(Reporting period is from October 1, 2023 through September 30, 2024)

INSTRUCTIONS: This a Word form with expanding text fields and check boxes. It will probably open as Read-Only. Save it to your computer before you begin entering data. This form can be saved and reopened.

Because this is a WORD form, it will behave generally like a regular Word document except that the font, size, and color are set by the text field.

- Start typing where indicated to provide the requested information.
- Click on the check box to mark either yes or no.
- To enter more than one item in a particular text box, just insert an extra line (Enter) between the items.

Save completed form and email as an attachment to <u>Shannon.Pries@parks.ca.gov</u>. You can also convert it to a PDF and send as an email attachment. Use the Acrobat tab in WORD and select Create and Attach to Email. You can then attach the required documents to that email. If the attachments are too large (greater than10mb total), you will need to send them in a second or third email.

Name of CLG County of Monterey

The County of Monterey Housing and Community Development Department administers our historic preservation program. Our local historic preservation commission is referred to as the Historic Resources Review Board (HRRB).

Report Prepared by: Phil Angelo, Senior Planner Date of commission/board review: January 7, 2025

MINIMUM REQUIREMENTS FOR CERTIFICATION

I. Enforce Appropriate State or Local Legislation for the Designation and Protection of Historic Properties.

A. Preservation Laws

- What amendments or revisions, if any, are you considering to the certified ordinance? Please forward drafts or proposals. *REMINDER*: Pursuant to the CLG Agreement, OHP must have the opportunity to review and comment on ordinance changes prior to adoption. Changes that do not meet the CLG requirements could affect certification status.
 Updating our certified ordinance is task 22-03 on our Long-Range Work Program.
- 2. Provide an electronic link to your ordinance or appropriate section(s) of the municipal/zoning code. **The certified local ordinance is found within multiple sections of the Monterey County Code:**

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Chapter 2.56 – Historic Resources Review Board:

https://library.municode.com/ca/monterey_county/codes/code_of_ordinances?nodeId=TIT2AD_CH2.56HIREREBO Chapter 18.25 – Preservation of Historic Resources:

https://library.municode.com/ca/monterey_county/codes/code_of_ordinances?nodeId=TIT18BUCO_CH18.25PRHIRE Chapter 21.64.270 – Preservation of Historic Resources:

https://library.municode.com/ca/monterey_county/codes/code_of_ordinances?nodeId=TIT21ZO_CH21.64SPRE_21.64.27 OREHIRE

Chapter 21.54 – Regulations for Historic Resource Zoning or "HR" Districts:

https://library.municode.com/ca/monterey_county/codes/code_of_ordinances?nodeId=TIT21ZO_CH21.54REHIREZODIH RDI

B. New Local Landmark Designations (Comprehensive list of properties/districts designated under local ordinance, HPOZ, etc.)

1. During the reporting period, October 1, 2023 – September 30, 2024, what properties/districts have been locally designated?

Two properties were added to the Monterey County Register of Historic Resources and one property was rezoned to include a Historic Resources overlay zoning district.

Property Name/Address	Date Designated	If a district, number of contributors	Date Recorded by County Recorder
Ferris Bagley House, 4161 Sunridge Road, Pebble Beach (APN's 008-071-011 and 008-071-012)	December 5, 2023 (Local register listing)	N/A	
June Haas House, 62 Yankee Point Drive (APN 243-152-005)	October 24, 2023 (Local register listing)	N/A	
Donald G. Thompson House, 51410 Partington Ridge Road (APN 420-221- 011)	July 9, 2024 (HR Overlay Zone)	N/A	

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REMINDER: Pursuant to California Government Code § 27288.2, "the county recorder shall record a certified resolution establishing an historical resources designation issued by the State Historical Resources Commission or a local agency, or unit thereof."

2. What properties/districts have been de-designated this past year? For districts, include the total number of resource contributors?

Property Name/Address	Date Removed	Reason
None		

C. Historic Preservation Element/Plan

- 1. Do you address historic preservation in your general plan? \Box No
 - \Box Yes, in a separate historic preservation element. \Box Yes, it is included in another element.

Provide an electronic link to the historic preservation section(s) of the General Plan.

