

City Planning & Community Investment Community Planning Group Training

**Historical Resources Training
October 6, 2007**

Welcome and Introductions

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Urban Form**

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Historical Resources Board Liaison**



CPCI Historical Resources Training

October 6, 2007

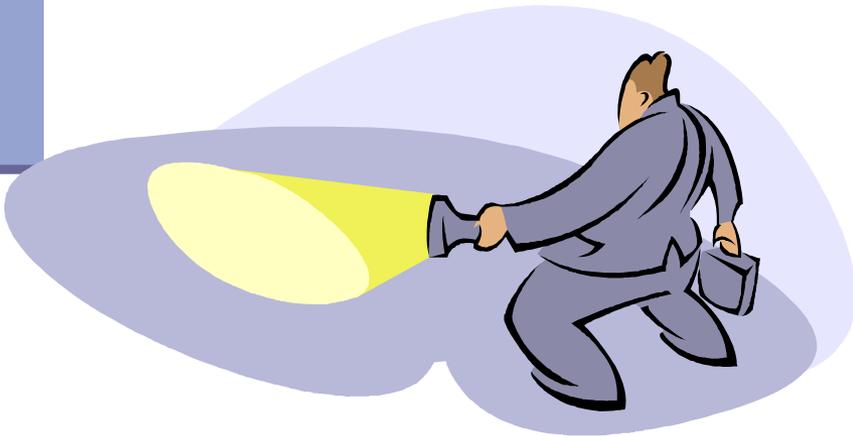
■ How To Identify And Protect Historical Resources

- Review process for determining when a historical resource is present
- Regulatory framework for designated historical resources
- Use of historic surveys in the community plan update process
- Historic preservation incentives
- Questions



Determining the Presence of a Historical Resource

- City Regulations
- Adopted Guidelines
 - Designation Criteria
 - Integrity



Determining the Presence of a Historical Resource

Land Development Code

- Archaeological and
Native American
Resources



Determining the Presence of a Historical Resource

- Land Development Code
 - Districts
 - Buildings
 - Structures
 - Objects



Land Development Code

- Section 143.0212
 - Mayor or designee shall determine the need for a site specific survey (historical resources research report)
 - Any parcel containing a structure that is 45 or more years old and not within an area identified as exempt
 - Any parcel identified as sensitive on the Historical Resource Sensitivity Maps
 - Need for survey shall be determined within 10 business days for construction permit (ministerial) or 30 calendar days for a development permit (discretionary)

Land Development Code

■ Section 143.0212

- Survey shall be conducted consistent with the Historical Resources Guidelines of the Land Development Manual
- Based on the survey and best information available, Mayor shall determine whether a historical resource exists, whether a potential historical resource is eligible for designation by the Historical Resources Board in accordance with the LDC, and the precise location of the resource

Land Development Code

- Establishes the Historical Resources Board (Section 111.0206)
 - 11 Members
 - 2 year term; 4 consecutive terms
 - Required professionals: architecture, history, architectural history, archaeology, landscape architecture
 - Others with special interest in historic preservation
 - No more than three historic property owners
 - 6 members constitute a quorum

Land Development Code

- Powers and Duties of HRB (Section 111.0206)
 - Identify and designate historical resources
 - Review and make recommendations on projects involving designated historical resources
 - Adopt guidelines for designating historical resources and identify specific areas exempt from site specific survey
 - Adopt standards and guidelines for review of projects
 - Compile and maintain an up to date register of designated historical resources
 - Make recommendations to Mayor and City Council to apply for, receive or expend grant funding

Land Development Code

- Powers and Duties of HRB (Section 111.0206)
 - Prepare annual report to Mayor and City Council
 - Promote educational programs and report to City Council on use of funds and mechanisms to promote preservation
 - Establish criteria and provide for a historical resources inventory and recommend procedures to use the results in planning process
 - Provide information and guidance to property owners for the restoration, rehabilitation, landscaping, or maintenance of designated historical resources

Land Development Code

- Designation Process for Historical Resources (Section 123.0202)
 - Nominations from City or member of public
 - Notice to owner required prior to HRB action
 - Designation based on research report
 - Property owner may request continuance
 - Designation decision based on adopted criteria
 - Affirmative vote of 6 board members required
 - Re-initiation of designation procedures within 5 years requires owner consent or significant new information
 - Designation action is appealable to City Council

Determining the Presence of a Historical Resource

- Historical Resources Guidelines
 - Historical resources include all properties eligible or listed on National Register or significant under California or San Diego registration programs
 - Property Types
 - District, Building, Structure, Landscape, Object, Archaeological Site, and Traditional Cultural Property
 - Typically over 45 years old

Determining the Presence of a Historical Resource

- Historical Resources Guidelines
 - Applicable Policies and Regulations
 - General Plan
 - Land Development Code
 - Historical Resources Board
 - NHPA
 - CEQA

