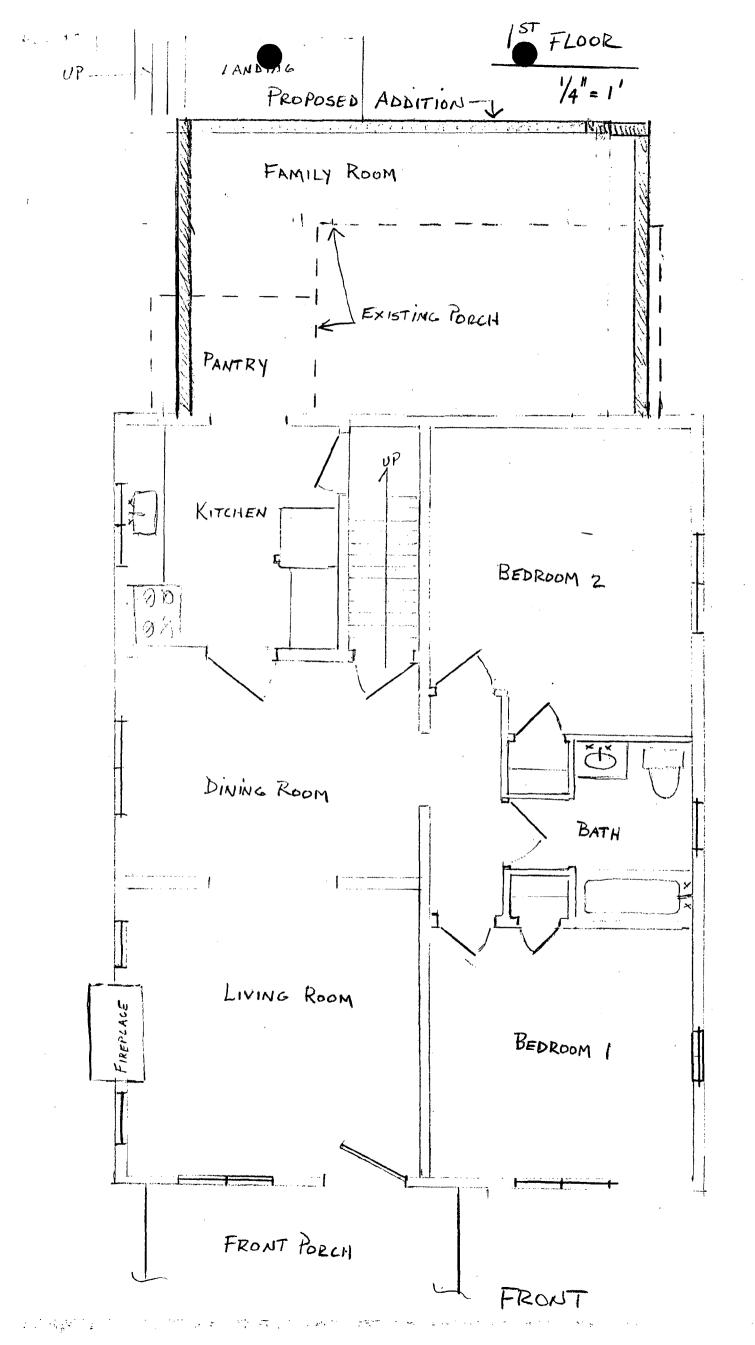
Dave Wachter 6809 Westmoreland Takoma Park, MD 20912

HPC Thought This was file. And ving avas or too ! 2/10/29 +1 50 50

FRONT ELEVATION

STAFF PROPOSAL

PROPOSED 2 STORY ALDITION 3' PROJECTION OVER EXISTING ROOF (STAIR HEADROOM) NEW ANDERSEN /I WINDOWS TO MATCH EXISTING 11 D II II ŦΪĹ FRONT. SIDE ELEVATION 1/4"=1" TRAGILE MARELANIN AVE



#### HISTORIC PRESERVATION COMMISSION STAFF REPORT

Address: 680	9 Westmoreland Avenue	Meeting Date: 2/10/99
Resource: Take	ma Park Historic District	Review: Preliminary Consultation
Case Number: N	/A	Tax Credit: N/A
Public Notice: 1	/27/99	Report Date: 2/3/99
Applicant: Dave	& Jackie Wachter	Staff: Robin D. Ziek
PROPOSAL: Re	ar Addition	RECOMMENDATIONS Proceed to HAWP

#### PROJECT DESCRIPTION

RESOURCE: Contributing Resource in the Takoma Park Historic District STYLE: Bungalow DATE: c1910s-1920s

The subject property is an odd shaped lot, with 42' street frontage. The 1-1/2 story bungalow (c780 sf. footprint) has a greater sideyard setbacks  $(12'\pm)$  on the driveway side than on the opposite side  $(5'\pm)$ . It has an asymmetrical front porch and a concrete block chimney, cast with the appearance of stone. The house is currently sided with painted shingles (non-wood) but the owner has indicated that the original siding may have been stucco. There is a small rear glassed-in porch which is supported by block piers. The windows include paired 1/1 double-hung wood windows, single 1/1 double-hung, and smaller multi-light casement windows as well.

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This house has suffered from deferred maintenance for a lengthy period of time during which it was a rental property. The current owners (and the applicant) are the current occupants. They are undertaking numerous repairs to the interior, the roof, porch, etc., while also proposing to increase the size of the living space by the amount of the proposed addition (240 sf footprint).

#### PROJECT PROPOSAL

The applicant proposes to add a two-story addition to the rear of their 1-1/2 story bungalow (see Circle  $\leq 6$ ). The addition would measure 12' x 20', and would replace the existing rear porch and rear vestibule. In order to accommodate required setbacks, the applicant proposes to set the new addition to the driveway-side of the house.

The addition will provide room for a family room on the first floor, and a master bedroom with bath on the second floor. The applicant proposes to use vinyl siding and vinyl-clad wood windows with thermal glazing on the addition. They also propose to install storm windows on the original windows, preserving them in place.

