



THE EPWORTH ASSEMBLY
CONSTRUCTION AND LANDSCAPING STANDARDS

THE
EPWORTH
ASSEMBLY

**CONSTRUCTION
AND
LANDSCAPING
STANDARDS**



1

FOREWORD

- PURPOSE
- OVERVIEW
- AUTHORITY

2

GENERAL DESIGN GUIDELINES

- INTENT
- DESIGN CHALLENGES
- EVALUATION CRITERIA
- MEMBER-LESSEE DESIGN WORKSHEET

3

PROCEDURE

- APPLICATION FOR LEASEHOLD PROJECT PERMIT
- DESIGN REVIEW
 - PRELIMINARY DESIGN REVIEW
 - PERMITTING REVIEW
 - ADMINISTRATIVE REVIEW

4

PROJECT TYPES AND SUBMITTAL REQUIREMENTS

- PROJECT TYPE I
- PROJECT TYPE II
- PROJECT TYPE III
- PROJECT TYPE IV

5

PROJECT REQUIREMENTS

- BUILDINGS
- LANDSCAPING

6

CONTRACTOR INFORMATION

- CONSTRUCTION RULES
- ADDITIONAL REQUIREMENTS

7

APPENDIX

- A"GUIDE" TO THE DESIGN GUIDELINES
- GLOSSARY OF ARCHITECTURAL/DESIGN TERMS
- NATIVE MICHIGAN TREES AND SHRUBS
- PROJECT FEE SCHEDULE
- ARCHITECTURAL AND STYLE GUIDEBOOKS

8

SAMPLE FORMS

- APPLICATION FOR A LEASEHOLD PROJECT PERMIT
- NEIGHBOR REVIEW OF PROPOSED PROJECT
- LEASEHOLD PROJECT PERMIT
- BGA COMMITTEE DESIGN REVIEW CHECKLIST

SECTION 1 – FOREWORD

		PAGE
(Revised)		
1.1	PURPOSE	1.1.1
	OVERVIEW.....	1.1.1
	AUTHORITY	1.1.2

Purpose

The purpose of this document is to provide the Member-Lessee, the design professionals, and the contractors with standards for all construction and landscaping projects on leaseholds within the Epworth Assembly. The standards endeavor to balance the interests of each individual Member's Leasehold with the interests of the general Epworth community.

Overview

Any Member-Lessee wishing to undertake a project, either minor or major, must follow the procedures set forth herein and in the Assembly's By-Laws and rules.

These Construction and Landscape Standards (Standards) will assist and guide the Member-Lessees as they plan a project and will cover the application procedure, the design guidelines, the design review process, the issuance of the Leasehold Project Permit, and the Authorization to Commence Work.

These standards apply to all leaseholds and cover all landscaping and building exteriors and all interior work involving modifications to electrical circuitry, plumbing supply and waste lines, fireplaces, and/or permanently installed or affixed HVAC (Heating Ventilating Air Conditioning) components.

Changes to or replacement of lighting fixtures, plumbing fixtures, and/or appliances **are not** subject to these standards.

Prior to commencement of any work:

- An **APPLICATION FOR A LEASEHOLD PERMIT** must be filed.
- A design review and project approval must be granted
- A **LEASEHOLD PROJECT PERMIT** must be issued.
- All required governmental permits must be obtained
- An **AUTHORIZATION TO COMMENCE WORK** must be written and posted at the Leasehold.

The length of time required for review of the application will vary, depending upon such factors as the receipt of neighbor's review forms (when required), the scheduled meetings of the Building, Grounds and Architectural Review Committee (BGA Committee), the time of year when the application is submitted (in-season or out-of-season), etc. Typically, the application review process takes a **minimum** of 21 days.

Building and landscaping design review decisions made by the BGA Committee may be appealed by the Member-Lessee making application or other Member-Lessees and will be considered by the full Board of Trustees for final resolution.

A Leasehold Project Permit is valid for two years from issuance unless it is suspended or revoked. The project work must commence within twenty four months (two years) or renewal of the Leasehold Project Permit must take place. Member-Lessees who have started but have not completed a project within two years may be subject to fines or other penalties as determined by the Building, Grounds and Architectural Review Committee; the committee's decision can be appealed to the Board of Trustees.

Authority

The Epworth Assembly By-Laws, Article VII, Section 8, confer upon the BGA Committee the unique authority and obligation to review and to approve or disapprove all plans for construction or demolition of any kind, all plans for planting trees, shrubs, bushes, and/or other substantial plantings ("plantings"), and/or the cutting, trimming or removal thereof, on the resort. Neighbors are afforded the opportunity to express opinions, but the BGA Committee's only obligation is to give due consideration to such opinions. Decisions rendered by the committee may be appealed to the Board of Trustees.

SECTION 2 – GENERAL DESIGN GUIDELINES

	PAGE
<i>(Revised)</i>	
2.1 INTENT	2.1.1
2.2 DESIGN CHALLENGES.....	2.2.1
2.3 EVALUATION CRITERIA	2.3.1
2.4 MEMBER-LESSEE DESIGN WORKSHEET	2.4.1

2.1 - Intent

In a very broad sense, the intent of these Design Guidelines is to help perpetuate the experience that defines Epworth. The cultural and religious values, combined with the existing cottages, the hotel, the marine dining room and auditorium, the walks and streetscapes, the open spaces, the varied topography, the lakeshore, the channel, the lagoon, and the other elements that make up this community create the Epworth experience. The natural and built environment that is a part of this experience must be recognized and preserved in order to protect and continue Epworth's special sense of place and time.

In a narrower sense, the intent of these Design Guidelines is to assist in determining whether a new cottage, an alteration of an existing one, or a modification to the landscape is visually compatible with the character of Epworth and enhances the Epworth experience.

- The Design Guidelines for landscaping are consistent with the current By-Laws, requiring each Member-Lessee to maintain their leasehold landscape with attractive plantings and trimmed trees in such a way as to not interfere with a neighbor's view of the lakes, sunsets, or other similar attractions and to not unreasonably obstruct or interfere with any walks or public ways. Allowing another Member-Lessee to maintain or restore a reasonable view of Epworth's beautiful scenery, including Lake Michigan, will be given special consideration, but this will be balanced against the desire to preserve the natural woods and other growth of Epworth's grounds.
- The Design Guidelines for building construction do not mandate replication of traditional architectural styles that exclude contemporary architectural designs or materials. There are many appropriate design responses to a given situation. The already diverse architectural fabric of Epworth conveys its history of growth and evolution. Each cottage is a product of its own time and should be respected for that. The paramount concern is whether a cottage's design respects the context of its immediate surroundings and responds in a manner that will contribute to the overall quality of Epworth's built environment.

2.2 - Design Challenges

To a large degree, the character of Epworth is defined by the visual quality of its neighborhoods. "Neighborhood" is being used in the following two manners:

- **The immediate context.** Here the concern is how the cottage relates to its adjacent cottages (or, in the case of an enlargement, how the addition relates to the existing cottage) and how the form of the new or enlarged cottage impacts the adjacent cottages.
- **The broader context.** Here the concern is how the cottage relates to the visual character and scale created by the collection of other cottages in the general vicinity. The cottages on the **block face**¹ in which the project is located are particularly relevant.

There are several types of neighborhood visual character:

- Clearly defined visual character where there is an obvious repetition of forms and building types.
- Complex visual character where building forms are more varied.
- Undefined visual character where there is no clear pattern.
- New visual character where an existing character is not present

A single cottage out of context with its surroundings can have a remarkably disruptive effect on the visual character of a place. It affects nearby cottages, the block face, and, if repeated often enough, the image of Epworth as a whole.

The major alteration of existing cottages is possibly the most important issue that will affect the future character of Epworth. As these cottages age, there is increasing pressure to replace the older cottages with larger, newer, different types of cottages. This poses a dilemma in determining the extent to which new development should remain compatible with older cottages or transition to a new neighborhood character.

⁽¹⁾ *The cottages abutting on one side of a street or major pedestrian walk and lying between the two nearest intersecting streets or major pedestrian walks, or lying between a street or major pedestrian walk and the lake, the lagoon, the channel, the resort boundary, or other recognizable boundary.*

2.3 - Evaluation Criteria

The goal of the Board of Trustees is to encourage any new development within established neighborhoods to be compatible with the existing cottages in order to protect the “character of the neighborhood”. Attempting to protect the “character of the neighborhood” presents a difficult task. The first step in the process is understanding what features give the neighborhood its unique character. This may include many elements such as the size of cottages, the year the cottages were built, the architectural character of cottages, setback areas, the character of the street and walks, the landscaping, the location of parking areas and garages, etc.

In its review of project proposals, the BGA Committee considers both how a design works as a whole within the broader neighborhood context as well as how the components of the cottage facades relate to one another and to those on adjacent cottages. A relatively minor alteration in one design element of a cottage can have major impacts on the project's compatibility.

On some block faces, existing building patterns and massing¹ will strictly define the options for new development. A predominant visual character is clear in the strong repetition of forms and building types. A small deviation in this neighborhood pattern would draw a great deal of attention to a new cottage - attention that is damaging to the existing block face character.

