

# Comparative Matrix of Local Preservation Guidelines and Climate Goals

## How to Use This Template

This matrix is a tool for communities to evaluate how their historic district guidelines address four key areas of clean energy retrofits:

- **Solar Energy Systems (SES)**
- **Air Source Heat Pumps (ASHP)**
- **Electric Vehicle Supply Equipment (EVSE)**
- **Windows**

It allows comparison with national preservation standards, peer community guidelines, and local climate or energy goals.

## How to Complete the Matrix

1. **Review the criteria** listed for each area (e.g., visibility, placement, equipment type).
2. **Enter your community's guideline** in the designated column.
3. **Assess alignment** with your climate or energy goals.
4. **Use the color key to shade the cell** that best represents the level of alignment: green, orange, or blue.

## Color Coding Guide

| Color  | Meaning   |
|--------|---|
| Green  | <b>Meets or exceeds national standards or fully aligns with local climate and/or energy goals.</b>                              |
| Orange | <b><u>Mostly meets national standards with some differences or partially aligns with local climate and/or energy goals.</u></b> |
| Blue   | <b><i>Does not meet national standards or is out of alignment with local climate and/or energy goals.</i></b>                   |

# Solar Energy Systems (SES)

| Criteria                      | National Historic Preservation Standards                                   | Your Community's Guidelines | Alignment with Local Climate Goals | Notes |
|-------------------------------|--|-----------------------------|------------------------------------|-------|
| Visibility from Public Way    | Panels should be minimally visible to avoid altering historic character.   |                             |                                    |       |
| Location and Placement        | Install panels on rear slopes or hidden locations.                         |                             |                                    |       |
| Color Compatibility           | Panels should match roof materials in color.                               |                             |                                    |       |
| Mechanical Equipment          | Should be unobtrusive and reversible                                       |                             |                                    |       |
| Solar Shingles                | Should look like conventional materials and not replace original materials |                             |                                    |       |
| Freestanding Systems          | Should be installed to minimize visibility and screened if necessary.      |                             |                                    |       |
| Removal of Historic Materials | Avoid altering historic features to install solar systems.                 |                             |                                    |       |
| Installation Procedure Impact | Installations should be reversible and not damage historic fabric          |                             |                                    |       |

## Air Source Heat Pumps (ASHP)

| Criteria                              | National Historic Preservation Standards                             | Your Community's Guidelines | Alignment with Local Climate Goals | Notes |
|---------------------------------------|--|-----------------------------|------------------------------------|-------|
| Visibility from Public Way            | Install in locations minimizing visibility from public ways.         |                             |                                    |       |
| Visual Impact / Scale and Size        | Ensure installations are appropriately scaled and sized.             |                             |                                    |       |
| Integration with Existing Environment | Install external components to match building exterior.              |                             |                                    |       |
| Reversibility                         | Modifications should be reversible without damaging historic fabric. |                             |                                    |       |

# Electric Vehicle Supply Equipment (EVSE)

| Criteria   | National Historic Preservation Standards  | Your Community's Guidelines | Alignment with Local Climate Goals | Notes |
|--|---|-----------------------------|------------------------------------|-------|
| Visibility from Public Way   | Place equipment minimally visible or blend with surroundings.   |                             |                                    |       |
| Ground Disturbance   | Minimize ground disturbance; use existing infrastructure.   |                             |                                    |       |
| Visual Impact / Scale and Size   | Ensure scale and size are compatible with historic environment.   |                             |                                    |       |
| Material Compatibility   | Use materials that blend with or complement historic surroundings.  |                             |                                    |       |
| Integration with Existing Environment  | Use aesthetic treatments to blend with historic fabric.   |                             |                                    |       |
| Reversibility  | Installations should be reversible without damaging historic elements.  |                             |                                    |       |
| Addresses Electric vehicle supply equipment for private homes, businesses, and municipal parking | Installations should be unobtrusive, use existing structures when possible, and minimize visual impact while accommodating unique property needs and preserving historic integrity. |                             |                                    |       |

# Windows

| Criteria                          | National Historic Preservation Standards   | Your Community's Guidelines | Alignment with Local Climate Goals | Notes |
|-----------------------------------|--|-----------------------------|------------------------------------|-------|
| <b>Visibility from Public Way</b> | Retain and preserve windows that define historic character; avoid major alterations. |                             |                                    |       |
| <b>Material Selection</b>         | Explore repair or replacement options; avoid replacement due to minor issues.        |                             |                                    |       |
| <b>Design Compatibility</b>       | Replace windows in kind; use compatible substitutes if necessary.                    |                             |                                    |       |
| <b>Energy Efficiency</b>          | Improve thermal efficiency through weatherizing and repairs.                         |                             |                                    |       |
| <b>Maintenance and Repair</b>     | Preserve and repair original windows and doors.                                      |                             |                                    |       |
| <b>Installation Methods</b>       | Use accurate restoration methods or new designs compatible with historic openings.   |                             |                                    |       |
| <b>Non-Invasive Techniques</b>    | <i>Not specifically addressed.</i>   |                             |                                    |       |