#### STAFF DISCUSSION

The proposal involves adding a small, but taller, addition to the back of this small bungalow. Staff has discussed other options with the applicant. This includes raising the roof on the original structure, adding dormers to the original roof, building a larger 1-story addition at the rear. The applicants have indicated problems with these alternatives, but have responded by lowering the roof of the proposed addition by approximately 4'. They have accomplished this by reducing the wall height of the rear addition (and reducing the height of the interior rooms), and by reducing the pitch of the roof of the addition. Staff feels that this change is substantial and goes a long way to bringing the scale of the addition in line with the scale of the original structure.

Westmoreland Avenue is a showcase for rear additions to bungalows, with every house using somewhat of a different approach. This particular bungalow offers a challenge because of the low height of the original building. Perhaps the closest parallel to the proposal is the rear addition which was proposed and constructed at 7214 Spruce Avenue in Takoma Park. That project was quite controversial, but was an attempt to more than double the size of the existing living space. In that proposal, the rear addition was wider, taller and much longer than the original bungalow, and had the effect of overpowering the original structure.

In contrast to that proposal, Staff feels that the proposed new addition for 6809 Westmoreland Avenue is a modest one, albeit 2-story. Staff feels that the addition on this house will be less noticeable at this site because of the close proximity of the adjacent neighbors and the narrow cross-section of the street. Westmoreland narrows down in width as it comes into this block, in contrast to the block between Elm and Carroll Avenues. In conjunction with this reduction in width, the street has smaller houses that sit closer to the sidewalk than the standard 25' setback (see Circle  $\langle \varphi \rangle$ ).

Staff notes that the addition is proposed as a continuation of the west (driveway side) elevation, with no setback at this corner. Setbacks have been used successfully by other applicants to accentuate the distinct building periods at a site, helping also to differentiate the old and new construction and to make the addition less obtrusive. Staff feels that the addition could be shifted to accommodate setbacks on both sides of the original house, perhaps centering the ridgelines of the addition with that of the original house (see Circle /O). This would provide setbacks without affecting interior space. The applicant has indicated that code requirements for setbacks from side property lines may not permit the relocation of the addition; it depends on whether or not the lot was recorded prior to 1930 (at which case 5' setbacks are minimum).

The proposed use of vinyl siding is generally considered an incompatible material in the historic district and, as noted in the Takoma Park Guidelines, is discouraged where visible from the public right-of-way. The HPC has approved vinyl siding on a case-by-case basis, such as when the house already had artificial siding, or when the addition was totally out of view from the public right-of-way. In this particular case, staff feels that a material which is more compatible with the historic district should be used. This would include wood clapboard siding, wood shingles, stucco, or even board-and-batten.

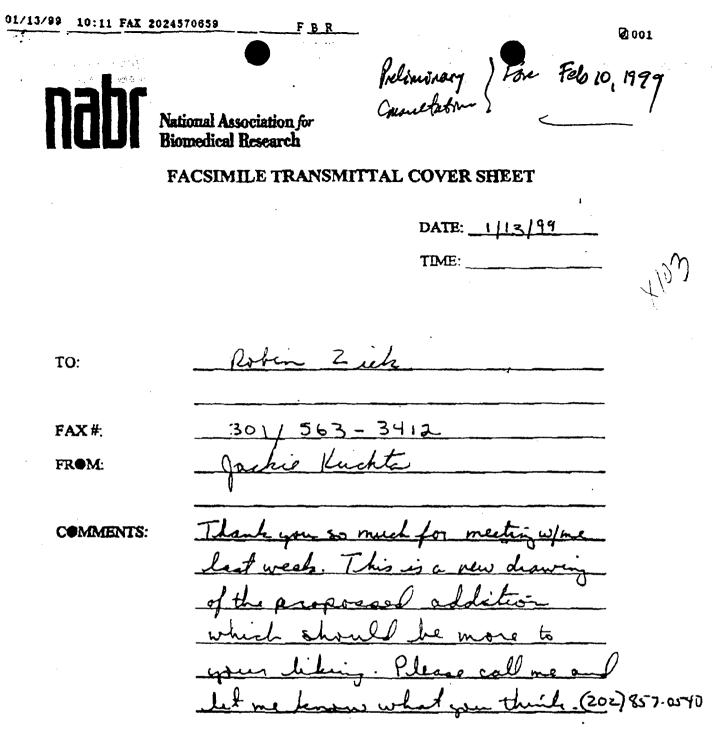
The proposed use of new vinyl-clad wood windows in the rear addition would have no adverse effect on the historic district. Staff notes that there are no proposed windows facing the street, and that the remaining windows in the proposed rear addition will be hardly visible (if at all) from the public right-of-way.

#### STAFF RECOMMENDATION

Staff recommends that the project proceed to HAWP with some modifications. This would include shifting the location of the proposed addition to the midpoint of the rear to provide setbacks on both sides. Staff notes that the applicant should apply for tax credits from both the county and the state for much of this project, including the new roof and the new storm windows (see Circle 22-26).