Epworth's clearly defined visual character will dictate the direction that proposed construction should take in most situations. Evaluation of the surrounding area and adjacent cottages will clearly define the potential for expansion with respect to the existing context.

⁽¹⁾ *The three-dimensional form of a building*

2.4 - Member-Lessee's Design Worksheet

Member-Lesseees are encouraged to use this worksheet as the initial step in the design process for their proposed project.

Once a design professional has been engaged to prepare the required Project Documents (see section titled "Project Types and Submittal Requirements"), the designer should reference the sections titled 'A "GUIDE" TO THE DESIGN GUIDELINES' and 'GLOSSARY OF ARCHITECTURAL/DESIGN TERMS'

A number of factors will contribute to a successful design and review process. These include:

Looking Around

A focused tour of existing cottages in Epworth can be instructive prior to starting the design process. The abundance of successful designs in differing settings can offer ideas about new cottages and alterations to existing cottages. Touring the neighborhoods and taking note of exemplary architecture, speaking with other Member-Lesseees and observing BGA Committee design review meetings can provide a reliable list of design professionals and home designers adept at getting their projects built.

Familiarity with the Guidelines

By becoming acquainted with this document, applicants will be conversant in the same range of topics as Epworth staff and the BGA Committee.

Selecting a Design professional

An early step in the process of landscaping a leasehold lot or designing and building a new cottage, an addition, or alteration, should be the selection of a design professional. It will be extremely beneficial to the project if the design professional is familiar with development conditions along Michigan's lakeshore in general and Epworth specifically. Applicants should meet potential designers, get a feeling for the designer's approach to residential design, and visit built examples of their work. There is a wide range of talent among design professionals. The BGA Committee's design review response is frequently a direct reflection of the designer's ability and experience.

Neighborhood Involvement

Early discussions with Neighbors can facilitate the design process by alerting the applicant and designer to potential neighborhood concerns. The early development of a dialogue that communicates design issues can mediate neighborhood concerns and lead to fewer delays as the project goes through the review process.

Complicated Projects and Modern Designs

Projects that are potentially controversial because of their size or complicated site constraints will elicit a more extensive consideration by the BGA Committee and will require that the applicant engage an experienced design professional. Similarly, cottages designed in a modern architecture style or renovations that deviate significantly from a cottage's established style require a well-experienced design professional and will receive greater scrutiny by the BGA Committee.

Epworth Staff Consultation

Epworth staff can advise applicants on the review process and can also assist in keeping a project on track

BGA Committee Process

The BGA Committee process allows for a series of check-ins with the Committee during the preliminary design of new construction. The Preliminary Review provides for early BGA Committee feedback regarding the initial design direction and can save time in the design process by assuring that the applicant and the BGA Committee are viewing the project with similar goals. Later in the process, formal meetings are held at which the BGA Committee will review a project and either approve it, deny it, or specify conditions under which it can be approved in the future.

Communicating the Design

There are a number of ways that applicants and their design professionals can communicate the implications that new construction will have for the block face and neighborhood in which it is proposed. Projects can sometimes be delayed by inadequate communication of the design. Methods for communicating the design include perspective renderings, computer simulations of before and after conditions, or three-dimensional models. The goal is to communicate to the greatest degree possible the design intent of the proposed project.

2.4 - Member-Lessee's Design Worksheet (continued)

Answering the following questions will help to create a detailed awareness of the neighborhood, block face, and site of the proposed project. This approach will give a better understanding of how to address the conditions and challenges of the project.

A. Siting

What is the history of development or dates of construction (eclectic, historical, etc.)?

Do the existing cottage locations create a consistent and rhythmic building setback?

What are the overall lot characteristics (shape, size, topography)?

Are there any site conditions that affect the project's height, setback lines, garage and driveway location, and/or landscape challenges (ravines, access easements)?

For my project, how can the location, shape, and size of the cottage, garage, and driveway complement the adjacent cottages?

B. Building Envelope

What is the predominant roof pitch, type, and material?

Is there an obvious pattern formed by the heights of the neighboring cottages?

What type of roof lines do the neighboring cottages have?

What type of cottage is neighboring this property (one-story, two-story)?

What are the plan dimensions and the proportions of the massing of the adjacent cottages?

What type of ornamentation do the neighboring cottages have?

C. Texture and Detailing

What is the predominant façade material?

What are the dominant architectural features (front porches, dormers, etc.)?

D. Openings

What is the predominant orientation of the fenestration¹ (vertical, horizontal)?

What are the proportions of the openings?

E. Landscaping

What are the dominant landscape features?

What are the unique features of the property?

Are there significant trees or mature vegetation on the property?

Do the neighboring cottages have formal landscaping along the block face?

What types are driveways and/or on site parking areas are dominant in the neighborhood?

For my project, how can common characteristics of the existing cottages be incorporated into this project (materials, architectural details, roof pitch, landscaping, etc.?)

⁽¹⁾ *The arrangement and design of windows and openings in a building*

SECTION 3 – PROCEDURE

	PAGE
<i>(Revised)</i>	
3.1 APPLICATION FOR THE LEASEHOLD PROJECT PERMIT.....	3.1.1
3.2 DESIGN REVIEW	3.2.1
PRELIMINARY DESIGN REVIEW	3.2.1
PERMITTING REVIEW	3.2.2
ADMINISTRATIVE REVIEW	3.2.3

3.1 - APPLICATION FOR A LEASEHOLD PROJECT PERMIT

*Before **any** demolition, construction or landscaping is allowed, a written **Authorization to Commence Work must be posted at the work site.***

Prior to beginning design work involving landscaping or alterations to the footprint of a structure on a leasehold, the Member-Lessee making application must inform the General Manager and be certain that the proposed project falls within his/her leasehold lot lines. If this has not already been done recently, with boundaries drawn and marked with metal stakes by the Epworth Grounds Crew, the Member-Lessee must request that the leasehold lot lines be determined by the Epworth General Manager and BGA Committee.

For significant renovations, GM/BGA will work with outside consultants to develop specific guidelines for maximum cottage envelope, based on leasehold lot lines, size and setbacks of neighboring cottages, and the context of the neighborhood. BGA will provide this information and guidance to Member-Lessee to factor into their design. Any costs associated with the engagement of outside consultants by Epworth will be borne by the Member-Lessee.

While larger lots may provide more flexibility in terms of a larger possible envelope, the mass and style of neighboring cottages must still provide guidance in design.

The Member-Lessee of all immediately adjacent lots and all other Neighbors who might reasonably be affected by the proposed project ("Neighbors") are encouraged to discuss the project with the applicant before submittal of the Application for a Leasehold Project Permit (after the application has been submitted, the Neighbors will have an opportunity to submit written comments to the proposed project on the **Neighbor Review of a Proposed Project**¹form).

An Application for a Leasehold Project Permit,⁽¹⁾ containing all relevant submittal requirements and complying with all guidelines, must be filed at the Epworth office by July 1st for any fall/winter/spring projects, unless an extension is granted by the BGA Committee Chairman.

Notice of the proposed project will be announced in the "Epworth Reminder" and posted in the Epworth office and on the Epworth web site.

Following a design review, the proposed project will be approved, conditionally approved, or denied. The decision may be appealed to the Board.

Once a proposed project is approved and the Leasehold Project Fee has been received, the Leasehold Project Permit will be issued and a pre-construction conference with the Member-Lessee, Contractor, and the General Manager will be scheduled by the Epworth Office. If the project requires a Township Building Permit, a copy of the permit must be provided to the Epworth Office before scheduling of the conference can occur.

Following the pre-construction conference and receipt of the contractor security deposit², the General Manager will authorize, in writing, the commencement of project work. The written Authorization to Commence Work must be posted at the work site, along with the Leasehold Project Permit, and any other required permits.

⁽¹⁾ Copies of the **Application for a Leasehold Project Permit** and the **Neighbor Review of a Proposed Project** form are included for review in the section containing Sample Forms.

⁽²⁾ See the **Project Fee Schedule** in the Appendix.

3.2 - DESIGN REVIEW

The Sections titled '**Project Requirements**' and '**A “Guide” to the Design Guidelines**' were prepared for reference by Member-Lessees and their designers to facilitate the design process for the various project types. The issues and categories of design were developed to provide a minimum standard by which new construction and renovations will be reviewed during Design Review. This section provides an overview of the Design Review process.

PRELIMINARY DESIGN REVIEW

The purpose of the Preliminary Design Review is to allow a Member-Lessee together with his or her designer to receive preliminary feedback from the BGA Committee on key issues of project design at an early stage in the design's development. It is the Board's intention that this process will save time and costs. The BGA Committee, or a consultant designated by the BGA Committee, will review the information submitted and will return a design review checklist for the project. This may save expended effort on a design direction that would not likely be approved.

The BGA Committee conducts Preliminary Design Reviews at set times and dates as determined by the BGA Committee Chairman. The applicant and the designer will be invited to join the committee. A published schedule of the BGA Committee meeting dates is available at the Epworth office and on the Epworth web site.

