

**Community Development**

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Staff Memorandum

CHC meeting of September 25, 2023

TO: Cultural Heritage Committee

FROM: Brian Leveille, Senior Planner

SUBJECT: (Discussion Item # 5a) – Draft Request for Proposals scope for Phase 1 of the Historic Resources Inventory Update project

On February 27, 2023, staff provided a brief overview of a consultant provided recommendation on how the City should proceed with an update to the Historic Resources Inventory. The CHC endorsed the recommended approach to update the Historic Resources Inventory with minor comments and corrections to be included in the final recommendations memo (attached). Subsequently, the effort to update the Historic Resources Inventory was funded in the FY23-25 budget in two phases consistent with recommendations. The attached draft Request for Proposals (RFP) document includes a scope intended to result in consultant proposals consistent with recommendations on needed updates of the Historic Preservation Ordinance and Historic Context statement to guide future efforts to update the historic inventory.

Staff will provide a brief overview of the RFP scope at the meeting. Please review the attached documents for discussion at the meeting.

Attachments: Preliminary assessments and recommendations
selected pages for RFP

MEMORANDUM

DATE	March 9, 2023	PROJECT NUMBER	22288
TO	Brian Leveille, Senior Planner	PROJECT	San Luis Obispo Inventory of Historic Resources Assessment
OF	City of San Luis Obispo 919 Palm Street San Luis Obispo, CA 93401	FROM	Stacy Kozakavich, Page & Turnbull Christina Dikas, Page & Turnbull
CC	Ruth Todd, Page & Turnbull	VIA	Email

REGARDING Preliminary Assessment and Recommendations – San Luis Obispo Inventory of Historic Resources.

I. Introduction

Page & Turnbull has prepared this memorandum at the request of the City of San Luis Obispo (City) to provide comments on the existing Inventory of Historic Resources, Historic Context Statement, and Historic Preservation Ordinance, as well as recommendations for potential future updates. The purpose of this report is to identify deficiencies in these documents, and to recommend a structured approach to revisions and updates which is consistent with current best practices in historic preservation.

The central focus of the City's efforts will be to revise and update the Inventory of Historic Resources, which was established in 1983 and has been periodically updated based on the findings of targeted historic resource surveys and individual property evaluations. The structure and content of the Inventory of Historic Resources relies on the interconnected rules and guidance provided by two documents, both developed following the establishment of the Inventory of Historic Resources: the City's municipal code, particularly the Historic Preservation Ordinance (Chapter 14.01) and the *City of San Luis Obispo Citywide Historic Context Statement* (Historic Context Statement) adopted in 2013. The Historic Preservation Ordinance provides definitions for categories of historic resources within the city and criteria and procedures for designation. The Historic Context Statement provides a chronological and thematic framework within which the significance of the City's historic resources can be understood and evaluated.

II. Inventory of Historic Resources Framework

Page & Turnbull reviewed the Historic Preservation Ordinance, Historic Context Statement, and Inventory of Historic Resources to identify possible deficiencies and opportunities for improvement. The following sections provide these findings, as well as recommendations for sequencing updates to the regulatory framework and contents of the Inventory of Historic Resources. A brief discussion of historic preservation practices related to local designation in six other cities with Certified Local Government status is also included.

Historic Preservation Ordinance

The first task in effectively bringing the City's Inventory of Historic Resources into alignment with current best practices in historic preservation should be to update the Historic Preservation Ordinance. Page & Turnbull reviewed sections related to the evaluation and designation of historic resources in the current ordinance (Chapter 14.01), and identified several areas for potential clarification and improvement. In general, we recommend that the overall approach in Chapter 14.01 be more consistent with guidance from the National Park Service and State of California Office of Historic Preservation (OHP) with respect to the definition and evaluation of significant historic resources, including the guidance provided in the OHP *Technical Assistance Bulletin #14 - Drafting Effective Historic Preservation Ordinances: A Manual for California's Local Governments*. Specific potential deficiencies and improvement recommendations for the Historic Preservation Ordinance include the following:

14.01.20 Definitions

- The definitions of the current classifications of "Contributing List resource or property" and "Master List resource" (Sections 14.01.020 and 14.01.050) do not communicate a clear difference in significance or protection between these two categories.
- The definitions of "Cultural resource," "Historic property," "Historic resource," and "Sensitive site" do not communicate how these terms are or should be differently applied with regard to implementation of the City's historic preservation policies.
- The definition of "Historic district/historical preservation district" inaccurately references Chapter 17.54. The correct chapter is 17.56 - Historical Preservation (H) Overlay Zone (Sections 14.01.020 and 14.01.080).
- The definition of "Noncontributing resource" inappropriately characterizes this classification as a "designation," when it is more accurately a lack of designation. This label is misused in place of a term such as "Non-historic property" or "Age-ineligible property," as it corresponds to the definition that these properties are "typically less than 50 years old." Since the appropriate use of the term "Noncontributing resource" is relevant only within the context of historic districts, the definition accurately provided in 14.01.050 is misplaced in this section.

14.01.50 Historic Resource Designations

- The introductory paragraph to Section 14.01.050 includes a partial definition of “Contributing properties,” which is made redundant by the full definition in subsection B.
- Section 14.01.050 does not include requirements for notification of and consent by property owners within proposed historic districts or requirements for consent by owners of individual properties nominated by Cultural Heritage Commission (CHC).
- Section 14.01.050 does not state if and how incentives may be available to owners of listed properties, as is noted with respect to properties in historic districts (Section 14.01.080).

