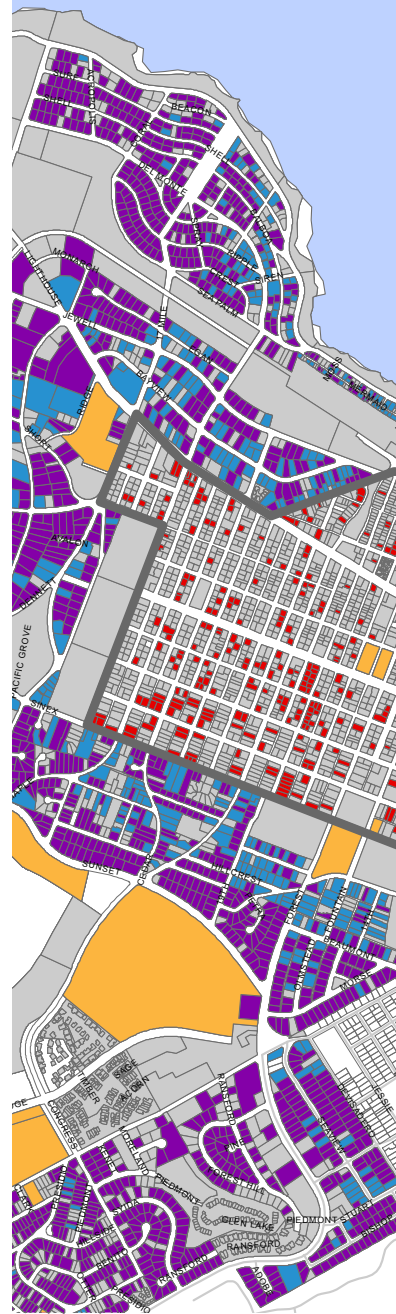


# PACIFIC GROVE PRESERVATION PROGRAM CONSIDERATIONS

PACIFIC GROVE, CALIFORNIA

Prepared for  
CITY OF PACIFIC GROVE



31 OCTOBER 2011

FINAL



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**Final  
31 October 2011**



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## **A. Introduction**

This document serves as a supplement to the City of Pacific Grove Historic Context Statement, and provides suggestions for tasks that could be considered by the Pacific Grove community as the City's preservation program is further developed in the future.

The City of Pacific Grove has already taken several critical steps to protect its historic resources, including the adoption of a Historic Preservation Ordinance, the creation of a Historic Resources Inventory, the establishment of a Historic Resources Committee, and the inclusion of historic preservation goals in the City's current General Plan (See Chapter II of the Historic Context Statement for a complete overview of Pacific Grove's existing historic preservation program).

The research and policy recommendations presented here are intended to help prioritize future historic preservation related efforts, as well as ensure appropriate treatment for those properties already listed as historic resources. These recommendations are suggested as "next steps" for the City to consider, after the Historic Context Statement (HCS) has been implemented and used. The recommendations included in this document are based on discussions held during the HCS public comment process, "best practices" in the historic preservation field, and Page & Turnbull's experience in other jurisdictions. Please note that except for Recommendation #1 which could be implemented as part of existing processes, City decision-makers and the Pacific Grove community would need to take further action in order to move these recommendations forward. A participatory public process would further vet and tailor these recommendations to the needs and desires of Pacific Grove.

## **B. Summary of Recommendations for Future Preservation Efforts**

The Historic Context Statement found that surviving examples of Pacific Grove's nineteenth century development are historically significant for associations with the founding of Pacific Grove as both a religious retreat and its early development as an incorporated resort community. Many buildings developed during the early twentieth century may also be significant for their associations with a key transitional period in the city's development. It is the opinion of this study that much of Pacific Grove's post-World War II development is unlikely to be historically significant, save for those buildings that serve as outstanding examples of mid-century property types and/or architectural styles.

It appears that many of the city's historically significant buildings are already included in the city's Historic Resource Inventory (HRI). However, the HRI is based primarily on surveys conducted during the 1970s, and many potentially significant buildings constructed after 1926 were not studied. Thus, it is recommended here that the City undertake focused survey efforts to identify additional buildings that may qualify for listing in the HRI. This includes a study of buildings constructed

between 1927 and 1945 in the historic core area of the city, as well as a survey of the city's post-war subdivisions to identify potentially significant buildings constructed during this era.

Conversely, since the establishment of the HRI during the 1970s, some buildings listed on the inventory appear to have been altered to the extent that they have lost their historic integrity. Thus, it is recommended that the context statement be used on a case-by-case basis to help resolve questions as to whether individual properties should be deleted from the HRI.

It is important to note that while the HRI focuses on individual properties, Pacific Grove may also wish to consider protection of its historic resources through the creation of historic districts and/or conservation zones. The primary benefit of such efforts would be to protect the historic character of designated areas through the use of design guidelines and controls on infill construction. Such examples are already used by several other jurisdictions in California, and it is recommended that the City look to these efforts for further guidance.

Finally, the City of Pacific Grove may also consider updating its Historic Preservation Ordinance so that it is more closely aligned with State and National criteria, particularly as it relates to the separation of significance and integrity. Other updates to the City's preservation program might include pursuing Certified Local Government (CLG) status, as well as the creation of historic preservation incentives. For any such undertaking, community outreach and participation should be an essential component of the process.

Using the Historic Context Statement and these Recommendations as a foundation, the City can continue its efforts to promote responsible stewardship of historic resources, and to engage and educate the community about historic preservation in Pacific Grove.

## **C. Definition of Terms**

The following terms are used throughout this document, and are defined here for reference:

**Windshield / Sidewalk Survey** – A visual or predictive survey of a large area that records the physical attributes of historic properties, but does not include property-specific historic research. Survey work is typically conducted by car or on foot, and only those features visible from the street are recorded. Deliverables may include a survey report or recommendation memorandum that synthesizes the findings.

**Reconnaissance Survey** – A basic level of documentation that concerns only the physical attributes of a historic property, with a preliminary evaluation based solely on architectural qualities. For the most part, reconnaissance-level documentation is based purely on visual observation and information collected in the field. Some additional information garnered from city data may also be included, but property-specific historic research is not typically included. Deliverables may include a

list or database recording the findings, as well as individual inventory forms, if desired (DPR 523 A forms in California).