PROCEDURE TO BE FOLLOWED:

Epworth Staff Contact

Once a design can be communicated adequately through drawings, graphics, and/or a written description (Supporting Documentation), project applicants should submit the material to the General Manager for review. If the General Manager determines that the Supporting Documentation and the design are developed to the extent that they are ready for a Preliminary Design Review with the BGA Committee (or its designated consultant), the review will be included on the agenda at the next scheduled Preliminary Design Review meeting. The meeting with the General Manager must occur at least ten (10) full working days in advance of the BGA Committee meeting date.

Neighbor Notice

In addition to the notice of the proposed project appearing in the "Epworth Reminder" and posted in the Epworth office and on the Epworth web site, applicants presenting plans at a Preliminary Design Review meeting shall contact the adjacent Member-Lessees to inform them of the pending project, offer to review the Supporting Documentation with them, and provide Neighbors with an opportunity to comment directly to the applicant, before design decisions are made. Neighbors should be encouraged to express their opinions with regard to the project.

PRELIMINARY DESIGN REVIEW (CONTINUED)

Supporting Documentation

There are no specific requirements for the Supporting Documentation submitted for presentation at a Preliminary Design Review. The information will vary, depending upon the Project Type and complexity of the project. However, the applicant and the designer should choose the materials and method for communicating the design so that the proposed project can be clearly understood within the context of its neighborhood.

PERMITTING REVIEW

The Permitting Review process is more formal than the Preliminary Design Review.

Submittal Requirements

It is up to the design professional to ensure that the plans contain sufficient information for Neighbors, Epworth staff, Epworth's consultants and the BGA Committee to understand how the completed project will appear. Information must be clear and understandable. For proposed cottage additions, the BGA Committee, Neighbors, and Epworth staff need to see what is being proposed in relation to what exists.

Application forms with specific submittal requirements, depending on the nature and scope of the project, are available in the Epworth Office. Items typically required are a location map, a site plan, site photos, floor plans and elevations, site survey, product cut sheets, a colors and materials board, and, when required, a landscape plan.

A published schedule of Review Meeting dates and final filing deadlines by which completed applications must be submitted is available at the Epworth office and on Epworth's website. Packages are processed by Epworth staff and distributed to BGA Committee members in time for their study and site review in advance of the meeting.

Upon receipt of a permit application that has met all submittal requirements, Epworth staff will forward project plans and Neighbor Review forms to affected nearby cottagers for comment.

Review Meeting Process

The BGA Committee will conduct at least one Review Meeting per year, whereat final decisions on project proposals will be rendered. At the meeting, and based on review of the materials, site review, and neighbors' comments, the BGA Committee will approve, conditionally approve or deny the permit application. The BGA Committee's decision may be appealed to the Board of Trustees.

Epworth Board Consideration of Appeals of BGA Decisions

When considering appeals of decisions made by the Building, Grounds and Architectural Committee in furtherance of the Committee's responsibilities set forth in the Bylaws, the following considerations should be taken into account by the Board of Trustees:

Did the Committee act without any conflicts of interest?

Did the Committee act in an arbitrary or capricious manner?

In rendering its decision, did the Committee follow all established rules and procedures?

Where Committee approval of construction or landscaping plans is being appealed, do the approved plans comply with the guidelines established in the Construction and Landscaping Standards? If not, why not, and are any variations reasonable under the circumstances?

Was all relevant information taken into account by the Committee in rendering its decision?

Administrative Design Review

The General Manager may review and administratively approve, on behalf of the BGA Committee, some projects which are consistent with these Standards and guidelines and which are of minimal potential impact to the neighborhood.

SECTION 4 – PROJECT TYPES AND SUBMITTAL REQUIREMENTS

	PAGE
<i>(Revised)</i>	
4.1 GENERAL REQUIREMENTS	4.1.1
PROJECT TYPE I.....	4.1.1
PROJECT TYPE II.....	4.1.2
PROJECT TYPE III.....	4.1.2
PROJECT TYPE IV	4.1.3

SECTION 4 - PROJECT TYPES AND SUBMITTAL REQUIREMENTS

4.1 - General Requirements

- An electrical and/or foundation inspection must be conducted by a qualified professional and written report provided to the General Manager prior to any addition or remodel that would require added electrical power or foundation building support.
- Construction drawings furnished for approval by the BGA Committee must be prepared by a design professional or home designer.
- Construction drawings for a replacement building or addition must include a highlight of the existing structure in each view.
- A site plan is required for any change on a lot that may alter storm water runoff or existing site drainage. The location of downspouts and their discharge, as well as, the provision for storm water retainage and drainage must be shown.
- Site plans, floor plans, and elevations must provide labels or directional symbols indicating north, south, east and west.
- Every drawing or sketch must contain a title block with the date drawn and any revision dates.
- Every Project Document must contain the Applicant's name and date.

Project Type I - Projects that encompass new construction or alterations to the structure of an existing building on the Applicant's leasehold.

Project Documents for a Leasehold Project Permit must include a clear and specific description of the work and drawings to scale. The Project Documents must include:

- A completed **Application For A Leasehold Project Permit**, along with the accompanying **Project Type I Submittal Checklist** and **Variance Request Form(s)**, if applicable.
- A site plan that clearly indicates the lot lines and building set backs, the location of the new building footprint; the existing building footprint if there is an addition, or any portion of the existing building that is demolished, and the location of all structures, equipment (**e.g., HVAC units**), propane tanks, and required screening to be constructed, placed, or installed.
- Site photos showing adjacent cottages with heights indicated.
- Dimensioned floor plans and elevations.
- Elevations rendered with shade and shadow or perspective drawing(s) depicting the overall appearance.
- Cut sheets or samples of the exterior materials including siding, trim, shutters, ornamentation, roofing, doors, windows, decking, and railings.
- A colors and materials board with a description of where the materials are to be used.
- A site plan required for a Project Type II and/or Project Type IV, if the project includes any of the work described under those Project Types.

Project Type II – Projects that encompass modifications to the existing grade, retaining walls, and clear cutting in areas prone to erosion on the Applicant's leasehold.

Project Documents to accompany the application for a Leasehold Project Permit pertaining to modifications to the existing grade, the replacement or addition of retaining walls, or clear cutting must include:

- A clear and specific project description of the work to be done.
- A site drawing to scale locating the modification of the grade and/or the location and height of a proposed retaining wall and/or the area to be clear cut.

For grade modifications:

- Cut and fill calculations for earth work exceeding three cubic yards
- A written statement describing the disposition of any excess soil.
- A sketch showing any changes to surface water drainage.

For retaining walls:

- Physical samples or photographs that adequately convey the scale, composition, and color of the retaining wall material.
- Construction drawings or an affidavit of Michigan building code compliance prepared by a registered professional for retaining walls exceeding 24" in height overall or for walls with terraced or stepped set backs exceeding 24" in height.

For clear cutting:

- A detailed written plan and sketch containing the proposed method(s) for eliminating and/or preventing erosion through the use of terracing, matting, grasses, or other plantings.
- Approval of clear cutting will be contingent upon approval of a proposed method for erosion control, and, if new plantings are integral to the proposed method, approval of a Project Type III application.

Project Type III – Projects that encompass the addition, removal, or trimming of trees or other plantings that are over three feet in height at maturity on the Applicant's leasehold.

Project Documents to accompany the application for a Leasehold Project Permit pertaining to the addition, removal, or trimming of trees or other **plantings** must include:

- A clear and specific project description of the planting and/or cutting/trimming work to be done.
- Labeled photographs and/or sketch identifying what is to be accomplished.
- A sketch identifying and locating any existing plantings, trees, or shrubs that are to be cut, trimmed or removed, with a notation as to how the plantings, trees, or shrubs will be tagged with colored tape on the leasehold lot.
- A sketch locating the ground stakes that will be used to identify and place any new plantings on the leasehold lot.
- A cost estimate from at least two sources if any costs to the neighboring Cottager are suggested.

Project Type IV - Projects that can be sufficiently described in narrative form.

Project Documents to accompany the application for a Leasehold Project Permit must include a detailed description of the work to be performed (Project Narrative).

- Examples of a Type IV project would include re-roofing with a similar material and color, exterior painting of the same color, window replacement of the same kind as the existing, etc.
- Drawings are not required.

SECTION 5 – PROJECT REQUIREMENTS

	PAGE
<i>(Revised)</i>	
5.1 BUILDINGS	5.1.1
5.2 LANDSCAPING	5.2.1

To facilitate locating a requirement that may pertain to a proposed project, the Project Requirements have been separated into two categories based on relevance to a “building” type project or a “landscape” type project. When a requirement has relevance to both types of projects, it is listed in each category which are titled “**Buildings**” and “**Landscaping**”

5.1 - **BUILDINGS**

Construction

All structures must be stick-built, new construction. Pre-fabricated or modular homes are not permitted.

Demolition

Generally, the partial or total demolition of an existing cottage is discouraged if it adversely affects the character of Epworth. Demolition can be approved if:

- The existing cottage does not contribute to the character of its block face and/or neighborhood.
- The deterioration of the existing cottage is so extensive that remediation is not economically feasible.