14.01.55 Historic Gardens, Site Features, Signs, and Other Cultural Resources

- The separation of Section 14.01.055 from those which define individually listed historic resources does not clearly communicate that “historic gardens, site features and improvements, accessory structures, signs, Native American sacred places, cultural landscapes and areas or objects of archaeological, architectural, cultural or historic significance” as well as signs may be listed on the Inventory of Historic Resources as either individual properties or contributors to historic districts.

14.01.070 Evaluation Criteria for Historic Listing

- The current evaluation criteria for historic resource designation could require evaluations to address up to sixteen different potential aspects of significance. Compared with the National Register of Historic Places and California Register of Historical Resources, each of which have four criteria, the necessity to address all of the City’s criteria in each property evaluation could be onerous for City reviewers’ time and property owners bearing the cost of evaluation. Much of the detail provided in the City’s Evaluation Criteria for Historic Resource Listing could be included in written guidance for evaluation according to a simplified set of criteria, rather than in the ordinance itself.
- “Integrity” is not an appropriate criteria for evaluation of significance. Rather, it is typically a separate requirement for eligibility for listing.

14.01.080 Historic District Designation, Purpose and Application

- Section 14.01.080 does not include or clearly refer to criteria for designation of Historic Districts, which is specified with respect to “H” overlay zones in Section 17.56.010.B.
- Land use policies and goals and “special considerations for development review” of projects within proposed districts (Section 17.56.010.B) are important issues to discuss as part of City review and hearings regarding applications for designation of historic districts. However,

requiring applications to include analyses of these issues may be onerous to applicants not experienced in planning policy. This may discourage private individuals and groups from submitting applications.

14.01.090 Process for Establishing or Amending Historic Districts

- Preparation of “graphic and written design guidelines” (14-01-090.C.4) should be developed as a separate process, to be consistent with and implemented as part of the City’s existing design review processes.
- While “Environmental Design Continuity” is a required review criterion for historic district applications (14-01-090.E), this criterion is not mentioned in the application requirements (14-01-090.C) or characteristics (17.56.010.B) of historic districts/“H” overlay zones.
- The relevance of individually eligible properties within proposed historic districts to CHC and City Council review is not made clear in Section 14-01-090.E.2. While it may be assumed that the presence of some proportion of individually eligible properties could benefit a district’s eligibility, this is not explicitly stated.

Preparation of revised Historic Preservation Ordinance text and meetings with City staff and the CHC are included as **Task 1.1** in the Recommended Scope of Work.

Historic Context Statement

Adopted in 2013, the Historic Context Statement provides a broad overview of the City’s history spanning chronologically from the 1700s through the mid-20th century. Contextual themes, property types, eligibility standards, and local examples are presented for each of six time periods between 1772 (the beginning of Spanish Colonization and establishment of Mission San Luis Obispo) and 1970. Though the majority of individual properties listed on the Inventory of Historic Resources were evaluated and designated prior to adoption of the Historic Context Statement, the document provides a good foundation for review of currently designated properties and new evaluations.

Page & Turnbull reviewed the Historic Context Statement, and identified the following areas for potential improvement:

- Discussion of the presence and historical contribution of Chumash and other Native American tribal groups is limited to sections which discuss the early history of San Luis Obispo, and “Associated Property Types, Integrity Considerations & Eligibility Standards” related to Native American peoples acknowledges only archaeological resources. Traditional cultural properties and other resource types associated with the area’s historic and current Native American residents and communities are not addressed.

- The “Ethnic Communities” themes presented with the contexts for the Late 19th Century, Early 20th Century, Great Depression, and World War II may encourage the identification of resources associated with distinct cultural groups who have contributed to the history and built environment of San Luis Obispo. However, the use of a specific category for “Ethnic Communities” within a limited number of the larger temporal contexts risks relegating resources that are not associated with the city’s Anglo-American history to a category of “other,” separate from the core histories of San Luis Obispo’s past.
- Some groups and themes which have been identified by other municipalities as significant in local history, as well as to the history of California, are not included in San Luis Obispo’s Historic Context Statement. Groups and themes which may be significant in the city’s history include (but are not limited to) LGBTQ+ communities, African American/Black communities, Latinx communities, and labor history.
- Transportation-related development is limited to the late 19th-century time period, and as such is limited in focus to the early construction and use of rail lines and related infrastructure. Later changes in the use of rail lines and the growth of automobile-focused routes and infrastructure are excluded from the potential significant associations.

Preparation of an addendum to the Historic Context Statement, including public meetings, meetings with City staff and the CHC are included as **Task1.2** in the Recommended Scope of Work.

Inventory of Historic Resources

San Luis Obispo’s Inventory of Historic Resources currently consists of 760 locally designated individual properties, including 198 “Master List” properties and 562 “Contributing List” properties. The inventory was established following the City’s first comprehensive historic resource survey, conducted in 1982-1983, which reviewed over 2,000 pre-1941 properties, primarily near the downtown core.¹ This survey established the basis for the Master List, plus three historic districts: Downtown, Mill Street, and Old Town. Of the currently listed properties on the Inventory of Historic Resources, 285 (149 on the Master List and 136 on the Contributing List) were listed on August 15, 1983 as a result of this survey.

