

Project Title	South Park Historic District and Community Driven Historic District Template
Project Sponsor	Save Our Heritage Organisation
Author	Janet O'Dea

1 Background

In the last two years the City of San Diego Historic Resources board heard three historic districts. Two were prepared years earlier by community volunteers and one by city staff. Both took staff time but a significant reduction in staff time to process the volunteer designation reports, which persuaded staff to be more open to a volunteer driven process. During this time, volunteers in other communities have expressed some interest in obtaining historic designation and one community has submitted a nomination report. The city's current financial crisis is holding back funding sources for this much needed preservation tool and leadership is necessary at this time.

South Park was surveyed in 1996 and a potential district was identified. South Park has a long history of community interest in the nomination of a very large historic district but the effort was incomplete. Because of the role historic districts as a preservation tool, SOHO's Events and Education committee is contemplating a program that would create a template to be used to guide communities through the process. City staff has advocated for the use of professional consultants for the volunteer driven historic districts as they rewrite their policies & guidelines for historic districts. Soho's model would set up a systematic process that could be followed by community members and be accepted within the parameters of the city staff needs for content, completeness, and professionalism etc.

Guidelines for completion of the process by the city staff are helpful in articulating what they need to evaluate a report but leave out a significant amount of the actual process, especially in terms of community relations, measuring support, managing volunteers, fundraising and preparations for hearings including getting involvement by the residents.

Ultimately, the template tools would be available on-line and would become beneficial for cities throughout San Diego county and ultimately be useful statewide and even nationally.

2 Objectives

To establish the first phase of the South Park Historic District and concurrently a model to be used as a template for future community volunteer historic districts by 2011.

3 Project Category

<p>Essential (External) These functions are not part of the final work product but impact the project.</p>	<ul style="list-style-type: none"> • SOHO identifies grants and other funding • SOHO management of fiduciary and accounting functions for the community. • SOHO will choose and contract with a Professional Consultant to work with the community and design the template tools. <p>**We are looking for a consultant to work as a coordinator, job description still to be developed/determined.</p>
<p>Essential</p>	

<p>Essential (Internal) Relates to the preparation of the designation report itself, which represents the final work product of the community's efforts.</p>	<ul style="list-style-type: none"> • SOHO sponsored Community Meetings (also inviting communities other than the community we are meeting in). • SOHO will provide homeowners with consultation advice during community meetings and to community members who want to restore properties to qualify for designation. • SOHO will enter into contracts to conform to the City established database format (Access) as necessary. • SOHO will make updates to the Website provided by the consultant including posting template tools, oral history transcripts and provide graphic design as needed to supplement consultant's work. • SOHO will involve interns in the project. • SOHO will archive materials gathered for creation of the district report including all maps, photos, water records, building records, resident and owner information, building description data. • SOHO will support the consultant during HRB hearings. (**The consultant will be speaking on behalf of SOHO, not as an outside consultant, so is this redundant?) • SOHO will contract with other experts & consultants as needed to support the creation of additional districts as needed as funding becomes available.
<p>Very Important – Related projects</p>	<ul style="list-style-type: none"> • Landscaping survey and Oral history projects will be managed by the consultant –including videotape and transcription of the oral history** and donation to the SDHS. ?

4 Project Justification

SOHO GOALS	
Proactive Preservation of Historic Resources	This project is aimed at providing the South Park Community with a completed historic district nomination package. The historic district itself is a preservation tool and source for neighborhood pride. Examples, guides and templates will be created concurrent with the process. By the final hearing a system and example for other communities to utilize to establish historic districts, even when the city does not fund them directly, will be available through SOHO on-line.
Education and Advocacy	SOHO has not agreed to fund the creation of historic districts but by creating template tools and the involvement during the process SOHO's mission of education is furthered and SOHO takes on a supportive role to the community members and in effect is funding much of the communities needs. The process for gathering research and volunteering will provide multiple opportunities for a rewarding experience for those who are interested. Residents in the Phase 1 area of the South Park district will receive a copy of the completed DPR form for the buildings they own. Additionally the context statement

will be available as a pdf on the SOHO website and the Historic District report will be available at the local library branch. ****Research will be made available at community meetings by the city at the end of the process.?** Other educational and advocacy programs may be developed by SOHO to highlight the findings during the research process or to celebrate the submittal of the report. During the process the understanding of the importance of the historic resources will be promoted ****and will contribute to participation in its success by community at large.?**

