

BALBOA TERRACE HOMES ASSOCIATION (BTHA)

RESIDENTIAL DESIGN GUIDELINES AND REVIEW PROCESS



**VERSION 1
AUGUST 2005**

This page intentionally blank

TABLE OF CONTENTS

1	DESIGN GUIDELINE BACKGROUND	1
	Introduction.....	1
	Balboa Terrace Homes Association	2
	Compliance	2
	Background and Purpose	3
2	BALBOA TERRACE AND NEIGHBORHOOD CHARACTER	5
	History of Balboa Terrace.....	5
	Neighborhood Character.....	6
3	DESIGN GUIDELINES	9
	Site Design	9
	Building Scale and Form	11
	Architectural Features.....	12
	Building Details.....	14
	Restrictions.....	15
	Other Issues.....	15
4	REVIEW AND APPROVAL	17
	Preliminary Discussion.....	17
	Neighbor Involvement.....	17
	Story Poles	17
	Application.....	18
	Review Process	18
	Approval	18
	Appeals	19
	APPENDIX—FORMS AND PROCEDURES	

This page intentionally blank

1. DESIGN GUIDELINE BACKGROUND

INTRODUCTION

The renovation of a residence is a major commitment of time, effort, and money. The reasons behind undertaking such an endeavor are different for each owner. Some people may desire additional space for growing family needs, others may wish to improve on the design of the building they own, while others may perceive of project of this type as a business opportunity and an investment. Each of these reasons is valid. An owner has a right to develop their property provided that the property rights of other homeowners in the neighborhood are taken into account.

Planning and Zoning Codes have provided a general limit on the development of lots in the past. Until recently, these Codes had adequately guided development in San Francisco's neighborhoods. However, in recent years, the premium on residential property in the city has resulted in an increase in development that, in many cases, has been unsympathetic to the character of the existing built environment.

In an effort to preserve the character of the city's neighborhoods and provide guidelines for growth, the citizens of San Francisco initiated and passed Proposition "M" in November of 1986. Proposition "M" provided a methodology for review of projects based on the relationships of buildings to the surrounding neighborhood. The Planning Commission adopted its first Residential Design Guidelines on November 2, 1989. The current version of the Residential Design Guidelines was adopted by the Planning Commission on December 4, 2003; they have been used extensively in the preparation of this document. These are available for download at:
<http://www.ci.sf.ca.us/site/uploadedfiles/planning/Documents/resdesfinal.pdf>.

Section 311 (c) (1) of the Planning Code provides that Residential Design Guidelines shall be used to review plans for all new construction and alterations. Specifically it states:

"The construction of new residential buildings and alternations of existing residential building in R districts shall be consistent with the design policies and Guidelines of the General Plan and with the "Residential Design Guideline" as adopted and periodically amended for specific areas or conditions by the City Planning Commission." [Residential Design Guidelines, December 2003, p. 3]

Note that Balboa Terrace is classified as an R district, or more specifically, an "RH-1D" district— single family detached residential.

The San Francisco Department of City Planning is charged with the duty of providing for the requirements contained in the *Residential Design Guidelines*. Because Neighborhood Associations such as Balboa Terrace have private Deed Restrictions or Codes, Covenants, and Restrictions (C.C.& R.s), the City Planning Department has, in the past, deferred varying responsibilities for review and approval of projects to the Neighborhood Associations. Therefore, it is to a neighborhood's advantage that the Association assure a

process for neighborhood review and approval of proposed renovation and construction that confirms with the City's guidelines.

In an effort to assist our residents in the increasingly complex and potentially difficult process of developing a design, working with neighbors, applying for approval, and, ultimately, securing building permits and completing construction of proposed projects, the Balboa Terrace Homes Association (BTHA) has developed the Design Guidelines described here-in based on the guidelines adopted by the San Francisco Department of City Planning.

BALBOA TERRACE HOMES ASSOCIATION

The Balboa Terrace Homes Association (originally Balboa Terrace Improvement Association) was originally formed on August 18, 1924. In the "Articles of Incorporation," the purpose of the Association is defined as the following:

"To promote collective and individual interests of all persons owning lots in the tract of land situated in the City and County of San Francisco, State of California, and known as 'Balboa Terrace...' [Balboa Terrace Homes Association, Amended Articles of Incorporation, May 1, 2001 edition, p. 6]

Deed restrictions apply to all BTHA property. The current restrictions were adopted in 2000 by a two-thirds vote of the individual homeowners. They were recorded in the Recorder's Office, City and County of San Francisco, on September 18, 2000 as Recorder's document 09/18/2000 G831827. These deed restrictions extended earlier Conditions, Covenants and Restrictions (CC&R's) which had reached their expiration date.

Article VII Fourth part of the BTHA Deed Restrictions requires review and approval of all construction in Balboa Terrace:

"...no building shall be erected or placed upon any lot unless the exterior plan and elevation of such building shall have been first approved by Lang Realty Company or assigns (Ed. note: BTHA has assumed this responsibility with the Amended Articles of Incorporation of August 18, 1924)." [Balboa Terrace Homes Association, Amended Articles of Incorporation, May 1, 2001 edition, p. 24]

COMPLIANCE

Article VII Eighth part of the BTHA Deed Restrictions requires that property owners in Balboa Terrace abide by the Deed Restriction provisions:

"...parties of the second part have accepted and do accept this conveyance upon and subject to the said restrictions, covenants and conditions and for (their) heirs,

personal representatives and assigns have covenanted and agreed, and do hereby covenant, undertake and agree to and with he said party of the first part, and also to and with the other owners of lots in said Balboa Terrace, and the several grantees and successors in the interest of said party of the first part of, in or to the said Balboa Terrace, or any portion of the same, to comply with , abide by and will and truly observe, fulfill and keep and perform the restrictions, provisions, covenants and conditions herein set forth .” [Balboa Terrace Homes Association, Amended Articles of Incorporation, May 1, 2001 edition, p. 25]

BACKGROUND AND PURPOSE

These Balboa Terrace “Residential Design Guidelines” have been developed to be used as a guide for designers and as a tool for reference during the process of project review. Their intent is to support efforts of preserving the quality and character of the Balboa Terrace neighborhood for all property owners and resident while permitting and encouraging property improvements.

