

# Survey of Local Historic District Residents

## About Their Experiences with the Brookline Preservation Commission

Spring 2009

### Report Summary

May 17, 2009 - Final

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#### A) Reasons for Survey

Over the past several years, it has become apparent that some property owners have encountered unanticipated challenges when attempting to renovate or enlarge their homes or undertake new construction within Brookline's local historic districts. Despite the Preservation Commission's efforts to create guidelines, rules, and procedures for repair or restoration, there have been sufficient instances in which homeowners encountered difficulties to justify efforts to address these concerns. It was decided by representatives of Brookline's Local Historic Districts (LHDs) and the Preservation Commission (PC) that LHD property owners be surveyed in order to help identify the problems and develop strategies to address them. In the winter of 2008/2009 we, as representatives from the LHDs, partnered with PC staff and the PC Chair and Vice Chair, to form an LHD/PC ad hoc committee and compose a survey. In March of 2009 that survey was distributed. We had the expert advice and guidance of an independent professional researcher, Karen Jacobsen, a professor at Tufts University, throughout the process. We are hopeful that the survey results and our recommendations will be used to promote thoughtful discussions regarding the current practices of the Commission and to effect improvements.

#### B) Results & Recommendations

The Committee believes the statistical information and comments from the survey warrant recommendations for improvement of the undertakings of the Preservation Committee. To create recommendations for improvement 115 written comments from qualitative questions #10-#23 (agree, no opinion, disagree) were reviewed and coded. Of these, approximately 50% were selected as valuable to the Results & Recommendations process\* and were classified into six general categories.

##### The results were:

code	type	responses
a	money & expense burden	6
b	guidelines not clear/arbitrary	7
d	decide on rules not aesthetics	6
e	disrespectful and unprofessional manner	17
f	unsatisfactory process	22
g	inconsistencies/enforcement	4

\*Approximately 45% were considered not to be specifically germane to the process of discovering areas of improvement for the Preservation Commission and approximately 5% were considered supportive of and/or positive towards the PC and thus self evident and not requiring improvement. Some responses were awarded two or more codes as the remarks touched on multiple categories.

**By priority, the Preservation Commission should be encouraged to:**

1. Recognize that about two-fifths of respondents found the process to be unsatisfactory;
2. Improve the quality of its interaction with applicants;
3. Make decisions based on guidelines and historic preservation principles and avoid debating personal aesthetics;
4. Consider financial impact on applicants;
5. Review/revise Guidelines with the goal of eliminating confusion;
6. Ensure execution/implementation of approved design.

**The Committee makes the following recommendations to the PC:**

1. Make best efforts to ensure staff has been in dialogue with applicant about Design Guidelines and their relevancy to proposed plans prior to scheduling their hearing;
2. Run meetings with professional decorum and according to Roberts Rules of Order and encourage the principle of balanced participation;
3. Provide orientation and training for Commission members and alternates (particularly those new to the Commission) re Historic Preservation Standards (generally the ones used by the Department of the Interior) and BPC's Design Guidelines
4. Reference specific Design Guideline(s) when rendering decisions;
5. Work towards consensus on all votes so that decisions are clear and provide strong direction;
6. Consider as a higher priority the need for energy-saving measures;
7. Institute public comment session at start of every Commission meeting
8. Consider term limits and/or avoid long-standing terms;
9. Consider a Round Table hearing format
10. Self review annually or request guidance from an outside evaluator;
11. Provide comment sheet to all applicants/design professionals upon completion of final hearing;
12. Deploy Brookline Access TV to televise hearings and/or make an audio recording of hearings;
13. Meet more frequently during construction season;

**The Committee offers these additional suggestions for consideration**

14. Better utilize its website to educate the public about its mission and provide links to useful information (e.g. NHS Preservation Briefs, Historic New England, etc.)
15. Engage real estate agents to make sure clients have LHD requirements early in the purchase process;
16. Develop an online application process, ideally with job tracking capabilities fully integrated with the other Town Departments;
17. Engage the LHD's or the neighborhood associations to help raise awareness of the PC's mission and to develop educational opportunities (e.g. "welcome wagon" packages for new residents; workshops on repairing windows, historically sensitive energy saving retrofits, etc) and should consider using Friends of the PC funds to provide grants for these activities.