If demolition is approved, the new cottage or alteration must be compatible with adjacent cottages and the neighborhood.

Externally Mounted/Installed Devices

Satellite dishes and electronic device antennas are discouraged.

Ground implanted flag poles, weather vanes, and any other external device mounted on a cottage or installed on a leasehold lot must be approved.

Foundations

An exposed foundation that is skirted must use a finish material that differentiates the foundation from the façade above it.

It must be compatible with the adjacent cottages in the block face and neighborhood.

Garages, Sheds, Free Standing Structures

These buildings are generally not permitted, but when permitted, they may not be built on common area.

If a garage is permitted, and where it is feasible, entries should be on the sides of cottages to avoid placing them in direct view from a public street.

Grade

Siting and design of cottages should conform to the natural contours of the site and mitigate the need for extensive cutting, filling or terracing.

Where grading is necessary, contour grading that emulates the topography of the existing slope should be utilized. The site should not be shaped into terraced building pads nor should a flat site be created on a parcel that has existing topography.

When alterations to the existing grade are proposed, the location of building downspouts and their discharge, as well as, the provision for storm water retainage and drainage must be documented.

Height

Cottage height is measured from the average grade surrounding the cottage to the highest roof ridge.

The cottage height must fall within a range of plus or minus ten percent (10%) of the average height of the nearest contributing cottages¹ on both sides, unless a variance is granted by the BGA Committee.

Lighting

Exterior lighting mounted on cottages or installed on a leasehold lot should not be directed toward the street, the sky or neighboring parcels.

Exterior lighting should be designed to subtly highlight key features of the landscape design, such as walkways or paths, and augment architectural features of the cottage.

Non-Conforming Structures

Non-conforming structures shall not be enlarged upon, expanded, intensified or extended.

Normal maintenance of a non-conforming structure is permitted, provided it does not increase the floor area of the structure or the lot coverage occupied by the non-conforming use.

⁽¹⁾ *A contributing cottage is a structure that meets the requirements for visual compatibility within a block face and neighborhood.*

Non-Contributing Cottages

Alterations to Non-contributing cottages must include modifications to the exterior facades that enhance the structure's visual compatibility within its block face and neighborhood.

Occupancy

Only one cottage, for single-family occupancy, shall be erected on any one lot as designated by the Board of Trustees.

Retaining walls

A retaining wall (or vertical segment in a terraced retaining wall) along public walkways must not exceed 4 ft. 6 in. in height.

Terraced retaining walls shall be horizontally separated by a minimum distance of 3 feet and that area shall be landscaped.

The exposed face of a retaining wall should be constructed of natural materials, such as stone or wood, or of concrete that has been formed and colored to simulate stone, so as to be in harmony with the predominant color and character of the adjacent landscape.

Rooflines

The rooflines of cottages on hillsides should be below the height of the existing tree canopy.

Roof Materials

Roof materials should be consistent with the materials used on surrounding cottages. Asphalt shingle is the predominant roofing material at Epworth and is generally preferred by the BGA Committee for new construction applications.

Sanitary Sewer and Water Connections

All sewer and water connections to Epworth's main lines must be completed by the Epworth Assembly.

All cottage sewer and water feeds must be approved by Epworth's maintenance superintendent before installation is completed and backfill is allowed. The fee for this service is listed in the Project Fee Schedule.

Water valves and sewer cleanouts may not be disturbed, blocked or covered up by construction.

All heat pump or furnace condensation runoff must be routed to a dry-well.

Sewer lift-stations are shut down and winterized from November – April and no infiltration is permitted during that time period.

Storm Water Retainage and Drainage

When alterations to the existing grade are proposed, the location of building downspouts and their discharge, as well as, the provision for storm water retainage and drainage must be documented.

Utilities/Mechanical Systems

Utility and mechanical systems (i.e., propane tanks, central air conditioning units, etc.) should be placed inconspicuously, and must be appropriately screened with lattice, board fencing or effective landscape plantings.

The decibel rating of heat pumps and central air conditioning units must not exceed 74 dB. The location of neighboring cottages should be considered when determining the placement of these units.

Utility wires must be relocated underground at the expense of the Member-Lessee for all new construction and additions, if feasible, as determined by the BGA Committee.

No underground utilities shall be installed, moved, replaced or relocated between Memorial Day and Labor Day, unless an emergency requires immediately action, as determined by the General Manager.

5.2 - LANDSCAPING

Externally Mounted/Installed Devices

Satellite dishes and electronic device antennas are discouraged.

Ground implanted flag poles, weather vanes, and any other external device mounted on a cottage or installed on a leasehold lot must be approved by the BGA Committee.

Fences

Privacy fences or walls are discouraged. Natural means of screening such as hedges are preferred. In all instances, the views from neighboring cottages must be respected.

Grade

Siting and design of cottages should conform to the natural contours of the site and mitigate the need for extensive cutting, filling or terracing.

Where grading is necessary, contour grading that emulates the topography of the existing slope should be utilized. The site should not be shaped into terraced building pads nor should a flat site be created on a parcel that has existing topography.

When alterations to the existing grade are proposed, the location of building downspouts and their discharge, as well as, the provision for storm water retainage and drainage must be documented.

Lighting

Exterior lighting mounted on cottages or installed on a leasehold lot should not be directed toward the street, the sky or neighboring parcels.

Exterior lighting should be designed to subtly highlight key features of the landscape design, such as walkways or paths, and augment architectural features of the cottage.

Non-Conforming Structures

Non-conforming structures shall not be enlarged upon, expanded, intensified or extended.

Normal maintenance of a non-conforming structure is permitted, provided it does not increase the floor area of the structure or the lot coverage occupied by the non-conforming use.

Plantings

Trees, shrubs, bushes, or other planting must be native to Michigan or have been successfully introduced to the Michigan Great Lakes basin (a list of native Michigan trees and shrubs is included in the Appendix). Other plants may be approved if recommended by a professional landscaper or arborist.

Approval of plantings that are likely to grow to a size where they might interfere with safe and reasonable use of, access to, and view from walks, common areas, or other leased lots must be maintained in a way as to not interfere with the use, access and views of other Member-Lessees.

Retaining walls

A retaining wall (or vertical segment in a terraced retaining wall) along public walkways must not exceed 4 ft. 6 in. in height.

Terraced retaining walls shall be horizontally separated by a minimum distance of 3 feet and that area shall be landscaped.

The exposed face of a retaining wall should be constructed of natural materials, such as stone or wood, or of concrete that has been formed and colored to simulate stone, so as to be in harmony with the predominant color and character of the adjacent landscape.

Tree Topping

No new topping of trees greater than 3" in trunk diameter will be permitted

Crown reduction and branch or limb reduction will be considered to help control height and spread of trees.

Trees previously topped may be considered for additional ongoing topping provided that the applicant agrees to replace the plant with an approved plant should it die prematurely.

Limb up or branch reduction pruning or cutting procedures may be utilized with proper techniques.

Tree Removal

Dead, dying, diseased, or fallen trees and trees posing a danger on individual leasehold lots are to be removed at the expense of the Member-Lessee.

Stumps may need to remain in place to prevent erosion.

All wood related to trimming and/or cutting of trees, including logs obtained from tree removal, shall remain on Epworth grounds, and disposed of in Epworth's wood, brush, and leaf disposal area.

See "View Obstruction" below for removal of other trees and plantings

Storm Water Retainage and Drainage

When alterations to the existing grade are proposed, the location of building downspouts and their discharge, as well as, the provision for storm water retainage and drainage must be documented.

Utilities/Mechanical Systems

Utility and mechanical systems (i.e., propane tanks, central air conditioning units, etc.) should be placed inconspicuously, and must be appropriately screened with lattice, board fencing or effective landscape plantings.

View Obstruction

Proposals for the removal or trimming of trees and other plantings to eliminate or prevent view obstructions are considered by the BGA Committee.

Old hardwood trees and/or family generational plants will be given special consideration. However, sentimental attachment to such a tree or plant will be balanced with the rights of other Member-Lessees as established in the By-Laws.

SECTION 6 - CONTRACTOR INFORMATION

No project work, including demolition, can begin until a written **Authorization to Commence Work** has been posted at the work site, along with the **Leasehold Project Permit**, and any other required permits.

The Member-Lessee/Contractor is responsible for all erosion control, sand retention, proper surface water drainage, and necessary repairs or replacement due to damage to neighboring leaseholds or Epworth Assembly common ground, including roadways, walkways, parking areas, sod or turf, etc. Water valves and sewer clean outs may not be disturbed, blocked, or hidden.

6.1 - Construction Rules

Advertising

No advertising signs of any kind are allowed.

Alcohol

Alcohol is prohibited outside the four walls of the cottage by anyone, including owners, visitors, contractors, and their employees and guests.

Burning

No burning of trash or waste material allowed.

Concrete Washouts

Washouts are only permitted on the job site. Any concrete washouts found off leasehold will result in contractor removal from the premises.