Background

Interest in Design Guidelines and a formal review process was expressed during 2002 by BTHA Directors following several controversial development efforts in the neighborhood. It was recognized that there needed to be a more effective means than was then available of permitting development, while allowing valid neighborhood concerns to be expressed. Without such a process, too many decisions that affected the neighborhood character of Balboa Terrace were being made hurriedly by the BTHA Board or (by default) by the City Planning Commission staff or Commissioners. As the time required for other neighborhood business did not allow Board members sufficient time for detailed reviews of plans, consideration of alternative design options, and soliciting neighbor input, the Board voted to establish a separate “Architectural Design Review Committee” to focus on these issues. All Committee actions would be subject to Board review on an as-needed basis. The committee members would be appointed with staggered terms so that no one Board could appoint all Committee members.

A volunteer “Guideline Development Committee” was appointed to propose both the procedures and content of a design review process. This committee researched the guidelines and procedures used in nearby neighborhoods (for example, St. Francis Wood and Westwood Park) where these processes were well established. The Committee then held neighborhood (block) meetings at six locations in Balboa Terrace with all neighbors in the vicinity notified by fliers. These meetings provided an opportunity for neighbors to express preferences and concerns as to different types of guideline procedures and content. Homeowners from approximately 40 addresses attended these meetings—about 15% of the neighborhood total. News items were included in “View from the Terrace.” Presentations were made to obtain further comments at two Annual Meetings (2002 and 2003).

During 2003, it was learned that the City Planning Department was in the process of revising its “Residential Design Guidelines.” Rather than develop neighborhood guidelines that would immediately be out-of-date, the Board decided to put the process of developing guidelines for Balboa Terrace on hold until the City Guideline review process was completed.

The City Guidelines were completed in December 2003. The Board returned to the guideline question, and at its meeting of March 2005 authorized development of the Guidelines and review process as provided here-in. Following this vote, the “Guideline Development Committee” was phased-out and the “Architectural Design Review Committee” appointed.

Purpose

These design guidelines are based on the San Francisco Department of City Planning’s document, “Residential Design Guidelines—December 2003.” According to the introduction to this Planning Department document, the Guidelines “...are intended to promote design that will protect neighborhood character, enhancing the attractiveness and quality of life in the City.” [Guidelines, *op cit*, p. 3]

As with the City’s Residential Design Guidelines, these Balboa Terrace guidelines provide a minimum criteria for designers in the development of a project’s design. The only fair method for review of a project is to have documentation that can be utilized in an evaluation in an open, non-partisan manner. These Guidelines have been developed to assist the community in the preservation and enhancement of the unique neighborhood character that the original designers created in Balboa Terrace.

Utilization of the guidelines during the design phase of a project by designers is intended to save residents professional fees in potential redesign. The purpose of these guidelines is to establish a review process permitting homeowners seeking development approval to move their project forward in a timely manner while respecting the integrity of the neighborhood into which the project is to be constructed. The Association urges all residents to contact the Committee prior to commencing design to discuss proposed alterations.

Modification

It is the intent of the Board of the Balboa Terrace Homes Association that these Guidelines be reviewed every five years, or upon major changes to City & County Residential Design Guidelines.

2. BALBOA TERRACE AND NEIGHBORHOOD CHARACTER

HISTORY OF BALBOA TERRACE

History

Balboa Terrace was originally developed as a planned subdivision during the early 1920's by Hueter Homes. The houses were originally billed as "Hueter-built Artistic Homes" and were sold exclusively through Lang Realty Company of San Francisco. Home styles "vary from the villa of the Italian Renaissance to the English Cottage type. However, the majority are, by popular demand, of Italian and Spanish design. Design, however, has been so carefully regarded that the house of one influence does not bear a too foreign relationship to its neighbor. Indeed, one might call it a symphony of architectural styles."

"Since these houses are the product of a single, well-organized building organization... standards are maintained throughout the tract. The same quality of materials, the same workmanship, is employed on each home; thus preserving the balance and increasing the sense of relationship one to the other."

"We have from beginning to end an organization of several individual units (Ed Note: Hueter Homes, Lang Realty, Harold G. Stoner Architect, and Walter Zwieg contractor are cited in parts of the article) working efficiently together to put before home buyers a residential district that will be a lasting source of pride and satisfaction to both its owners and its city."

Quotations from: "A Place to Live" by L. K. Burton in *The Home Designer and Garden Beautiful*, October 1926, p. 169 ff. Subtitle of the article is: "In Which Many Factors are Employed, and as Much Talent, for the Preparation of a Residential Tract Such as Balboa Terrace, San Francisco, California."

Building Heights (Levels)

A survey as to the heights of homes in Balboa Terrace was undertaken in 1997 as part of a compilation of information in support of discussions about Residential Guidelines. The results of the survey are summarized in the following table. As indicated, of the 283 residences in Balboa Terrace, 63% are one level (either with basement or on-grade without basement) and 37% are two level (again, with or without basement).