The second historic resource survey, completed in 1986, reviewed approximately 500 properties, mostly single-family residences outside of the downtown area, which had been identified by the Cultural Heritage Committee. A total of 400 properties were evaluated, 100 for eligibility for the Master List and National Register, and all 400 as potential district contributors. Of the currently

¹ Previous historic resource survey approaches and findings are summarized from: Historic Resources Group, *City of San Luis Obispo Citywide Historic Context Statement* (Pasadena: Prepared for the City of San Luis Obispo, September 30, 2013), 6-8.

listed Inventory of Historic Resources properties, 256 (three on the Master List and 253 on the Contributing List) were listed on February 2, 1987 as a result of this survey, and the Chinatown and Railroad historic districts were identified. Three additional districts that were recommended following the 1987 survey Little Italy, Monterey Heights, and Mount Pleasanton/Anholm, were not designated, though each area contains a concentration of designated Contributing List properties.

In 2006-2007, City staff surveyed properties in the East Railroad and Monterey Heights potential districts. Of the currently listed Inventory of Historic Resources properties, 22 were listed on February 19, 2007 as a result of this survey.

The fourth Inventory of Historic Resources update survey, conducted in 2011-2012, reviewed properties dating to ca. 1900-1925 in an area recommended by the Cultural Heritage Committee "outside of existing historic districts adjacent to Johnson Avenue between Higuera and Buchon Streets."² Of the currently listed Inventory of Historic Resources properties, 57 Contributing List properties were designated on December 3, 2012 as a result of this survey.

The majority of properties listed in the Inventory of Historic Resources are within one of the City's five designated Historic District Overlay Zones (**Table 1**). A total of 128 of the 198 Master List properties are within the boundaries of a Historic District Overlay Zone. Of the 562 Contributing List properties, 392 are within the five designated Historic District Overlay Zones. There are 234 within the Old Town District, the largest historic district in the City, consisting primarily of single-family residential properties.

An additional 110 Contributing List properties are within five concentrations of properties which appear to have been identified in previous surveys as potential districts during previous surveys, but which are not designated as Historic District Overlay Zones.³

There are 60 individual Contributing List properties outside of an existing historic district or neighborhood previously identified as a potential historic district, approximately three quarters of which are within the 2012 survey area immediately south of Higuera Street and east of Toro Street and Johnson Avenue.

Table 1. Count of Inventory of Historic Resources-listed properties within historic districts and neighborhoods.

² Historic Resources Group, *City of San Luis Obispo Citywide Historic Context Statement*, 6-7.

³ Historic Resources Group, *City of San Luis Obispo Citywide Historic Context Statement*, 171-186.

District or Neighborhood	Designated as Historic District Overlay Zone	Number of Master List Properties	Number of Contributing List Properties
Railroad	Yes	11	17
Downtown	Yes	45	65
Mill Street	Yes	12	70
Old Town	Yes	58	234
Chinatown	Yes	2	6
East Railroad	No	Not recorded	23
Johnson Avenue	No	Not recorded	1
Little Italy	No	Not recorded	3
Monterey Heights	No	Not recorded	7
Mt. Pleasanton/Anholm	No	Not recorded	76

The majority of properties included in the Master List were designated prior to development of the Historic Context Statement, so specific contexts or themes described in the 2013 document were not formally associated with most properties at the time of their designation. Page & Turnbull reviewed information available through the City's GIS system for Master List properties to make preliminary context theme assignments to each property. While estimated based on limited information, these assignments provide some insight into which themes are currently represented in the Inventory of Historic Resources and by designated historic districts, and may provide opportunities for better representation in future evaluations and designations.

The majority of Master List properties, 128 of the total 198, are related to two themes: late-19th-Century and Early 20th-Century residential development. The next most frequent are late-19th-Century and Early 20th-Century commercial development, represented by 31 of 198 Master List properties. These time periods and themes are also reinforced through association with the designated historic districts, whose contributors predominantly represent late 19th- and early 20th-century residential and commercial buildings.

The 17 other themes included in the Historic Context Statement are represented by relatively small numbers of properties. In the case of Mission-Era Institutional Development and Residential Development, this is understandable due to the relative rarity of properties dating to this early period. The small number of properties associated with the Great Depression & World War II (1930-1945) and Mid-20th-Century Growth (1945-1970) context periods, a total of about 12 Master List properties across all themes for the periods from the 1930s to 1970, suggests that properties built during these years may have not been prioritized in previous historic resource surveys. Only one Master List property, the Ah Louis Store at 800 Palm Street, is explicitly associated with "Ethnic

Communities” themes across all time periods. The Historic Context Statement notes that 11 properties “were identified in 2008 for their historic association with the local Italian community,” however, the annotations associated with Master List properties on the City’s publicly available GIS information do not identify this significant association for any properties.⁴

Construction dates and historic significance information was not available for Contributing List properties during preparation of this memorandum. It is therefore not clear if the proportions of context themes represented in the Contributing List differs from that in the Master List.

A detailed review of property types, context themes, and time periods represented in the Inventory of Historic Resources, as well as an updated assessment of the integrity of listed properties, is included as **Task 1.3** in the Recommended Scope of Work. Development and implementation of a survey plan for evaluation of new potential individual resources and historic districts are described in **Tasks 2.1 and 2.2** of the Recommended Scope of Work.

III. Comparative Preservation Policies

Page & Turnbull reviewed the preservation ordinances of six Certified Local Governments with populations between approximately 20,000 and 120,000 to provide comparison and insight into current and potential approaches for updating San Luis Obispo’s historic preservation program. Administered by the State of California Office of Historic Preservation, the Certified Local Government (CLG) program provides funding opportunities for cities with qualifying historic preservation policies and practices, including maintenance of an inventory of historic resources and ordinance-guided preservation review commission. Cities whose ordinances were reviewed for this report include Alameda, Berkeley, Burbank, Calabasas, Monterey, and Palm Springs (**Table 2**).

