

**2010 Certified Local Government Grant
City of Monterey National Historic Landmark District Survey and Context Statement
Scope of Work and Schedule**

Project Summary

The City of Monterey received a \$25,000 grant from the State Office of Historic Preservation (OHP) for the preparation of a National Historic Landmark District Survey and Context Statement. The City has contracted with a consultant meeting the Secretary of the Interior's Professional Qualifications for historian or architectural historian as set forth in 36 CFR part 61, Appendix A to work with qualified City staff to develop a historic context statement and conduct an intensive level survey of the area inclusive of, and surrounding, the Monterey Old Town National Historic Landmark District (NHLD) (see attached map).

The historic context statement will identify the themes in the historical development of this area significant at local, state and national levels, establish periods of historical significance, identify associated property types with their character defining features, and establish evaluation criteria and integrity thresholds for important property types sufficient to provide a framework for evaluating resources individually and as district contributors for the National, California, and local registration programs. Although the context will address the appropriate themes and boundaries for the NHLD and establish eligibility requirements for the district, it will also address the identification and evaluation of additional themes and property types using National Register, California Register, and local register criteria. The complete survey will serve a framework for the eventual resubmittal of the NHLD nomination to the National Parks Service (NPS) for recertification.

Project Scope

On April 15, 1970, the Monterey Old Town Historic District was designated a National Historic Landmark (NHL) by the National Park Service (NPS). Since the designation of the Monterey Old Town Historic District in 1970, NPS has adopted amendments to the National Historic Preservation Act that require nominations to include identification of historic themes, landscape features, archeological potential, and the location of significant historic events. This project will serve to update and reevaluate Monterey's NHLD to address the new requirements for NHL districts.

Although the City of Monterey maintains a diligent approach to the preservation of historic resources, infill development and other improvement projects pose a threat to the NHLD. Since the original nomination does not identify historic themes, landscape features, archeological potential, and the location of significant historic events; development and improvement projects have the potential to compromise the integrity of the district. In addition there is a need to evaluate nationally significant historic properties in the vicinity of the district to determine whether or not their inclusion is warranted.

The focus of the City's historic preservation program on community resources and the development of neighborhood historic contexts further reinforce the need for the development of a context statement and the documentation and evaluation of previously overlooked resources for inclusion in the NHLD. Further, the survey and context statement will lead to the refinement of the NHLD, which will enable the City and the community to continue to solidify efforts to establish a strong heritage tourism program, thus strengthening the economic viability of Monterey and establishing the City as a national destination.

The City's Historic Master Plan, adopted in 2000, establishes a framework for preserving and interpreting historic, archaeological and cultural resources in Monterey. The Plan has two main goals: 1) Integration of governments and non-profit historic preservation and interpretation efforts; and 2) Protection of historic resources (landscapes, sites, buildings, artifacts and memories). Objectives include: the coordination of efforts to make Historic Monterey a destination; making the City's history more comprehensible for its citizens; establishing a proactive program to preserve areas and resources of historic significance;

conduct, maintain and update historic surveys; preserve historic landscapes; and develop and encourage interpretive programs and collection of artifacts and memories.

The City has identified the resolution of the NHLD boundary and resurveying of contributing properties as a priority in order to comply with the goals and policies outlined in Monterey's Historic Master Plan.

On May 14, 2009, the City of Monterey hosted a public workshop with national, state, and local leaders in historic preservation to define the steps necessary to submit a request to NPS for redesignation of the NHLD. Participants included the National Park Service, National Trust for Historic Preservation, California State Parks, Historic Preservation Commission, representatives from local preservation groups, and property owners. This workshop served as the foundation for developing a scope of work for the project. The context statement and survey will be the first step in this process.

The project consists of conducting an historic survey of an area that includes, and goes beyond, the existing NHLD boundaries to develop a context statement which will identify historic themes and provide the basis for the survey and eventually the redefining of the NHLD boundary. Many of the buildings within the district already have intensive surveys that will need to be reworked to meet today's Department of Parks and Recreation standards for surveys. The project will produce a list of contributing and non-contributing properties to be included in the updated NHLD.

Monterey's NHLD includes a unique mix of privately and publically owned properties, including many properties owned and operated by the NPS, State of California Monterey State Historic Park, the National Trust, and the City of Monterey. This project is anticipated to identify nationally significant historic resources previously overlooked by past efforts. The inclusion of these resources in the NHLD will provide a level of protection through local, state and federal laws. Additionally, the solidification of the NHLD will enable the City to move forward with designation of a local historic district to provide the most protection of the resources within the NHLD.

The success of this project can only be accomplished through education and outreach to community groups and the general public. Education and outreach will be provided to the community at all stages of the project. The public will have a unique opportunity to gain preservation education through charrettes, survey work, and coordination with City staff, the National Park Service, the National Trust and the Office of Historic Preservation.

The process includes three community meetings with stakeholders, including private property owners, the National Trust for Historic Preservation, the National Park Service and the City of Monterey, and residents. The public will also have the opportunity to participate during Historic Preservation Commission meetings during review of the draft context statement and adoption of the context statement and survey. All draft and final products will be made available on the City's website and at the Planning Office.

The City of Monterey currently promotes Mill's Act contracts for qualifying properties. The program has been very successful and residents are realizing the benefits of the incentive. It is anticipated that the context statement and survey will identify additional properties that could benefit from the Mill's Act program, as well as, enhance the City's Heritage Tourism program.