(see D)



Number of Pages: \_\_\_\_\_ (including cover)

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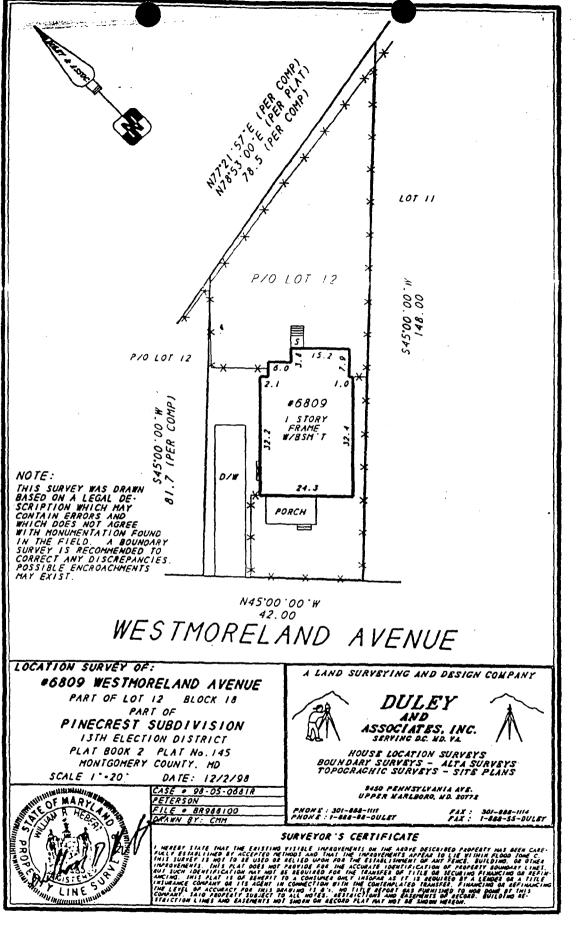
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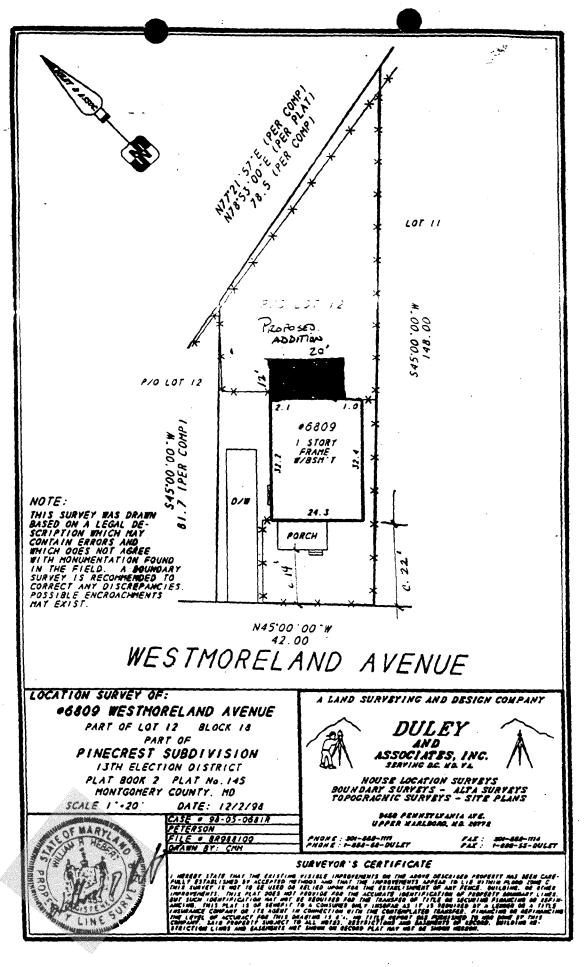
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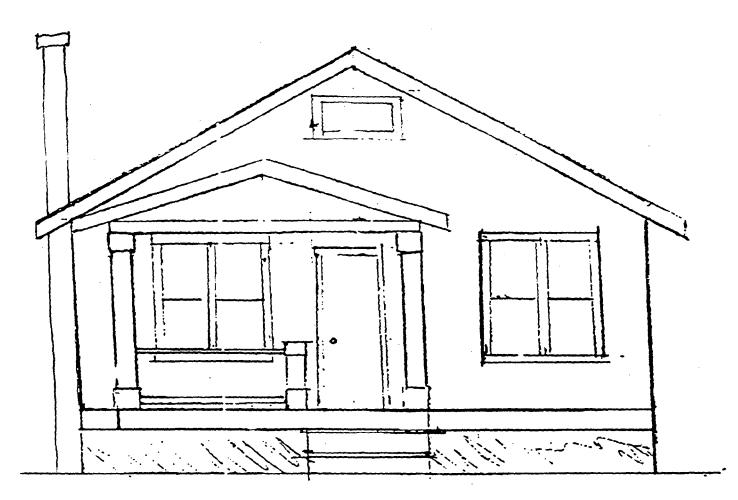