5 Scope

The City of San Diego has recognized the limits of community volunteers in processing large district designation nominations such as the size of the South Park district as it is defined in the Mid Cities Survey and has accepted the realities of a phased project. During the initial project proposal directed to the City of San Diego, a decision will be made involving the professional consultant, community representatives and SOHO staff to define the area of focus. In order to achieve success by 2011, volunteers dedicated to gauging the level of support from the community with a door to door petition drive would need to be limited to a more concentrated and realistic area of a manageable size district in order to meet the objective (estimated size for in this proposal is 125 buildings). The first phase of the South Park Historic District will provide momentum for the community to begin the process and will allow for future phases if this model is accepted and volunteerism and interest exists. Involved community members become advocates and unofficial spokespeople regarding the process that will encourage the next phase of the district to emerge. With success of the first phase and a template established subsequent phases can begin and other areas initiated.

6 Deliverables and Timetable

6.1 Deliverables

- South Park Historic Designation Nomination Report including a landscape survey and District Guidelines.
- Historic Designation of South Park - Phase 1 representation at HRB hearings (the timing for hearings is contingent upon cooperation of the city).
- Template forms, guidelines and example documents.
- Allocation of any remaining funds from all funding sources will be used for initiating the start up process of the next phase of the district or a district in another area.
- Oral history of current residents if time permits and volunteers are available.

6.2 Estimated Timetable

City staff has not indicated any timeline for review of historic district nomination submissions to date. The proposal for the South Park district will be provided to the city as an estimated timeline and includes work by SOHO and the Professional Consultant. Some progress outlined below is contingent upon city staff review of materials during the process. The timetable is an outline of the research process and concurrent development of template tools to inform SOHO staff and City staff of the timeline to encourage inclusion into their work schedule and plans.

2008	<i>Contract with Professional Liaison Consultant reviews available materials and conducts preliminary research</i>	Summer 2008
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	<p>Consultant SOHO and community members define a Boundary for Phase 1</p> <p>SOHO identifies funding resources **consultant and SOHO work together to apply for funds</p> <p>Consultant liaison with City Staff regarding the upcoming proposal</p> <p>Signage proposal & design for district is heard by DAS</p>	
	<p>Consultant identifies and meets with Volunteers and continues recruiting, training and organization</p> <p>Consultant meets with City staff</p> <p>SOHO sponsors an initial Community Meeting – inviting city staff and interested parties from other communities</p> <p>**SOHO will provide homeowners who want to restore properties to qualify for designation with consultation advice.??</p> <p>Consultant will continue ongoing research, record gathering and database input.</p> <p>SOHO sets up and begins fiduciary management of donations</p>	Fall 2008
2009	<p>Consultant organizes volunteers to establish fundraising efforts in the community by community members</p> <p>Consultant generated community outreach and updates continue</p> <p>Website updates begin and continue throughout</p> <p>Consultant regularly scheduled meetings with community leaders begins</p> <p>Consultants Research and record gathering efforts and Database input continue</p>	Winter - Spring 2009
	<p>Research and record gathering continues</p> <p>Database input continues</p> <p>SOHO contracts a vendor who can convert excel data into Access database and develop an Access DPR report through that database</p> <p>SOHO intern program involvement. **consultant works directly with and supervises district work for intern</p> <p>Consultant defines themes for the context statement and reviews them with City Staff</p>	Summer 2009
	<p>Consultant recruits community members for a landscape survey- Survey begins</p> <p>Research and record gathering and Database input continue</p> <p>Consultant begins drafting the Context statement</p> <p>SOHO graphic design of district parcel maps with various overlays (contributor, landmark, landscape etc).</p> <p>Consultant manages Community Progress Update</p>	Fall 2009
	<p>Consultant arranges for a community group Oral History and photo collection</p>	Winter 2010