**Intensive Level Survey** – A detailed study of an area which includes an architectural survey, historic research, and an evaluation of significance for each property. In addition to DPR 523A forms, deliverables may include individual inventory forms and district records (DPR 523 B and D forms), and a historic context statement documenting existing conditions and historical background.

**Historic District** – Defined by the National Park Service as “a significant concentration, linkage, or continuity of sites, buildings, structures, or objects united historically or aesthetically by plan or physical development.” Districts must be a definable entity with distinct boundaries or characteristics, and can contain both contributing and non-contributing elements. A historic district can be designated at the local, state, or national level, depending on the significance and integrity of the resources.

**Conservation Zone** – Conservation Zones, known in some jurisdictions as Historic Preservation Overlay Zones, are a way to provide protection and design review for historic resources through zoning policies. Because they are administered differently, Conservation Zones may offer more flexibility than traditional historic districts. Conservation Zones are often “combined zoning districts,” where a parcel’s historic status is appended to its other zoning classifications.

**Period of Significance** – According to the National Park Service, “Period of Significance is the length of time when a property [or district] was associated with important events, activities, or persons, or attained the characteristics which qualify it for National Register listing.”<sup>1</sup> Establishing a period of significance is an essential part of any historic resource analysis, and can be especially helpful when deciding whether or not a historic district is present.

**Design Guidelines** – These are preservation tools designed to protect the historic character of a neighborhood by regulating height, bulk, and the character of alterations and infill development. Design Guidelines can be completed in conjunction with, or following, an intensive-level survey or some other type of area character appraisal. The guidelines provide property owners, architects, and city officials with information regarding appropriate rehabilitation, and/or how new construction should complement historic fabric.

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<sup>1</sup> National Park Service, *National Register Bulletin 16A: How to Complete the National register Registration Form* (1997), 42.

## **D. Recommendations / Next Steps**

The following section provides a list of recommended “next steps” to be considered by City decision-makers and the Pacific Grove community.

### **#1: CONTINUE TO ADD OR DELETE INDIVIDUAL BUILDINGS FROM THE CITY’S HISTORIC RESOURCE INVENTORY (HRI) ON A CASE-BY-CASE BASIS**

When a development project is proposed that involves an older building, the Pacific Grove Community Development Department requires that buildings that are 50 years of age or older and not listed on the HRI be evaluated as to whether they meet the criteria of a historical resource. An owner may request an Initial Historic Screening or have a Phase 1 Historic Assessment prepared by a qualified historic consultant in order for the City to make a Historic Determination. If an Initial Historic Screening is inconclusive as to a building’s eligibility as a historical resource, a Phase 1 Historic Assessment is required. Once the assessment is made, it is entered into the HRI database. It is recommended that this existing process continue to be used to add or delete individual buildings from the HRI on a case-by-case basis.

The City’s current Historic Assessment process is required in order to comply with the California Environmental Quality Act (CEQA). The Pacific Grove Historic Context Statement will provide useful information to aid in the preparation of Phase 1 Historic Assessments by qualified consultants, potentially reducing the time and cost involved. Using the HCS as a foundation for Phase 1 Historic Assessments will help to strengthen and accredit the HRI, which includes approximately 1,300 buildings, about 21% of Pacific Grove’s total parcels.<sup>2</sup> The HCS will also be very helpful to the Historic Resources Committee, and should be used as a reference point when questions arise concerning the significance or integrity of individual properties.

### **#2: CONDUCT ADDITIONAL HISTORIC RESOURCE SURVEYS**

Many of Pacific Grove’s historic resources have been previously documented through survey efforts that resulted in the City’s Historic Resource Inventory (HRI). The HRI provides an excellent foundation for the City’s preservation efforts, but it should be updated periodically to reflect current standards and/or correct errors. Based on a preliminary review of properties currently listed in the inventory, it does not appear that a wholesale revision of the HRI is warranted. Although Pacific Grove’s HRI is generally comprehensive, relatively few buildings constructed post-1926 or located outside the City’s historic core were listed. Surveys that focus on adding younger properties to the inventory should be conducted as follows:

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<sup>2</sup> Rough calculation by Page & Turnbull in September, 2011, based on best-available GIS parcel information obtained from the Monterey County Assessor.

- **HRI Deletions Survey**

The Historic Resources Committee has already identified a number of properties throughout the City that are currently listed in the HRI, but appear to lack integrity. Although deletions from the existing HRI could occur on a case-by-case basis (Recommendation #1), these low-integrity properties could be formally identified through a survey, using the significance and integrity thresholds provided in the Historic Context Statement as a guide. Those properties found to lack integrity could then be removed from the HRI as part of a broader effort to improve the existing inventory. However, if undertaken, the implications of deleting a group of properties from the HRI should be considered under the California Environmental Quality Act (CEQA).

- **“City of Homes” Historic Core Survey**

Pacific Grove’s prior survey efforts focused primarily on pre-1926 resources, especially Victorian and turn-of-the-century architecture in the city center. Thus, it is recommended that an intensive-level survey of the historic core (original Retreat & First through Fifth Additions) be conducted with a focus on buildings constructed during the “City of Homes” period (1927 - 1945). This survey would expand the age range, property types and architectural styles examined by previous surveys, encompassing items such as period revival architecture, auto-related industrial and commercial buildings, and other important property types and themes that are significant to Pacific Grove’s history.

- **Historic Outliers & Early Subdivisions Survey**

Because Pacific Grove’s prior survey efforts focused primarily on resources in the city center, it is also recommended that a survey be conducted of properties constructed before 1945 *outside* the Historic Core to expand the HRI geographically. This survey would include a handful of Victorian-era and turn-of-the-century residences, as well as important early subdivisions such as Spazier’s Addition, the Hillcrest Tract, Country Club Heights, Pacific Grove Beach Tract, and Pacific Grove Acres. This Historic Outliers & Early Subdivisions Survey would ideally be carried out in conjunction with the City of Homes Historic Core Survey, but could also be undertaken as a separate phase to accommodate budget constraints.

