



# CITY OF SAN MATEO

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## Agenda Report

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**TO:** City Council

**FROM:** Alex Khojikian, City Manager

**PREPARED BY:** Community Development Department

**MEETING DATE:** January 21, 2025

**SUBJECT:**  
Historic Policy Update Effort Professional Services – Appropriation and Agreement

### RECOMMENDATION:

Review and provide direction on historic preservation policies, including: the adoption of a Resolution to appropriate \$328,743 (Option 1) or \$394,450 (Option 2) from the Advance Planning Fund to the Historic Policy Update project, with each option corresponding to a different project schedule; and approve an agreement with Rincon Consultants for community outreach and technical support related to historic policy and code amendments; and authorize the City Manager to execute the agreement in substantially the form presented and to revise it as needed based on the selected option.

### BACKGROUND:

The Proposed Resolution to appropriate funds from the Advance Planning Fund to the Historic Policy Update project, if Option 1 or Option 2 are selected, it is included as Attachment 1, and the professional services agreement with Rincon Consultants to provide community outreach, historic policy and code amendment technical support is included as Attachment 2.

#### General Plan 2040

San Mateo's General Plan 2040, which was adopted by the City Council on March 18, 2024, sets the policy framework for how issues such as historic resources and preservation should be addressed. The Community Design and Historic Resources Element addresses the topic of historic and cultural resources, and includes goals, policies, and actions that outline the framework for how the City should approach historic resources and preservation. Specifically, Goal CD-5 speaks to preserving the historic and culturally important resources to maintain San Mateo's special identity and continuity with the past and includes seven policies and six actions to support achievement of this goal (Attachment 3).

During the adoption process for General Plan 2040, the topic of historic resource preservation generated significant community interest and comments; with the historic related policies and actions based around this community input and the final versions based on Council direction. In addition, in the fall 2023, a historic district designation application for the Baywood Neighborhood was submitted to the State Office of Historic Preservation by the San Mateo Heritage Alliance. This application resulted in significant community discussions surrounding establishing historic districts, how the designations are approved at the State and local levels, and questions about the potential impacts of an application and a subsequent designation on properties within the district. To address questions about the State and local historic review processes and how historic districts are established, Planning Division staff, with support from historic consultant Architectural Resources Group (ARG), conducted a community informational meeting (link: <https://www.youtube.com/watch?v=mICAKmxT3w8&t=6s>) in February 2024. The City's Historic Resources webpage (link here -<https://www.cityofsanmateo.org/4775/Historic-Resources>) was also updated to provide FAQs related to the historic district designation process, the City's permitting process for potential historic resources, and information on how the

California Environmental Quality Act (CEQA) addresses historic resources.

#### City Council Study Session

Following General Plan adoption, on June 17, 2024, the City Council held a study session to consider options for how to proceed with updating the City's local historic policies and codes pursuant to the actions in the General Plan. Following a staff presentation, community input and Council discussion, a majority of the Council directed staff to prioritize implementation of an update to the City's Historic Preservation Ordinance and preparation of a Citywide Historic Context Statement. The Historic Preservation Ordinance Update and Historic Context Statement effort would include the retention of a qualified historic consultant to provide technical support (issuing a Request for Proposals (RFP)), creation of a framework for the designation of historic resources and districts, establishment of review and permitting procedures for historic alterations and demolitions, consistency with Federal and State standards and guidelines, and alignment with the other goals and policies outlined in the General Plan. The Citywide Historic Context Statement would provide an overview of the City's historical development patterns to help inform the community discussion and clarify the areas of significance to guide what resources should be prioritized for preservation. The Historic Context Statement would NOT change the historic status of any property in the City, create any new eligible historic districts, conduct any individual property or neighborhood surveys, or halt the development of new housing projects. The Context Statement is intended to create a citywide baseline to provide for consistent and uniform evaluation of historic resources moving forward and increase awareness and understanding of the factors that contribute to whether or not a property is eligible. The effort would also include robust outreach and engagement to ensure community awareness and to help inform the content of the updated historic resource codes and policies.

#### Historic Consultant Proposal

In August 2024, a Request for Proposals (RFP) for historic policy support services from qualified historic professionals to support this effort was issued. A copy of the RFP is included as Attachment 4. In response to the RFP, a total of seven proposals were received by the September 13, 2024, submittal deadline. The proposals included a mix of local and nationwide consultants, with costs that ranged from \$206,000 to \$500,000. Staff evaluated each proposal using the following five criteria: 1) Quality/ Responsiveness of Proposal; 2) Experience with Similar Engagements; 3) Professional Experience 4) Approach and Methodology; and 5) Cost.

In October 2024, the two highest scoring consultants were brought in for follow-up interviews.. Based on overall professional experience, quality of proposal, responses to interview questions and composition of the consultant team, staff identified Rincon Consultants, Inc. as being the best suited to support the City's historic policy update effort. In addition, Rincon's proposed budget was one of the most cost-competitive of all the proposals received. The Work Plan and Budget are included as Exhibit A and Exhibit B in Attachment 2.

Since the issuance of the RFP, staff has received community and decisionmaker input about the timing of the activities in the work plan. Specifically, there was interest in focusing on the Historic Preservation Ordinance update before a Citywide Historic Context Statement was developed. To provide Council with an alternative schedule that approaches these two activities sequentially rather than concurrently, staff worked with the Consultant to develop Option 2. The scope of work would not change, but the timeline and budget would be adjusted to schedule each action sequentially. For Option 2, there would be additional costs related to project management, staff time and public meetings, and additional community engagement. These costs would increase the budget by approximately 20 percent and increase the timeline to complete the effort from 14 months to 18 months.