2010 General Plan Public Services Element (applies in inland areas of County):

https://www.co.monterey.ca.us/home/showdocument?id=45810

1982 General Plan Public Services & Facilities Element (applies in coastal areas of County):

https://www.co.monterey.ca.us/home/showpublisheddocument/37963/636371079943570000

Many of the County's Area Plans (apply in the inland) and Land Use Plans (apply in the coastal zone) also contain supplemental policies which address historical resources. These are all also on our website: https://www.co.monterey.ca.us/government/departments-a-h/housing-community-development/planning-services/current-planning/land-use-regulations-

<u>11559</u>

(Reporting period is from October 1, 2023 through September 30, 2024)

- 2. Have you made any updates to your historic preservation plan or historic preservation element in your community's general plan? Yes No If you have, provide an electronic link. Type here.
- 3. When will your next General Plan update occur?

The County is currently in the process of updating the Housing, Safety, and Environmental Justice Elements of our General Plan. The Big Sur Land Use Plan and Moss Landing Community Plan, which provides much of the planning framework and policy direction for those areas are also in the process of being updated. Timing of a comprehensive update is unknown.

D. Review Responsibilities

1. Who takes responsibility for design review or Certificates of Appropriateness?

 \Box All projects subject to design review go the commission.

Some projects are reviewed at the staff level without commission review. What is the threshold between staff-only review and full-commission review?

Some roof replacement projects, foundation work and rear lot line fence replacement or repair within the Spreckels Historic District are reviewed at the staff level and not required to be referred to the HRRB, consistent with the adopted Spreckles Design Guidelines.

Projects where a phase I historical assessment has been prepared, but that assessment determines that the property would not qualify for listing under the national, state, or local historic registers due to a lack of historic significance are also not referred to the HRRB.

2. California Environmental Quality Act

• What is the role of the staff and commission in *providing input* to CEQA documents prepared for or by the local government?

County staff prepare CEQA documents but the HRRB are typically not involved in the document preparation process. Sometimes projects are referred early to the HRRB for input on appropriate mitigation measures.

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What is the role of the staff and commission in *reviewing* CEQA documents for projects that are proposed within the jurisdiction of the local government?

County Staff and the HRRB review CEQA documents that are either prepared for County projects, or prepared for projects within the County jurisdiction where the County is acting as a responsible agency.

One CEQA document for a project related to historic resources was referred to the County and HRRB for review from an external agency during the reporting period, the Draft Environmental Impact Report for the Limkekiln Creek Bridge Replacement Project (REF240001).

3. Section 106 of the National Historic Preservation Act

• What is the role of the staff and commission in *providing input* to Section 106 documents prepared for or by; the local government?

Staff provides input on Section 106 documents. The HRRB provides input on large Section 106 projects. Typically review is limited to Section 106 documents referred to the County by outside agencies, as County projects which would be considered federal undertakings are rare.

What is the role of the staff and commission in *reviewing* Section 106 documents for projects that are proposed within the jurisdiction of the local government? **Staff reviews Section 106 documents and the and the HRRB reviews documents involving large projects.**

II. Establish an Adequate and Qualified Historic Preservation Review Commission by State or Local Legislation.

A. Commission Membership

Name	Professional Discipline	Date Appointed	Date Term Ends	Email Address
Salvador Muñoz	Architect	02/2000	12/01/2024	munfris@hotmail.com
Kellie Morgantini	Attorney/Planner	09/2010	12/31/2024	<u>kellie@lassmc.net</u>

(Reporting period is from October 1, 2023 through September 30, 2024)

Judy MacClelland	Planner	08/2008	12/31/26	Judymacc39@gmail.com
Sheila Lee Prader	Genealogist/Historian	02/2010	12/31/27	cccoastresearch@gmail.com
John Scourkes	Architect	03/1995	12/31/2026	john@scourkesarchitecture.c om
Belinda Taluban	Engineer	09/2016	12/31/2024	taluban@sbcglobal.net
Michael E. Bilich		12/2019	12/31/2025	m.bilich909@gmail.com

Attach resumes and Statement of Qualifications forms for all members.

If you do not have two qualified professionals on your commission, explain why the professional qualifications not been met and how professional expertise is otherwise being provided. N/A

If all positions are not currently filled, why is there a vacancy, and when will the position will be filled? No vacancy

B. Staff to the Commission/CLG staff

Is the staff to your commission the same as your CLG coordinator? \boxtimes Yes \square No If not, who serves as staff? If the position(s) is not currently filled, why is there a vacancy? No vacancy

Attach resumes and Statement of Qualifications forms for staff.