The City of Monterey takes great pride in its historic resources and is continually seeking improved ways to promote its rich history. This project will enable City policy makers to launch advanced preservation programs based on the newly defined NHLD. City staff anticipates that the NHLD will serve as the base historic district, from which new interpretive programs can be developed and established.

The context statement and survey will be completed using the Department of Parks and Recreation standards and Forms 523 A and D. The survey will be consistently applied when projects involving

identified historic resources are proposed to prevent improper and potentially damaging effects to these resources.

The survey will provide written and photographic documentation of resources and their status as contributing or noncontributing to the NHL. It is estimated that between 150 and 200 resources (building, structures, landscapes, sites and objects) may be surveyed. After survey data is organized and evaluated, the district context statement will be refined as necessary and finalized.

The City's adoption of the context statement and survey will mark the end of the grant cycle. The City will complete the NHL update process using staff resources and/or funds secured through additional resources. Final tasks will include the reevaluation of district boundaries and preparation of the required documentation for filing with NPS.

Personnel

The City has contracted with Architectural Resources Group, a consultant specializing in preservation planning, historic research and field inspection and meets the Secretary of the Interior's Professional Qualification Standards to prepare the context statement and conduct the intensive survey according to the task and timeline schedule below.

Elizabeth Caraker, Principal Planner will serve as project manager to provide consultant management and overall coordination of the process. Christine Hopper, Senior Associate Planner will serve as primary staff on the project and will prepare the background report, review all consultant products, and prepare staff reports and presentations for the Historic Preservation Commission. Due to Staff's expertise in historic preservation and coordination with SHPO, their role will provide maximum support and efficient and comprehensive review and comments to the consultant, maximum responsiveness to SHPO, and will result in a cost-effective process.

Summary of Tasks and Schedule

Month	Task	Staff	Deliverable
Task 1 – Consultant Selection and Management			
Sept.	1a. Prepare and distribute RFP to qualified professionals	Principal Planner	RFP
Oct.	1b. Review proposals, select consultant	Principal Planner	
Oct. 14	Historic Preservation Commission recommendation to City Council to initiate survey	Principal Planner Sr. Associate Planner	
Oct. 19	City Council takes action to initiate survey	Principal Planner Sr. Associate Planner	
Oct.	1c. Execute contract, notify OHP before November 8	Principal Planner Consultant	Executed contract
Task 2 – Background Report			
Oct- Nov.	2a. Identify Stakeholders, prepare notification and participation list	Principal Planner Sr. Associate Planner	
Nov.	2b. Collect Background Information including GIS maps with background information (ownership, year built, architectural themes, cultural landscape features, etc.), photograph all resources, collect existing survey forms, and historic structure reports, prepare list of resources	Principal Planner Sr. Associate Planner	
Dec.	2c. Conduct Community Meeting, tour district with key stakeholders, facilitate discussion about district (historical resources, character defining features, potential themes)	Principal Planner Sr. Associate Planner Consultant	
Dec.	2d. Prepare meeting summary consisting of meeting description, notes, and comments received	Principal Planner Sr. Associate Planner	Meeting Summary

Dec.	2e. Prepare Background Report to include all resources from Tasks 2a – 2d.	Principal Planner Sr. Associate Planner	Background Report
Task 3 – Develop Context Statement			
Dec – Jan.	3a. Prepare draft context statement. Submit to City draft of the historic context statement reflecting the extent of work accomplished to date, and a rationale for the survey boundaries by January 30, 2011	Consultant	
Feb.	3b. City to review and forward draft context statement to OHP (and NPS) for comment by February 11. City to summarize OHP comments and forward to consultant	Principal Planner Sr. Associate Planner	Draft Context statement
Feb. – March	3c. Revise draft context statement as necessary	Consultant	
March	3d. Present draft context statement at community meeting	Principal Planner Sr. Associate Planner Consultant	
March	3e. Prepare meeting summary consisting of meeting description, notes, and comments received	Principal Planner Sr. Associate Planner	Meeting Summary
March	3f. Revise draft context statement as necessary	Consultant	
April	3g. Present revised draft context statement to Historic Preservation Commission on April 14 for comment	Principal Planner Sr. Associate Planner	
April	3h. Finalize revised draft context statement, prepare samples of the survey documentation, submit to City by April 25.	Consultant	
May	City to submit revised context statement and samples of the survey documentation to OHP by May 2	Principal Planner Sr. Associate Planner	Revised Draft Context statement
Task 4 – Survey District Resources			
May - June	4a. Conduct survey, prepare survey forms, submit survey forms to City by July 4	Consultant	
July	4b. Review and forward draft survey forms to OHP (and NPS) for comment. Summarize comments and forward to consultant by July 11	Principal Planner Sr. Associate Planner	Draft Survey Forms
July - August	4c. Revise historic survey forms as necessary	Consultant	
Sept	4g. Consultant to prepare and submit to the City by September 20 Final Context Statement and Survey to include <ul style="list-style-type: none"> An historic context statement for the area inclusive of, and surrounding, the Monterey Old Town National Historic Landmark District (NHLD). The electronic equivalent of DPR 523 A, B, and D forms for resources within the survey area with GIS data and California Historical Resource Status Codes. A Final Survey Report which documents the 1) project objectives; 2) area surveyed; 3) research design; 4) methodology; 5) results; 6) recommendations. The results section will include a discussion of how the survey findings will be incorporated into local planning. City to submit to OHP by September 30	Principal Planner Sr. Associate Planner Consultant	
Oct- Nov.	4h. Present Draft Survey to Historic Preservation Commission and City Council for adoption	Principal Planner Sr. Associate Planner Consultant	Adopted Survey