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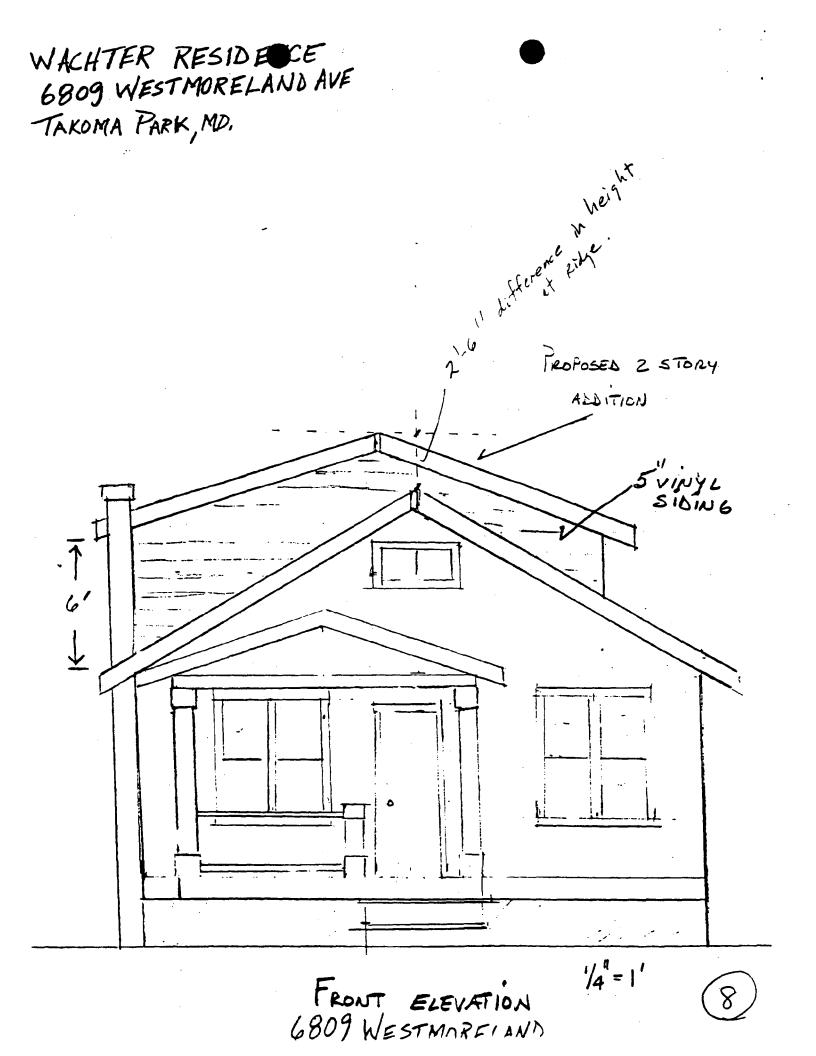
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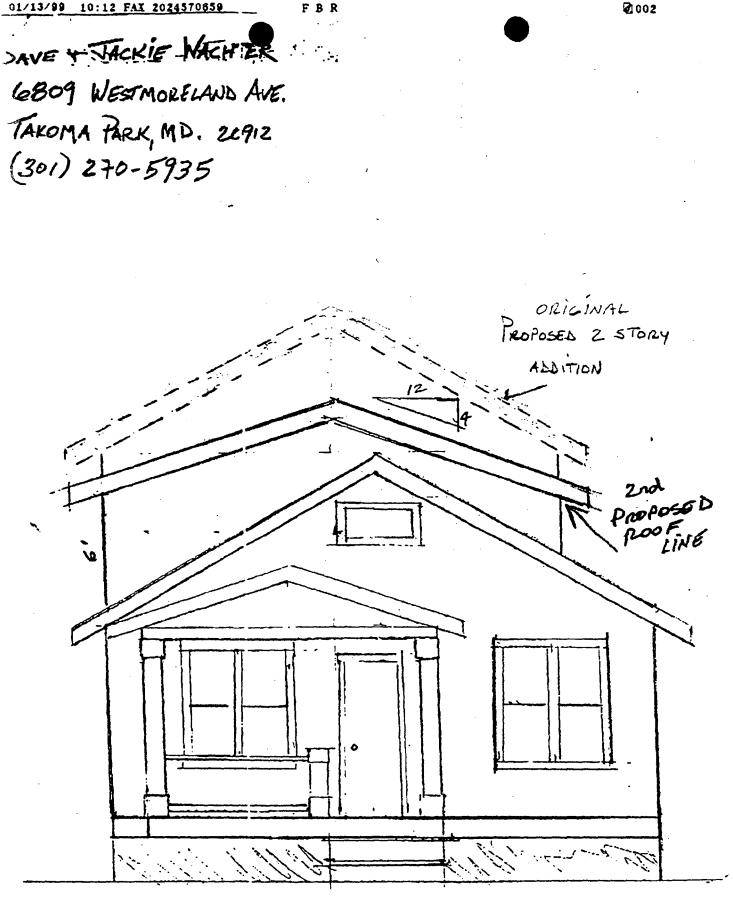