- **Suburbanization Survey**

It is recommended that a reconnaissance survey of neighborhoods developed during the post-war era be conducted, with a focus on identifying outstanding examples of property types and/or architectural styles. Neighborhoods such as Pacific Grove Acres, Pacific Grove Beach Tract, Del Monte Park, Sea View Tract and Marino Pines were late to develop and have a high concentration of post-war resources. These neighborhoods have not been previously surveyed; being proactive about identifying historic resources and ineligible properties in these areas would help to streamline the Historic Assessment process and relieve the burden on property owners.

The context statement suggests that post-war residences in Pacific Grove are not likely to be significant as a group, but may be significant as individual examples of a type or architectural style. At the conclusion of a focused reconnaissance survey, a list of properties deemed ineligible for inclusion on the HRI could be easily created, and additional research could be

conducted on potential historic resources. This survey could be carried out as one large project (a few thousand properties), or could be phased over the course of several years. Methodology for such a survey should be developed in consultation with the California Office of Historic Preservation.

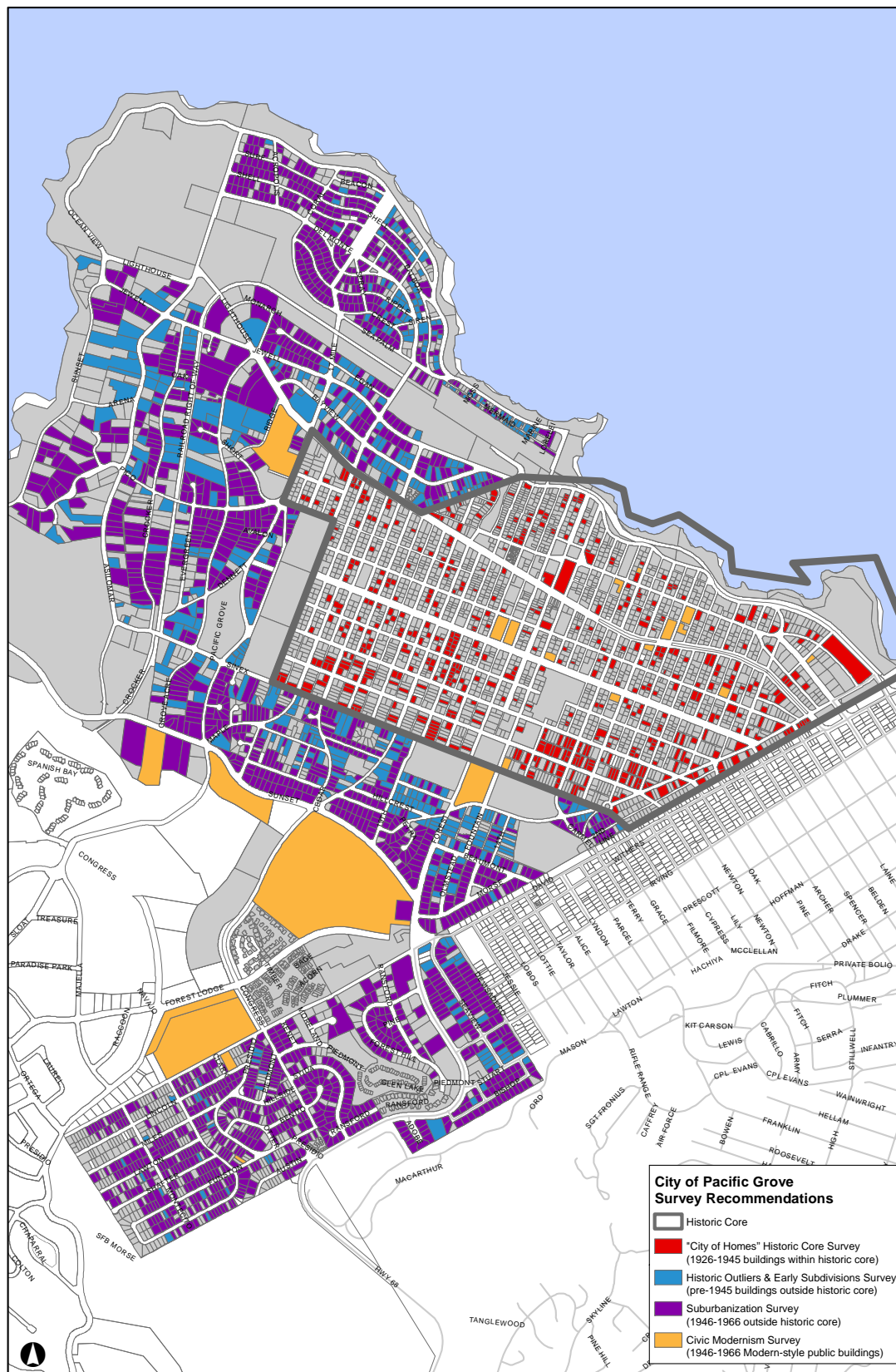
- **Civic Modernism Survey**

Research for the context statement suggests that post-war public assembly (especially churches) and commercial properties are more likely than residences to exhibit the hallmarks of Modern architectural styles. Thus, an intensive-level survey of these property types focused on Modern-style buildings 45 years or older is recommended. Looking at these resources as a group would provide the best comparative information on which to base significance and integrity evaluations.

#### **Surveys: Additional Resources**

The following examples of historic resource surveys in other jurisdictions could be referenced by Pacific Grove if the abovementioned surveys are undertaken:

- **SurveyLA** is a comprehensive survey program currently underway in Los Angeles. This methodology is specifically designed to survey a large number of properties in a short period of time, and has been well-received by preservationists. SurveyLA may be a good model to apply to the Pacific Grove “Suburbanization” survey.  
<http://www.preservation.lacity.org/survey>
- The City of Napa established its **Heritage Napa** program in 2008, which began with the preparation of a city-wide historic context statement. The city has since completed intensive-level surveys of five neighborhoods, and has been using this information to systematically update its inventory:  
[http://www.cityofnapa.org/index.php?option=com\\_content&task=view&id=656&Itemid=701](http://www.cityofnapa.org/index.php?option=com_content&task=view&id=656&Itemid=701)
- A study of **San Jose Modernism** was completed in 2009, including a reconnaissance survey and focused historic context statement. San Francisco also completed a modern architecture survey and context statement in 2010. A similar approach might be appropriate for the Pacific Grove “Civic Modernism” survey. <http://www.sanjoseca.gov/planning/historic/>