**C) Thanks**

The PC/LHD Committee would like to thank Jim Bachelor, Sheri Flagler, Greer Hardwicke and PC Staff, Dr. Karen Jacobsen and all the LHD members who contributed to this initiative.

# Survey of Local Historic District Residents

Re Brookline Preservation Commission

Spring 2009

**Report Detail**

May 17, 2009 - Final

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## A) Survey Design & Implementation Methodology

The survey was conducted of Brookline's local historical district residents who had completed an application to the Preservation Commission in the past three years. The target population was 80, based on a list of PC applicants obtained from the administrative staff of the PC. The list was sent to the researcher, Karen Jacobsen, who devised a coding system, and assigned codes to each name on the list.

The survey questionnaire was designed by Karen Jacobsen, working with the Historic District ad hoc committee. Questions were created and tested over a period of about a month. Jacobsen also worked with a team of six students who helped revise and field test the questionnaire. Two weeks prior to the start of the survey, a letter to the target population was drafted by the LHD ad hoc committee.

The survey was conducted in two ways, online and by telephone, using the same questionnaire. Of our target 80 people, 32 completed the survey online using SurveyMonkey.com, and student researchers were able to interview eight on the phone, despite repeated attempts at all remaining 48 people on the list.

**We ended with a total of 40 completed interviews, for a response rate of (40/80) 50%.**

Respondents were asked to complete 24 questions, with the option of adding comments for each question. The last question asked for suggestions about how to improve the PC process, and 26 respondents offered a range of suggestions.

The codes allowed us to analyze the data according to the five historical districts. Responses were divided as follows:

Chestnut Hill 8 (20%)

Cottage Farm 6 (15%)

Graffam-Mckay 7 (17.5%)

Harvard Ave 2 (5%)

Pill Hill 16 (39)

(responses do not total 40 because one respondent misapplied the code)

## B) Summary of the Quantitative Results

### 1. Most respondents had knowledge of the requirements before they made their application to the Preservation Commission. *(Survey Questions 2, 3)*

Four-fifths of respondents (80%) learned their house was in a local historic district when they bought it or when the LHD was formed. Ten percent learned from the Preservation Commission.

The respondents reported a total of 58 applications to the PC since 1987. Over forty percent had applied more than once in those 22 years.

### 2. Most respondents used available resources to prepare and present their application. About three-fifths did not feel they had trouble with the application process, but two-fifths found the design guidelines to be unclear. *(Survey Questions 5, 6, 7, 8, 12, 13, 14, 15)*

More than four-fifths of respondents (82%) referred to the design guidelines for LHDs before preparing their application. Two (5%) commented that they didn't know about them.

Two thirds of applicants (68%) agreed that prior to their hearing, the PC staff gave them all the information they needed to prepare their application. Five (13%) disagreed.

A majority (56%) hired at least one professional to help with their application.

If one was hired, the professional was most frequently an architect (43%), followed by a contractor (30%) or a landscape architect (26%).

Three quarters (75%) of the applicants agreed that at the start of their hearing the staff accurately presented their application to the PC. Four (10%) disagreed.

Most respondents apparently understood the application process. Most (62%) disagreed with the statement that they had trouble understanding it. One-fifth (18%) agreed that they had trouble.

Two-fifths of respondents (40%) indicated that the design guidelines for LHDs are unclear. An equal number (40%) indicated that the design guidelines are clear.

A minority of respondents (41%) said they presented historical or architectural research to the PC.

**3. Most applications were for minor renovations and a majority of all applications were decided in one hearing.** *(Survey Questions 4, 19)*

Most applications (62%) were for minor renovations. Three (8%) were for retroactive approval.