Adopted Guidelines

- San Diego Register of Historical Resources
 - Any improvement, building, structure, sign, interior element and fixture, feature, site, place, district, area, or object may be designated a historical resource by the City's HRB if it meets one or more of the adopted designation criteria

Designation Criteria

- A. Exemplifies or reflects special elements of the City's, a community's, or a neighborhood's, historical, archaeological, cultural, social, economic, political, aesthetic, engineering, landscaping or architectural development;
- B. Is identified with persons or events significant in local, state or national history;
- C. Embodies distinctive characteristics of a style, type, period, or method of construction or is a valuable example of the use of indigenous materials or craftsmanship;
- D. Is representative of the notable work of a master builder, designer, architect, engineer, landscape architect, interior designer, artist, or craftsman;

Designation Criteria

- E. Is listed or has been determined eligible by the National Park Service for listing on the National Register of Historic Places or is listed or has been determined eligible by the State Historical Preservation Office for listing on the State Register of Historical Resources; or
- F. Is a finite group of resources related to one another in a clearly distinguishable way; or is a geographically definable area or neighborhood containing improvements which have a special character, historical interest or aesthetic value; or which represent one or more architectural periods or styles in the history and development of the City.

Designation Criteria

- Applying Criteria (A-F)
 - To determine the significance of the resource:
 - Identify the historic context with which the resource is associated
 - Identify the period of significance in which the resource is important
 - Determine if the resource is associated with the historic context in any important way
 - Assess the resource's historic integrity

Criterion A

Special elements of the City's, a community's, or a neighborhood's development



Criterion A



#727 - 941 11th Avenue

Designated for its social, economic and architectural contribution to the East Village as an example of the physical evolution of the apartment building in response to the population boom fueled by the 1915 Exposition. Also designated under C.

#624 - 715 La Canada

Designated as one of the earliest homes in the La Jolla Hermosa subdivision, representative of development in this area of La Jolla. Modifications made the building ineligible under C.



Criterion B

Persons or events significant in local, state or national history



Criterion B



#627 – 3117 28th Street

Designated for its association with Antoine and Jeanne Frey, local entrepreneurs who made significant contributions to new San Diego's early history, and for its association with Rear Admiral Francis Benson, a decorated and distinguished Naval Officer.

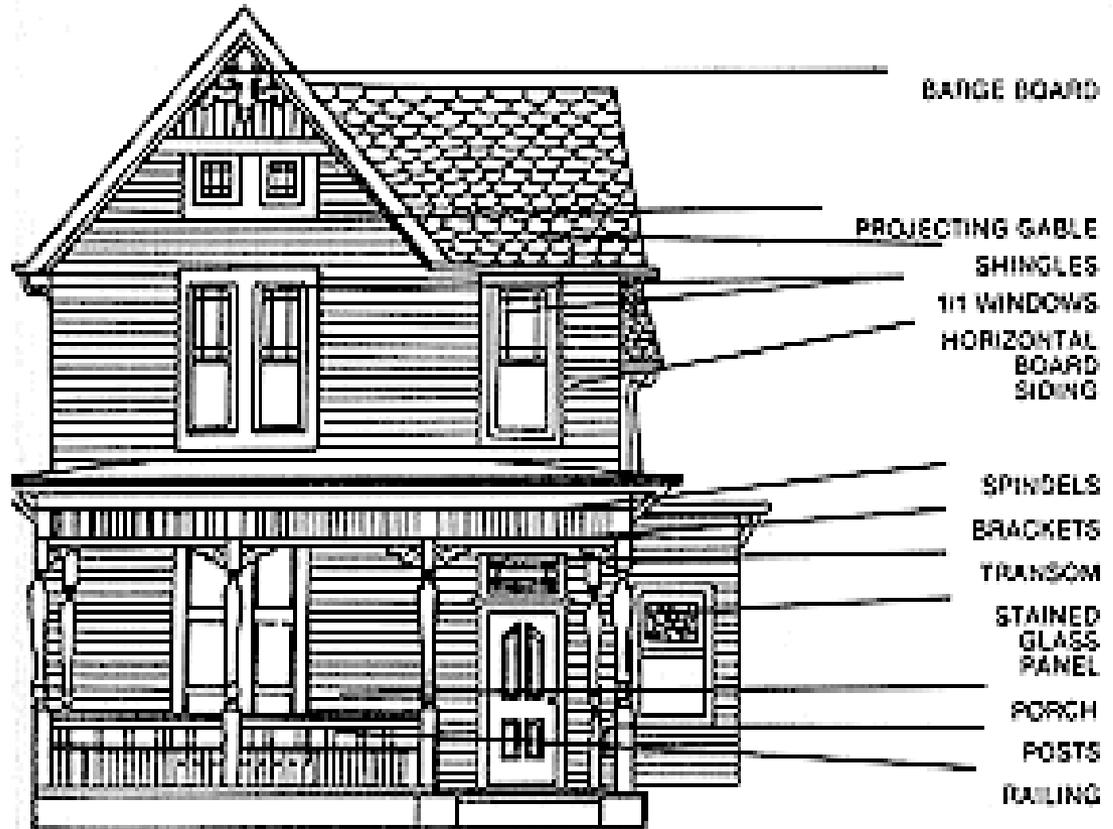
#594 – 1753 W Lewis Street

Designated for its association with prominent automobile dealer and civic leader Edgar Davies.