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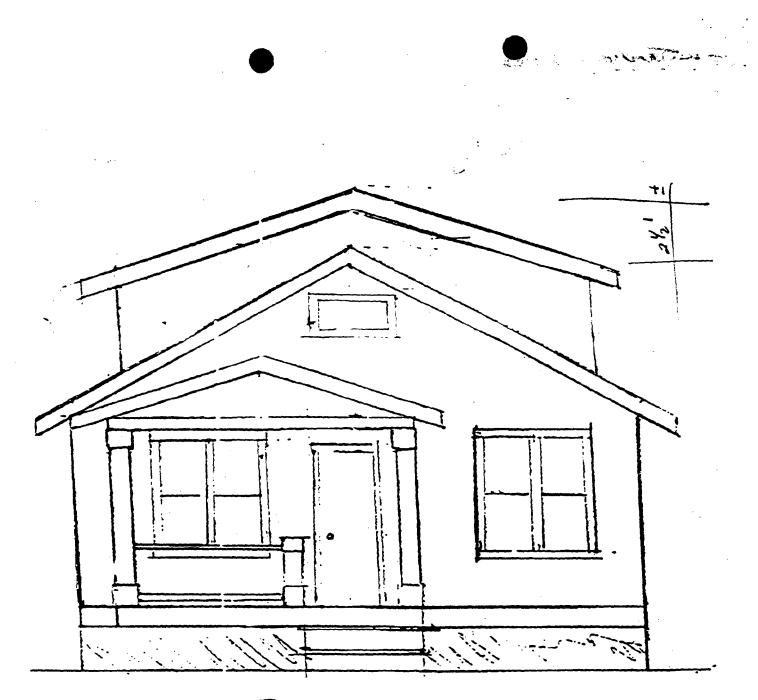
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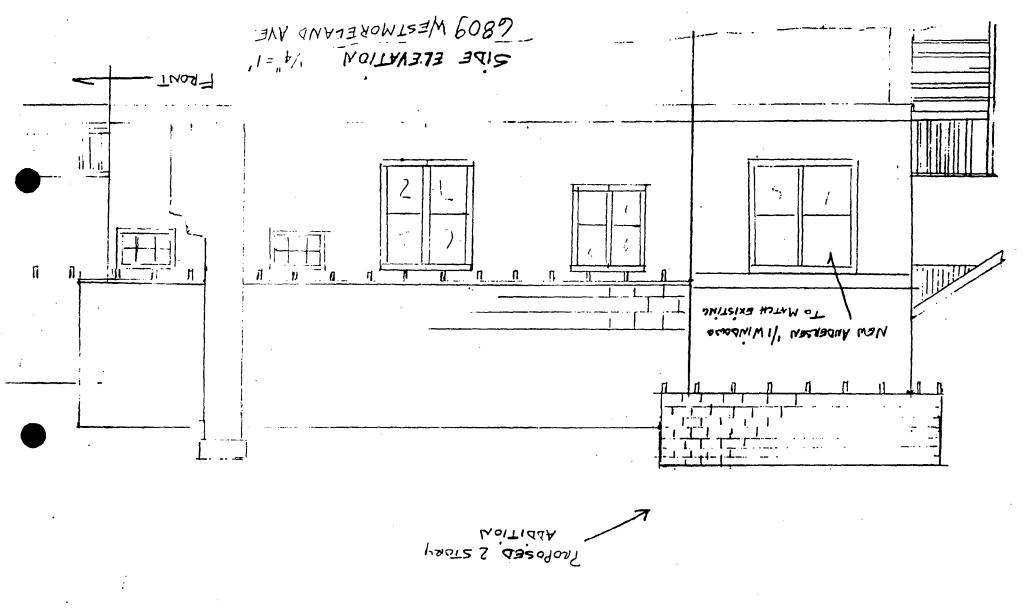
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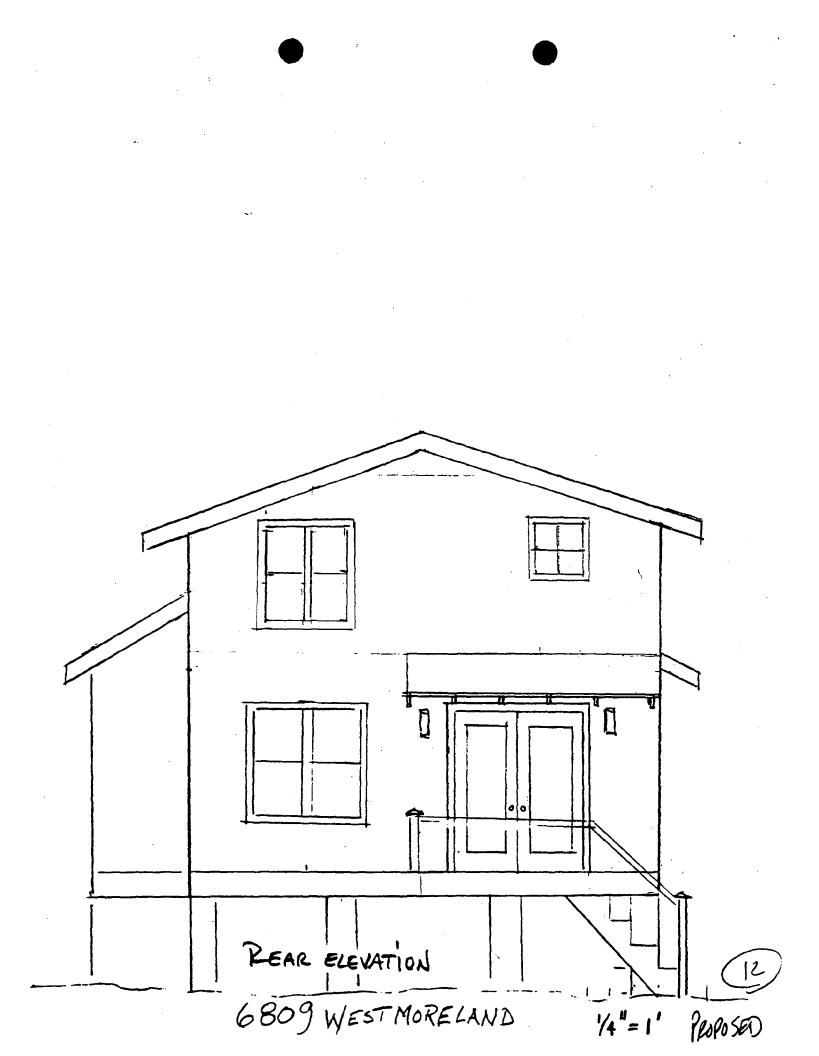
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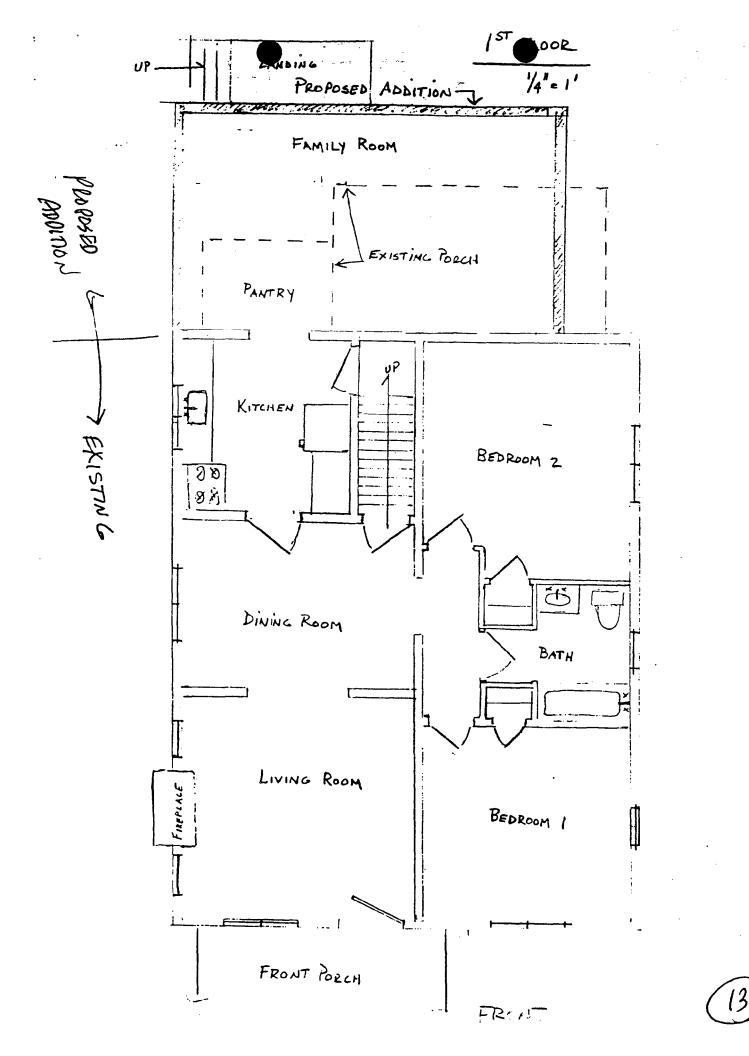