Firearms

Firearms are prohibited on Epworth property.

Hunting

Hunting is prohibited on Epworth property.

Noise

Excessive noise is prohibited. There should be no profanity, yelling or exterior radio noise.

Portable Heating Devices

Temporary or portable heating devices must have flame-out sensors and be UL approved. Devices may not be left unattended.

Landscaping Tools

All landscaping tools and equipment must be maintained in a sanitary condition to help prevent the spread of plant diseases throughout Epworth.

Sand/Fill Disposal

All excavated fill-sand, and/or backfill material must be removed from the premises and disposed of, or stored off-site, at the discretion of the General Manager.

Tree Removal and Trimming Debris

Logs from tree removal projects and all limbs, branches, logs, trimmings or other residual cuttings generated from a trimming or removal project will remain at Epworth and placed at the wood, brush, and leaf disposal area.

Site

The site must be kept clean of debris at all times. A dumpster must be provided for disposal of building materials. Placement of dumpster must be approved by the General Manager before arrival and must be removed from the premises by the Friday before Memorial Day.

Demolition

All glass must be removed and properly disposed of before demolition takes place.

Temporary Toilet Facilities

Porta Potties must be located in an unobtrusive area and must be provided until an inside toilet is available for use. Placement of such must first be approved by the General Manager before arrival and must be removed from the premises by the Friday before Memorial Day.

Vehicles

All vehicles must register at the Administration Office or Front Gate and display a vehicle pass while on the premises. Vehicles without a pass will be removed immediately. Vehicles, trailers, equipment, must be parked on site or in designed

parking areas only. Please do not park in another Cottagers' parking spot. Overflow parking is available in several locations. Parking on common grassy areas or on the side of the road is prohibited.

Driving on sidewalks is strictly prohibited. Inform the General Manager if alternate access to a cottage is needed.

6.2 - Additional Requirements

Construction Season

Construction may take place between the first day after Labor Day through 8:00 PM on June 15th. No construction, remodeling, repair work, power washing or use of mechanical tools of any type are allowed between June 16th and Labor Day. No construction work is allowed on Sundays.

All porta-potties and dumpsters must be removed from the premises before the Friday of Memorial Day weekend.

Pre-construction Conference

Prior to the commencement of work, a pre-construction conference, as described in "Section 3 – Procedure", must be attended by the contractor. The meeting agenda will include a review of plans, permits, site plans, cottage placement, contractor requirements, etc.

Registration, License, and other Qualifications

All contractors must register with the Epworth Office.

A copy of the contractor's license must be provided before work can begin.

A registration application must be completed certifying that he/she has read, understands, and agrees to abide by the "Epworth Assembly Construction and Landscaping Standards" and the Epworth Assembly rules, as described in the most current "Epworth Reference Reminder".

Contractors engaged in tree removal or trimming must attest to a familiarity with the International Society of Arboriculture (ISA) or Tree Care Industry Association (TIA) or the American Society of Consulting Arborist (ASCA) guidelines for environmentally sound methods of tree trimming, pruning, or other procedures as outlined by the U.S. Forest Service.

Registration by Epworth is not to be construed as a determination or recommendation of competency or quality of workmanship.

Contractors who fail to abide these Standards may be prevented from continuing to do business on Epworth grounds.

Insurance

Proof of contractor's workmen's compensation and liability insurance must be on file in the office.

6.2 - Additional Requirements (continued)

Authorizations and Permits

The Authorization to Commence Work, the Leasehold Project Permit, and the appropriate Township Building Permit (if required) shall be posted in a prominent place on the work site at all times while work is being performed. Obtaining the required building permits from Pere Marquette or Hamlin Township is the responsibility of the contract entity performing the work.

SECTION 7 – APPENDIX

		PAGE
(Revised)		
7.1	A “GUIDE” TO THE DESIGN GUIDELINES.....	7.1.1
7.2	GLOSSARY OF ARCHITECTURAL/DESIGN TERMS.....	7.2.1
7.3	NATIVE MICHIGAN TREES AND SHRUBS.....	7.3.1
7.4	PROJECT FEE SCHEDULE	7.4.1
7.5	ARCHITECTURAL AND STYLE GUIDEBOOKS.....	7.5.1

7.1 – A “GUIDE” TO THE DESIGN GUIDELINES

In Section 2 of this document, it was stated that the Design Guidelines were created *“...to assist in determining whether a new cottage, an alteration of an existing one, or a modification to the landscape is visually compatible with the character of Epworth and enhances the Epworth experience.”* This Section describes in greater detail the specific guidelines that will help to achieve visual compatibility among the cottages in Epworth.

Style

The architectural style used on a cottage should be consistent throughout all facades. All elements of design, shape, and form should be consistent with the selected architectural style.

New cottages that fall under the architectural genus “Modernism” are not encouraged, but are permitted. However, when this style is designed badly or executed poorly, the results can be dramatic and create impacts that ripple into a community such as Epworth where Modernism is not the predominant style. Therefore, cottages designed as one of the subtypes of Modernism will be subject to a higher level of scrutiny during the Design Review process.

Ornamentation/Trim

Significant architectural features such as cornices and brackets, decorative gable-ends and other ornamental elements should be preserved or used wherever appropriate.

Roofs

Roof shapes are important to defining residential architectural styles. Roof forms contribute to the massing, scale, and proportions of all cottages. The intent of the guidelines is to have roofs compatible with the cottages to which they visually relate. This is particularly important where cottages are spaced close together. The following are general guidelines relating to roof forms.

- **Overlapping Gables** - New construction should contain simple roof forms. Overlapping gables are most appropriate when the smaller gable is part of a balcony, porch, or entrance, or when they are appropriate for the architectural style.

Roof Shape (continued)

- **Slope** - Where similar types of roofs are used, (*e.g., a large hipped roof at the main cottage, with smaller hipped wings, or gable porch on the gable end of a cottage*) the roof pitch should be common throughout. The overall structure will be unified and each part will tie in with the next.
- **Consistency** - Roof slopes should not vary significantly from neighboring cottages of the same architectural style. The primary roof slopes of a particular style should fall within a range of no greater than 15 percent. Ancillary roof slopes should be appropriate to the style of the cottage, which is in most cases between one-third and one-half of the primary roof slope.

Roof material should be consistent with the surrounding neighborhood. Asphalt shingle is the predominant roofing material at Epworth and is generally preferred by the BGA Committee for new construction applications.

Scale / Height / Mass

The scale of a cottage is its perceived size relative to the size of its elements and to the size of elements in neighboring cottages. The scale of any new cottage or cottage alteration should be compatible with that of neighboring cottages.

To assess compatibility, the dimensions and the proportions of the design elements of neighboring cottages should be examined. Two cottages of the same dimensions can be very different if differently proportioned.

The overall shape and massing of cottages is significant in defining character. In order to retain the character of Epworth, maintaining a balance between landscaping and building scale in relation to space available is essential.

- Limitations on the size, height, scale, and setbacks of expanded or altered cottages will be based on its compatibility with the character of its neighborhood.
- The scale and proportions of new construction should be compatible with adjacent cottages and the surrounding area.
- The appearance of mass should be minimized through the use of design elements such as porches, porticos, bay windows, and dormer windows, for example.

- The boundary between each floor of the cottage is encouraged to be delineated through belt courses, cornice lines, balconies, or similar architectural detailing.
- Long unarticulated exterior walls are discouraged on all cottages. Massing offsets, varied textures, openings, recesses, and design accents on cottage walls are strongly encouraged in order to enhance the architecture.

Scale / Height / Mass (continued)

- Long, single-ridge rooflines (over 50 feet long) are discouraged. Vary roof lines through changes in height and form to break up massing.
- Cottages should be similar in height to provide cohesiveness to the neighborhood. Cottages that are too tall will create a barrier to the rhythm of the massing while cottages that are too short will create a void or space in rhythm.

Unlike the historical areas, newer neighborhoods may exhibit less size and style diversity. In these less diverse areas, greater effort may be required to make unusually large cottages blend in with surrounding cottages. In these cases, it may be necessary to use architectural styles or techniques that help create the illusion that larger cottages appear more compatible with the size of existing cottages.

One-way to accomplish this is to articulate facades with reveals and setbacks to bring down the visual scale of the cottage. Pilasters can help to communicate a specific design style and can break a façade into smaller components. However, pilasters do not belong on many styles and should not be artificially applied.

Another way is to articulate the roof such that rooflines step down to respect those of surrounding cottages.

Porches

Although front porches are not appropriate for all styles of architecture, they aid in minimizing the appearance of bulk by breaking-up the façade.

Porches are primarily of two forms. They are either inset into the primary mass of a cottage or built outside the main cottage as a separate volume that helps mediate the cottage mass consistent with the cottage's architectural style.

Porches should follow basic principles of an architectural style, which will determine:

- Inset porch or external to primary massing
- Horizontal percentage of façade covered
- Roof form over the porch

For new construction, front porches should be designed to have a depth that is great enough to make them functional spaces. In most cases, front porches should be at least 7 feet in depth to allow adequate room for furniture.