#### Historic Policy Effort Work Plan

The work plan to complete this policy effort (Option 1) includes six tasks and is anticipated to take approximately 14 months to complete. The proposed tasks and their timeline are as follows, with additional details included in Exhibit A:

1. Kick-Off Meeting and Ongoing Project Management (*Months 1-14*)
2. Research and Analysis (*Months 1-3*)
  - 2.1 Preservation Ordinance Research and Analysis

## 2.2 Historic Context Research

### 3. Community Outreach and Engagement (*Months 1-10*)

#### 1.1 Outreach and Engagement Strategy

#### 1.2 Outreach and Engagement Delivery

### 4. Preparation and Development of Historic Preservation Ordinance Amendments and a Citywide Historic Context Statement and Historic Policy (*Months 3-11*)

#### a. Historic Preservation Ordinance Amendments and Policy

#### b. Historic Context Development

### 5. Planning Commission and City Council Public Hearings (*Months 6-12*)

### 6. Implementation Plan (*Months 6-14*)

Overall, the policy effort would start with research and analysis, along with community outreach and engagement, which would lead to one of more City Council study sessions to present the results of the community engagement and solicit feedback for the development of the Historic Preservation Ordinance update and Citywide Historic Context Statement framework. Based on the community feedback and Council direction, the draft ordinance language and context statement framework would be prepared, with potential alternative options if necessary, and shared with the public for comments and input. The Ordinance and policy development process would be iterative, with additional decisionmaker study sessions to help guide the final drafts of the Ordinance and context statement. Thereafter, public hearings will be held before the Planning Commission and then City Council, with the objective to have an Ordinance and context statement that is ready for Council adoption within 12 months. Once an updated Ordinance and Citywide Historic Context Statement is adopted, the consultant would work with staff to prepare an implementation plan that includes the necessary internal processes and procedures, and informational handouts for applicants and the public to support full understanding of the new policies and requirements. The overarching goal is to establish an updated Ordinance and associated policies in a transparent process to build trust and reach community consensus on how historic resources in San Mateo should be evaluated and preserved.

The work plan to complete Option 2 would include the same tasks and scope of work as outlined above but would start with an update to the City's Historic Preservation Ordinance. This would include community engagement, study sessions, publication of one or more draft Ordinances, Planning Commission public hearing(s), and then an updated Historic Preservation Ordinance for Council consideration and adoption. Once the Ordinance adoption has been completed, then the consultant would begin work on preparation of a Citywide Historic Context Statement. This would include community engagement, study sessions, publication of a draft context statement and then public hearings to consider adoption. This approach would take approximately 18 months to complete.

## City Council Action

The City Council should take one of the following actions:

- Option 1 – Approve a Resolution to appropriate \$328,743 from the Advance Planning Fund to the Historic Policy Update project; approve an agreement with Rincon Consultants for community outreach, historic policy and code amendment technical support; and authorize the City Manager to execute the agreement in substantially the form presented.
- Option 2 – Approve a Resolution to appropriate \$394,450 from the Advance Planning Fund to the Historic Policy Update project; approve an agreement with Rincon Consultants for community outreach, historic policy and code amendment technical support; and authorize the City Manager to execute the agreement in substantially the form presented.<sup>1</sup>
- Option 3 – Do not approve an appropriation Resolution or an agreement with Rincon Consultants and vote not to proceed with the historic policy update effort at this time.

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<sup>1</sup> If this option is selected, the Work Plan and Budget in the professional services agreement (Exhibits A and B in Attachment 2) would be updated as specified in this agenda report.

**BUDGET IMPACT:**

The budget appropriation of \$328,743 for Option 1 or \$394,450 for Option 2 (Attachment 1) is proposed to be funded by the Advance Planning Fund (Fund 225) and would not have an impact on the City's General Fund. The Advance Planning Fund currently has an available fund balance of approximately \$2.2 million. The budget appropriation for Option 1 would be for a professional services agreement with Rincon Consultants for \$285,843 and a 15 percent contingency in the amount of \$42,900 to cover additional services that may be necessary during the course of the project. The budget appropriation for Option 2 would be for a professional services agreement with Rincon Consultants for \$343,000 and a 15 percent contingency in the amount of \$51,450

In addition to the consultant services, it is anticipated that the staff time and resources to support this policy effort from the Community Development Department, City Attorney's Office and City Manager's Office will cost between \$125,000 and \$175,000. These staff costs do not require an additional budget appropriation, as they would be covered by each Department's current operating budget.

**ENVIRONMENTAL DETERMINATION:**

The appropriation of funds and agreement approval is not a project subject to CEQA, because it is an organizational or administrative activity that will not result in direct or indirect physical changes in the environment. (CEQA Guidelines Section 15378(b)(5).)

**NOTICE PROVIDED:**

All meeting noticing requirements were met.

**ATTACHMENTS**

- Att 1 – Proposed Resolution
- Att 2 – Professional Services Agreement with Rincon Consultants
- Att 3 – General Plan 2040 Historic Resource Policies
- Att 4 – Historic Consultant Request for Proposals (RFP)

**STAFF CONTACT**

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