While the specific category titles and approaches vary from city to city, in general, each provides definitions and criteria for the designation of individual resources and districts. In four of the cities (Burbank, Calabasas, Monterey, and Palm Springs), the criteria for designation of individual resources and districts are entirely or closely based on the criteria used by the National Register and California Register. The City of Burbank relatively recently adopted this approach, following the recommendations of a Historic Context Statement prepared in 2009.⁵ Four of the cities (Alameda, Berkeley, Monterey, and Palm Springs) have two separate levels of designation for individual resources. None of the six cities reviewed uses the term “contributing” or “contributor” in designation of resources outside of historic districts. In some cities, including Berkeley and

⁴ Historic Resources Group, *City of San Luis Obispo Citywide Historic Context Statement*, 71.

⁵ Galvin Preservation Associates, *City of Burbank: Citywide Historic Context Report* (Redondo Beach: Prepared for the City of Burbank, September 2009).

Calabasas, properties listed on the National Register or California Register are automatically added to the local inventory.

Five of the cities reviewed have Mills Act contract programs. Enacted by the State of California in 1972, this legislation “grants participating local governments (cities and counties) the authority to enter into contracts with owners of qualified historic properties who actively participate in the restoration and maintenance of their historic properties while receiving property tax relief.”⁶ Cities with Mills Act programs typically limit the number of available Mills Act contracts per year and establish a local designation threshold required for a property to be eligible (Table 2). The City of San Luis Obispo currently requires that properties be designated on the “Master List” to be eligible for Mills Act contracts, and will establish up to 10 new contracts per year. As of 2021, 56 Mills Act contracts were active in San Luis Obispo. At the state level, the legislation governing the Mills Act program defines a “qualified historical property” for the purposes of the program as follows:

“Qualified historical property” for purposes of this article, means privately owned property which is not exempt from property taxation and which meets either of the following:

- (a) Listed in the National Register of Historic Places or located in a registered historic district, as defined in Section 1.191-2(b) of Title 26 of the Code of Federal Regulations.
- (b) Listed in any state, city, county, or city and county official register of historical or architecturally significant sites, places, or landmarks.⁷

Table 2. Historic resource designation categories of selected CLG cities.

City (population) Ordinance	Historic Resource Designation Categories	Criteria Similar to CR/NR?	Published Mills Act Contract Eligibility Threshold
Alameda (approx. 76,300) <i>Article VII, Section 13-21 – Preservation of Historical and Cultural Resources</i> (Ordinance dated 2003)	Historical Monument (Districts are not a separate category, but may be historical monuments) Historical Building Study List	No - Specific to City of Alameda	No Mills Act program.
Berkeley (approx. 117,100)	Landmark Structure of Merit	No – Specific to City of Berkeley	Designated as City of Berkeley Landmarks

⁶ State of California Office of Historic Preservation, “Mills Act Program,” electronic resource at https://ohp.parks.ca.gov/?page_id=21412.

⁷ State of California Government Code Article 12, Section 50280.1, electronic resource at https://leginfo.ca.gov/faces/codes_displaySection.xhtml?lawCode=GOV§ionNum=50280.1.

<p><i>Chapter 3.24 – Landmarks Preservation Commission</i> (Ordinance dated 1974 and 1985)</p>	<p>Historic District</p>		<p>or Structures of Merit.</p>
<p>Burbank (approx. 105,400) <i>Article 9, Division 6. Historic Preservation Regulations</i> (Ordinances dated 1994, 2010, and 2011)</p>	<p>Designated Historic Resource Eligible Historic Resource Historic District</p>	<p>Yes – Patterned after CR/NR. District criteria slightly different than those for individual resources.</p>	<p>Designated as a City of Burbank Historic Resource or listed on the National Register or California Register.</p>
<p>Calabasas (approx. 22,900) <i>17.36.010 – Historic Preservation Ordinance</i> (Ordinance dated 2010)</p>	<p>Historic Landmarks Historic District Historic Landscape</p>	<p>Yes – Patterned after CR/NR District criteria slightly different than those for individual resources or landscapes.</p>	<p>Designated as a City of Calabasas Historic Landmarks, contributing structures in designated historic districts, or listed on the National Register or the California Register.</p>
<p>Monterey (approx. 29,900) <i>Chapter 38 - Article 15 – Historic Zoning Ordinance</i> (Ordinances dated 2012 and 2022)</p>	<p>Landmark Overlay Zoning (H-1) Historic Resource Overlay Zoning (H-2) Historic District Overlay Zoning</p>	<p>Yes – Explicitly uses NR and CR criteria.</p>	<p>Designated as a City of Monterey historic resource, with an “H” designation.</p>
<p>Palm Springs (approx. 45,000) <i>Chapter 8.05 – Historic Preservation</i> (Ordinance dated 2019)</p>	<p>Class 1 Historic Resources Class 2 Historic Resources</p>	<p>Yes - Eligibility based on a slightly modified version of the NR/CR criteria, with lower integrity requirements for Class 2 Resources.</p>	<p>Designated by the City of Palm Springs as a Class 1 historic site or Class 2 historic site with the extant historic resource, contributing structures in a locally designated historic district, or listed on the National Register.</p>

IV. Recommended Scope of Work

Following review of San Luis Obispo's Inventory of Historic Resources, Historic Context Statement, and Historic Preservation Ordinance, Page & Turnbull recommends a two-phased approach to updating the inventory. Phase 1 would address the existing inventory and its regulatory framework, and would include revisions to the ordinance and Historic Context Statement (Tasks 1.1 and 1.2) and assessment of the current inventory (Task 1.3). The definitions and criteria codified in the ordinance, and the preservation priorities and significant context themes provided by the Historic Context Statement, must guide evaluations of eligibility for additions to the Inventory of Historic Resources. Following these tasks, a detailed update to the existing Inventory of Historic Resources should be undertaken to align the information associated with currently designated properties with the changes made during Tasks 1 and 2. This would include reclassifying listed properties, removing individually listed properties that may lack sufficient significance or integrity, and reviewing previously identified concentrations of properties as potential historic districts.