These results indicate a greater variety in the heights of homes in Balboa Terrace than in surrounding neighborhoods. The Westwood Park Association to our east reports "91.6% (613 total) of the 669 residences in Westwood Park are "one level"...only 8.4% (56 total) of the 669 residences are 'two levels.'" (Ed Note: each is with or without basements).

(“Westwood Park Association, Residential Design Guidelines”, January 1992, p. 38). To our north, in St. Francis Wood, a walking survey of homes indicates that well over 90% are two story.

The diversity of housing heights in Balboa Terrace permits greater design flexibility while placing greater responsibility on the design review process to assure that heights and other design features appropriate to the site and its neighborhood context are maintained.

**BALBOA TERRACE BUILDING SURVEY SUMMARY
(283 RESIDENCES)**

Number	Percent	TYPE
17	6%	One Level. One story main living level on grade with no basement. Usually with on-grade detached garage.
160	57%	One Level Over Basement. One story main living level over a basement.
52	18%	Two Level. One story main living level with upper living level and no basement. Usually with an on-grade garage.
54	19%	Two Level. One story main living level with upper living level over basement.

NEIGHBORHOOD CHARACTER

Balboa Terrace Perspective

As there are no vacant lots, the alteration or replacement of existing residences is possibly the most important issue that will affect the future character of Balboa Terrace. Due to the open vistas of its streets, neighborhood character is strongly influenced by the collective appearance. Out-of-character additions that may be desired by a particular owner may be inconsistent with the existing neighborhood fabric and problematic for the integrity of the neighborhood’s character. It is in the interest of the residents of Balboa Terrace to maintain the value of their properties through the maintenance of the overall neighborhood character, harmony of home design and quality.

San Francisco Planning Department Perspective

The Residential Design Guidelines of the San Francisco Planning Department consider “Neighborhood Character” a subject of sufficient importance to require a full chapter.

Neighborhood Context describes one part of the concept:

“Though each building will have its own unique features, proposed projects must be responsive to the overall neighborhood context. A sudden change in the building pattern can be visually disruptive. Development must build on the common rhythms and elements of architectural expression found in the neighborhood. In evaluating a project’s compatibility with neighborhood character, the buildings on the same block face are analyzed.” [Guidelines, op cit, p. 7]

There is both an Immediate Context (“*showing concern as to how the proposed project relates to the adjacent buildings*”) and Broader Neighborhood Context (“*showing concern as to how the proposed project relates to the visual character and scale created by other buildings in the general vicinity*”). [Guidelines, op cit, p. 8]

Visual Character describes the second part of the concept.

In some instances there is a Defined Visual Character; in other instances, there is a Mixed Visual Character. Where there is a Defined Visual Character, “*buildings must be designed to be compatible with the scale, patterns and architectural features of surrounding buildings, drawing from elements that are common to the block.*” [Guidelines, op cit, p. 9]

Where there is Mixed Visual Character, “*a designer has a greater opportunity and responsibility to help define, unify, and contribute positively to the existing visual context. Designs should draw on the best features of surrounding buildings.*” [Guidelines, op cit, p. 9]

Consideration should be given to whether a neighborhood has a Defined or Mixed Visual Character during the design and review of projects. Different blocks in Balboa Terrace have varying degrees of Defined and Mixed character. In general, however, the result tends towards the middle in that dwellings along the Defined blocks are not absolutely alike, while those along Mixed blocks continue to provide common elements.

The visual character of individual blocks will dictate the direction that proposed construction should take in most situations. Evaluation of adjacent buildings and the surrounding area will clearly define the potential for expansion with respect to the existing content.

This page intentionally blank

3. DESIGN GUIDELINES

SITE DESIGN

“In designing the building on a site, the topography of the site and its location on the block must be considered.” [Guidelines, op cit, p.11]

The siting of the homes in Balboa Terrace is one of the most important factors that has defined the neighborhood character. Balboa Terrace is zoned RH-1(D) by the City Planning Code. Buildings are limited to a single unit per lot and are to be detached from adjacent structures with setbacks on all sides. It is the detached requirement that has resulted in the open, light feeling that we have in the neighborhood. It is further observed that homes in corner locations (street intersections or street and BTHA walkway intersections) frequently have larger homes than mid-block locations.

Topography

In the evaluation of the “location” of a building, the building will be reviewed for its harmonious integration into both the overall topography of the site as well as its relationship to the adjacent built environment of surrounding structures. To fully integrate into the neighborhood, *“New buildings and additions to existing buildings cannot disregard or significantly alter the existing topography of a site.” [Guidelines, op cit, p.11]*

Balboa Terrace was developed on a site sloping upward from the Pacific Ocean. This slope has been utilized in the layout of the lots to provide for a terraced rhythm of development. For houses on slopes, the terracing allows each successive residence to gain light, air, private and shared open space, and, in many cases, full or partial views. Similarly, homes on the uphill side of several neighborhood streets are raised above street level. Any development should respect the siting in use along its side of the street.

Front Setback

The “Front Setback” for a particular lot is the distance between the front property line at the sidewalk to the front building line. In Balboa Terrace, the front setback line was defined in Article VII: FIRST of the BTHA Deed Restrictions *“[Any] structure or building hereafter erected or constructed upon said premises shall be so erected or constructed [so as] not to come nearer to the front street line than a distance of one-tenth of the depth of lot and not come nearer to the side street line than a distance of one-tenth of the width of lot.” [Amended Articles of Incorporation, op cit, p.23]*. Because of the uniformity of setbacks in Balboa Terrace and the visibility of these setbacks, a front setback that does not conform with the overall pattern of development will be seriously disruptive to neighborhood character. This parameter is applicable to all levels of a structure.

