

ITEM 7 ATTACHMENT
City of Calabasas
Policies and Procedures for Review and
Acceptance of
Monuments, Memorials, Markers and Plaques

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PURPOSE: The purpose of this policy is to provide the City Council, City Staff, the Historic Preservation Commission (HPC), and the general public with guidance for determinations of appropriateness, acceptance, placement, and maintenance of monuments, memorials, markers, and plaques proposed by outside entities or persons. From time to time requests are received from individuals and organizations for permission to place on City property monuments, memorials, markers or plaques to recognize or honor an individual, organization or event. When properly designed, planned, fabricated and displayed, memorials can furnish the general public with essential information, as well as an enhanced sense of place and understanding of the community.

As the steward of public lands within the City, the City of Calabasas is committed to protecting the parks, open spaces, public buildings, and other public areas of the city while providing opportunities for appropriately designed monuments, memorials, markers, and plaques that honor an individual, organization or event beneficial to the greater good of the community.

NOTE: These policies and procedures are not intended to address proposals of commemorative public artwork – works of art are addressed in Calabasas Municipal Code chapter 17.24, Art in Public Places. Similarly, these policies and procedures are not intended to address street naming requests, which are reviewed and considered under separate City policies and guidance.

INITIAL CRITERIA FOR SUBMITTED PROJECTS:

Before proceeding with the subsequent steps of this process, applicants desiring to place a monument, memorial, marker or plaque should submit to the City’s Historic Preservation Officer a letter that outlines in sufficient detail the main purpose and concept of their proposal. Staff will then schedule a feasibility consultation with the applicant to inform and advise of the content of this policy, the appropriateness of the proposed memorial or monument in light of this policy, and the necessary courses of action required to complete the application. In the case of proposals for significant memorials or monuments, Staff reserves the right to submit the applicant’s preliminary proposal directly to the Historic Preservation Commission

for a review of the concept before embarking on further costly planning and study.

To be considered for acceptance, the proposed project must meet the following criteria.

1. **Use of Public Space:** Donors of monuments, memorials, markers, and plaques shall consider the primary uses of public spaces and facilities in their request for a location or suitable site. While appropriate memorials may enrich an area, public parklands, civic spaces and open spaces are precious commodities. Therefore, monuments, memorials, markers, and plaques should be carefully reviewed to appropriately balance these two public benefits to protect the greater good.
2. **Timelessness:** The quality of timelessness shall be considered in the significance of the individual, organization, or event being memorialized. Memorial proposals should represent long-standing values and principles of the greater community, and will therefore offer meaning and relevance not only to the present day citizenry, but also to future generations.
3. **Community Significance:** Proposed projects must serve to commemorate or to identify a particularly significant historic event, organization or person, and should appeal to the broader interests of the community. To assure that the significance of an event or person has withstood the test of time, a project may commemorate only an event one year or older, and only a person one year or more posthumously. The City Council may waive this requirement for those individuals with exceptional community significance in cases of unusual and compelling circumstances.
4. **Past Honors:** The City inventories all publicly owned fine artworks, public art, and design enhancements, in addition to all commemorative monuments, memorials, markers, and plaques. In consideration of any proposed new memorial, it is recognized that some individuals, organizations or events may have been sufficiently honored in the past, and that additional recognition may be unwarranted or redundant.
5. **Maintenance Planning:** Maintenance concerns should be an essential consideration, with adequate financial provision made for continued future maintenance. In all cases, permanent memorials should be made from durable materials that will stand up over time. Memorials that include moveable parts or technological elements may not be as enduring and will require additional consideration and review.
6. **Financial Responsibility:** The donor of a proposed memorial is required to pay for the complete design, fabrication, installation, and maintenance (via an endowment) to ensure adequate quality of care for the memorial. Funding contributions toward the endowment or maintenance fund may be combined with other donations to benefit not only the donated memorial, but also other memorials. Donations made towards larger scale projects will be pooled and the larger project(s) will appropriately recognize both individual and group donations.