The three Phase 1 tasks, including the Historic Preservation Ordinance Update, Historic Context Statement Addendum, and Inventory of Historic Resources Review and Recommendations, could be completed within approximately **12 months**, for an estimated fee within the range of **\$68,000 - \$112,000**. This fee range includes all tasks, plus a 15% contingency. The estimated duration assumes that Task 1.1 and Task 1.2 would begin concurrently, and that Task 1.3 would be initiated after submittal of the Administrative Draft Historic Context Statement Addendum (Task 1.2). The estimated duration also assumes a three-week review period for each draft deliverable. Task durations may vary based on City staff and stakeholder availability, and the meeting and hearing schedules.

Phase 2 would develop and implement an approach to evaluating new potential resources for listing on the Historic Resource Inventory. Guided by a review of the current representation of significant context themes presented in the Historic Context Statement, a detailed survey plan would be prepared for identifying new areas and resources for evaluation (Task 2.1). This survey plan would identify geographic, temporal, and thematic priorities for future survey and nomination efforts which may then be implemented as a separate task or tasks (Task 2.2).

The Phase 2 tasks, including the Inventory Update Survey Plan, reconnaissance survey of up to 500 properties, individual property evaluation of up to 25 properties, and evaluation of two historic districts, could be completed within approximately **nine months**, for an estimated fee within the range of **\$70,000 - \$110,000**, which includes estimated consultant fees plus a 15% contingency.

Table 3 provides a summary of estimated fee ranges and durations by task. Detailed task descriptions are provided in the following section.

Table 3. Inventory of Historic Resources Update – Estimated Task Fees and Durations

Task	Fee Range ⁸	Duration
Phase 1 – Revise Current Inventory and Framework		
1.1 – Historic Preservation Ordinance Update	\$19,000 - \$29,000	6 months
1.2 – Historic Context Statement Addendum	\$25,000 - \$38,000	8 months
1.3 – Inventory of Historic Resources Review and Recommendations	\$24,000 - \$45,000	6 months
Phase 2 – Add to Inventory of Historic Resources		
2.1 – Inventory Update Survey Plan	\$15,000 - \$25,000.	5 months
2.2 – Inventory Update Survey Implementation	\$71,000 - \$98,000	9 months
Total Estimated Fee Range and Duration	\$154,000 - \$235,000	26 months

Phase 1 – Revise Current Inventory and Framework

Task 1.1 – Historic Preservation Ordinance Update

Estimated Resource Commitment: \$19,000 - \$29,000

The City of San Luis Obispo’s Historic Preservation Ordinance provides the legal framework for recognizing, protecting, and managing changes to the City’s historic resources. To update the Historic Preservation Ordinance, the consultant will:

- a) Review the existing ordinance (Municipal Code Chapter 14.01) and opportunities for improvement identified in this assessment document.
- b) Discuss issues and approaches for potential revisions and updates with the CHC and City staff in one study session.
- c) Using the information from document review and input from the study session, as well as knowledge of best practices, current laws, and ordinances used by other Certified Local Governments, draft updates to the City’s historic preservation ordinance. Updates will include, but may not be limited to, revising the categories of individually listed historical resources and district contributors, the evaluation criteria for individual resources and

⁸ Includes estimated consultant staff time at average hourly staff billing rates between \$100 and \$150, plus a 15% contingency per task. Cost estimate calculations do not include travel time or mileage costs, nor lodging and per diem costs for participation in study sessions, outreach workshops, or field surveys, as these will vary based on the location of the consultant and the number of study sessions or hearings requested.

historic districts, procedures and requirements for designation of individual resources and historic districts, and applicability of historic preservation incentives. Revision of local designation categories may require revision to the City of San Luis Obispo's Mills Act program policies and guidance publications.

Updates to the Historic Preservation Ordinance will be provided and revised accordingly for administrative review, public review, CHC review, and final adoption.

Task 1.2 – Historic Context Statement Addendum

Estimated Resource Commitment: \$25,000 - \$38,000

The City's Historic Context Statement provides the significant historic contexts and themes within which potential historic resources are evaluated for significance, identifies property types associated with these themes, and recommends thresholds for significance. To update the existing Historic Context Statement, the consultant will:

- a) Review the existing Historic Context Statement, adopted in 2013, and opportunities for improvement identified in this assessment document to develop a preliminary list of themes, including groups, patterns, or events, which are not yet represented in the Historic Context Statement.
- b) Discuss preliminary findings with CHC and City staff in one study session.
- c) Conduct general public outreach to share the preliminary list of contexts and themes, and to solicit public input into additional areas for context development.
- d) In collaboration with the City's Office of Diversity, Equity, and Inclusion, identify and consult with specific community groups to develop approaches for identifying, recording, and designating intangible cultural resources and traditional cultural properties in San Luis Obispo. This directed outreach will include groups and individuals affiliated with the Northern Chumash, Salinan Tribe, and other Native American tribal groups, and may include other groups identified through the broader public outreach and study session described above.
- e) Prepare an addendum to the Historic Context Statement which includes historic context descriptions for new themes, associated property types, thresholds for significance, and integrity considerations. These themes may be recommended to be integrated as appropriate into existing temporal and thematic categories, or be considered as new categories.