Landscaping

“Landscaping in the front setback creates a visually interesting transitional space between the public realm of the street and the private realm of the building. It also provides an opportunity to screen undesirable building features or otherwise enhance the appearance of a house, and contribute to the overall quality of the streetscape.” [Guidelines, op cit, p.14]

Areas in front of setbacks for landscaping were the major focus of the Balboa Terrace developers in the creation of a “terrace” atmosphere for the area. Every effort should be made to minimize pavement for driveways and walkways so that the maximum area in the front of the residence can be used for planting. At the same time, plantings should be undertaken in a manner that does not impede the visual openness of adjacent front yards.

Side Spacing

Balboa Terrace is privileged to have side yards where windows can be placed for light and air. This element of the design is a major factor in the quality of the residences of the neighborhood. These side yards are a requirement of the Planning Code, but the Code does not address location of windows and the pattern of spacing on a block. In the development of a design, attention should be paid, not only to the pattern of spacing in the area, but also to the location of windows on the side. Although side yards provide the opportunity to provide windows for light and air, the location of these windows should be such that privacy of neighboring residences is addressed.

The Planning Department Design Guidelines state:

“Planning Code Section 133 requires setbacks in RH-1(D) Districts only. Planning Code Section 136 limits projections into the side yard to three feet or $\frac{1}{6}$ of the required side yard, whichever is less.” [Guidelines, op cit, p.15]

Side yards are an integral part of the “detached” characteristic of homes in our neighborhood. Developments close to the side property line which would jeopardize this characteristic are strongly discouraged.

Rear Yards

The Space between the rear property line and the rear of the residence is defined as the “Rear Yard” of the lot. Not only do rear yards provide private open space for the specific residence but also, in tandem with the other yards in the block, provide a public, visually open, shared space. In Balboa Terrace, side and rear setbacks vary in dimension.

“When expanding a building into the rear yard, the impact of that expansion on light and privacy for abutting structures must be considered.” [Guidelines, op cit, p.16]

Construction in Side and Rear Yards

It is recognized that some efforts to remodel homes may desire to use space in areas designated for side or rear setbacks. To be considered, any variances must meet the following criteria.

1. No variances will be considered for changes to front yard setback requirements.
2. Maintenance of overall neighborhood character remains an overriding consideration. Any proposed construction in a setback location will be reviewed to ascertain that it is in harmony with the existing (or proposed) structure and neighborhood character in general.
3. Neighbor agreement. Variances to the side or rear setback standards will require consideration of the neighbors. Any proposed construction in a setback location must seek concurrence from the neighbor on the affected side. Agreement of the neighbor will not override item #2 above as evaluated by the Architectural Guidelines Committee.
4. Non-habitable uses. Any proposed construction in a setback location should be for non-habitable uses. For example, permitted uses include porches, decks or stairways, but not primary structure. In keeping with this use, the height of any structure erected in a setback area should be less than that of the abutting wall (ground to roof) height of the habitable portion of the dwelling-- it should not exceed two-thirds (2/3rds) of such height.
5. Maintenance of Detached homes. Balboa Terrace is identified and zoned as a neighborhood of detached homes. As such, for visual reasons and for reasons of public safety, there shall remain at least a 3 foot (3') separation between homes. No owner will be permitted to build to the property line.

BUILDING SCALE AND FORM

In the alteration of an existing building, the building envelope that is allowable by code is not the only factor in determining the compatibility of a design. The way the building envelope relates to the surrounding buildings is the factor that should be addressed during any preliminary conceptual design. Balboa Terrace was developed originally as a tract of homes of diverse size, but whose common features provide a cohesive, neighborhood character. Major deviation from the prevalent scale, form and features is highly disruptive.

The buildings in Balboa Terrace are either located along level or gently sloped streets with wide vistas, or are terraced down the side of a hill on those street with greater slopes. A building that attempts to break either of these patterns would be considered disruptive to the overall pattern of development. In some cases where the pattern may not be as obvious as others, or where there is a mixed pattern of building heights, setting the upper level of a taller building back from the first level may mitigate some of the disruption created, but these upper level setbacks may not provide a solution to a break with the pattern in all cases.

Scale

“The building scale is established primarily by its height and depth. It is essential for a building’s scale to be compatible with that of surrounding buildings, in order to preserve the neighborhood character.” [Guidelines, op cit, p.23]

The scale of a building is based on its dimensions in a plan and elevation as well as its proportions of design elements. In Balboa Terrace, the overall building envelope is specified in Article VII: FIFTH of the BTHA Deed Restrictions: *“each and every dwelling house placed or built upon said property shall be of a height no greater than two stories, with basement and attic.”* [Amended Articles of Incorporation, op cit, p.24]. Review of floor-to-lot area ratio may also be considered as appropriate.

Form

The actual dimensions of a building are the length, width and height of the structure. Balboa Terrace residences vary in the overall dimensions of the buildings. This diversity of design creates a condition which dictates that proposed changes need to be carefully assessed to determine their compatibility with the surrounding neighborhood. The visual impact from an increase in height might be counteracted in some cases by incorporating front setbacks as well as side and/or rear setbacks on upper levels.

Buildings that “decorate” facades with appropriate articulation and detailing can still be grossly out of character with the surrounding area due to incompatible scale. Likewise, large, well proportioned buildings can be incompatible if the scale of the surrounding buildings is small. Both the scale and the proportions of a project need to be addressed within its neighborhood context during design and review.

Proportions

The proportions of a building are the relationships between the dimensions of height, width, and depth of the elements of design as well as the relationship of the building to other surrounding structures.

“Building features must be proportional not only to other features on the building, but also to the features found on surrounding buildings.” [Guidelines, op cit, p.29]

Even small changes to the proportions of such elements of a façade design as the window shape or trim location can have a major affect on the compatibility of the design within the context of the surrounding buildings.