Criterion C

Distinctive architecture or method of construction or valuable example of indigenous materials or craftsmanship



Queen Anne (1880-1910)



Steeply Pitched Roof

Dominant Front-Facing Gable

Patterned Wood Shingles at the Gables

Horizontal Wood Siding

Asymmetrical Façade

Partial or Full-Width Porch

Banker's Hill

Folk Victorian (1870-1910)



Symmetrical Gabled or Asymmetrical Cross-Gable Forms

Cornices and Cornice Line Bracket

“Gingerbread” Detailing

Porches with Detailed Spindles

Clairemont

Craftsman (1905-1930)



Low Pitch Gable Roof

Wide, Unenclosed Eaves

Exposed Rafters

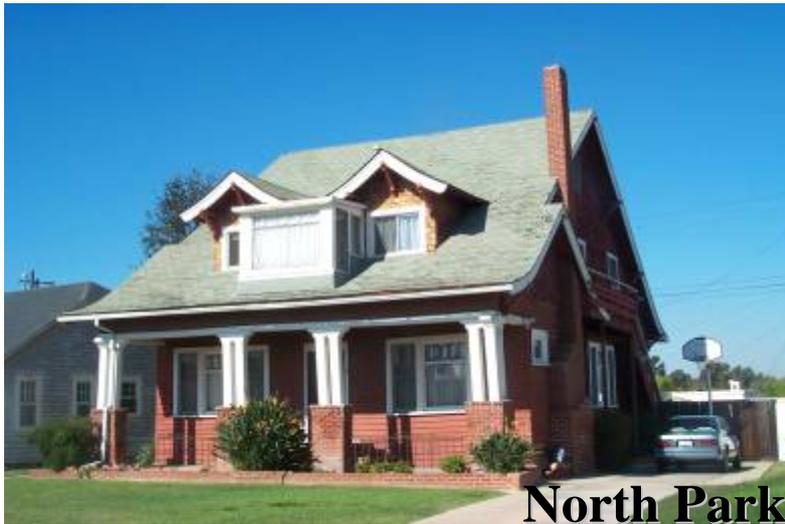
Decorative Beams
& Brackets

Full or Partial-Width
Porches

Porches Supported by
Piers & Columns

North Park

Craftsman Variants



North Park



South Park



North Park



Uptown

Prairie (1900-1920)



Low Pitch Roof

Wide, Overhanging
Eaves

Usually Two Stories

Emphasis on
Horizontal Lines

One Story Wings or
Porches with Heavy
Square Piers

Point Loma

Prairie Variants



Mission Revival (1890-1920)



Mission-Shaped Dormer
or Roof Parapet

Widely Overhanging
Eaves

Smooth Stucco

Porch Supported by
Large Square Piers,
Typically w/ Arch Above

North Park

Spanish Eclectic & Spanish Colonial Revival Styles (1915-1940)



Low Pitch Roof

Little or No Eave Overhang

Red Tile Roof

Smooth Stucco

Generally Asymmetrical

Arch Elements

Kensington

Spanish Eclectic & Spanish Colonial Revival Variants



La Jolla



Kensington



La Jolla



Point Loma

Italian Revival (1890-1935)



Symmetrical Facade

Low-Pitch Roof

Wide Eaves

Decorative Brackets

Entrance Accented by
Columns

Decorative Window Crowns

North Park

Other Eclectic & Revival Styles



North Park

Tudor Revival 1890-1940



North Park

Colonial Revival 1880-1955



La Jolla

French Eclectic 1915-1945



North Park

Dutch Colonial Revival 1880-1955

Ranch (1935-1975)



Long, Rambling
Floor Plan

Low-Pitch Roof

Wide Eaves

Traditional
Detailing

Ribbon Windows

La Jolla

Modern



Natural Materials

Attempt to
Conform to the
Landscape

Simple, Clean
Lines

Point Loma

Criterion D

Master builder, designer, architect, engineer, landscape architect, interior designer, artist, or craftsman



Criterion D



#612 - 1345 Granada

Designated as a representative work of Master Architect Irving Gill. Also designated under C.

#585 - 2650 Jonquil Drive

Designated as a representative work of Master Architect Richard Requa. Also designated under C.