The addendum to the Historic Context Statement will be provided and revised accordingly for administrative review, public review, CHC review, and final adoption.

Task 1.3 – Inventory of Historic Resources Review and Recommendations

Estimated Resource Commitment: \$24,000 - \$45,000

The City's current Inventory of Historic Resources represents four decades of survey efforts and changing historic preservation priorities and approaches. To review the current condition of listed resources and update information to align with revised frameworks developed in Tasks 1 and 2, the consultant will:

- a) Obtain and review existing documentation (including survey and/or evaluation forms and reports) from previous Inventory of Historic Resources surveys, conducted in 1982-1983, 1987, 2006-2007, and 2011. Where possible, the significant themes or associations justifying original listing of each property and the corresponding context or theme in the 2013 Historic Context Statement and/or Addendum will be noted in a table or database of all listed resources.
- b) The use of field survey tools for digital data collection is a cost saving measure when used effectively. The consultant will utilize GIS parcel data provided by the City and/or County Assessor to map properties that will be surveyed and build a customized mobile survey application for use in the field with tablets or mobile devices to efficiently collect and export photographs and field data for each property. The selected survey app should have the capability to collect customized, geolocated cloud-based data that can be exported to easily update the City's existing GIS data.
- c) Conduct pedestrian or "windshield" reconnaissance survey of all resources currently listed on the Inventory of Historic Resources (198 "Master List" and 562 "Contributing List"), using a survey application for mobile devices. As part of the survey, identify any properties which have been removed, demolished, or altered to the extent that their integrity appears to have been diminished such that they are no longer eligible for listing in the Inventory of Historic Resources.
- d) Compile information collected during survey with previous documentation to provide a database of properties which includes, at minimum:
 - Current digital photograph(s)
 - Assessor Parcel Number (APN)
 - Address
 - Year built
 - Property type
 - Architect or builder (if known)
 - Architectural style
 - Architectural features, materials, and alterations

- Assessment of integrity
 - Associated Historic Context Statement context and theme
 - Current Inventory of Historic Resources listing category
 - Associated historic district
 - Recommended Inventory of Historic Resources category
 - California Historical Resource Status Code
- e) Prepare an Inventory of Historic Resources Recommendations Report, using collected field data and previous documentation. Contents will include, but may not be limited to:
- i. A description of survey methods,
 - ii. Analysis of the historic contexts and themes, time periods, and architectural styles represented in the current Inventory of Historic Resources,
 - iii. A review and update of historic resource category assignments for listed properties to those developed during Task 1.0, including:
 - A list of individual properties both within and outside of the five existing historic districts (Downtown, Old Town, Chinatown, Railroad, and Mill Street) which may qualify for status as individually listed properties on the Inventory of Historic Resources.
 - A list of properties within the five existing historic districts (Downtown, Old Town, Chinatown, Railroad, and Mill Street) which should be identified as district contributors only, rather than individually listed resources.
 - iv. A discussion of existing groupings of properties on the Inventory of Historic Resources and the neighborhoods identified in the 2013 Historic Context Statement, such as the Anholm, East Railroad, and Monterey Heights areas, and recommendations as appropriate for potential historic districts.

The Inventory of Historic Resources Recommendations Report will be provided and revised accordingly for administrative review, public review, CHC review, and final adoption.

Phase 2 – Add to Inventory of Historic Resources

Task 2.1 – Inventory Update Survey Plan

Estimated Resource Commitment: \$15,500 - \$25,000

Historic Resources Inventories are necessarily works in progress, and must be periodically updated to represent the full range of significant contexts and themes, and to incorporate properties not old enough for evaluation as historic resources during previous surveys. The consultant will work with

the CHC and City staff to develop an inventory update survey plan which may be implemented in phases according to priorities and available funding. To complete this task, the consultant will:

- a) Use the findings of the Inventory of Historic Resources Recommendations Report and existing City and County information about dates of construction and/or tract development to identify previously unsurveyed areas of San Luis Obispo with a majority of buildings 50 years of age or older. The consultant may also review the State of California Office of Historic Preservation Built Environment Resource Directory (BERD), aerial and historical photographs, Sanborn Map Company fire insurance maps, and tract maps, which will additionally inform an understanding of citywide development.
- b) Develop preliminary recommendations for potential survey areas. Priority for recommended reconnaissance survey will be given to areas or property types associated with time periods and themes described in the Historic Context Statement and Addendum which are not well represented in the existing Inventory of Historic Resources. Reconnaissance areas may include neighborhoods with modern architectural styles, such as Greta Place; other planned tracts which may not contain a large number of individually eligible resources but are representative of significant periods or types of development; or property types such as cultural landscapes and tribal resources.
- c) Discuss preliminary findings with CHC and City staff in one study session.
- d) Based on the findings of document review and discussion with the CHC and City staff, develop a survey plan which describes areas recommended for additional survey and the contexts or themes associated with those areas. The survey plan will provide the basic task structure for a phased approach with estimated resource needs for each proposed survey area, and will assume the use of mobile data collection applications.
- e) Develop a Volunteer Surveyor Training Plan for instruction of volunteers who may include students from California Polytechnic State University in San Luis Obispo, public and private secondary schools in San Luis Obispo, and local historical societies. The training plan will include a brief description of basic reconnaissance and intensive survey methods, visual references for common architectural styles and building types, and guidelines for field photography. The training plan will be prepared as an appendix to the survey plan, such that it may be utilized as a standalone document during surveys.