Page & Turnbull, Inc. / 1 September 2011

### **#3: UPDATE HISTORIC PRESERVATION ORDINANCE**

The Historic Preservation Ordinance (Pacific Grove Municipal Code, Chapter 23.76) could be updated to improve the clarity of the city's historic preservation policies and processes, and to reflect changes to survey and evaluation methodology that have occurred since the ordinance was first written in 1994. When updating the ordinance, consider the following:

- Consider streamlining or simplifying the PGMC evaluation criteria to align more closely with National and State criteria, particularly as it applies to separating significance and integrity criteria
- Consider including a provision for cultural landscapes and other non-traditional resource types
- Consider including clear documentation requirements for both additions and deletions to the HRI (i.e. DPR 523 forms, list of character-defining features, etc.)
- Consider whether delegating some types of design review to city staff would streamline the application/design review process for the HRC.
- Consider whether establishing a multi-tiered approach to historic resources would satisfy the community's needs. With a tiered system, different levels of reviews may be warranted depending on historic status. For example, should protections and processes for National Register-listed buildings differ from those for local landmarks or historic district contributors?
- Consider including a provision for Conservation Zones and/or Historic Districts (see Recommendation #4)
- Consider whether changes to the Historic Preservation Ordinance will need to be reconciled with other aspects of the PGMC. For example, do current zoning designations (i.e. height and bulk) conflict with recommendations and goals established by the ordinance?

Additionally, community outreach and participation will be an essential component of an ordinance update. Time and funds should be dedicated to educating and engaging the public if the historic preservation ordinance is to be rewritten.

#### **Ordinance Update: Additional Resources**

The **California Office of Historic Preservation (OHP)** is the best resource regarding Historic Preservation Ordinances, with publications and links: [http://www.parks.ca.gov/?page\\_id=1243](http://www.parks.ca.gov/?page_id=1243)

- *Drafting and Amending Historic Preservation Ordinances: A Manual for California's Local Governments* (Technical Assistance Bulletin #14) identifies key issues that communities should address when drafting or revising an ordinance, and provides pros and cons to various approaches: <http://ohp.parks.ca.gov/pages/1072/files/tab14hpordinances.pdf>
- Presentations and workshops by OHP staff about preservation ordinances are available online for reference: <http://www.parks.ca.gov/pages/1054/files/fresno%204-29-2011.pdf>; <http://www.parks.ca.gov/pages/1054/files/napaord11.pdf>

The **National Park Service** has also collected information and compiled “frequently asked questions” about ordinances on an easy-to-read, user-friendly website:

<http://www.nps.gov/history/hps/workingonthepast/guardian.htm>

The following California cities have recently adopted new preservation ordinances or have undergone major ordinance updates, and thus may have information useful to Pacific Grove:

- **Napa County** (proposed update to preservation ordinance in 2011 includes more incentives, utilizes state significance criteria, and establishes a multi-tiered approach to design review): [http://www.countyofnapa.org/Planning/Landmark\\_Preservation/](http://www.countyofnapa.org/Planning/Landmark_Preservation/)
- **Alameda County** (proposed amendment to zoning ordinance in 2011 to include historic preservation issues): <http://www.co.alameda.ca.us/cda/planning/landuseprojects/phpo.htm>
- **Paso Robles** (new ordinance proposed in 2011 includes multi-tiered approach to significance and provisions for both historic districts and conservation zones): <http://www.prcity.com/Government/departments/commdev/pdf/HistoricPreservationOrdinance-Final.pdf>
- **Benicia** (revisions to the historic overlay district proposed in 2011 included simplifying the review process for applicants, adopting National Register criteria, adding provisions for deleting properties, and expanding the area where historic resources may be designated): <http://beniciaherald.wordpress.com/2011/06/25/historic-overlay-revision-nears-end/>
- **Redondo Beach** (an update to the ordinance proposed in 2003 would make it easier to designate historic districts and would clarify appropriate treatments for historic resources, but inclusion in the inventory would still be voluntary): <http://home.earthlink.net/~beckers912/presprog/news.htm>
- **Santa Cruz** (amended 2001-02): <http://www.parks.ca.gov/pages/1072/files/city%20of%20santa%20cruz.pdf>

#### **#4: CONSIDER POTENTIAL DISTRICTS AND/OR CONSERVATION ZONES**

Pacific Grove has an unusually large number of historic properties whose collective significance may benefit from the creation of historic districts or conservation zones. Previous surveys in Pacific Grove have focused on identifying the city's individually significant resources, but there may be an opportunity to better recognize and protect the city's high concentration of historic resources and overall historic character. Evaluating the presence of potential historic districts could therefore be a future step in the development of Pacific Grove's preservation program, and may be a way to introduce a "tiered" system of significance evaluations and design review. Establishing Historic Districts or Zones helps to preserve neighborhoods and not just individual buildings, by articulating community character that could inform an approach to new additions and infill construction. However, since the city does not currently have any historic districts, this approach should be carefully vetted to determine whether the creation of historic districts or conservation zones will meet the needs of the community.

##### **Preliminary District Locations**

Pacific Grove's historic buildings are typically interspersed in areas that also include more recent construction. Thus, the windshield survey efforts undertaken by this study did not reveal any obvious, large concentrations of historic properties that appear to qualify as historic districts (based

on the traditional National Register definition of a district). However, it is likely that a more thorough examination will reveal pockets of properties with sufficient architectural cohesion and integrity to merit designation as small historic districts. It is therefore recommended that a focused reconnaissance-level survey of the city's historic core be conducted to identify and evaluate potential historic districts. For example, the following areas all exhibited cohesive character, and with further study, may be good candidates for consideration as potential historic districts:

- Northwest corner of the historic core centered on Union Street
- Portion of the original Retreat north of Central and west of 5<sup>th</sup> Street
- Second Addition
- Spazier's Addition
- Hillcrest Tract
- Mermaid Alley

While the city's historic core (original Retreat boundaries & First through Fifth Additions) does not appear to qualify as a traditional historic district, it may be a good candidate for a large Conservation Zone. In the Retreat, the lot pattern and scale of buildings—even those that are less than 50 years of age—are unique, and convey Pacific Grove's historic character better than any other neighborhood in the city.