Criterion E

Listed or determined eligible for listing on the National or California Register



Criterion E



#715 - 3250 McCall Street

Listed on the California Register.



#405-408 - Brown Field (portions)

Determined eligible for the National Register through Section 106 review.

Criterion F

Historic District



Criterion F



#1 - Balboa Park



#127 - Gaslamp



#208 - Sherman Heights

Integrity

- Majority of essential physical features
- Convey significance of resource
- Not same as condition
- Seven Aspects
 - Location
 - Design
 - Setting
 - Workmanship
 - Materials
 - Feeling
 - Association

Integrity or Condition

- Fire Station #9



- Seventh Avenue Home



Integrity or Condition

San Diego Historical Society

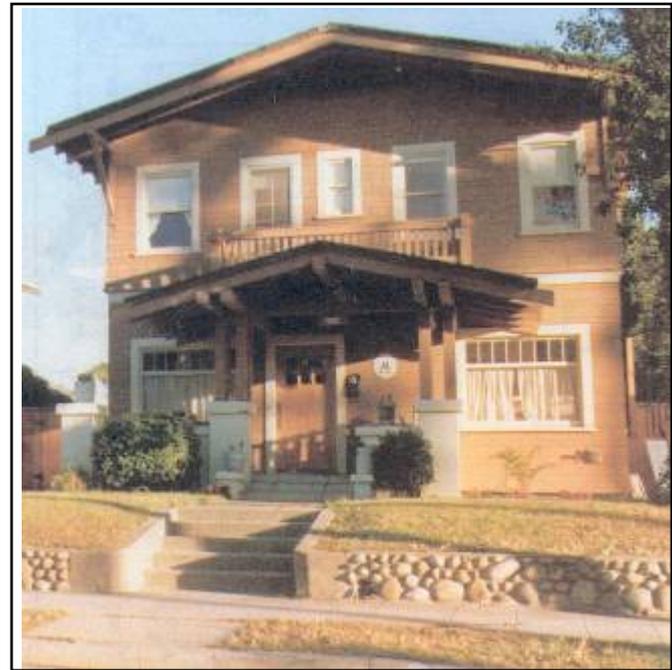


Integrity or Condition



Integrity: Design, Materials Workmanship, Feeling

- Would the original property owner recognize the resource?



Integrity: Location, Setting & Association



Determining the Presence of a Historical Resource

■ Questions



Regulatory Framework for Designated Historical Resources

Historical Resources
Regulations Overview

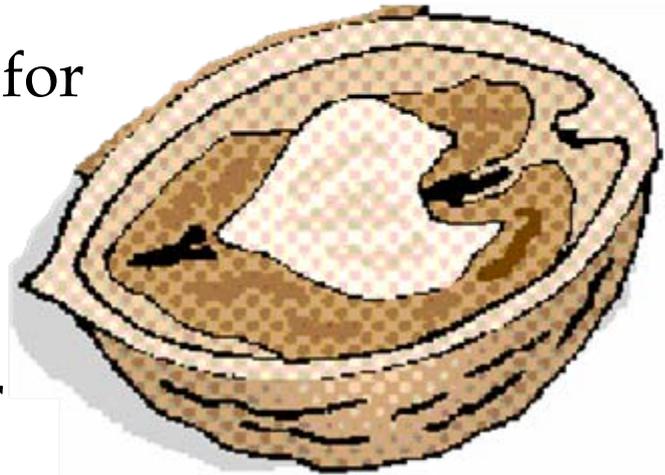
Current City Review
Process

Issues with the Process



Historical Resources Regulations

- All properties 45 years old or older must be evaluated for historical significance prior to development on the property
- Process Four Site Development Permit for projects which will impact designated historical resources
- HRB reviews the project and makes a recommendation to the decision maker
- Exemption for projects which have a minor impact consistent with the Standards



Site Development Permit Exemptions

- Projects exempted from a Site Development Permit if the applicant maintains the property in a manner consistent with the U.S. Secretary of the Interior Standards
 - HRB Staff must review all proposed restorations, modifications, or additions to designated historical resources.
 - Staff may approve the project administratively
 - Input from the HRB Design Assistance Subcommittee may be sought prior to staff approval

U.S. Secretary of the Interior's Standards for the Treatment of Historic Properties

- **Preservation:** places a high premium on the retention of all historic fabric through conservation, maintenance and repair. It reflects a building's continuum over time, through successive occupancies, and the respectful changes and alterations that are made.
- **Restoration:** focuses on the retention of materials from the most significant time in a property's history, while permitting the removal of materials from other periods.
- **Reconstruction:** establishes limited opportunities to re-create a non-surviving site, landscape, building, structure, or object in all new materials.
- **Rehabilitation:** emphasizes the retention and repair of historic materials, but more latitude is provided for replacement because it is assumed the property is more deteriorated prior to work. Of the four treatments, only Rehabilitation includes an opportunity to make possible an efficient contemporary use through alterations and additions.