About half the cases (51%) were decided in one hearing. Five cases (13%) took three hearings or more.

**4. A majority of respondents (55%) agreed that the PC process was unnecessarily cumbersome. Forty percent disagreed.** *(Survey Question 22)*

**5. More than half felt that the PC dealt with their case in a professional manner, but in a similar question almost two-fifths felt that the PC did not deal with their case in a respectful manner.** *(Survey Questions 16, 21)*

More than a third (38%) disagreed that members of the PC dealt with their case in a respectful manner. Less than half (48%) agreed that the PC's manner was respectful.

More than a third (38%) agreed that the PC's manner was unprofessional. A majority (55%) indicated that members of the PC dealt with their case in a professional manner.

**6. About half thought the PC's reasons for the decision were clear and consistent, but more than a quarter felt that the decision was not consistent with the guidelines.** *(Survey Questions 17, 18)*

One quarter (25%) indicated that the PC did not clearly explain their reasons for their decision. Half (50%) agreed that the PC did explain clearly.

More than a quarter (28%) indicated that the PC decision was not consistent with the design guidelines. Less than half (48%) agreed that it was consistent.

- 7. Most respondents reported that they changed their renovation plans, but, at the same time, a majority said their original plan was approved.**  
*(Survey Questions 10, 11)*

As a result of their discussion with the PC or staff, most (73%) respondents said that they changed their plans at least a little. Five (13%) said they changed their plans a lot.

A majority of respondents (54%) said their original plan was approved.

- 8. Almost two-thirds of respondents found the outcome of their case acceptable, only one quarter thought their renovation project was better as a result of working with the PC.** *(Survey Questions 19, 20)*

Most (64%) agreed that the final outcome was acceptable to them. About a quarter (23%) disagreed.

Many (43%) disagreed that their renovations project was better as a result of working with the PC. About one quarter (28%) agreed that it was better.

- 9. Two thirds (67%) agree that overall they are glad that their property is in a local historic district. A fifth (21%) disagree.** *(Survey Question 23)*

- 10. More than two thirds (72%) had suggestions on how the Preservation Commission could improve its policies and/or procedures.**  
*(Survey Question 24)*

### **III) Further analysis of 11 cases where the respondents indicated that the PC was both unprofessional and not respectful.**

Eleven respondents (28%) both disagreed that the members of the PC dealt with their case in a respectful manner and agreed that members of the PC dealt with their case in an unprofessional manner. On each of these questions, an additional 4 respondents (10%) gave the same response, but these 8 respondents did not answer the same way to both questions.

1. None of these 11 reported that their original plan was approved (0%), compared to the 75% of the other respondents who said it was.
2. All (100%) of these 11 agreed that the PC process was unnecessarily cumbersome, compared to 38% of the other respondents.
3. Most of these 11 (82%) disagreed with the statement that the PC clearly explained the reasons for its decision, compared with 3% of the others.
4. More than two-thirds of these 11 (72%) disagreed with the statement that the PC decision was consistent with the design guidelines, compared with 10% of the other respondents.
5. Most of the 11 respondents had hired a professional (82%), compared with 46% of the other respondents. The professionals the 11 hired included 7 design professionals and one contractor. The other 29 respondents collectively hired 12 design professionals and 5 contractors.
6. Most of the 11 respondents (82%) said that their case was not decided in one hearing, compared with 41% of the other respondents.
7. One-third of these 11 (36%) disagreed with the statement that the staff accurately presented their application to the commission, compared to none (0%) of the other respondents.
8. Seven of these 11 respondents (64%) disagreed with the statement that the final outcome was acceptable, compared to 7% of the other respondents.
9. Four of the 11 said they applied for major renovations (36%) and 5 for minor (45%), compared with 7 for major (24%) and 18 for minor (62%) among the other respondents.
10. These 11 respondents made a total of at least 47 comments on questions 10 to 23 and all made suggestions (Question 24). Thirty three of these 47 comments (70%) came from 3 of these respondents.