The Inventory Update Survey Plan will be provided and revised accordingly for administrative review and CHC review.

As the number of properties and size of survey areas is not yet known, potential fee cannot be estimated for implementation of the survey plan; however, estimated costs for typical survey sizes are provided below.

Task 2.2 – Survey and Evaluation of Potential Resources

Estimated Resource Commitment: \$71,000 - \$98,000

The scope and scale of survey and evaluation undertaken would be dependent on the findings of the Phase 1 tasks and recommendations of the Inventory Update Survey Plan. The following survey descriptions and estimates represent typical approaches and scales that may be implemented. Each of these survey subtasks could be repeated as needed for different areas of the city, with the estimated resource commitment dependent on the number of properties included in each survey area and intensity of the survey.

The total estimated resource commitment for Task 2.2 assumes one Type 1 reconnaissance survey of up to 500 properties, one Type 2 intensive survey of 25 potential individually eligible properties, and two Type 3 surveys for new historic districts.. This estimated number of resources, and thus the estimated resource commitment, is preliminary, and would be refined through completion of Phase 1 and Task 2.1.

Type 1 Survey: Reconnaissance

Reconnaissance-level survey of age-eligible (at least 45 years old) properties, undertaken as a street-by-street windshield survey to identify potential individual resources and districts. This effort would be guided by the Historic Context Statement's evaluative criteria as the basis of evaluation, and would be used to inform the methodology and approach to more intensive survey of potential resources and districts. Field survey would include training and supervision of volunteer survey crew members, based on the Volunteer Surveyor Training Plan prepared as part of Task 2.1. The deliverable would include lists and maps of potential historic resources and districts for further review. Estimated Resource Commitment: **\$22,000 - \$32,000** for each survey of approximately 500 properties.

Type 2 Survey: Intensive Recording and Evaluation – Individual Resources

Intensive-level survey of properties identified during reconnaissance-level survey as likely to be eligible as individual historic resources. The estimated budget includes a brief field survey, two hours of property-specific research, and six hours to prepare basic State of California Department of Parks and Recreation (DPR) 523 forms for each property. Intensive-level survey evaluates properties according to the criteria for the National Register, California Register, and local criteria. Field survey would include training and supervision of volunteer survey crew members, based on the Volunteer Surveyor Training Plan prepared as part of Task 2.1. The time estimate for research and form preparation assumes the use of pre-prepared context, basic architectural description, and limited

property-specific research. Resource Commitment: **\$27,000 - \$36,000** for each survey of up to 25 individually eligible properties.

Type 3 Survey: Intensive Recording and Evaluation – Historic District

Intensive-level survey of properties identified during reconnaissance-level survey as likely to be eligible as contributors to a potential historic district. The estimated budget includes a brief field survey, neighborhood and district-level research and context development, and preparation of State of California Department of Parks and Recreation (DPR) 523 forms for the district. Intensive-level survey evaluates a historic district according to the criteria for the National Register, California Register, and local criteria. Field survey would include training and supervision of volunteer survey crew members, based on the Volunteer Surveyor Training Plan prepared as part of Task 2.1. The time estimate for research and form preparation assumes that forms will not be prepared for individual properties, and that property-specific research will be limited. Resource Commitment: **\$11,000 - \$15,000** for each survey of one district with 10 to 25 contributors.

A. INTRODUCTION

Background and Project Purpose

The City of San Luis Obispo is pursuing a two-phase project to accomplish an update of its Inventory of Historic Resources. The first phase of the effort is the subject of this RFP which includes necessary updates to the Historic Preservation Ordinance (HPO) and Historic Context Statement (HCS) to guide the update to the City's list of historic resources. The City's historic inventory was established in 1983 and has been updated with subsequent surveys and individual actions to add (list) or remove (delist) properties from the City's inventory. The majority of the properties on the list were added prior to the City's adoption of the HPO in 2010 and the City's HCS which was adopted in 2013. The HPO includes the eligibility criteria for listing as a Master List of Contributing List Resource and the City's Historic Context Statement is a key document for establishing preservation priorities and significant context themes to guide evaluations of eligibility for additions or removal of existing resources from the historic resource inventory. The scope and deliverables included in this RFP (Phase 1) to update the HPO and HCS will provide the updated definitions/criteria and preservation priorities and significant context themes to guide subsequent work to update the full inventory.

Historic Preservation Program Overview

The City of San Luis Obispo is a Certified Local Government (CLG) with the Cultural Heritage Committee (CHC) serving as its Historic Preservation Commission. The City has four historic districts and there are currently 760 locally designated properties including 198 Master List properties and 562 Contributing properties. The City also has an active Mills Act program with 52 properties under Historic Preservation contracts with the City.

For more information and links to the City's HPO, HCS and Historic Districts, please view the City's Historic and Archaeological Preservation Program website: <https://www.slocity.org/government/department-directory/community-development/historic-and-archeological-preservation>

B. SCOPE OF WORK

Historic Preservation Ordinance - Regulatory Framework

Prepare a comprehensive update to the Historic Preservation Ordinance (HPO) related to the evaluation and designation of historic resources which includes the following:

- (1) Update the HPO to be more consistent with guidance on definitions and evaluation of significant historic resources from the National Park Service and State of California Office of Historic Preservation (OHP) including guidance in the OHP Technical Assistance Bulletin #14 – Drafting Effective Historic Preservation Ordinances: *A Manual for California's Local Governments*.
- (2) Definitions: Update and clarify current classifications of "Contributing" and "Master List" historic resources to communicate a clear difference in significance or levels of protection between the two categories.

