Preservation Planning & the Secretary of the Interior’s Standards

Contexts and Surveys

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San Diego
14 September 2009
Preservation Planning

• Historic properties are irreplaceable
• Responsible planning requires information
• Public Participation – early and continuing
Planning Standard I

Preservation Planning Establishes Historic Contexts

• Decisions about the identification, evaluation, registration and treatment of historic properties are most reliably made when the relationship of individual properties to other similar properties is understood.

• Information about historic properties representing aspects of history, architecture, archeology, engineering and culture must be collected and organized to define these relationships.
The development of **historic contexts** is the foundation for decisions about identification, evaluation, registration and treatment of historic properties.
HISTORIC CONTEXTS

Built Environment

History

Patterns
People
Values
Describe the significant aspects and broad patterns of an area’s history and cultural development.
Historic Contexts

Tell the stories that explain

how,

when, and

why

the land use patterns and built environment developed or looks the way it does.
Historic Context Statements

So What?

• So what are the important forces which shaped the current built environment?
• So what are the important property types associated with those themes?
• So what is the appropriate context for evaluation a particular resource
• So what characteristics does a resource need to have to be significant as a representative property type within its appropriate context?
CONTEXTS

• Synthesize information about significant historical patterns, events, people, groups, and values
• Identify Information Needs
• Recommend Goals, Priorities, and Strategies
• Evolve as additional information is acquired
• Create Framework for Evaluation
• Permit development of plans for identification, evaluation, and treatment even in absence of complete knowledge of individual properties.
CONTEXTS FOCUS ON PROPERTY TYPES*

• **Identify** properties types associated with important themes

• **Identify** characteristics each property type needs to represent the property type within the context

• **Identify** locational patterns

• **Characterize** current condition of property types

• **Establish** Eligibility criteria – context & criteria

• **Define** integrity thresholds – context & criteria

• **Provide** framework for applying criteria and thresholds

*Groupings of individual properties based on shared physical or associative characteristics
Planning Standard II

Preservation Planning Uses Historic Contexts To Develop Goals and Priorities for the Identification, Evaluation, Registration and Treatment of Historic Properties
CONTEXTS & SURVEYS

Revitalization
Incentives
Design Guidelines
General Plan Element
Specific Plans
Registration
NR Multiple Property Submission
Transportation & Infrastructure

Infill & Community Development
Adaptive Reuse
Affordable Housing
Heritage Tourism
Project Review
Ordinances
Disaster Planning & Response

Provide Direction for Preservation Planning
Planning Standard III

Results of Preservation Planning Are Made Available for Integration Into Broader Planning Processes
Dynamic Processes of Preservation Planning

• Contexts developed and revised
• Surveys conducted
• Goals and priorities altered based on new information
• Plan revised through regular and systematic review
• Resolve conflicts in historic preservation goals
• Resolve conflicts between historic preservation and other land use planning goals
Public Participation

- Professionals – related disciplines
- Interested individuals, organizations and communities
- Prospective users of preservation plan
- Coordinate with local, regional, state & national planning efforts
IDENTIFICATION

Scope of Identification Activities depends on:

• Existing knowledge

• Goals for survey activities developed in planning process

• Current management needs

• Available resources
Identification Standard I

Identification of Historic Properties is Undertaken to the Degree Required to make Decisions

- Research Design
- Archival Research
- Field Survey
- Informant interviews
- Analysis
Survey Methodology

Systematic process for gathering information about a community’s historical resources, identifying and evaluating the quantity and quality of historical resources for land-use planning purposes.

- Windshield – Reconnaissance
- Intensive
- Sampling
SURVEYS PROVIDE CLUES

- **What** resources exist?
- **Where** are the resources located?
- What are the **character defining features**?
- Why are they **significant**?
- Have they retained **integrity**?
- How does each need to be considered in planning?

*Revisit, Reevaluate, Update*
Identification Standard II

Results of Identification Activities Are Integrated Into the Preservation Planning Process

• May refine understanding of contexts

• May alter the need for additional survey or study of particular property types
Identification Standard III

Identification Activities Include Explicit Procedures for Record-Keeping and Information Distribution

Survey Report
  » Objectives
  » Area
  » Research Design
  » Results

Inventory
EVALUATION STANDARD I

Evaluation of the Significance of Historic Properties Uses Established Criteria

Evaluation is the process of determining whether identified properties meet defined criteria of significance.

» National Register Criteria
» California Register Criteria
» Local Criteria
EVALUATION

• What **context** and **property type** does the resource represent?
• Is it a **contributor** to a **district**?
• What **criteria** apply?
• What is its **significance**?
• Does it have the expected **character-defining features** for its type?
• Does it possess the **integrity** characteristics for its property type within the defined context?

*Multiple contexts/multiple periods of Significance?*
EVALUATION STANDARD II

Evaluation of Significance Applies the Criteria Within Historic Contexts

Properties are evaluated using a historic context that identifies the significant patterns that properties represent and defines expected property types against which individual properties may be compared. Within this comparative framework, the criteria for evaluation take on particular meaning with regard to individual properties.
Application of the Criteria within a Historic Context

• **Identify** which criteria each property type might meet.
• **Identify** how integrity will be evaluated for each property type under each criterion.
• Specific guidelines for evaluating the eligibility of individual properties should be established.
• Evaluation should state how a particular property meets the criteria for its type
EVALUATION STANDARD III

Evaluation Results in a List or Inventory of Significant Properties That Is Consulted In Assigning Registration and Treatment Priorities

- Inventories to be maintained and updated regularly
Inventory

• Summaries of important **historic contexts**
• Descriptions of significant **property types**.
• Results of **surveys**
• Information on individual properties evaluated including those demolished, altered, and not significant
  – Context
  – Description and boundaries
  – Significance statement
EVALUATION STANDARD IV

Evaluation Results Are Made Available to the Public

• Computer-assisted databases
• Inventories to be maintained and updated regularly
• Safeguard sensitive information (archeology sites)
For More Information:

- California State Office of Historic Preservation [www.ohp.parks.ca.gov](http://www.ohp.parks.ca.gov)
- “How to Complete the National Register Multiple Property Documentation Form” [National Register Bulletin #16 B.](http://www.nps.gov/history/prod/bulletins/NR Bul #16B.pdf)