Porches (continued)

Porches must not be enclosed with an opaque material above railing height.

Historically, porches were open structures devoid of any enclosure such as screening, glass, or solid opaque material. Over the years, the porches of Epworth's cottages have been enclosed for a variety of reasons, the most common being the desire to expand the habitable space. Consequently, the architectural character of cottages with enclosed porches has been transformed.

The typical porch enclosure in Epworth consists of either insect screening or a transparent solid material (i.e., glass or flexible plastic film) above an opaque siding material that replaced the original railing and balustrade. Because this type of enclosure is prevalent throughout Epworth, these guidelines cannot dictate a departure from this method. However, other techniques for enclosing porches that can satisfy the desire for more habitable space while maintaining the illusion of openness of the original porch are encouraged. One such technique for screens or flexible plastic film is described below.

Construct full height panels of manageable size for the screen or film material. The framework for the panels should be as minimal as possible and dark in color. The inter-locking or hinged panels should be placed behind features such as columns, lintels, and open railing balustrades. For added privacy, dark opaque modesty panels of railing height can be substituted for the lower screening or film in the framework.

Railings

The use of railings on porches, balconies and upper level windows or door openings should be carefully considered as a component of an architectural style. When properly applied, well designed and properly detailed railings are an opportunity to reinforce specific characteristics of the selected architectural style. The materials used for railings should be part of an appropriate palette of materials for the architectural style of the cottage.

Shutters

Window shutters were often added to pre-1945 houses to provide interior shading in the summer and to protect windows during storms. With the advent of air conditioning, window shutters are more ornamental in design than practical.

Shutters should be of wood or composite material and should be of louvered or paneled construction.

Shutters (continued)

Shutters should be one-half the width of the sash they are, or appear to be, covering.

All shutters should be installed to be operable or appear to be operable. The use of hinges and dogs (a device mounted to the wall that may be pivoted to prevent the shutter from moving when in the open position) is encouraged. As a minimum, a spacer between the shutter and wall is required so that the shutter does not appear to be attached directly to the surface of the wall.

Exterior Color - Painting and Staining

Painted siding and roofing colors should be compatible with the adjacent area and appropriate for the style of the particular cottage. With the exception of natural cedar and porch deck framing that has been treated, all exposed exterior surfaces, including wood porch roof framing, stair risers, railings and all vertical surfaces must be painted or stained with opaque stain within two years of installation.

Porch flooring, decks, walks, stair treads, etc. (horizontal walking surfaces), made of natural or composite material may be left unfinished.

The use of primary colors should be avoided.

The selected colors should be authentic and representative of the architectural style of the cottage.

Changes in cottage colors should not occur at the corners of walls or at changes in a façade plane.

Architectural details, such as eaves, window and door trim, and the cottage foundation, are appropriate features for the use of accent colors. Accent colors should be harmonious with the color(s) of the main body and part of an appropriate palette.

Generally, a lower sheen paint is preferred for wall surfaces while higher sheen paint can be appropriate for trim features.

Fenestration

Possibly the most important features of any cottage are its openings. The doors and windows are the “eyes” of a cottage. Each individual cottage contains a rhythm established by the arrangement of windows and doors versus solid wall sections. The

size, proportion and location of openings are an essential part of the overall design and architectural styling. It is important to carefully consider the alteration of an original opening.

Fenestration (continued)

Openings should not be placed randomly. Traditional architecture almost always places openings in a manner that while sometimes not simple or regular, is nonetheless extremely rational. Openings should be placed according to a rational system. Openings centered between regularly spaced columns is one obvious strategy.

Doors

- Entry features should be scaled to the façade and appropriate to the architectural style. The size and material of the entry door as well as the quality of door hardware should be appropriate to the scale and style of the cottage.

Windows

- Windows should match the style of the cottage. Windows should be installed into walls with an adequate depth, or reveal, to create shadows, which heighten the visual richness of the façade. The depth of the reveal should be in keeping with the architectural style.
- Window openings and window panes should be vertically proportioned or square and should be similarly proportioned throughout the entire cottage.
- Muntins should divide panes into divided lights. The preferred methods would be true divided lights or simulated divided lights with grills adhered to both sides of the glass and a spacer bar in between the glass.
- Trim molding, lintels and window sills should be used to express a level of detail on the façade, consistent with the façade design.
- The preferred material for residential windows is wood sashes and wood frames. As an alternative, vinyl and vinyl coated wood or aluminum coated wood may be considered.

Skylights

- The installation of roof-mounted skylights should not create visual impacts for neighboring properties. Other solutions should be explored, such as chimney skylights and dormers.

- Roof-mounted skylights should not be installed on a roof surface that faces a street or primary walk.
- The color of the glazing on roof-mounted skylights should be clear or tinted a color that does not contrast with the roof color. Mirrored glass shall not be used.

Site

The siting and design of cottages should integrate mature and native trees and existing vegetation into the site plan and cottage design. It is Epworth's policy to prevent significant loss of vegetation through individual projects.

A cottage's mass, roof form and projecting elements should be designed so as to minimize the visual impact of the cottage on a slope. Rooflines should be designed in ways that minimize interference with views from neighboring properties.

Cottages should be broken into a collection of volumes that step up or down a hillside, unless appropriate for a particular style. Habitable spaces and overhanging or cantilevered decks should avoid excessive cantilevering unless it is integrated into the architectural design and topographical conditions

Roof forms, such as gabled or hipped roofs, should generally parallel the slope.

Lot lines/Set backs

The rhythm of the cottages establishes the overall opening and solid feeling of the neighborhood. Retaining the existing rhythm is imperative in established block faces.

Front yard setbacks, rear yard setbacks, and side yard setbacks will be particularly important to the adjacent neighbors and for maintaining or creating rhythm along the block face.

Cottage setbacks for infill or rebuilt cottages should generally fall within the range of existing setbacks on both sides of the street or walk. In cases where averaging is applied, the new cottage may be averaged in a stepping pattern between the front yards of the adjacent cottage, or the new cottage's entire frontage may be built on the average setback line.

In new neighborhoods and neighborhoods that have no consistent setbacks or distinct rhythm, additions to existing cottages and new, infill, or rebuilt cottages must be set back from the leasehold lot lines as follows:

- Front yard, side yards, and back yard setbacks must be no less than ten (10) feet.
- Setbacks do not necessarily include decks and stairways.

- Member-Lessees may appeal to the BGA Committee for a variance on setbacks prior to the initiation of design. Any such request must be accompanied by a written Variance Request Form.

Fenestration

The arrangement and design of openings in a building. The balance and placement of openings on a façade should communicate the building floor plan and the structural logic of the building.

Height

Height is measured from the average grade surrounding the cottage to the highest roof ridge.

Historic/Historical

Historic and *historical* have different usages, though their senses overlap. **Historic** refers to what is important in history: *the historic first voyage to the moon*. It is also used for what is famous or interesting because of its association with persons or events in history: *an historic house*. **Historical** refers to whatever existed in the past, whether regarded as important or not.

Mass

Mass describes three dimensional forms, the simplest of which are cubes, boxes (or "rectangular solids"), cylinders, pyramids and cones. Buildings are rarely one of these simple forms, but generally are composites of varying types of assets. This composition is generally described as the "massing" of forms in a building.

The mass of a building, its three-dimensional form, is evaluated for scale, bulkiness and relationship to exterior spaces. Massing that is "broken up" to reduce bulkiness is usually more successful.

Neighborhood

The cottages comprising a block face and, if existing, the cottages comprising a block face on the opposite side of a street or major pedestrian walk.

Non-Conforming Structures

Inhabitable structures (e.g., garages, yard sheds and other out-buildings) not meeting the requirements of the current construction standards.

Non-Contributing Cottage

A cottage that does not meet the requirements for visual compatibility within a block face and neighborhood.

Pilaster

A column or vertically split column attached to a wall or pier constructed to coordinate with the style of the building.

Riser

The vertical portion or surface of a step.

Rhythm (Horizontal, Vertical)

The regular or harmonious recurrence of lines, shapes, forms, elements or colors, usually within a proportional system.

Ridge

The highest line of a roof where the sloping planes intersect.

Scale

The scale of a building is based on its dimensions in plan and elevation as well as its perceived size relative to the size of its elements and to the size of elements in neighboring buildings.

SECTION 7.3 - NATIVE MICHIGAN TREES AND SHRUBS

The following list includes examples of native plants that have proven to do well in our area that can be approved for planting on Epworth grounds and individual leaseholds, depending on the specific location desired. Other plants may be considered if recommended by a professional arborist or landscaper.