Secretary of the Interior's Standards

■ Preservation

■ Everyday maintenance activities

- Clean
- Paint
- Repair
- Stabilize
- Replace in kind
- Utility upgrades
- Code compliance



Secretary of the Interior's Standards

Restoration

- Removing incompatible features, or
- Recreating lost features, and
- Replacing with accurate reproduction of original feature



Secretary of the Interior's Standards

■ Reconstruction

- Accurately recreating a lost resource from historical evidence



Secretary of the Interior's Standards

■ Rehabilitation

- Maintain historic use or compatible new use
- Retain & preserve historic character
- Do not add features creating a false sense of history
- Retain changes that have gained significance over time
- Preserve distinctive materials, features, finishes, craftsmanship & construction techniques

Secretary of the Interior's Standards

■ Rehabilitation

- Repair rather than replace; replace distinctive deteriorated features in kind when necessary based on historic documentation
- Use gentlest cleaning techniques possible
- Protect & preserve archaeological resources in place; mitigation required prior to disturbance

Secretary of the Interior's Standards

■ Rehabilitation

- Additions, alterations, or related new construction will not destroy historic materials, features and spatial relationships that characterize the property. The new work shall be differentiated from the old and compatible with historic materials, features, scale and proportion, and massing to protect the integrity of the property and its environment.
- New additions and adjacent related new construction will be undertaken in such a manner that if removed in the future, the essential form and integrity of the historic property and its environment would be unimpaired.

Rehabilitation



Rehabilitation



Review Process – Flow Charts

- Over 45 years old Ministerial and Discretionary Projects
 - DSD staff reviews ministerial and discretionary projects impacting buildings and structures over 45 years old that are not designated historical resources
 - To determine need for historical resources research report
 - To determine consistency with the regulations and standards
 - May informally consult with HRB staff

Review Process – Flow Charts

- Designated Historical Resources
 - CPCI Historical Resources Board staff review all ministerial and discretionary projects involving individually designated historical resources and within all established Districts
 - To determine consistency with the Standards, the Historical Resources Regulations, and any applicable design guidelines
 - Projects are reviewed by the HRB Design Assistance Subcommittee to aid staff determination if necessary

Issues with Review Process

- Lack of Training
 - Not all DSD staff are experienced in the use and application of the Standards
- Lack of Consistency
 - The number of planners reviewing these projects result in inconsistency in the application of the Standards and regulations, and in the documentation of compliance with the Standards
- Lack of Enforcement
 - The review may be compromised in the field by contractors and inspection staff who are not aware of the significance of the resource
 - Projects that comply with the Standards at the time of permit issuance may be changed in the field, resulting in a significant adverse impact to the resource

Changes to Project Review Process

- Recent Improvements
 - Documentation
 - Training

Documentation

- All projects required to provide the following information on the plans:
 - The HRB designation number
 - A complete and detailed scope of work:
 - Additions
 - Modifications
 - Demolition
 - Materials
 - Finishes
 - Colors
 - The Secretary of the Interior Treatment Standard being utilized and all standards that apply to that treatment.

Documentation

- Two stamps have been developed for staff's use:
 - One signed by the contractor prior to final approval
 - One signed by staff to acknowledge that the project has been reviewed for consistency with all applicable guidelines and standards

Stamp for Contractor Acknowledgement of Resource

ACKNOWLEDGEMENT OF HISTORICAL DESIGNATION

As the contractor working on a project involving a designated historical resource, I understand that any and all modifications to the structure must be consistent with the U.S. Secretary of the Interior's Standards for the Treatment of Historical Properties and the City of San Diego Historical Resources Regulations; and I understand that this project, which has been reviewed and approved by the Historical Resources Board staff, has been reviewed for consistency with those standards and regulations. I also understand that ANY modifications or plan changes MUST be reviewed by Historical Resources Board staff for consistency with all applicable standards and regulations PRIOR to the modifications or plan changes being carried out. Failure to receive Historical Resources Board staff approval will result in consequences which may include, but are not limited to, fines, a stop work order, a Site Development Permit, de-designation, and cancellation of the Mills Act property tax reduction, if applicable.

Print Name: _____ Signature: _____ Date: _____

Stamp for Identification of Resource

DESIGNATED HISTORICAL RESOURCE

This site has been designated as a historical resource by the City of San Diego. All alterations, additions, modifications, demolition, or enhancements must be reviewed by Historical Resources Board staff for consistency with the all applicable standards and regulations. This project, as identified in detail on the plans, has been reviewed and approved by staff. Any changes to the approved scope of work must be brought back to staff for review and approval.