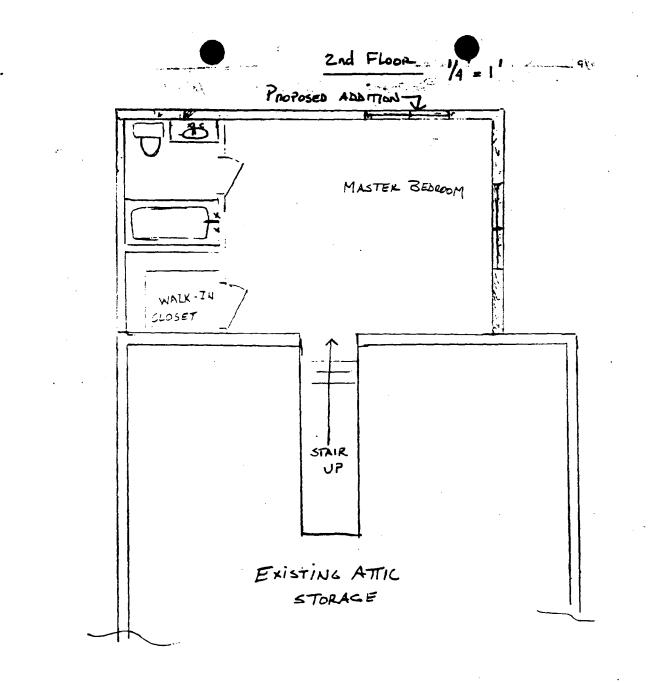
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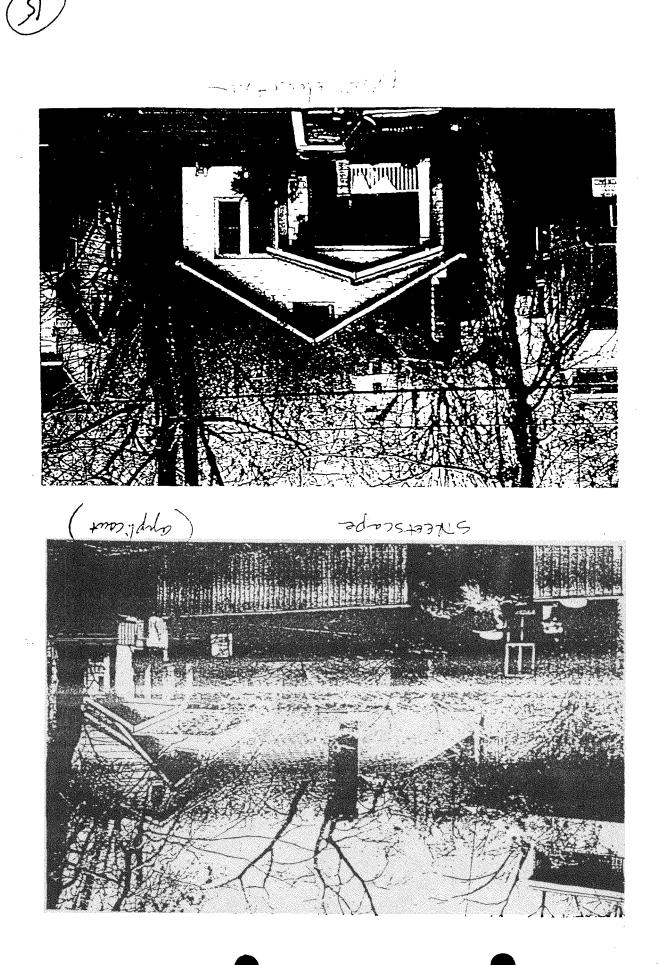