#### **Districts & Zones: Things to Consider**

Establishing Historic Districts or Conservation Zones would allow the City to conduct design review and regulate development within the district boundaries. When evaluating potential districts or zones, consider the following:

- Identify why the district is significant (especially significant themes), and establish a clear period of significance. This is essential to any district evaluation.
- Consider the pros/cons of large areas with long periods of significance versus smaller, more focused districts with narrower periods of significance. Valuable guidance may be found in the *National Register Bulletin for Historic Residential Suburbs*.
- Understand that National Register-eligible districts will likely require a higher concentration of contributing resources than locally-eligible districts.
- Consider that creating districts may be a way to create a tiered system of significance, and can allow controls to be placed on infill construction to ensure retention of historic character, if desired. Non-contributing structures would not be required to preserve current fabric. Alterations and new infill construction on non-contributing parcels would likely only be reviewed for compatibility with the surrounding district. Guidelines for development within a district would vary depending on the district's size and character. For instance, a larger district's guidelines might be limited to overall scale, massing, and form, whereas smaller districts may have more restrictions on style and materials.
- Establishing a large Conservation Zone or Historic Preservation Overlay Zone may afford protections similar to that of a historic district, but without the same integrity requirements. A Conservation Zone would still need to be based on the themes, patterns, and property types, but its boundaries and the required percentage of contributing resources may be more

flexible than that of a traditional historic district. Design review of infill construction within a Conservation Zone could help ensure that the scale of the surrounding area is preserved, especially in areas such as the historic core where the small lot sizes largely dictated the nature of the buildings that were constructed.

Although concern about negative economic effects is often raised when considering potential historic districts, many studies have shown a direct correlation between the creation of historic districts and a long-term increase in property values. One of the nation's leading authorities on this matter is real estate and economic development consultant Donovan Rypkema of PlaceEconomics. While presenting a recent study about property values and historic districts in Philadelphia, "...Rypkema showed statistics that homes in Philadelphia's local historic districts, once those districts took effect, enjoyed an immediate 2 percent increase in values relative to the city average. Afterward, the historic district homes appreciate at an annual rate that is 1 percent higher than the city average."<sup>3</sup> A number of similar studies have been conducted in communities across the country, and data from these reports might be applicable in Pacific Grove (see section **D. Additional Resources**).

#### **Districts & Zones: Additional Resources**

Historic Districts and Conservation Zones are widely used in other jurisdictions, and Pacific Grove could look to other cities for guidance if the concept of districts is further pursued:

- The **City of Los Angeles** utilizes Historic Preservation Overlay Zones to protect its historic neighborhoods. The City's Office of Historic Resources has collected excellent information about the creation and administration of these zones:  
<http://www.preservation.lacity.org/hpoz>
- **San Francisco** has two types of historic districts: Historic Districts and Conservation Districts. The former are similar to National Register districts, while the latter are exclusively located Downtown and focus on architectural quality. Contributors and non-contributors in both types of districts are administered by the City's Historic Preservation Commission.  
<http://www.sf-planning.org/Modules/ShowDocument.aspx?documentid=5082>
- **San Diego's** historic district program has established four primary types of recognized districts: geographic/traditional; thematic; voluntary/traditional; and emerging. Each type of district is significant for a different reason, and registration requirements and design review process varies accordingly:  
<http://www.sandiego.gov/planning/programs/historical/districts.shtml>
- Historic districts in **Glendale** must be initiated by members of the neighborhood, and can only be formed when a majority of neighbors consent. The city has created a Historic District Overlay Zone and a series of design guidelines to regulate changes to properties within its historic districts. <http://www.ci.glendale.ca.us/planning/HPHistoricDistricts.asp>;  
<http://glendalehistorical.org/district.html#faqs>

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<sup>3</sup> Don Nelson, "There's value in preserving towns' historic homes," *Athens Banner Herald* (Georgia, 8 May 2011), at [http://www.onlineathens.com/stories/050811/bus\\_825928005.shtml](http://www.onlineathens.com/stories/050811/bus_825928005.shtml) (accessed 1 September 2011)

- The **City of Napa** is in the process of creating several new local historic districts, and has prepared a fact sheet about the economic benefits of districts: <http://www.cityofnapa.org/images/CDD/planningdivisiondocs/heritagenapa/econbenhistdist.pdf>
- In the **City of Monterey**, much of downtown has been designated as a National Historic Landmark (NHL) District, the highest level of protection, while Cannery Row is protected as a Conservation Zone. Additionally, property owners may apply for “H” Zoning designation, which provides various benefits: <http://www.monterey.org/en-us/departments/planspublicworks/planning/historicpreservation.aspx>

The following publications may also be of assistance as Pacific Grove considers whether or not to create historic districts and/or conservation zones:

- The **National Park Service** has compiled information about the benefits of historic districts—as well as how to create and regulate them—on their website in an article entitled, “Working on the Past in Local Historic Districts” <http://www.nps.gov/history/hps/workingonthepast/index.htm>
- The **National Trust for Historic Preservation** has a series of publications about maintaining community character through the use of historic districts and conservation zones: <http://www.preservationbooks.org/Bookstore.asp?Item=1284>

## **#5: CREATE LOCAL PRESERVATION INCENTIVE PROGRAM**

Preservation is not just about placing restrictions on historic properties; a healthy preservation program should also offer positive benefits to property owners in order to promote preservation of significant resources. The City of Pacific Grove currently provides an opportunity for properties listed in the HRI to receive an exception to certain land use regulations as an incentive to preserve the property. Project sponsors may apply for a historic preservation permit, which grants an exception to zoning district regulations—such as parking, setbacks, height and coverage regulations—where those requirements would otherwise require a variance to conduct an appropriate preservation or restoration effort. This incentive is discussed further in the Pacific Grove Municipal Code, Section 23.76.060.