- Consistent with the U.S. Secretary of the Interior's Standards for _____
- Consistent with the Historical Resources Regulations
- Consistent with applicable design guidelines

Print Name: _____ Date: _____ Phone: _____

HRB Site Number: _____ PTS Number: _____

Training

- DSD intake and permit issuance staff
 - Utilize GIS layers to identify historic resources
 - Do not issue permits without Plan-Historic review and stamps
- Inspections staff
 - Increase awareness about historic resources and the impact of on-the-site changes
 - Introduce new stamps and make sure they look for them

Training

- Architects and Contractors
 - Increase awareness of designated resources, how to check to see if the property is designated, and the importance of following the Standards and the approved plans
- Real Estate Agents
 - Increase awareness of 45 year review and the limitations on historically designated structures

Training

- Information Bulletins
 - New Information Bulletins to address:
 - Review and permitting requirements for designated historical resources
 - Development within Historical Districts
 - 45 year review of non-designated properties proposing development or redevelopment
 - Existing Information Bulletins related to permit processing requirements (i.e. “No Plan Permits”, single and multi-family construction permits, commercial tenant improvements, etc)
 - Modified to reference historic resources bulletins for all projects impacting designated historical resources

Regulatory Framework for Designated Historical Resources

■ Questions



Historic Surveys and the Community Plan Update Process

A survey is the process of identifying and gathering data on a community's historic resources.

This includes:

- Planning and background research
- Field survey
- Organizing and preserving survey data (all information gathered on each property and area investigated)
- The development of inventories (an organized compilation of properties evaluated as significant using established criteria)

Historic Surveys and the Community Plan Update Process

- Reasons to Survey
 - Identify historically important properties
 - Identify properties that should be preserved or subjected to scientific investigation
 - Establish priorities for conservation, restoration and rehabilitation
 - Provide the basis protection and enhancement of historic resources
 - Provide planners with a data base
 - Increase awareness of historic properties in the public and private sectors
 - Enable local governments in planning and review responsibilities

Historic Surveys and the Community Plan Update Process

- Secretary of the Interior's Standards for Preservation Planning, Identification, Evaluation and Registration of Historic Resources
 - Planning
 - Preservation Planning establishes historic contexts
 - Uses contexts to develop goals and priorities for identification, evaluation, registration and treatment of historic properties
 - Integrates Results into broader Planning Process
 - Identification
 - Undertake to the degree required to make a decision
 - Integrate results in preservation planning process
 - Include explicit procedures for record keeping and information distribution

Historic Surveys and the Community Plan Update Process

- Evaluation
 - Use established criteria
 - Apply criteria within established contexts
 - Results in an inventory of significant properties that is consulted in assigning registration and treatment priorities
 - Results made available to the public

- Registration (Designation)
 - Conduct according to stated procedures
 - Registration information locates, describes and justifies significance and integrity of the property
 - Registration information is made available to the public

Historic Surveys and the Community Plan Update Process

■ Types of Surveys

■ Reconnaissance

- “Once over lightly”
- Often a preliminary tool for planning more intensive surveys.
- Documents the quantity and kind of properties surveyed, boundaries, methodology and extent of survey coverage.
- Specific properties identified as well as places where no resources are located.

■ Intensive

- Identifies precisely and completely all historic resources in the survey area.
- The types of properties surveyed, boundaries of the survey, survey methodology, record of precise location, appearance, significance, integrity and boundary of each property are identified to a degree sufficient to permit an evaluation of a resource’s significance.

Historic Surveys and the Community Plan Update Process

- Surveys are Used as part of Community Plan Updates to:
 - Develop opportunity and constraint analysis for new development.
 - Determine community character from existing historic fabric (structures, views, streetscapes, social groups and traditional activities).
 - Identify areas where it is appropriate to use community character as basis for new development.
 - Treat specific historic resources as assets to catalyze new development.
 - Strengthen and/or enhance community character in historic areas with possible design guidelines for new construction based upon existing development patterns.
 - Identify and protect significant groupings of historic properties with historic district designation and use of Standards.

Historic Surveys and the Community Plan Update Process

- Surveys are Used as part of Community Plan Updates to:
 - Identify and protect significant individual historic properties with historic designation and use of Standards.
 - Measure social/cultural impact of proposed development on traditional/ethnic properties and neighborhoods.
 - Adjust zoning densities to be compatible with character of identified historic resources.
 - Develop future preservation plan goals and priorities within a community plan framework.
 - Provide mechanism for resolution where preservation and development conflict.
 - Understand what is being lost and make an informed decision about appropriate treatment of historical resources.

Historic Surveys and the Community Plan Update Process

- Identification needs to be an on-going effort with evaluation conducted within established contexts.
- It is a continual process with feedback loops and adjustments based on new information.
- Determinations of significance or non-significance need to be an orderly and defensible process with sufficient information to make a decision.