	<p><i>SOHO manages contract with transcriptionist for the Oral History</i> <i>SOHO Archives materials from the Oral history</i> <i>Consultant includes landscape input into the database.</i> <i>Research and record gathering & Database input continues</i> <i>Drafting Context statement continues</i> <i>Feedback from city staff on materials to date</i> <i>Consultant drafts the statement of significance</i></p>	
	<p><i>Community Progress update</i> <i>Community members take Photographs and DPR forms dated</i> <i>Community member creates Maps for each DPR form created</i> <i>Access database DPR forms created and photos are added</i></p>	<p>Spring 2010</p>
	<p><i>Context statement finalized</i> <i>Final draft DPRs delivered throughout the community with feedback request.</i> <i>Obtain DPR feedback from community members, proof and make corrections as necessary</i> <i>SOHO intern program involvement</i> <i>Corrections from DPR forms brought back into the Access Database and new DPR forms are created.</i></p>	<p>Summer 2010</p>
	<p><i>Community meeting is organized regarding district Guidelines</i> <i>SOHO provides expertise at the Guidelines meeting- city staff also attends.</i> <i>Provide Guidelines and submit to the City for review</i></p>	<p>Fall 2010</p>
	<p><i>Submit report and guidelines to the staff and HRB.</i> <i>SOHO archival of materials</i> <i>SOHO and Professional Consultant support during hearings when scheduled</i></p>	<p>Winter 2011</p>

7 Assumptions, Risks, Dependencies and Constraints

An initial survey of the boundaries and review of the data as well as a proposal to the city will provide some assurances early on that there is a viable district in South Park. The involvement of the city during the process following city guidelines should result in staff support and minimize the potential for denial of the district.

Working with volunteers and the City of San Diego staff is a challenge. Often the best intentions are earnest but it should be expected that obstacles will come up, staffing issues with the city are always a threat. ~~City staff will also have needs that do not coincide with the goals of completion of the historic district and to date policies do not include any timelines for review of materials. The staff also may delay the report by not honoring the timelines for review of certain parts of the report when it is in process.~~ The value of community members funding the research comes in at this point as well as a well-developed communication system so that community members

can get involved in the process, as they will back up requests by the consultant and city staff to move forward with the hearings when the report is finalized.

The County? Assessor has shown some signs that they will not cooperate and provide residential building records for any houses that owners have not given express permission for the residential building records. The mood of the county has changed and staff is not as openly favorable for support of historic districts.

Volunteers, while having the best intentions can have any number of issues arise. Family emergencies, their paid work schedules for instance. Volunteers can hold on to materials and not produce them, become distracted by the amount of time it takes to complete the project and some may lose interest for a while or entirely. In order to best prepare for these type of variables, it will be important to cultivate dedicated core volunteers that will help recruit new volunteers during the course of the process. Some residents who donate financially will feel that other volunteers who donate time only “owe them” and this expectation needs to be managed early and delicately by referring all matters to the ~~professional consultant~~ ***coordinator** instead.

The city requirement for an Access Database has not been addressed to date and Access is not available in a Mac format. The way around this will be to subcontract conversion of excel data into Access and have the form fields in Access or the DPR forms which will add an additional burden to the cost of the project and at least two sets of changes. One after residents and proofing and one by city staff unless this can be waived by providing the staff a copy of the Access database form and records. The Access DPR form created for this district should be able to be used for subsequent districts.

SOHO will manage funds from fundraisers. It is possible that the project may not be fully funded by community fundraising efforts and the willingness for the community to step up and develop adequate fundraising mechanism is unclear at this time.** **Should that occur and Professional Consultant is not paid to coordinate the project it may end up incomplete for the South Park community again and sour the relationships with important historic preservation advocates in that community.** ??