The City of Pacific Grove may also consider offering additional local economic incentives that would encourage the preservation of historic resources. A comprehensive local preservation incentive program could include a variety of financial and procedural tools, such as using the Mills Act to provide property tax relief, authorizing the use of the California Historical Building Code, or offering discounted fees or expedited permit processing. Encouraging property owners to nominate their properties to the National Register may make additional incentives available, such as Federal Historic Preservation Tax Credits for income-producing properties. It is recommended to look to other cities for examples of successful preservation incentive programs.

#### **Preservation Incentives: Additional Resources**

A variety of incentives are available from national, state, and local agencies, and many California cities have creatively combined these offerings to maximize benefits to property owners . The following sources may be of assistance when building a comprehensive preservation incentive program in Pacific Grove:

- The **City of Palo Alto** offers incentives and exceptions throughout their Municipal Code to encourage the preservation and rehabilitation of historic resources:  
<http://www.cityofpaloalto.org/knowzone/news/details.asp?NewsID=540&TargetID=127>
- The **City of Eureka** has detailed provisions for a Mills Act program (State-sponsored property tax credit that is administered locally):  
[http://www.ci.eureka.ca.gov/depts/cd/mills\\_act/default.asp](http://www.ci.eureka.ca.gov/depts/cd/mills_act/default.asp)
- **Los Angeles'** Office of Historic Resources summarizes available incentives on their website:  
<http://www.preservation.lacity.org/incentives>
- In **Riverside**, incentives for historic property owners include permit fee reductions, landmark plaques, and technical assistance from the city's preservation planners:  
<http://www.riversideca.gov/historic/preservation.asp>
- **Technical Assistance Bulletin #15**, published by the California Office of Historic Preservation (OHP), outlines the myriad preservation incentives available across the state:  
[http://www.parks.ca.gov/?page\\_id=24626](http://www.parks.ca.gov/?page_id=24626)

## #6: EXPAND EXISTING DESIGN GUIDELINES FOR HISTORIC RESOURCES

Design guidelines can help facilitate appropriate treatment or restoration efforts for historic resources in accordance with the *Secretary of the Interior's Standards for the Treatment of Historic Properties*. They can also help lessen the impact of new infill construction on the setting of historic properties, while also maintaining a consistent architectural vocabulary in terms of scale, massing, materials, etc. The City of Pacific Grove currently applies the *Secretary of the Interior's Standards* for alterations to HRI properties through the City's Phase 2 Historic Assessment process, and already maintains a set of design guidelines—the *City of Pacific Grove Architectural Review Guidelines for Single-Family Residences* (1998)—that provides guidance for appropriate modifications and infill construction in Pacific Grove's historic residential neighborhoods. However, it is recommended that updated or expanded guidelines be developed for other property types. Additionally, if historic districts are designated, additional focused guidelines could be implemented to further guide development within the district boundaries.

### Design Guidelines: Additional Resources

Consider the following publications and examples of design guidelines from other cities and organizations:

- The National Park Service publication entitled **“Creating & Using Design Guidelines”** should be consulted: <http://www.nps.gov/history/hps/workingonthepast/roletheyplay.htm>
- The California Office of Historic Preservation (OHP) has also developed a **“Guide to Developing Downtown Design Guidelines:”** <http://ohp.parks.ca.gov/pages/1074/files/devdwtwndsn.pdf>
- The **Town of Los Gatos** has a set of Residential Design Guidelines, as well as a separate set of guidelines for each of its five historic districts: <http://www.losgatosca.gov/index.aspx?NID=198>
- **Santa Barbara** has developed design guidelines based on neighborhood and building type. All documents are collected on one page of the city's website for easy access: <http://www.santabarbaraca.gov/Resident/Home/Guidelines/>
- **San Jose Downtown Historic Design Guidelines** is one of several sets of design guidelines for the city. This document includes a helpful matrix for understanding when each set of guidelines apply: [http://www.sanjoseca.gov/planning/historic/pdf/Dwntwn\\_Hist\\_Dsgn\\_Guidelines.pdf](http://www.sanjoseca.gov/planning/historic/pdf/Dwntwn_Hist_Dsgn_Guidelines.pdf)
- A collection of over 15 design standards and guidelines in the **City of Monterey**—including “Cannery Row Conservation District Design Program,” “Architectural Review Committee Design Guidelines,” “Downtown Mixed Use Design Guidelines,” and others—can be used to guide development associated with historic properties: <http://www.monterey.org/en-us/departments/planspublicworks/planning/documentandformlibrary.aspx>

## **#7: EDUCATION & OUTREACH**

Public education and outreach are key components of any successful preservation program, and it is recommended that efforts are made to engage and educate the community about historic preservation in Pacific Grove. The City could consider sponsoring walking tours, brochures, workshops, and various web and print resources to promote public awareness of historic preservation issues. The Heritage Society of Pacific Grove already offers many of these services, but those existing efforts could be further expanded or publicized by the City.

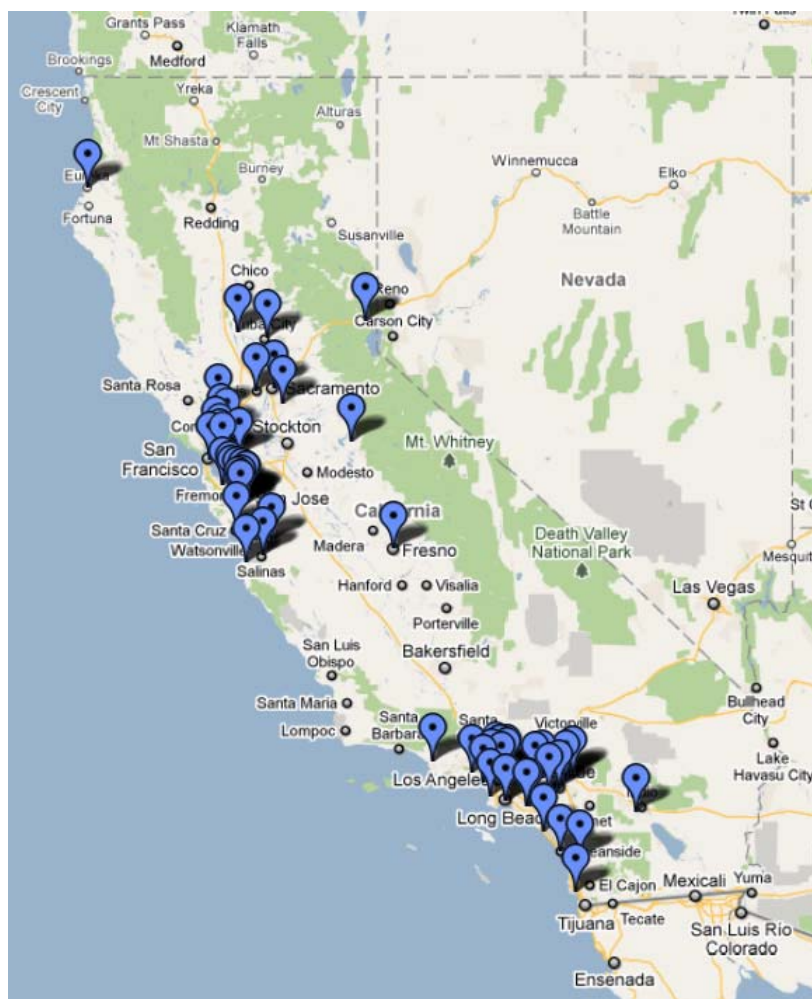
### **Education & Outreach: Additional Resources**