Name/Title	Discipline	Dept. Affiliation	Email Address
Phil Angelo, Senior Planner	Planning	Housing and Community Development	AngeloP@countyofmonterey.gov
Armida R. Estrada, Secretary	Administration	Housing and Community Development	Estradaar@countyofmonterey.gov

(Reporting period is from October 1, 2023 through September 30, 2024)

C. Attendance Record

Please complete attendance chart for each commissioner and staff member. Commissions are required to meet four times a year, at a minimum. If you haven't met at least four times, explain why not.

Commissioner/Staff	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Salvador Munoz	\boxtimes	\boxtimes	\boxtimes	\boxtimes	\boxtimes	\boxtimes			\boxtimes			\mathbb{X}
Kellie Morgantini	\boxtimes	\boxtimes	\boxtimes			\boxtimes			\boxtimes			\mathbb{X}
Judy MacClelland	\boxtimes	\boxtimes	\boxtimes	\boxtimes	\boxtimes	\boxtimes						\boxtimes
Shiela Lee Prader	\boxtimes	\boxtimes	\boxtimes		\boxtimes	\boxtimes			\boxtimes			\boxtimes
John Scourkes	\boxtimes	\boxtimes	\boxtimes	\boxtimes		\boxtimes			\boxtimes			\boxtimes
Belinda Taluban	\boxtimes	\boxtimes	\boxtimes	\boxtimes	\boxtimes	\boxtimes			\boxtimes			
Michael E. Bilich	\boxtimes	\boxtimes	\boxtimes	\boxtimes	\boxtimes	\boxtimes			\boxtimes			

The HRRB meetings for the months of April 2024, May 2024, July 2024, and August 2024 were cancelled.

D. Training Received

Indicate what training each commissioner and staff member has received. Remember it is a CLG requirement is that all commissioners and staff to the commission attend at least one training program relevant to your commission each year. It is up to the CLG to determine the relevancy of the training.

Commissioner/Staff Name	Training Title & Description (including method presentation, e.g., webinar, workshop)	Duration of Training	Training Provider	Date
Michael E. Bilich	Modernism Week Palm Springs	Approx. 8 hours	Various provided by Modernism	October 19-22, 2023
Michael E. Bilich	Historical Buildings	1 hour 30 minutes	National Park	February 22, 2024

Certified Local Government Program -- 2023-2024 Annual Report (Reporting period is from October 1, 2023 through September 30, 2024)

Michael E. Bilich	Building on History: A Summit for Housing Solutions Foundation (webinar)	7 Hours	California Preservation	May 29, 2024
Judy MacClelland	Preservation Brief 16 Use of Substitute Materials (webinar)	90 minutes	National Park Service	February 6, 2024
Judy MacClelland	Architect Plan Books and The Small House Movement (webinar)	60 minutes	California Preservation Foundation	July 25, 2024
Belinda A. Taluban	Preservation Brief 16 - Use of Substitute Materials	90 minutes	California Preservation Foundation	February 6, 2024
Belinda A. Taluban	Preservation of Glass/Stained Glass	60 minutes	Califorinia Preservation Foundation	April 18, 2024
Salvador Muñoz	Protecting Visual Storytelling for Mural Documentation and Presentation (zoom)	3 hours	California Preservation Foundation	July 18, 2024
Salvador Muñoz	Property Research Rabbit Hole with George Smart, USModernist.org (zoom)	1 hour 30 minutesCalifornia Preservation Foundation		June 27, 2024
Salvador Muñoz	Building on History: A summit for Housing Solutions (zoom)	7 hours 30 minutes	California Preservation Foundation	May 29, 2024
Salvador Muñoz	The women Who Change Architecture (zoom)	1 hour	Type here.	August 8, 2024
Salvador Muñoz	Meeting Future in the Historical Heart of Salinas Histortic	2 hours 20 minutes	Presentation at the Salinas Heritage Center & Welcome Center	June 20, 2024
Salvador Muñoz	AMAP Presentation of Joe Mora legacy At Totter Gallery P. G. Annual Meeting	2 hours 30 minutes	Type here.	July 3, 2024
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(Reporting period is from October 1, 2023 through September 30, 2024)

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III. <u>Maintain a System for the Survey and Inventory of Properties that Furthers the Purposes of the National Historic</u> <u>Preservation Act</u>

A. Historical Contexts: initiated, researched, or developed in the reporting year (excluding those funded by OHP) NOTE: California CLG procedures require CLGs to submit survey results, including historic contexts, to OHP. If you have not done so, submit a copy (PDF or link if available online) with this report.