8 Financial Summary

5 Year Costs and Benefits

The benefits of the historic district are both intangible and tangible. Limits to reckless demolitions and incentives for homeowners to maintain the integrity of their homes by use of the Mills Act are benefits that can be estimated and calculated. Additionally property values have been studied and designated structures have on average 16% value increase on average compared to similar buildings in the same neighbourhoods. Additionally, a halo effect of this increased value affects neighboring buildings, therefore non-contributors in a historic district benefit from being in a district even if they don’t themselves contribute to it.

Calculating the value of the Mills Act benefit is difficult as it does not relate to the costs of restoration but instead uses a calculation that compares rents to adjust the appraised value of the building. Higher rents are associated with larger buildings and larger buildings tend to have larger tax deductions.

Aggregate Cost Calculation - Total project requirement 2008-11				
2.5 Year Summary	Consulting Fees	IS Services, Printing, Duplication,	SOHO	Total

		Residential Bld Records		
Costs	\$ 43,125.00	\$ 850.00	\$ 25,000	\$ 43,975.00

- IS services are the IS services provided by an outside consultant to make Excel data compatible to Access database systems and to create DPR forms. Ideally the city would accept the Excel spreadsheet data and up convert to Access and create the forms to eliminate this expense. – Estimated at \$350.00 ****Too low?**
- Printing and Duplication will be the costs to produce handouts to community members, to produce draft reports and DPR forms, and flyers or other external services associated elements of the project. – Estimated at \$500.00 ****Too low?**
- It is assumed that the first phase defined area will consist of 125 buildings. Consulting fees are assumed at a rate of \$575.00 per residence and 75 or 60% of the building owners funding the consultant portions of this project. Consulting fees pay for the many parts of the project that affect the global success of the designation and are only defined by cost per residence to come up with a shared expense per household. ****discuss**
- SOHO investment is calculated at \$200.00 per household at 100% instead of the 60% that are anticipated to contribute funds. If the funding is only available at 60% then SOHO fundraising would be subsidized from other funding resources identified through SOHO by grants or other means to be determined. ****discuss **website work must be accounted for**

Upon completion of the historic district the owners who own buildings that contribute to the historic district will be able to apply for the Mills Act. At this time the costs to the individual community member are as follows:

Costs per Individual Contributing Homeowner				
5 Year Summary	Donation paid in 2008	Mills Act Agreement Fee proposed \$549 paid in 2011	Monitoring fee will be a cost in subsequent years	Total
Costs	\$ 775.00	\$ 549.00	Unknown at this time	\$1,324.00 + unknown

Estimated Total benefit assumed for a \$400k house in 2013			
1st Year Designation Summary	16% Property Value increase	Mills Act approximate annual tax reduction	Total perceived benefit
30 % Mills Act Benefit	\$64,000	\$1,800.00	\$65,800.00
40% Mills Act benefit	64,000	\$2,400.00	\$66,400.00
50% Mills Act benefit	64,000	\$3,000.00	\$67,000.00

This is a simplified example of savings. The county provides a difficult to understand Mills Act worksheet that individual homeowners can attempt to use to calculate the percentage that they would receive as an actual reduction. Generally larger homes earn a higher benefit because the calculation is based on rental rates and larger properties rent at a higher rate.

The historic district is a long-term investment, however, payback of the donation for research paid in 2008 and for fees paid during the cost of the report preparation is very likely recovered by the building owner in the first year of participation in the Mills Act (which is in arrears so it is likely to be available in 2013). It should be noted that the first year would not allow for as much of an incentive towards funding of home improvement maintenance repairs. Also that some Mills Act agreements may include provisions for required restoration in order to participate in the tax reduction program. In some cases the requirements may exceed the initial benefits so restoration that can occur before the final report is generated will eliminate these items being added as a condition to the agreement.