Roofline

Balboa Terrace has predominate roofline forms along most blocks. The greatest number of exceptions are found in corner properties.

“When designing a project, consider the types of rooflines found on surrounding buildings. For example, if most buildings have front gables, adding a building with a flat roof may not be consistent with the neighborhood pattern.”
[Guidelines, op cit, p.30]

In evaluating the roof form of an alteration or addition, attention must be paid primarily to the adjacent structures for non-corner locations.

ARCHITECTURAL FEATURES

“Architectural features add visual interest to a building, and provide relief by breaking up a building’s mass. Architectural features include building projections such as bay windows, porches, garage structures, rooftop forms, and building entrances. They are a significant component of the architectural character for both the building and the neighborhood.” [Guidelines, op cit, p.31]

Entryways

The entrance to the house is considered the entryway. Balboa Terrace homes utilize several methods to articulate entryways. Most houses have decorative doors, often with curved tops. Most of the homes also emphasize the entryway with a stair and entry porch. Doors are often recessed and are oriented toward the street.

“Many neighborhoods have block faces with distinctive patterns of building entrances. Entrances may be consistently located on the left side, right side, or middle of the front façade, or may be recessed. Some entrances may be at street level while others are elevated above the street. Proposed projects must respect the existing pattern of building entrances.” [Guidelines, op cit, p.32]

Entryways that are altered should respect the level of articulation of the existing entry as well as the predominant level of articulation and design in surrounding buildings.

Windows

In Balboa Terrace, in many smaller homes, windows play an important role in the design and proportions of the buildings and are often the major ornamentation element of the façade.

“Bay windows are an important element of a building’s design and as such, they must be appropriately detailed and located with respect to other building elements to create a well-proportioned building. The length, height, and type of bay window must also be compatible with patterns that are prevalent in the area.” [Guidelines, op cit, p.34]

The quality of wood windows and/or wood trim should be utilized in facades for conformity with the quality of the original development. Multi-pane windows (“divided light”) should be employed if a common feature of nearby homes.

Garage Doors

The majority of homes in Balboa Terrace of garage access at the rear of the house. This characteristic is articulated in Article VII: SEVENTH of the BTHA Deed Restrictions *“all garages or garage runways shall be built or constructed only from the rear driveway ... eliminating all runways or driveways from crossing the front sidewalk” [Amended Articles of Incorporation, op cit, p.24]*. The garage itself may be underneath the house or a separate structure.

Homes along some blocks were constructed in a manner differing from this rule. Any proposed designs should follow the pattern employed along its block face. In addition, at those locations where garage access is at the front of the house, the garage should not extend forward of the front wall of the house. Care should be taken to de-emphasize the garage door in the design.

BUILDING DETAILS

“A building’s architectural details, windows and materials provide the finishing touches that convey a sense of quality and define a building’s character. Architectural details have a great impact on how a building is perceived, and provide visual interest, texture, and richness. Buildings with virtually identical forms can appear dramatically different due to their details. The use of compatible details visually unifies a neighborhood’s buildings, providing continuity and establishing the architectural character of the area.” [Guidelines, op cit, p.43]

Exterior Materials

The designers of Balboa Terrace's homes utilized many materials in the design of the development but the predominant material is cement plaster (stucco) for walls and wood for windows. Visible roofs are typically either clay tile or composition shingles. Unpainted and painted brick is used for the entry porches and steps in many cases. Infrequently examples can be found of wood or stone details.

In the design of an addition or renovation, the materials of the existing house as well as the materials of the surrounding buildings need to be addressed. The quality of materials and installation should be comparable to those used in the original buildings.

Ornamentation

Ornamentation is the decorative detailing of a building. Balboa Terrace homes are not heavily ornamented like those found in the Victorian style of design. The concept of simple, well crafted detailing was an important concept in the dominant Spanish-influenced style. Therefore, detailing of the exterior of buildings will be evaluated on simple ornamentation. If used with restraint, ornamentation can be an effective method of mitigating other inconsistencies in design. If used without consideration for the surrounding neighborhood, ornamentation can become tacky and obtrusive.

RESTRICTIONS

Deed Restrictions of Balboa Terrace prohibit uses of any building or structure for purposes other than that of a dwelling house or appurtenance thereto. *[Amended Articles of Incorporation, op cit, p. 23]*

Deed Restrictions likewise specify that no "trade, business or manufactures of any kind, or anything of the nature thereof, shall be carried on or conducted up said real property." *[Amended Articles of Incorporation, op cit, p. 23]*

OTHER ISSUES

Because of the number of cars that are required to be parked on the street, the narrowness of our streets, and the negative impact that additional parking has on the neighborhood, these Guidelines discourage removal of enclosed parking garages and their conversion to living space.

The City and County of San Francisco and the State of California endorse residential solar energy systems. Any proposal for installation of a residential solar energy system will be reviewed to confirm its conformance with these guidelines in order to minimize the visual impact of such a system on neighborhood character.

This page intentionally blank

4. REVIEW AND APPROVAL

This section describes the various steps in the Balboa Terrace Design Review Process. This process applies to external changes only.

PRELIMINARY DISCUSSION

It is to the advantage of the project sponsor, owner or representative (e.g., architect) to discuss a proposed project with a member of the Balboa Terrace Architectural Design Review Committee prior to commencing design. Committee members are familiar with the sensitivities of neighbors and the Committee as a whole. At this stage, however, Committee member comments are advisory and non-binding. They are offered to provide initial direction and reaction to design ideas. Identifying potential problems at the beginning of the project can save an owner valuable revision time and design fees.