The following resources may be helpful as Pacific Grove develops a public education and outreach program:

- The **City of San Clemente** has prepared a series of illustrated historic preservation brochures that outline the City's programs and policies and answer frequently asked questions. The City also sponsored a Historic Preservation Education Workshop Series, funded in part by grants received from the National Park Service & the California Office of Historic Preservation: <http://san-clemente.org/sc/standard.aspx?pageid=440>
- A series of "Historic Homes Workshops"—intensive, hands-on, educational workshops for homeowners focusing on weatherization and sustainability options—were successful in the **City of Napa**: [http://www.cityofnapa.org/index.php?option=com\\_content&task=view&id=656&Itemid=701](http://www.cityofnapa.org/index.php?option=com_content&task=view&id=656&Itemid=701); <http://www.cityofnapa.org/images/CDD/planningdivisiondocs/heritagenapa/windowwrkshp.pdf>
- As part of its burgeoning preservation program, the City of **Paso Robles** provided training for Planning Commission, City Council, City staff, and interested community members: <http://www.prcity.com/government/departments/commdev/preservation.asp>
- The website of the **San Francisco Planning Department** includes a lengthy list of Frequently Asked Questions, links to helpful resources, and updates on current Department projects: <http://www.sf-planning.org/index.aspx?page=1825>. An interactive San Francisco Property Information Map on this site allows members of the public to readily access previous survey data, <http://ec2-50-17-237-182.compute-1.amazonaws.com/PIM/>
- The **City of Burbank** received a \$5,000 CLG Grant from the California Office of Historic Preservation in 2011-2012 to "Develop an education and outreach campaign to provide more information to the public about Burbank's preservation programs and to engage the community in on-going preservation efforts." [http://www.parks.ca.gov/?page\\_id=21239](http://www.parks.ca.gov/?page_id=21239)
- **Non-profit organizations** such as the California Preservation Foundation (CPF), the Los Angeles Conservancy, and San Francisco Architectural Heritage also offer publications and workshops that have a wide variety of useful applications.

## **#8: APPLY TO BE A CERTIFIED LOCAL GOVERNMENT (CLG)**

The Certified Local Government (CLG) Program is “a preservation partnership between local, state and national governments focused on promoting historic preservation at the grass roots level.”<sup>4</sup> The program is jointly administered the National Park Service (NPS) and the California Office of Historic Preservation (OHP), and more than 60 cities in California and 1,600 local governments nationwide have achieved CLG status. CLGs are eligible to receive exclusive funds and grants to undertake historic resource surveys and other preservation-related programs; receive technical advice and support from NPS and OHP; partner with non-profit organizations such as the National Trust for Historic Preservation; and take advantage of a wide range of other resources and opportunities. In return, a CLG must enforce appropriate federal, state and local laws; establish and maintain a local inventory, historic preservation review commission, and local ordinance; and report to NPS and OHP annually on preservation activities.



Map showing all the Certified Local Governments (CLGs) in California  
(Google Maps, edited by Page & Turnbull)

<sup>4</sup> National Park Service, “Certified Local Government Program,” <http://www.nps.gov/history/hps/clg/> (accessed 8 June 2011).

Each state is required to allocate a minimum of 10% of the annual Federal funds received through the Historic Preservation Fund (HPF) Grants Program to CLG activities. According to the National Park Service, “Types of activities that can be funded include: architectural, historical, archeological surveys; nominations to the National Register of Historic Places; staff work for historic preservation commissions; design guidelines and preservation plans; public outreach materials such as publications, videos, exhibits, and brochures; training for commission members and staff; and rehabilitation or restoration of National Register listed properties.”<sup>5</sup> In California, the 2011 HPF allocation was \$1.4 million; OHP received 15 grant applications, and selected 10 local governments to receive grants totaling \$184,500, exceeding the required 10% allocation.<sup>6</sup>

The City of Pacific Grove could consider pursuing CLG status to demonstrate its commitment to preserving the community’s history and ensure credibility for the city’s local preservation program. Many of the programs and processes already in place in Pacific Grove would meet the requirements for CLG designation, although some procedural changes may be required. City of Pacific Grove staff estimates that the annual cost of maintaining CLG status would be approximately \$3,000, plus any city match for grant funds (required to be 40%). CLG grants can be valued at up to \$25,000, so the City of Pacific Grove would be responsible for contributing a maximum of \$10,000 (can be given in staff time or funds) for each grant received.

#### **CLGs: Additional Resources**

Additional information about the CLG Program is available from OHP & NPS:

- OHP website: [http://www.parks.ca.gov/?page\\_id=21239](http://www.parks.ca.gov/?page_id=21239)
- NPS website: <http://www.nps.gov/history/hps/clg/>

The following California cities have become CLGs within the last 5 years, and might be able to provide guidance to Pacific Grove about the CLG application process. Contact information for these cities can be found here:

<http://www.parks.ca.gov/pages/1072/files/clg%20contact%20list.pdf>

- Benicia (2007)
- Calabasas (2009)
- Ventura (2011)
- Elk Grove (2010)
- Los Angeles (2007)
- Norco (2009)
- Richmond (2007)
- Santa Clara County (2008)
- Sausalito (2011)

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<sup>5</sup> National Park Service, “Certified Local Government Opportunities,” at [http://www.nps.gov/history/hps/clg/CLG\\_opportunities.html](http://www.nps.gov/history/hps/clg/CLG_opportunities.html) (accessed 1 September 2011).