Historic Surveys and the Community Plan Update Process

- Existing Surveys Used by Staff
 - East Village Combined Historical Surveys (2005)
 - Downtown Warehouse Survey (2005)
 - African-American Heritage Study (2004)
 - Historic Site Inventory of the Core for CCDC (1989, 2002)
 - Mid-City Survey (1995/1996)
 - Uptown Cultural Resource Inventory (1993)
 - Barrio Logan Redevelopment Area Historic and Urban Resource Inventory (1990)
 - San Ysidro Historic Resources Survey (1989)
 - La Jolla - A Historical Inventory (1977)

Historic Surveys and the Community Plan Update Process

- Active Reconnaissance Surveys :
 - Uptown
 - La Jolla
 - North Park
 - San Diego Modernism (Context Statement)
 - Mission Beach Seawall (National Register)

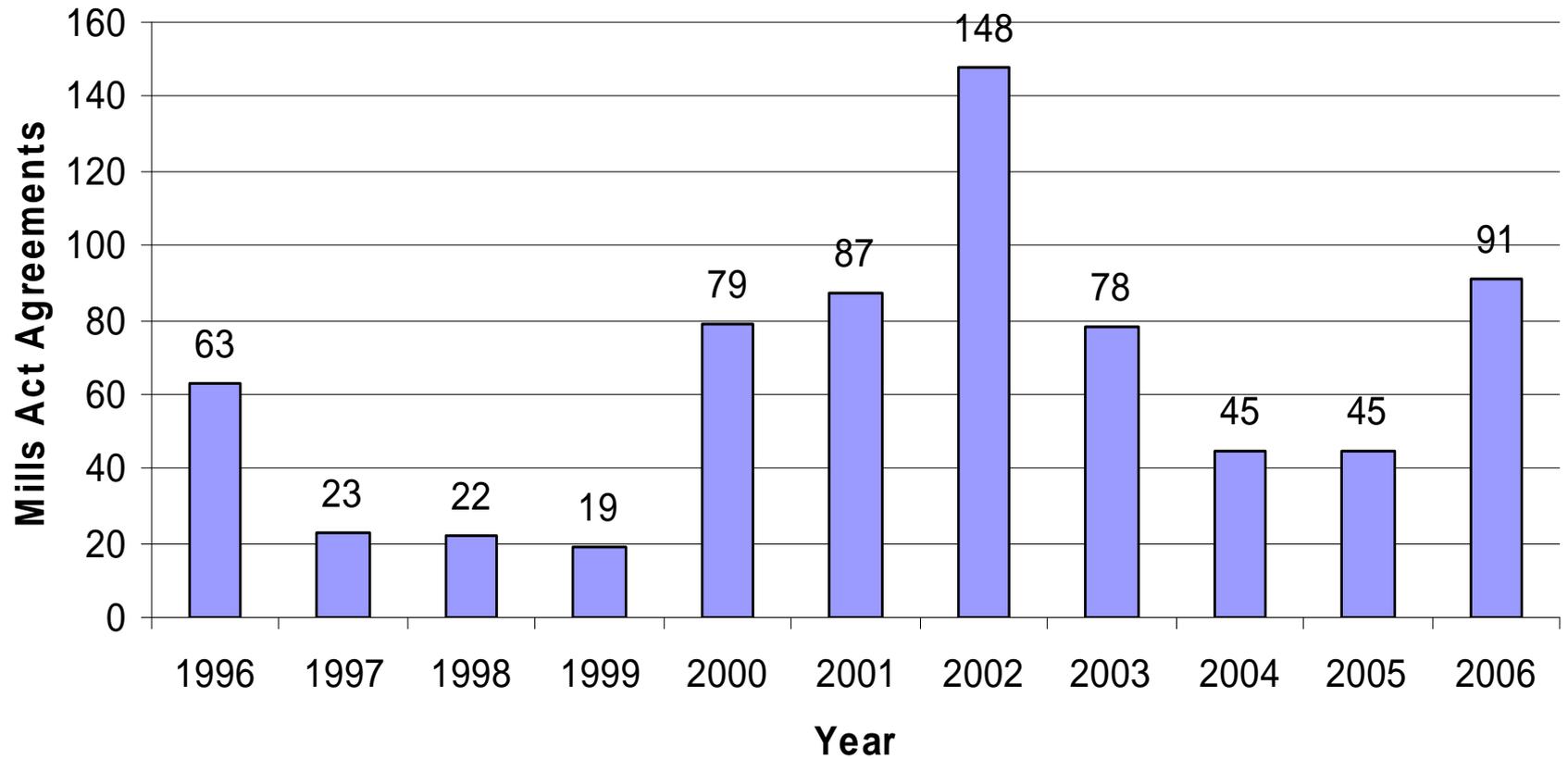
Historic Preservation Incentives

- Current Benefits
 - Federal tax credits
 - Use of State Historic Building Code
 - Mills Act property tax reduction
 - Façade easement
 - Conditional Use Permit for commercial uses in a historic property
 - Design assistance for owners of historical resources through the Historical Resources Board
- Additional Benefits from Draft General Plan
 - Use of Transfer of Development Rights
 - Architectural assistance service
 - Retention of non-conforming setbacks