Committee members are assigned specific streets and blocks within Balboa Terrace so to develop a familiarity with the neighbors and neighborhood. A member of the BTHA Board of Directors or other Committee member should be able to assist an applicant in contacting the appropriate Committee member for their site.

NEIGHBOR INVOLVEMENT

In an effort to include Balboa Terrace residents in the process of design review, the Architectural Design Review Committee requires the scheduling of a meeting with surrounding neighbors and the Committee in order to present and discuss the proposed project. The project sponsor shall notify the Architectural Design Review Committee as well as all neighbors in the surrounding area using the “Neighborhood Meeting Notification” Form from Appendix “A.” (See Appendix “A” for determination of residents required to be notified.) The form is to be received by residents and the Committee a minimum of two weeks prior to the meeting in order to provide for scheduling by interested parties.

The “Neighbor Notification List” form should be completed indicating the neighbor and addresses notified. At the meeting itself, the “Neighborhood Meeting Attendees” form should be used as a “sign in” sheet by all attendees.

STORY POLES

In cases where proposed horizontal or vertical additions to homes will increase the existing envelope of a residence, the Committee reserves the right to request that story poles be installed to indicate the outermost envelope of the building. Poles shall be placed to mark the perimeter corners of the proposed addition at a height that designates the proposed project’s roof. Additional center poles shall be installed to indicate roof peaks. The tops of the story poles shall be connected with colored tape or rope in a manner that clearly denotes the envelope and massing of the proposed building.

The requirement for the installation of story poles provides a method for residents who may not be able to interpret design drawings to effectively ascertain the ultimate height and bulk of a building and make educated decisions regarding a proposed project.

APPLICATION

After the neighborhood meeting, design drawings incorporating neighborhood input should be submitted by the project sponsor to the Architectural Design Review Committee. The sponsor shall submit a copy of the following items:

- “Neighborhood Meeting Notification” form
- “Neighbor Notification List” form (optionally also a map of notification lots)
- “Neighborhood Meeting Attendees” form
- “Application for Project Review” form with legible drawings of the proposed project
- “Design Review Checklist” completed to reflect the sponsor’s understanding of the proposed project’s impact.

These required forms are included in Appendix “A” of this document.

Contact the Committee for details of when and where to submit the application materials. If the application materials are submitted to the Committee at least two weeks before its next scheduled meeting, the Committee will review the project at that meeting and make its recommendations. If the materials are not received at least two weeks before the next scheduled meeting, the project will be presented, reviewed and discussed at the following scheduled meeting or at a specially convened meeting.

Additional meetings will be scheduled if needed.

REVIEW PROCESS

When the application is received, the Architectural Design Review Committee members will review the project for conformance with these Design Guidelines by utilizing a “Design Guideline Checklist” of the same format as that submitted by the applicant (as in Appendix A).

APPROVAL

After review of the project, the Architectural Design Review Committee will make a decision to either approve the project, deny approval of the project, continue the project to the next meeting, and/or request additional information from the applicant. Every effort will be made to expeditiously review the project and make a determination.

If the project is denied approval, a letter outlining the reasons for the Committee’s decision will be prepared. The project sponsor may choose to revise the drawings with attention paid to the elements of the design that were found to be problematic and resubmit the revised project for review and approval.

In cases where alternative design elements are available to meet the programmatic needs of the project sponsor, studies of alternative schemes may be requested by the Committee for submittal and review.

Approval will come from a majority vote of the Balboa Terrace Architectural Design Review Committee. Upon approval, the applicant will be provided with a letter stating the results of the favorable review. Submittal can, subsequently, be made to the San Francisco Building Department for building permit review and approval. The Committee will confirm its approval (on behalf of the Balboa Terrace Homes Association) to the San Francisco Building Department if so requested.

Approval by the Committee will be valid for a period of two years from the date of the approval letter. If this period expires before construction is completed, the project will need to be resubmitted, reviewed, and approved again.

When approval is made, two sets of the final approved documents are to be filed with the Committee. These approved documents will be utilized to ascertain that work during construction is in conformance with the approved design of the project. No revisions can be made to an approved exterior design without repeating the process and gaining approval again for the revisions. If work that has not been approved commences, the work may have to be removed.

Approval of the project by the Committee on behalf of the Association does not guarantee approval by the governing agencies in San Francisco. Approval by the Association indicates that the proposed project conforms with the Balboa Terrace Homes Association "Residential Design Guidelines." Building permits need to be secured from the appropriate government agencies for all work.

APPEALS

If an application is rejected by the Architectural Design Review Committee for reasons that the applicant believes to be unjustified, then the applicant has the right to appeal to the Balboa Terrace Homes Association Board of Directors. At such a meeting, the applicant can present their design, review the points of disagreement with the Committee, and seek Board approval. Request for such a review should be submitted to the Board at least two weeks before their next scheduled meeting (usually the first Monday of each Month except for July and August).

Any decision by the Board will be binding upon and supersede decisions by the Architectural Design Review Committee. The Board will notify the San Francisco Planning Commission of its decision.

This page intentionally blank

APPENDIX A – FORMS AND PROCEDURES

“NEIGHBORHOOD MEETING NOTIFICATION” FORM

This document is required to notify the surrounding neighbors as well as the Balboa Terrace Homes Association of the opportunity to have input into the proposed design of the project. Compile a list of the neighbors to be notified. Notification lots are described below. Fill out the “Neighborhood Meeting Notification” form with a detailed description of the proposed work and a time and place for the neighbors to attend a presentation and discussion of the project. (Details to be jointly arranged by the applicant and the Architectural Design Review Committee.) Deliver or mail the form to all notification lots and the Balboa Terrace Homes Association so that the notification is received a minimum of two weeks prior to the scheduled meeting.