Context Name	Description	How it is Being Used	Date Submitted to OHP
None			

B. New Surveys or Survey Updates (excluding those funded by OHP)

NOTE: The evaluation of a single property is not a survey. Also, material changes to a property that is included in a survey, is not a change to the survey and should not be reported here.

Survey Area	Context Based- yes/no	Level: Reconnaissance or Intensive	Acreage	# of Properties Surveyed	Date Completed	Date Submitted to OHP
None						

(Reporting period is from October 1, 2023 through September 30, 2024)

Survey Area	Context Based- yes/no	Level: Reconnaissance or Intensive	Acreage	# of Properties Surveyed	Date Completed	Date Submitted to OHP

How are you using the survey data?

C. Corrections or changes to Historic Property Inventory

Property Name/Address	Additions/Deletions to Inventory	Status Code Change From _ To_	Reason	Date of Change
Ferris Bagley House, 4161 Sunridge Road, Pebble Beach (APN's 008-071-011 and 008-071-012)	Addition	Addition to Monterey County Register of Historic Resources	Request by property owner	December 5, 2023
June Haas House, 62 Yankee Point Drive (APN 243-152- 005)	Addition	Addition to Monterey County Register of Historic Resources	Request by property owner	October 24, 2023
Donald G. Thompson House, 51410 Partington Ridge Road (APN 420-221-011)	Addition	Historic Resources Zoning Overlay applied to property (property already on local historic register)	Required by Monterey County Code as a condition for approved alterations to a field identified historic resource	July 9, 2024

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IV. Provide for Adequate Public Participation in the Local Historic Preservation Program

A. Public Education

What public outreach, training, or publications programs has the CLG undertaken? How were the commissioners and staff involved? Please provide copy of (or an electronic link) to all publications or other products not previously provided to OHP.

Item or Event	Description	Date
None		

ADDITIONAL INFORMATION FOR NATIONAL PARK SERVICE ANNUAL PRODUCTS REPORTS FOR CLGS

<u>NOTE: OHP will forward this information to NPS on your behalf. Please read "Guidance for completing the Annual</u> <u>Products Report for CLGs" located at http://www.nps.gov/clg/2015CLG_GPRA/FY2013_BaselineQuestionnaireGuidance-May2015.docx.</u>

A. CLG Inventory Program

During the reporting period (October 1, 2023 -September 30, 2024) how many historic properties did your local government **add** to the CLG inventory? This is the total number of historic properties and contributors to districts (or your best estimate of the number) added to your inventory **from all programs**, local, state, and Federal, during the reporting year. These might include National Register, California Register, California Historic Landmarks, locally funded surveys, CLG surveys, and local designations.

Program area	Number of Properties added
Local Register Designation	Тwo

B. Local Register (i.e., Local Landmarks and Historic Districts) Program

(Reporting period is from October 1, 2023 through September 30, 2024)

- 1. During the reporting period (October 1, 2023 -September 30, 2024) did you have a local register program to create local landmarks and/or local districts (or a similar list of designations) created by local law?
- 2. If the answer is yes, then how many properties have been added to your register or designated from October 1, 2023 to September 30, 2024? **Two**

C. Local Tax Incentives Program

- 1. During the reporting period (October 1, 2023 -September 30, 2024) did you have a Local Tax Incentives Program, such as the Mills Act? ⊠ Yes □ No
- 2. If the answer is yes, how many properties have been added to this program from October 1, 2023 to September 30, 2024?

Name of Program	Number of Properties Added During 2023-2024	Total Number of Properties Benefiting From Program
Mills Act Program (Monterey County	Тwo	Fifteen
Code Chapter 18.28)	Ferris Bagley House, 4161 Sunridge Road, Pebble Beach (APN's 008-071-011 and 008-071- 012)	
	Corey House, 100 River Road (APN 139-221-024)	

D. Local "bricks and mortar" grants/loan program

1. During the reporting period (October 1, 2023 -September 30, 2024) did you have a local government historic preservation grant and/or loan program for rehabilitating/restoring historic properties? □Yes ⊠No

(Reporting period is from October 1, 2023 through September 30, 2024)

2. If the answer is yes, then how many properties have been assisted under the program(s) from October 1, 2023 to September 30, 2024?