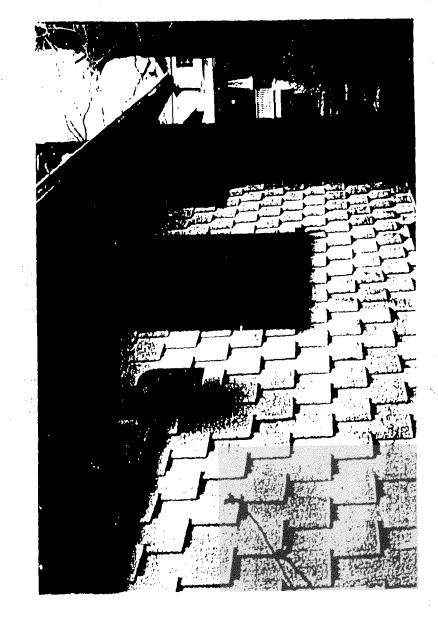


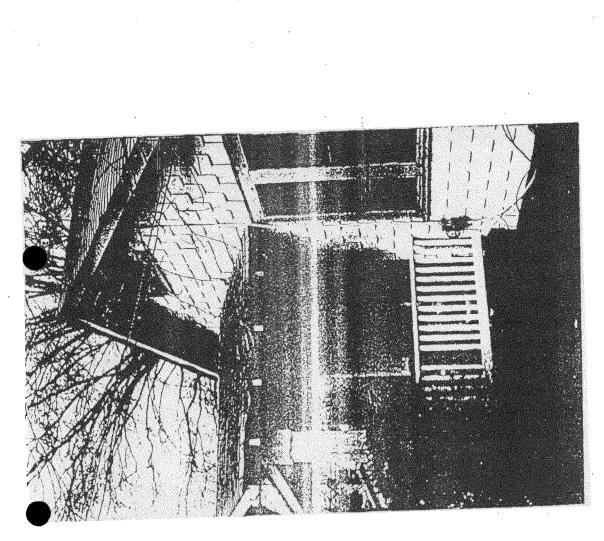
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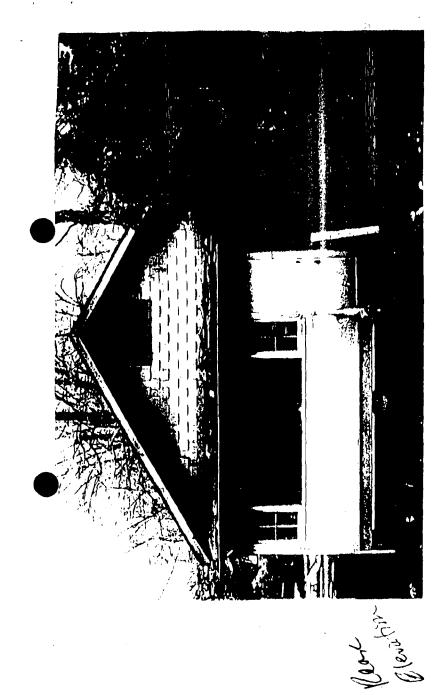
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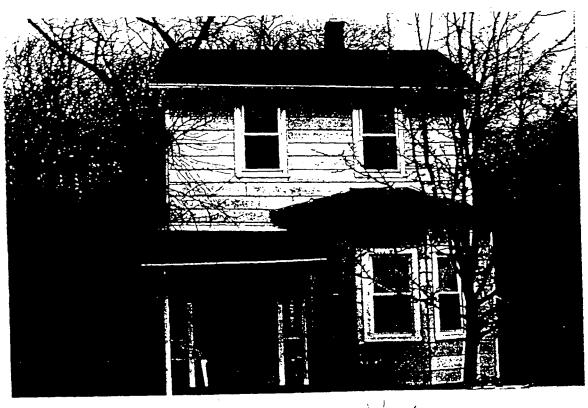
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## HERITAGE PRESERVATION TAX CREDIT FOR THE REHABILITATION OF HISTORIC PROPERTY

A significant income tax incentive for the revitalization and rehabilitation of historic buildings became effective January 1, 1997. The Heritage Preservation Tax Credit Program, administered by the Maryland Historical Trust, a unit of the state's Department of Housing and Community Development, provides Maryland income tax credits equal to 10% (calendar year 1997), 15% (calendar year 1998), and 25% as of January 1, 1999, of the qualified capital costs expended in the rehabilitation of a "certified heritage structure." A certified heritage structure can include structures:

- 1. listed in the National Register of Historic Places;
- 2. designated as a historic property under local law;
- 3. located in a historic district listed in the National Register or in a local historic district and certified as contributing to the district's significance; or
- 4. located in a certified heritage area and certified as contributing to the area's significance.

It is estimated that more than 49,000 structures in Maryland are currently eligible, with several hundred thousand structures potentially eligible. The credit is available for owner-occupied residential property as well as income-producing property. The rehabilitation expenditure in a 24-month period must be substantial, exceeding \$5,000 for owner-occupied residential property, and the greater of the adjusted basis of the structure or \$5,000 for all other property. The rehabilitation must conform with the Secretary of the Interior's *Standards for Rehabilitation* and must be certified by the Maryland Historical Trust.

If the amount of the tax credit exceeds the tax liability of the taxpayer for the year in which the credit is first claimed, the excess credit may be applied for a period of up to 10 years. Additionally, if a rehabilitated structure is sold, the amount of any unused credit may be transferred to the new purchaser. The credit may also be combined with local and federal incentives for the rehabilitation of historic property.

For more information or to request a Heritage Preservation Certification Application, contact the Maryland Historical Trust's Office of Preservation Services at 410.514.7627 or 410.514.7628.

## Most Frequently asked Questions about the Maryland Heritage Preservation Tax Credit Program

#### How do I find out if my property is eligible for the credit?

The Maryland Historical Trust (MHT) maintains a list of National Register properties, both individually listed and district properties. Contact Jan Gowing (410-514-7644 or gowing@dhcd.state.md.us) to see if your property is on the list. Local planning offices maintain lists of locally designated historic properties. Call your local planning office for details. If you don't know how to get in touch with your planning office, contact Nicole Diehlmann at MHT (410-514-7625 or diehlmann@dhcd.state.md.us) for that information.

# How do I know if my property contributes to the significance of a National Register or local historic district?

Nomination forms for both National Register and local historic districts will list contributing properties within the district boundaries. Contact Jan Gowing or your local planning office (see contact information above) to see if your property is contributing. If these lists are not comprehensive, then reviewers at the Maryland Historical Trust will make that evaluation.

#### Are plumbing, HVAC and electrical system upgrade costs eligible?

Yes, as long as the work does not negatively impact historic elements of the interior or exterior.

#### Are kitchen and bathroom rehabilitation costs eligible?

Yes. The cost for new appliances is also eligible when part of an overall rehabilitation scheme.

#### Are architectural fees eligible?

Yes. Architectural, engineering and consultant fees are eligible.

#### What about financing charges and building permit fees?

These costs are not eligible.

#### Are landscaping costs eligible?

The costs associated with the restoration of significant historic landscape features, such as a parterre garden, walls or garden walks, etc. are eligible when there is adequate documentation as to the feature's historic significance. All other landscaping costs are not eligible.

#### Are patios, back decks, roof decks, etc. eligible?

No. New construction does not qualify.

#### Are rehabilitation costs for outbuildings, barns, garages, etc., eligible?

If these structures are historically associated with the building and contribute to the significance of the site, then the rehabilitation costs are eligible. Non-historic structures are not eligible.