Notification lots are the 3 adjacent lots in each direction from the subject property on the same block, the lot directly behind the subject lot and the 3 adjacent lots in each direction, and the lot directly across the street and the 3 adjacent lots in each direction on that block. In the case of corner lots, the notification shall be 3 adjacent lots in each direction from the subject property along each block face, and the nearest 3 lots on each opposite block across the street or streets from the subject lot. This applies to lots both within and outside Balboa Terrace.

“NEIGHBOR NOTIFICATION LIST” FORM

Fill in the name and address of each resident notified as required by the “Neighborhood Notification Meeting” form (as an option, a copy of a map of the surrounding area with the notification lots highlighted can be attached).

“NEIGHBORHOOD MEETING ATTENDANCE” FORM

When the neighborhood meeting is held, have the attendees fill in their names and addresses on the “Neighborhood Meeting Attendance” form and file a copy of the form with the completed Application.

“APPLICATION FOR PROJECT REVIEW” FORM

The “Application for Project Review” must be filled out completely and filed with the Association. Contact the Association for details on when and where to file the required materials.

DRAWING REQUIREMENTS

The Balboa Terrace Homes Association believes it is in the best interest for a thorough review of a project that plans be provided that enable site neighbors, Committee members and Association officers to clearly understand the proposed development. The Committee is willing to accept partial plans if they are legible and fully reveal all necessary information. At the same time, the Committee reserves the right to request architectural drawings to the following specifications if needed to better understand a proposed development:

Site Plan ($\frac{1}{8}$ inch/ft) –	Note all paved surfaces.
Floor Plans ($\frac{1}{4}$ inch/ft) –	Note dimensions and proposed uses.
Exterior Elevations ($\frac{1}{4}$ inch/ft) –	Note all exterior materials and existing and proposed building heights.
Building Sections ($\frac{1}{4}$ inch/ft) –	Provide one section in each direction through the entire building.
Roof Plan ($\frac{1}{4}$ inch/ft) –	Note sloping and flat roofs.

DESIGN REVIEW CHECKLIST

The checklist is utilized for “in-house” design review of the project and is intended as a tool to formalize the review process for the Architectural Design Review Committee and if necessary for the full Board of Directors of the Association. Failure in several aspects of the design, or failure to resolve conflicts with neighbors, will force the Committee to disapprove the project and request revisions to the design.

NEIGHBORHOOD MEETING NOTIFICATION

Date: _____

Assessor's Block: _____

Lot: _____

Project Address: _____

This notice has been sent to you to inform you that (applicant) _____ will be applying for approval of a proposed building alteration or addition at the above address. The project will consist of the following:

(detailed project description)

In accordance with the review process of the Balboa Terrace Homes Association, this notice is being sent to all residents within the surrounding area of the proposed project as well as the Association. You are under no obligation to take any action. You are being notified so that you are aware of the project's scope and can evaluate whether or not you believe the project could significantly affect you or your property. The applicant will be holding a meeting to present the project and discuss any concerns you may have for incorporation into the design at the time and place described below.

Meeting Date and Time: _____

Meeting Location: _____

Applicant: _____

Applicant's Address: _____

Applicant's Telephone: _____

If you feel that you are unable to resolve your concerns after working with the applicant, please contact the Balboa Terrace Homes Association.

This page intentionally blank

NEIGHBOR NOTIFICATION LIST

Date: _____

Assessor's Block: _____

Lot: _____

Project Address: _____

Date of Meeting: _____

The following residents have been notified of the neighborhood meeting regarding the above project. (An optional map may be attached with the notification lots highlighted. If so, the addressed of the notification lots should be shown on the map.) (Attach additional sheets if necessary.)

	Name	Address
1.	<u>BALBOA TERRACE HOMES ASSOCIATION</u> <u>Architectural Design Review Committee</u> <u>P.O. Box 27642, San Francisco, CA 94127</u>	
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____
6.	_____	_____
7.	_____	_____
8.	_____	_____
9.	_____	_____
10.	_____	_____

This page intentionally blank

NEIGHBORHOOD MEETING ATTENDANCE

Date: _____

Assessor's Block: _____

Lot: _____

Project Address: _____

Date of Meeting: _____

The following residents have attended the neighborhood meeting regarding the above project. (Attach additional sheets if necessary.)

	Name	Address
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____
6.	_____	_____
7.	_____	_____
8.	_____	_____
9.	_____	_____
10.	_____	_____
11.	_____	_____
12.	_____	_____

This page intentionally blank

APPLICATION FOR PROJECT REVIEW

Date: _____

Assessor’s Block: _____

Lot: _____

Project Address: _____

Project Description:

I am filing the accompanying information for review of the proposed project described above. I understand that I must obtain approval from the Balboa Terrace Homes Association for the project as required by the Deed Restrictions of the Balboa Terrace Homes Association.