Name of Program	Number of Properties that have Benefited	

E. Design Review/Local Regulatory Program

- 1. During the reporting period (October 1, 2023 -September 30, 2024) did your local government have a historic preservation regulatory law(s) (e.g., an ordinance) authorizing Commission and/or staff review of local government projects or impacts on historic properties? ⊠ Yes □ No
- 2. If the answer is yes, how many historic properties did your local government review for compliance with your local government's historic preservation regulatory law(s) from October 1, 2023 to September 30, 2024?

Four properties were reviewed for compliance with design regulations during the reporting period:

- PLN230203 PORTER VALLEJO MASION, 29 Bishop Street, Pajaro (referral by public works department)
- DA230229 DAMSCHEN, 37 Railroad Avenue, Spreckles (Design Review)
- PLN220327 RIVERA 4161 Sunridge Road, Pebble Beach (Design Review)
- PLN240083 CRAIG 62 Fourth Street, Spreckles

F. Local Property Acquisition Program

- 1. During the reporting period (October 1, 2023 September 30, 2024) did you have a local program to acquire (or help to acquire) historic properties in whole or in part through purchase, donation, or other means?
- 2. If the answer is yes, then how many properties have been assisted under the program(s) from October 1, 2023 to September 30, 2024?

Name of Program	Number of Properties that have Benefited	
Type here.	Type here.	

(Reporting period is from October 1, 2023 through September 30, 2024)

IN ADDITION TO THE MINIMUM CLG REQUIREMENTS, OHP IS INTERESTED IN A SUMMARY OF LOCAL PRESERVATION PROGRAMS

- A. What are your most critical preservation planning issues?
 - 1) Preservation of 20th Century Historic Resources;
 - 2) Lack of context statements for each planning area to assist in the evaluation of resources;
 - 3) Ensuring all projects that potentially impact historic resouces are referred to the HRRB for review and recommendation;
 - 4) Loss/damage of historic resources due to demolitions, vandalism and insensitive remodels; and
 - 5) Contentious preservation projects.
- B. What is the single accomplishment of your local government this year that has done the most to further preservation in your community?
 Added two properties to the Mills Act Program, ensuring future preservation of these historic structures

is required and more economically feasible for the property owners.

- C. What recognition are you providing for successful preservation projects or programs? None.
- D. How did you meet or not meet the goals identified in your annual report for last year? Last year included two goals:
 - 1) HRRB to provide additional staff training for projects being referred to HRRB;
 - 2) For the HRRB to work with County staff in an effort to update the Local Historic Preservation Ordinance.

HRRB training for staff was discussed and a list of potential trainings was drafted, but the training curriculum has not been put together. There has not been progress on the historic preservation update over the last year. While the historic preservation ordinance update is on the County's Long Range Work Plan as a 2010 General Plan implementation task, it's been given a low priority, generally indicating that it will be considered in future years, after priority projects are first completed.

E. What are your local historic preservation goals for 2023-2024?

(Reporting period is from October 1, 2023 through September 30, 2024)

- 1) HRRB to provide additional staff training for projects being referred to HRRB;
- 2) For the HRRB to work with County staff in an effort to update the Local Historic Preservation Ordinance; and
- 3) Update information the County has available on historic resources, including more easily accessible lists of resources for staff and the public, and administrative procedures for staff.
- F. So that we may better serve you in the future, are there specific areas and/or issues with which you could use technical assistance from OHP?
 Targeted training on loss or damage of historic resources through unpermitted demolition and demolition by neglect.
- G. In what subject areas would you like to see training provided by the OHP? How you like would to see the training delivered (workshops, online, technical assistance bulletins, etc.)?

Training Needed or Desired	Desired Delivery Format
Design Review	Workshop, webinar, technical assistance bulletin
Interpretation of the Secretary of Interior Standards	
Cultural Landscapes, Rural and Designed	
Coordination with CALBO	
Discussion of Historic Building Code	
Training on loss or damage of historic resources through	
unpermitted demolition and demolition by neglect	

- H. Would you be willing to host a training working workshop in cooperation with OHP? \square Yes \square No
- G. Is there anything else you would like to share with OHP?

XII Attachments

Resumes and Statement of Qualifications forms for **all** commission members/alternatives and staff

Minutes from commission meetings

Drafts of proposed changes to the ordinance

(Reporting period is from October 1, 2023 through September 30, 2024)

Drafts of proposed changes to the General Plan

Public outreach publications

Email to Shannon.Pries@parks.ca.gov