- (3) Update or revise definitions for “Historic Property,” “Historic Resource,” and “Sensitive Site,” to more clearly convey how these terms are differently applied with respect to implementation of the City’s Historic Preservation Policies.
- (4) Revise inaccurately referenced Zoning Chapter 17.54 for Historic district/historic preservation district (Sections 14.01.020 and 14.01.080 - Should be 17.56)
- (5) Update “non-contributing” resource classification to clearly apply to only within the context of historic districts. Definitions should also be added which may include “non-historic property” or “age ineligible” for properties outside districts which do not meet significance criteria.
- (6) Remove the redundant partial definition of “Contributing properties” in 14.01.050.
- (7) Review and recommend potential updates for notification and consent by owners of individual properties nominated by the Cultural Heritage Committee (CHC) in 14.01.050.
- (8) Amend 14.01.55 to clarify that “historic gardens, site features and improvements, accessory structures, signs, Native American sacred places, cultural landscapes and areas or objects of archaeological, architectural, cultural or historic significance” maybe listed on the Inventory of Historic Resources as either individual properties or contributors to historic districts.
- (9) Revise the current criteria of 14.01.070 (has sixteen different potential aspects of significance) to simplify and more closely reflect the NRHP and CRHR criteria. This should also include revision of “integrity” currently listed by itself as a potential criterion of significance.
- (10) Update 14.01.080 to clearly refer to criteria for designation of Historic districts similar to “H” overlay discussion in Zoning Chapter 17.56.010.B
- (11) Update 14.01.090 to clarify only the Council or CHC may initiate a process to establish or alter the boundaries of a Historic Preservation District and remove the requirement to develop “graphic or written design guidelines” which should be a separate process.
- (12) Explore and recommend potential updates to 14.01.090.E.2. for more clarity or review criterion for numbers or proportions of individually eligible properties which should be in a proposed district.
- (13) Recommend any other updates or amendments which would improve the HPO’s regulatory framework for determining historic resource significance.

Please note that City staff will be concurrently working to update the HPO to clarify review procedures and other needed updates outside the scope of the above items. It is anticipated that the HPO update will include both the updates in the scope of consultant services noted herein that relate to the evaluation and designation of historic resources, and other staff recommended updates to clarify review procedures and other updates to add necessary cross references. City staff will be fully responsible for all aspects of the update that fall outside the scope noted above in items 1-13 or that are contained in the consultant proposal.

Historic Context Statement

Prepare an update to the Historic Context Statement which includes the following:

- (1) Update the discussion and evaluate and recommend resource types regarding the contribution of Chumash and other Native American Tribal groups to include traditional cultural properties and other resource types (in addition to archaeological resources) associated with the area’s historic and current Native American residents and communities.
- (2) Evaluate, recommend, and include needed updates to the “Ethnic Communities” discussion to potentially include more detail on distinct cultural groups and their contributions and associations with San Luis Obispo’s past.

- (3) Evaluate, recommend, and include updates to transportation related development that include later changes (currently limited to late 19th Century) in the use of rail lines and the growth of automobile focused routes and infrastructure.
- (4) Evaluate, recommend, and include updates for groups and themes that are not included in the current context statement including but not limited to LGBTQ+ communities, African American/Black communities, Latinx communities, and labor history.
- (5) Complete a comprehensive review of the Historic Context Statement and evaluate, recommend, and include any other updates needed for a fully up to date document that can more effectively guide decisions on resource eligibility in the upcoming historic resource inventory update.

Completion date: early calendar year 2025 (see draft/preliminary schedule below)

Presentations/Public Hearings: The consultant should be available for two hearings at the CHC (one study session and one final review for recommendation to Council) and one hearing for the City Council to consider final adoption of the updated documents. The consultant will be ready to present the recommended updates and answer questions from the CHC, City Council and the public. There will also be periodic meetings either virtual or in person with a CHC subcommittee to provide guidance on the updates as the project progresses.

Deliverables: Products include administrative draft documents, public draft documents, versions ready for final CHC review and a final document that responds to CHC and final staff feedback for Council review.

Personnel: Brian Leveille, Senior Planner and Cultural Heritage Committee Liaison is the project lead and will be assisted by City staff.

C. PROJECT SCHEDULE

Preliminary Schedule*	Tasks
October 16, 2023	<ul style="list-style-type: none"> • RFP Sent to qualified consultants
November 17, 2023	<ul style="list-style-type: none"> • Consultant proposals due
December 8, 2023	<ul style="list-style-type: none"> • Consultant selection and contract execution
December 15, 2023	<ul style="list-style-type: none"> • Kick-off meeting with staff team
April-May 2024	<ul style="list-style-type: none"> • CHC Study session
September-October 2024	<ul style="list-style-type: none"> • Administrative Draft update documents to City
November 2024	<ul style="list-style-type: none"> • City comments/edits on admin draft documents
December 2024	<ul style="list-style-type: none"> • Final Draft for CHC review
January 2025	<ul style="list-style-type: none"> • CHC Review Public Hearing
February 2025	<ul style="list-style-type: none"> • Updated draft based on any needed updates from CHC review
March-April 2025	<ul style="list-style-type: none"> • City Council review for approval Historic Context Statement update and Ordinance introduction for Historic Preservation Ordinance

*estimate/rough schedule only - schedule may be updated based on consultant recommended changes and additional detail included in the proposal including outreach, subcommittee meetings, staff collaboration, etc.