Applicant: _____

Applicant’s Address: _____

Applicant’s Telephone: _____

Enclosed Materials:

- Forms:**
- “Neighborhood Meeting Notification” _____
- “Neighbor Notification List” _____
- “Neighborhood Meeting Attendance” _____
- “Design Review Checklist” _____

Drawings:
Project Drawings _____
(See Design Guidelines for Requirements)

Applicant’s Signature: _____

Date Signed: _____

This page intentionally blank

DESIGN REVIEW CHECKLIST

Date: _____

Assessor's Block: _____

Lot: _____

Project Address: _____

Applicant: _____

Applicant's Address: _____

Applicant's Telephone: _____

DESIGN REVIEW CHECKLIST
 (from pp. 59 – 61, “Residential Design Guidelines: December 2003”)

NEIGHBORHOOD CHARACTER (pages 7-10*)

QUESTION	
The visual character is: (check one)	
Defined	
Mixed	

* All page numbers refer to the San Francisco City & County “Residential Design Guidelines”
 Comments:

SITE DESIGN (pages 11 - 21)

QUESTION	YES	NO	N/A
TOPOGRAPHY (Page 11)			
Does the building respect the topography of the site and the surrounding area?			
Is the building placed on its site so it responds to its position on the block and to the placement of surrounding buildings?			
Front Setback (pages 12 - 15)			
Does the front setback provide a pedestrian scale and enhance the street?			
In areas with varied front setbacks, is the building designed to act as transition between adjacent buildings and to unify the overall streetscape?			
Does the building provide landscaping in the front setback?			
Side Spacing (page 15)			
Does the building respect the existing pattern of side spacing?			
Rear Yard (pages 16 - 17)			
Is the building articulated to minimize impacts on light to adjacent properties?			
Is the building articulated to minimize impacts on privacy to adjacent properties?			
Views (page 18)			
Does the project protect major public views from public spaces?			
Special Building Locations (pages 19 - 21)			
Is greater visual emphasis provided for corner buildings?			
Is the building facade designed to enhance and complement adjacent public spaces?			
Is the building articulated to minimize impacts on light to adjacent cottages?			

Comments:

BUILDING SCALE AND FORM (pages 23 - 30)

QUESTION	YES	NO	N/A
Building Scale (pages 23 - 27)			
Is the building's height and depth compatible with the existing building scale at the street?			
Is the building's height and depth compatible with the existing building scale at the mid-block open space?			
Building Form (pages 28 - 30)			
Is the building's form compatible with that of surrounding buildings?			
Is the building's facade width compatible with those found on surrounding buildings?			
Are the building's proportions compatible with those found on surrounding buildings?			
Is the building's roofline compatible with those found on surrounding buildings?			

Comments:

ARCHITECTURAL FEATURES (pages 31 - 41)

QUESTION	YES	NO	N/A
Building Entrances (pages 31 - 33)			
Does the building entrance enhance the connection between the public realm of the street and sidewalk and the private realm of the building?			
Does the location of the building entrance respect the existing pattern of building entrances?			
Is the building's front porch compatible with existing porches of surrounding buildings?			
Are utility panels located so they are not visible on the front building wall or on the sidewalk?			
Bay Windows (page 34)			
Are the length, height and type of bay windows compatible with those found on surrounding buildings?			
Garages (pages 34 - 37)			
Is the garage structure appropriate to surrounding styles?			
Are the design and placement of the garage entrance and door compatible with the building and the surrounding area?			
Is the width of the garage entrance appropriate to the style of the surroundings?			
Is the placement of the curb cut coordinated to maximize on-street parking?			
Rooftop Architectural Features (pages 38 - 41)			
Is the stair penthouse designed to minimize its visibility from the street?			
Are the parapets compatible with the overall building proportions and other building elements?			
Are the dormers compatible with the architectural character of surrounding buildings?			
Are the windscreens designed to minimize impacts on the building's design and on light to adjacent buildings?			

Comments:

BUILDING DETAILS (pages 43 - 48)

QUESTION	YES	NO	N/A
Architectural Details (pages 43 - 44)			
Are the placement and scale of architectural details compatible with the building and the surrounding area?			
Windows (pages 44 - 46)			
Do the windows contribute to the architectural character of the building and the neighborhood?			
Are the proportion and size of the windows related to that of existing buildings in the neighborhood?			
Are the window features designed to be compatible with the building's architectural character, as well as other buildings in the neighborhood?			
Are the window materials compatible with those found on surrounding buildings, especially on facades visible from the street?			
Exterior Materials (pages 47 - 48)			
Are the type, finish and quality of the building's materials compatible with those used in the surrounding area?			
Are the building's exposed walls covered and finished with quality materials that are compatible with the front facade and adjacent buildings?			
Are the building's materials properly detailed and appropriately applied?			

Comments:

SPECIAL GUIDELINES FOR ALTERATIONS TO BUILDINGS OF POTENTIAL HISTORIC OR ARCHITECTURAL MERIT (pages 49 – 54)

QUESTION	YES	NO	N/A
Is the building subject to these Special Guidelines for Alterations to Buildings of Potential Historic or Architectural Merit?			
Are the character-defining features of the historic building maintained?			
Are the character-defining building form and materials of the historic building maintained?			
Are the character-defining building components of the historic building maintained?			
Are the character-defining windows of the historic building maintained?			
Are the character-defining garages of the historic building maintained?			

Comments:

ITEMS OF UNIQUE CONCERN TO BALBOA TERRACE

APPENDIX A

QUESTION	YES	NO	N/A
Is there sufficient unpaved open area for landscaping in the front setback area of the project?			
Are any walls or fences proposed in conflict with BTHA Deed Restrictions?			
Is the proposed design clearly for a single-family unit?			
Does the proposed design provide for off-street parking?			
Does the proposed involve a solar collection installation? If so, how has the visual impact been assessed in contrast with system performance?			
Is there neighborhood opposition for reasons not listed in these guidelines?			

Comments:

Resources available on the Internet (July 2005):

San Francisco Planning Department:

http://www.ci.sf.ca.us/site/planning_index.asp?id=24810

Housing Element of the General Plan:

http://www.ci.sf.ca.us/site/planning_index.asp?id=24994

City and County of San Francisco Residential Design Guidelines:

<http://www.ci.sf.ca.us/site/uploadedfiles/planning/Documents/resdesfinal.pdf>