#### Can I put in skylights to light interior rooms?

Skylights are usually discouraged, however, they are reviewed on a case-by-case basis,





#### Are interior finishes eligible?

Capital expenditures are eligible for the credit. For the interior, this usually means finishes that become part of the structure. Eligible costs may include repair or restoration of wainscoting, mantles, interior shutters, molding, and plaster. Consult MHT staff for a final determination of eligibility.

#### I am rehabilitating my 1885 Queen Anne structure that has a 1960s addition. Is work done on the non-historic addition eligible?

Yes. MHT recognizes that buildings change over time. Reviewers will judge all changes to the building against the appearance of the building at the time the application is made. Work done within the existing walls of the structure, both historic and non-historic, is eligible.

# My historic house had vinyl siding installed in the 1970s. If I am not planning to remove it as part of my rehabilitation project, will I still be eligible for tax credits on other work that meets the Secretary "Standards"?

Yes. MHT will not require owners to replace vinyl or aluminum siding with a more appropriate historic treatment if there is no work planned for this feature as part of the overall project.

#### Can I use historic materials obtained from an architectural salvage shop?

Yes, if the architectural feature used replaces a missing original feature of the same architectural style and period.

# I plan to rehabilitate my house over a period of years, but the regulations say the rehabilitation must occur within a 24-month period. What should I do?

In this case, MHT recommends that the project be "phased." This means breaking the project into smaller, more manageable units. Remember, each phase must meet the cost threshold --\$5,000 for owner-occupied residential projects or the greater of the adjusted basis of the structure or \$5,000 for all other projects. In phased projects, MHT would prefer the first application to describe all projected phases of work. Later applications may amend the initial application.

#### If I am completing both the Federal and State tax credit application forms, do I have to completely fill out both forms?

No. You must fully complete the federal form, but only have to complete the first sheet of each part of the state form. All the other pages are identical.

#### Last year, I completed a rehabilitation project but only recently heard about the tax credit program. Am I still eligible for the credit?

Possibly. MHT prefers that no work begin on a project until the plans have been approved. Without this approval, there is a chance that the project will not meet the Secretary of the Interior's "Standards for Rehabilitation" and therefore not qualify for the credit. To receive credit after completion, the project must not only meet all of the "Standards", but also be sufficiently documented through before and after rehabilitation photographs so that adherence to the "Standards" can be adequately assessed by MHT.

# THE HISTORIC PRESERVATION TAX CREDIT

To encourage the restoration and preservation of privately-owned structures designated on the <u>Master Plan for Historic Preservation</u>, either individually or within a historic district, the Montgomery County Council in 1984 passed legislation providing for a tax credit against County real property taxes (Chapter 52, Article VI). The tax credit is 10% of documented expenses for exterior maintenance, restoration or preservation work. The work must be certified eligible by the HPC.

In summary, eligible work includes repairs, restoration, or preservation of exterior features of designated structures. Examples of eligible projects would include (but not be limited to) painting, repairing roofs or windows or replacing them in-kind, repairing architectural trim or ornament, uncovering and repairing original siding, repointing brick or stone foundations or chimneys, restoring a documented feature such as a dormer or porch that was previously altered or removed, and repairing and maintaining outbuildings such as barns and garages.

New construction and interior work are expenditures that are not eligible. Other ineligible work includes (for example) repaying driveways, replacing features (such as windows) with new features that are not identical in size and material, and repairing mechanical equipment.

WORK ELIGIBLE FOR THE TAX CREDIT MUST MEET ALL OF THE FOLLOWING CRITERIA:

- 1. be certified by the HPC as contributing to the restoration or preservation of sites listed on the <u>Master Plan for Historic Preservation</u> in Montgomery County either individually or within a historic district;
- 2. be exterior work only;
- 3. be undertaken with a <u>previously</u> approved Historic Area Work Permit (HAWP) if alterations that require a HAWP are proposed; <u>QR</u>
- 4. be ordinary maintenance exceeding \$1,000 in expense; the work must be subsequently certified (at the time the tax credit application is reviewed by the HPC) as being consistent with the purposes of Chapter 24A, the County's historic preservation ordinance;
- 5. be performed by a licensed contractor.

### THE TAX CREDIT IS NOT ALLOWABLE FOR:

- 1. new construction of a structure, or a new addition to a historic building;
- 2. interior work;
- 3. work requiring an approved HAWP that is completed without the approval of the HPC;
- 4. the value of labor unless performed by a licensed contractor.

The tax credit is allowed for the tax year immediately following the year in which the work or any distinct portion thereof is completed. The tax year is July 1 - June 30 and the application deadline is always April 1. In other words, tax credit applications are reviewed by the HPC in the spring of every year and the approved tax credit is applied to tax bills received by property owners that summer. Any unused portion of this tax credit may be carried forward for as many as five years. If the property is subsequently removed from the <u>Master Plan for Historic Preservation</u>, any unused portion of the tax credit would immediately lapse. A property not listed on the <u>Master Plan for Historic</u> <u>Preservation</u> at the time the work is undertaken is not eligible for the preservation tax credit.

#### HOW TO APPLY FOR THE PRESERVATION TAX CREDIT:

- 1. For projects completed and paid for during the previous year, file the tax credit application form and attachments with the HPC. The address is printed on the application form. <u>APPLICATIONS SHOULD BE POSTMARKED BY APRIL 1</u>.
- 2. Complete both the <u>Application Form</u> and the <u>Receipts Transmittal Form</u> and return them with photocopies of documented receipts and clear, pint photographs thoroughly showing the completed work. Please attach photographs to single sides of 8 1/2" x 11" paper, labeling the photographs on the front. Proof of payment must be shown by receipts marked "paid" or by copies of canceled checks.

The receipts must be itemized so that eligible exterior expenses are clearly marked and separated from any non-eligible expenses. If your receipt shows one price for a project that also included interior work or new construction, have your contractor break down the eligible expenditures. Expenditures must be clearly listed on the Receipts Transmittal Form and keyed to the copies of the receipts.