STRIPED MAPLE
AMERICAN HORNBEAM
FLOWERING DOGWOOD
NANNYBERRY VIBURNUM
DWARF FRUIT TREES
FLOWERING/SIBERIAN CRABAPPLE
CRANBERRY
EUROPEAN/COMMON BUCKTHORN
EASTERN FLOWERING DOGWOOD
WILD APPLE
EASTERN REDBUD
AMUR MAPLE
MUGO PINE (sunny areas only)
DWARF HACKBERRY
RIVERBIRCH
DUNE/LANDSCAPE GRASSES
SMOOTH SUMAC
STAGHORN SUMAC

As well as these non-native species that do well here:

KATSURA TREE
JAPANESE LILAC
JAPANESE MAPLE

Local arborist:

Andy Chulski, International Society of Arboriculture - license number MI- 3862

7.4 – PROJECT FEE SCHEDULE

Leasehold project fees are listed as a separate line item in the Epworth Assembly financial records. The monies from the leasehold project fee account are used to partially offset the expenses associated with project related activities.

Project related expenses encompass professional service fees for outside consultation and the additional administrative costs of project documents reproduction, telecommunications, certified mailings, documenting additional information related to the project, and office equipment depreciation. Further, there are expenses related to the maintenance of Epworth's infra-structure that is subjected to heavy construction traffic, causing subtle, but cumulative, wear and tear on roadways, walkways, vegetation and drainage systems.

Additionally, a security deposit paid by the contractor prior to the commencement of work is used to cover potential damage to the infra-structure that is immediately obvious during construction. A post construction inspection is done by the Epworth staff to determine what portion of the deposit is to be returned to the contractor.

Project Fees

Fees are paid after the Leasehold Project Permit has been issued but prior to the written Authorization to Commence Work being executed.

Projects with an estimated cost of \$100,001 or more \$2,500

Consultation Fees

Fees are paid after the Leasehold Project Permit has been issued but prior to the written Authorization to Commence Work being executed.

- Applicants shall reimburse Epworth for actual costs incurred..... \$

Miscellaneous Fees

Fees are paid prior to the service being rendered.

- Leasehold lot line staking \$100

(Not charged when needed for a construction project)

Water/sewer hook up by Epworth staffAt Cost

Contractor nonrefundable fee for projects over \$100,000 \$2,500

7.5 – ARCHITECTURAL AND STYLE GUIDEBOOKS

Baker, John Milnes. American House Styles: A Concise Guide. New York: W.W. Norton & Company, 2002.

Ching, Francis D.K. Building Construction Illustrated. New York: Van Nostrand Reinhold Company, 1975.

Foster, Gerald. American Houses: A Field Guide to the Architecture of the Home. Boston: Houghton Mifflin, 2004.

McAlester, Virginia and Lee McAlester. A Field Guide to American Houses. New York: Alfred A. Knopf, 1998.

Walker, Lester. American Homes: An Encyclopedia of Domestic Architecture. New York: Black Dog & Leventhal, 2002.

SECTION 8 – SAMPLE FORMS

(Revised)

APPLICATION FOR A LEASEHOLD PROJECT PERMIT

NEIGHBOR REVIEW OF PROPOSED PROJECT

LEASEHOLD PROJECT PERMIT

BGA COMMITTEE DESIGN REVIEW CHECKLIST

The appropriate number of copies of this application and the required Project Documents must be provided to the General Manager for distribution to the BGA Committee (four copies) and the Neighbors (one each). The General Manager will mail the copies of the Application, to the Neighbors listed below within five business days of receipt of this Application, provided the Application is in order.

The Neighbors (as defined above) to whom a copy of this Application, the Project Documents, and the Neighbor Review of a Proposed Project form should be given are:

1. Name: _____ Cottage: _____
2. Name: _____ Cottage: _____
3. Name: _____ Cottage: _____
4. Name: _____ Cottage: _____
5. Name: _____ Cottage: _____

Applicant Name: _____

Cottage Name: _____ Lot: _____ Block: _____

Permanent Address: _____

Phone: _____

I will contract for this project and be fully responsible for all contracts and clean-up during and upon completion of the project.

Member-Lessee Signature: _____ Date: _____

PROJECT TYPE 1 SUBMITTAL CHECKLIST

(TO BE COMPLETED, INITIALED, AND SUBMITTED BY THE APPLICANT TOGETHER WITH THE APPLICATION)

(INT)

- _____ The project encompasses new construction or alterations to the structure of an existing building on my leasehold.
- _____ The project documents include a clear and specific description of the work
- _____ *(Initial if applicable)* The existing cottage, or a portion thereof, is to remain and an electrical and/or foundation inspection has been conducted by a qualified professional and a written report has been provided to the General Manager.
- _____ Every project document contains my name and the date.
- _____ The construction drawings furnished for approval by the BGA Committee have been prepared by a design professional or home designer.
- _____ Every construction drawing contains a title block with the date drawn and all revision dates.
- _____ The site plan(s), floor plans, and elevations include identifying labels and directional symbols indicating north, south, east and west.
- _____ The construction drawings have been dimensioned and drawn to a clearly indicated scale.
- _____ The construction drawings include a site survey prepared by a licensed professional depicting the footprint of the new building or addition and the footprints of the adjacent cottages.
- _____ The site plan clearly indicates the lot lines and building set backs, the location of the new building footprint, the existing building footprint (if there is an addition or a portion of the existing building is to be demolished), and the location of all structures, equipment (e.g., HVAC units), propane tanks, and required screening to be constructed, placed, or installed.
- _____ The site plan indicates all changes on a lot that may alter storm water runoff or existing site drainage. The location of downspouts and their discharge, as well as, the provision for storm water retainage and drainage, has been shown.
- _____ The construction drawings for a replacement building or addition have included a highlight of the existing structure in each plan and elevation view.
- _____ The elevations have been rendered with shade and shadow or perspective drawing(s) depicting the overall appearance are included.
- _____ Photos of the existing and adjacent cottages' facades, with heights indicated, are included.
- _____ The cut sheets and/or samples of the exterior materials including siding, trim, shutters, ornamentation, roofing, doors, windows, decking, and railings are included
- _____ A colors and materials board with a description of where the materials are to be used is included.
- _____ *(Initial if applicable)* The site plan requirements for a Project Type II and/or Project Type IV have been met for the work described under those Project Types.
- _____ *(Initial if applicable)* Variance Request Form(s) have been included with the application materials.
- _____ My architect, contractor and I have attended a Preliminary Design Review meeting, and the recommendations of the Building, Grounds and Architectural Review Committee have been incorporated into my project plans.
- _____ Consideration has been given to parking and automobile access.
- _____ Trees planned for removal have been clearly marked on the site plan.

Variance Request Form

The BGA Committee requires that all Type I projects conform to the guidelines set forth in the Epworth Construction and Landscaping Standards and the limitations imposed in the cottage Building Envelope. This form is to request considerations outside BGA Committee policy. The following is to be completed by the Applicant or Applicant's designee.

Cottage Name: _____

Lot Number: _____

Block Number: _____

Member-Lessee: _____

A Variance is being requested for the following reason(s) (please check all that apply):

☐ Medical needs

☐ Human safety

☐ Structural requirements

☐ Aesthetic considerations

☐ Other (please specify): _____

Briefly describe the nature of the Variance request and why you feel the proposed project cannot reasonably be executed in conformance with the Standards and the Building Envelope:

	<u>Approved</u>	<u>Denied</u>	<u>Date</u>
BGA Chairman _____	_____	_____	_____
BGA Member _____	_____	_____	_____

General Manager/BGA Committee Comment(s):



LEASEHOLD PROJECT PERMIT

PROJECT LOCATION

Cottage Name: _____

Lot Number: _____

Block Number: _____

Member-Lessee: _____

Daytime Phone Number: _____ Cell Phone Number: _____

Brief Description of work to be done: _____

Cost of project: \$2,501-\$25,000 \$25,001-\$100,000 \$100,001-\$250,000 \$250,001+

Work to be performed by (check one): Member-Lessee **OR** Contractor

Contractor Name: _____

Address: _____

Office Phone Number: _____ Cell Phone Number: _____

The responsibility for adherence to the Epworth Assembly "Construction and Landscaping Standards," and the Epworth Assembly rules described in the most current "Epworth Reference Guide," having been read and understood, is hereby accepted.

Member/Lessee Signature _____ Date _____

Contractor Signature _____ Date _____

ALL REQUIREMENTS FOR THE LEASEHOLD PROJECT PERMIT HAVE BEEN SATISFIED.

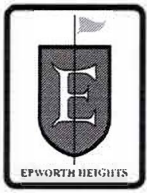
General Manager _____ Date _____

Approved Denied

BGA Chairman _____ Date _____

BGA Member _____ Date _____

General Manager/BGA Committee Comment(s): _____



NEIGHBOR REVIEW OF A PROPOSED PROJECT

Please complete this form and return it to the Epworth Office, as soon as possible, so that your response may be considered before the Application for a Leasehold Project Permit has been acted upon. **Any Neighbor who has not responded within fourteen (14) days from the receipt of mailing will be assumed to have no concerns.** However, the BGA Committee reserves the right to contact those who have not responded and extend the review period. Neighbors have up to seven (7) days for subsequent reviews of updated plans, and seven (7) days to appeal the decision of the BMA committee once rendered.

Cottage name where work is to be done: _____

Name of Member-Lessee Applicant: _____

Project _____ Date: _____

☐ I have no concerns about the proposed project as described and depicted in the Application and Project Documents shown to me.