<sup>6</sup> [http://www.parks.ca.gov/?page\\_id=21239](http://www.parks.ca.gov/?page_id=21239)

## **E. Additional Resources**

In addition to the detailed references above, the following sources are recommended to provide specific technical advice or answer questions.

### **NATIONAL PARK SERVICE PUBLICATIONS**

#### **Preservation Briefs**

The National Park Service's Technical Preservation Services (TPS) division has prepared a series of *Preservation Briefs*, provide guidance on preserving, rehabilitating and restoring historic buildings. There are currently 47 briefs on a variety of topics, ranging from how to repair steel windows, clean terra cotta, and gently remove graffiti from historic masonry, to identifying character-defining features, designing appropriate storefronts, and improving accessibility.

These documents are available for purchase or free download at  
<http://www.nps.gov/history/hps/tps/briefs/presbhom.htm>

#### **National Register Bulletins**

The National Register Bulletin series provides guidance on evaluating, documenting, and listing different types of historic resources. The bulletins include advice about how to apply the National Register Criteria for Evaluation; guidelines for evaluating various property types, such as landscapes and traditional cultural properties; assistance for identifying properties associated with significant persons; and answers to Frequently Asked Questions by owners of historic properties.

These documents are available for purchase or free download at  
<http://www.nps.gov/history/nr/publications/>

### **CALIFORNIA OFFICE OF HISTORIC PRESERVATION**

The California Office of Historic Preservation (OHP) is one of the best resources for local governments and communities interested in historic preservation. A variety of preservation tools are available for download, including technical assistance bulletins, publications, workshop presentations, and information about state and federal laws such as the California Environmental Quality Act (CEQA).

Visit OHP online at <http://ohp.parks.ca.gov/>

### **NATIONAL TRUST FOR HISTORIC PRESERVATION**

The National Trust for Historic Preservation (NTHP) is a national nonprofit organization dedicated to preserving America's historic places. According to NTHP, their organization "provides

leadership, education, advocacy, and resources to save America's diverse historic places and revitalize our communities.” NTHP has technical assistance publications, case studies, and other information available for purchase or free download at <http://www.preservationnation.org/>

## CALIFORNIA PRESERVATION FOUNDATION

Founded in 1977, the California Preservation Foundation (CPF) is a statewide nonprofit organization that is committed to preserving California’s diverse cultural and architectural heritage. CPF hosts educational workshops across the state and publishes books and brochures about historic preservation. Useful information can be found at the CPF website:

<http://www.californiapreservation.org/shopcpf.shtml#navtop>

<http://www.californiapreservation.org/events.shtml#navtop>

## PRESERVATION ECONOMICS STUDIES

Many studies have been conducted about the economics of historic preservation, and much of this data is available online. A Master’s Thesis by Prema Katari entitled “Preservation and Residential Property Values: The Case of Philadelphia” (2005) gathered some of these studies into a table entitled “A Matrix of Selected Studies on the Economic Impact of Local Historic Designation.” This table was prepared as an appendix to the thesis, and is reproduced here for reference.<sup>7</sup>

<b>Report</b>	<b>Author(s)</b>	<b>Year</b>	<b>Findings</b>
Investing in Michigan's Future	Clarion Associates	2002	local historic district designation has an effect that is either positive or consistent with appreciation in comparable areas
Preservation and Property Values in Indiana	Donovan Rypkema	1997	property values in local historic districts increase with designation, equaling if not outpacing undesignated areas
Profiting from the Past: The Economic Impact of HP in Georgia	David Listokin et al.	2001	local districting increases property values
Smiling Places, Historic Places: The Economic Benefits of HP in South Carolina	Chad Lennox and Jennifer Revel	2000	positive correlation between historic district designation and property values, often outpacing comparable neighborhoods

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<sup>7</sup> Prema Katari, “Preservation and Residential Property Values: The Case of Philadelphia,” (Master’s Thesis, University of Pennsylvania, 2005), in Scholarly Commons, [http://repository.upenn.edu/hp\\_theses/32/](http://repository.upenn.edu/hp_theses/32/) (accessed 1 September 2011).

<b><u>Report</u></b>	<b><u>Author(s)</u></b>	<b><u>Year</u></b>	<b><u>Findings</u></b>
Economic Benefits of Historic Designation in Knoxville, Tennessee	Ann Bennett	1996	increased rehabilitation activity in historic districts lead to greater gains in property values in local historic district
Economic Benefits of HP in Colorado	Clarion Associates	2002	marginal appreciation in historic districts over comparable neighborhoods; designation enhances existing economic climate
Economic Impact of HP in Florida	David Listokin et al.	2001	historic districting helps to maintain property values
Economics of HP: A Community Leader's Guide	Donovan Rypkema	1994 (2005 edition also)	Several arguments for the economic benefits of local historic designation summarized
Effect of Historic District Designation of Single Family Home Prices	Deborah Ann Ford	1989	hedonic; price premium in local historic districts attributed to assurance that surrounding neighborhood will not change in character
Historical Preservation Districts and Home Sales Prices: Evidence from the Sacramento Housing Market	David E. Clark and William E Herrin	1997	greater property value appreciation attributed to positive authenticity and upkeep externalities outweigh higher costs of maintenance
HP at Work for the Texas Economy	David Listokin et al.	1991	designation may have a catalytic effect on surrounding areas; location may be a more important factor than designation in examining property appreciation
Impact of Historic District Designation in Washington, D.C.	Dennis Gale	1996	no evidence that historic designation affects property values
Impact of Historic Districts on Residential Property Values	NYC Independent Budget Office	2003	properties in a historic district trade at a premium when compared to comparable properties
Internal and External Impact of Historical Designation on Property Values	N. Edward Coulson and Robin Liechenko	2001	historic district designation substantially raises property values in both designated areas and adjacent properties in Abeline, TX



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