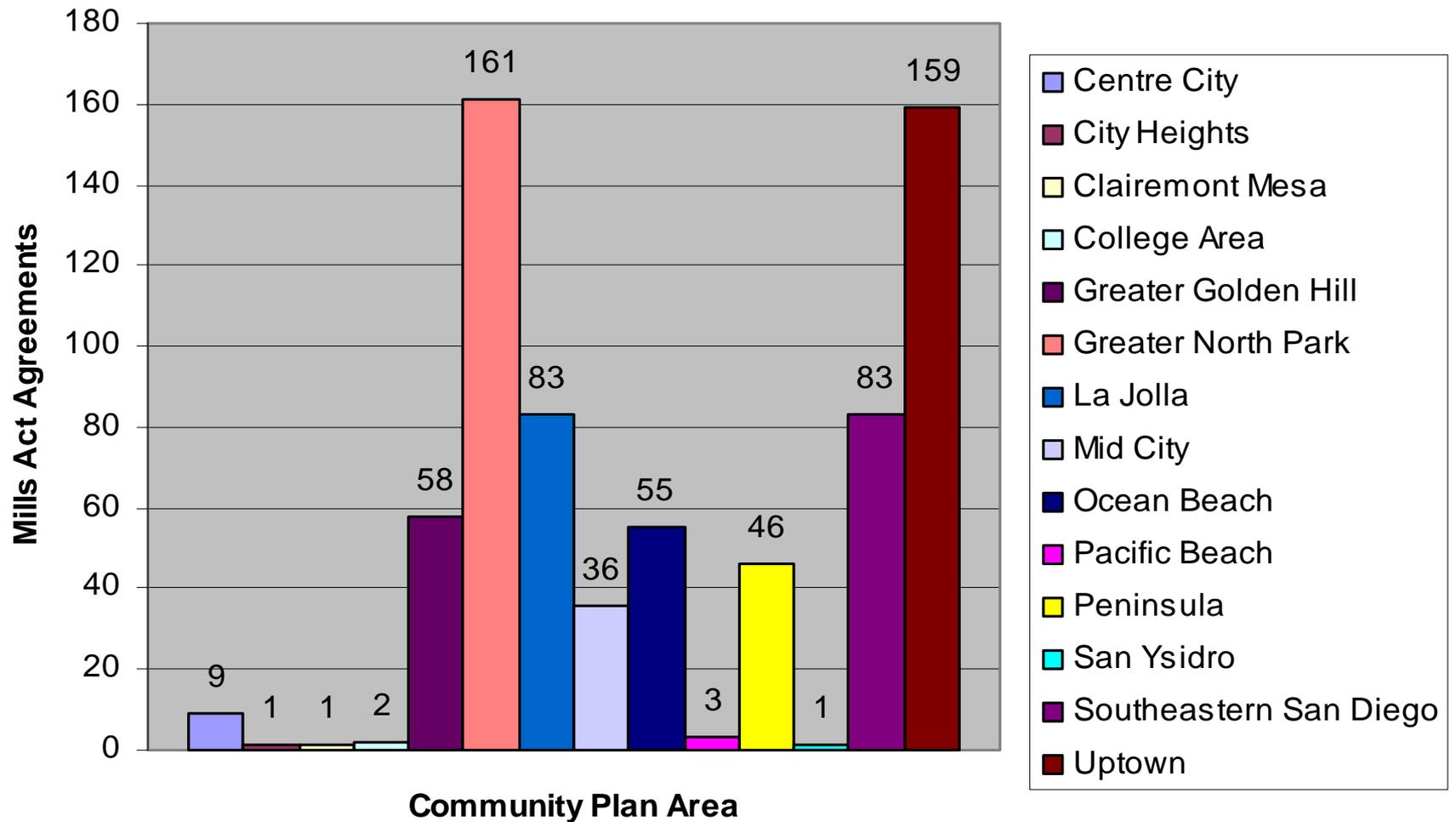
Historic Preservation Incentives

- Mills Act Program
 - State program adopted locally
 - City Council Policy 700-46 (adopted July 18, 1995)
 - Property tax reduction for designated historical properties
 - County Tax Assessor uses formula set by State law
 - 20%-70% savings
 - 10 year life, renewed annually
 - Maintain property according to Secretary of the Interior's Standards

Number of Mills Act Agreements by Year



Number of Mills Act Agreements by Community Plan Area



City Planning & Community Investment Community Planning Group Training

■ Questions