☐ I have concerns about the proposed project, as described and depicted in the Application and Project Documents shown to me, for the following reasons: (Please set forth your objections, and/or any other comments or suggestions that you desire, in the space provided below, and/or on a separate signed and dated page(s) attached hereto.)

Date: _____ Cottage: _____

I understand that while I have the right to express my opinions, concerns and suggestions regarding the proposed project in question, I do not have "veto" power over such project.

Signature of Member-Lessee Neighbor _____

BGA PERMITTING REVIEW CHECKLIST

Cottage Name: _____

Date: _____

Block: _____

Lot: _____

Member-Lessee Applicant: _____

Member-Lessee's Address: _____

Member-Lessee's Telephone: _____

SITE:

Location:

_____ The project harmoniously integrates into the overall topography of the site.

_____ The project harmoniously integrates into the surrounding built environment.

Front Setback:

_____ The front setback of the project conforms with the overall pattern of the surrounding area at all levels of the cottage.

Rear Yards:

_____ The rear yard allows for open space of the subject lot.

_____ The rear yard allows for the overall open space of the mid-block.

Side Yards:

_____ The side yard maintains light and air for the subject lot.

_____ The side yard reflects the overall pattern of development in the surrounding area.

BUILDING ENVELOPE:

Roofline:

_____ The roofline of the proposed project follows the pattern of adjacent or surrounding cottages.

Volume and Mass:

_____ The volume and mass of the proposed project is compatible with the surrounding cottages.

_____ The design of the penetrations and articulation of the facade is consistent with those of the surrounding area.

SCALE:

Dimensions:

_____ The plan and height dimensions of the project is compatible with the cottages in the surrounding area.

_____ The proposed height of the project is consistent with heights of adjacent or surrounding cottages.

Proportions:

_____ The proportions of the massing of the project is compatible with the massing of cottages in the surrounding area.

_____ Openings and ornamentation proportions is consistent with those of cottages in the surrounding area.

TEXTURE AND DETAILING:

Exterior Materials:

_____ Materials of the project reflects the existing materials and/or those of the surrounding area.

Ornamentation:

_____ The level of ornamentation is consistent with the design of surrounding cottages.

OPENINGS:

Entryways:

_____ The entryway is proportioned, articulated, and decorated in a consistent manner with surrounding cottages.

Windows:

_____ Proportion of solid to void is compatible with that of cottages in the surrounding area..

_____ Window material and design is compatible with that of the cottages in the surrounding area.

Garage Doors:

_____ The garage door is recessed or setback from the front façade, where applicable.

LANDSCAPING:

_____ There is sufficient unpaved open area for landscaping in the front setback area of the project, where applicable.

RESTRICTIONS:

_____ The project is clearly proposed for one unit.

_____ On site parking is maintained, where applicable.

NEIGHBOR'S REVIEW COMMENTS:

_____ Neighbor's review comment forms, received within the required time period, have been considered.

2.4 - Member-Lessee's Design Worksheet

Member-Lesseees are encouraged to use this worksheet as the initial step in the design process for their proposed project.

Once a design professional has been engaged to prepare the required Project Documents (see section titled "Project Types and Submittal Requirements"), the designer should reference the sections titled 'A "GUIDE" TO THE DESIGN GUIDELINES' and 'GLOSSARY OF ARCHITECTURAL/DESIGN TERMS'

A number of factors will contribute to a successful design and review process. These include:

Looking Around

A focused tour of existing cottages in Epworth can be instructive prior to starting the design process. The abundance of successful designs in differing settings can offer ideas about new cottages and alterations to existing cottages. Touring the neighborhoods and taking note of exemplary architecture, speaking with other Member-Lesseees and observing BGA Committee design review meetings can provide a reliable list of design professionals and home designers adept at getting their projects built.

Familiarity with the Guidelines

By becoming acquainted with this document, applicants will be conversant in the same range of topics as Epworth staff and the BGA Committee.

Selecting a Design professional

An early step in the process of landscaping a leasehold lot or designing and building a new cottage, an addition, or alteration, should be the selection of a design professional. It will be extremely beneficial to the project if the design professional is familiar with development conditions along Michigan's lakeshore in general and Epworth specifically. Applicants should meet potential designers, get a feeling for the designer's approach to residential design, and visit built examples of their work. There is a wide range of talent among design professionals. The BGA Committee's design review response is frequently a direct reflection of the designer's ability and experience.

Neighborhood Involvement

Early discussions with Neighbors can facilitate the design process by alerting the applicant and designer to potential neighborhood concerns. The early development of a dialogue that communicates design issues can mediate neighborhood concerns and lead to fewer delays as the project goes through the review process.

Complicated Projects and Modern Designs

Projects that are potentially controversial because of their size or complicated site constraints will elicit a more extensive consideration by the BGA Committee and will require that the applicant engage an experienced design professional. Similarly, cottages designed in a modern architecture style or renovations that deviate significantly from a cottage's established style require a well-experienced design professional and will receive greater scrutiny by the BGA Committee.

Epworth Staff Consultation

Epworth staff, together with consultants engaged by Epworth for the purpose of assisting in the application review process, can advise applicants on the review process and can also assist in keeping a project on track.

BGA Committee Process

Cottagers and their design professionals are required to visit with the BGA Committee (and the committee's consultants, if applicable) during the preliminary design of new construction. The Preliminary Review provides for early BGA Committee feedback regarding the initial design direction and can save time in the design process by assuring that the applicant and the BGA Committee are viewing the project with similar goals. Later in the process, the BGA Committee will review a project and either approve it, deny it, or specify conditions under which it can be approved in the future.

Communicating the Design

There are a number of ways that applicants and their design professionals can communicate the implications that new construction will have for the block face and neighborhood in which it is proposed. Projects can sometimes be delayed by inadequate communication of the design. Methods for communicating the design include perspective renderings, computer simulations of before and after conditions, or three-dimensional models. The goal is to communicate to the greatest degree possible the design intent of the proposed project.

2.4 - Member-Lessee's Design Worksheet (continued)

Answering the following questions will help to create a detailed awareness of the neighborhood, block face, and site of the proposed project. This approach will give a better understanding of how to address the conditions and challenges of the project.

A. Siting

What is the history of development or dates of construction (eclectic, historical, etc.)?

Do the existing cottage locations create a consistent and rhythmic building setback?

What are the overall lot characteristics (shape, size, topography)?

Are there any site conditions that affect the project's height, setback lines, garage and driveway location, and/or landscape challenges (ravines, access easements)?

For my project, how can the location, shape, and size of the cottage, garage, and driveway complement the adjacent cottages?

B. Building Envelope

What is the predominant roof pitch, type, and material?

Is there an obvious pattern formed by the heights of the neighboring cottages?

What type of roof lines do the neighboring cottages have?

What type of cottage is neighboring this property (one-story, two-story)?

What are the plan dimensions and the proportions of the massing of the adjacent cottages?

What type of ornamentation do the neighboring cottages have?

C. Texture and Detailing

What is the predominant façade material?

What are the dominant architectural features (front porches, dormers, etc.)?

D. Openings

What is the predominant orientation of the fenestration¹ (vertical, horizontal)?

What are the proportions of the openings?

E. Landscaping

What are the dominant landscape features?

What are the unique features of the property?

Are there significant trees or mature vegetation on the property?

Do the neighboring cottages have formal landscaping along the block face?

What types are driveways and/or on site parking areas are dominant in the neighborhood?

For my project, how can common characteristics of the existing cottages be incorporated into this project (materials, architectural details, roof pitch, landscaping, etc.?)

⁽¹⁾ *The arrangement and design of windows and openings in a building*

7.4 – PROJECT FEE SCHEDULE

Leasehold project fees are listed as a separate line item in the Epworth Assembly financial records. The monies from the leasehold project fee account are used to partially offset the expenses associated with project related activities.

Project related expenses encompass professional service fees for outside consultation and the additional administrative costs of project documents reproduction, telecommunications, certified mailings, documenting additional information related to the project, and office equipment depreciation. Further, there are expenses related to the maintenance of Epworth's infra-structure that is subjected to heavy construction traffic, causing subtle, but cumulative, wear and tear on roadways, walkways, vegetation and drainage systems.

Additionally, a security deposit paid by the contractor prior to the commencement of work is used to cover potential damage to the infra-structure that is immediately obvious during construction. A post construction inspection is done by the Epworth staff to determine what portion of the deposit is to be returned to the contractor.

Project Fees

Fees are paid after the Leasehold Project Permit has been issued but prior to the written Authorization to Commence Work being executed.

- Projects with an estimated cost of \$100,000 or more\$2,500

Consultation Fees

Fees are paid after the Leasehold Project Permit has been issued but prior to the written Authorization to Commence Work being executed.

- Applicants shall reimburse Epworth for actual costs incurred..... \$

Miscellaneous Fees

Fees are paid prior to the service being rendered.

- Leasehold lot line staking \$100

(Not charged when needed for a construction project)

Water/sewer hook up by Epworth staff At Cost

Contractor security deposit for potential damage to infrastructure\$2,500