7. **Ownership:** Improvements made on City lands, including any donated monument, memorial, marker, or plaque, become the property of the City of Calabasas.
 8. **Structures Over Six Feet in Height:** The California Building Code, the current building code adopted by the City, requires that any structure over six feet in height be designed according to professional engineering practices and will require an engineer's letter as well as a building permit.
 9. **Calabasas Civic Center Plaza:** The Civic Center Plaza, which includes the Calabasas City Hall, Calabasas Public Library, and the Calabasas Senior Center, is a cohesively designed civic campus, which serves as the centerpiece of the city. Outdoor spaces and amenities throughout the plaza are as integral to the overall appearance and feel as the individual buildings. This valuable resource deserves special protection. The following standards shall apply to any proposed new memorial within the Civic Center Plaza.
 - a. California State Historical markers and markers pertaining to events or persons of national significance are permitted, if mounted to walls or structures. Pole-mounted markers are not permitted.
 - b. Plaques recognizing donors for significant improvements or acknowledging the naming of a significant improvement such as, but not limited to, pocket parks, fountains, gardens, gazebos, overlooks and other significant features may be placed within the Calabasas Civic Center Plaza. The plaques may be no larger than four (4) square feet and must be made of either cast bronze, cast aluminum (or other suitable metal), carved stone, or tile. Any such acknowledgement shall utilize wording similar to: "sponsored by...", "underwritten by...", or "a gift from...", and shall not contain any corporate logos. Plaques must be placed on or immediately adjacent to the improvement being recognized.
 - c. Plaques acknowledging the gift of a public bench, drinking fountain, or other similarly small scale memorial shall be bronze and no larger than ten inches by four inches (10" x 4"). Memorial plaques for trees or other plantings are not permitted.
 - d. Approval of monuments, memorials, markers and plaques within the Civic Center campus will be under the jurisdiction of the City Council, following a review and recommendation from the HPC.
 10. **Headwaters Corner Property:** For projects associated with the Headwaters Corner property, applications shall be reviewed first by the HPC, and the Commission shall forward its recommendation to the City Council.
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CRITERIA FOR REVIEW OF DESIGN & PLACEMENT:

The basic types of memorials vary greatly in the impact they have upon the city and open spaces. The review process for allowing them to occur on City owned land should reflect those differences. Accordingly, all proposed memorials will be judged for appropriateness based upon the following criteria.

Design Criteria:

- The quality, scale, and character of the memorial should be at a level commensurate with the particular location or setting.
- The memorial contributes to the location from a functional and design standpoint.
- The memorial should be designed by a qualified professional in the field appropriate to the size, scale, and complexity of the proposal.
- Logos (symbols or trademarks designed for easy and definite recognition) may not be used in the overall design concept of the memorial. Logos may not appear on a plaque acknowledging the memorial's donors. An acknowledgment plaque should be incidental to the memorial and not the main focus of the memorial.

Placement Criteria:

- The location under consideration shall be an appropriate setting for the memorial. There must be some specific geographic justification for the memorial being located in the proposed location.
- It should be considered that a particular location may reach a saturation point and it would be appropriate to limit future memorial installations at a particular location or area.
- The location of the memorial should complement and enhance existing and proposed circulation and use patterns.
- The location of the memorial should be supported by, and not conflict with, the City's General Plan policies, as well as any adopted public art master plan, applicable neighborhood or community plan, park plan or area design guidelines.

BASIC APPLICATION REQUIREMENTS: The following items must be provided in order to file an application for review by the HPC.

1. **All Inclusive Costs:** The cost of design, fabrication, plaques, transportation, installation, site preparation work, foundation, lighting, electrical, permits etc. must be financed by the sponsoring or requesting party. The memorial proposal shall list all-inclusive costs, and any cost exclusion shall be stated clearly in the proposal. Additionally, any party hired or employed by the requesting party must provide proof of insurance approved by the City that may include and not be limited

to: general liability, automobile insurance, professional liability insurance, performance insurance bonds, workman's compensation coverage, and others as may be required by the City.

2. **Site:** All proposed monuments or memorials must relate to and support their proposed site and/or community. Any party proposing to install a monument, plaque or memorial must propose a specific location, along with written justification that explains the significance and relationship to the proposed memorial or monument. The City reserves the right to consider alternative locations.
3. **Maintenance:** All monuments, memorials, markers, and plaques require insurance, bond, and/or an endowment fund (as appropriate). Furthermore, a maintenance schedule shall be prepared by the memorial donor adequate to ensure long-term care at conditions satisfactory to both the donor and the City. The posted insurance or bond should also cover costs of replacement and/or removal. If an adequate level of maintenance is not continued, the City reserves the right to remove or modify the memorial or any portion of the memorial.
4. **Wording on memorial plaques:** Individuals and groups may be recognized for their contributions towards a memorial project. All text and design must be approved by the HPC prior to the fabrication of the plaque.

APPROVAL PROCESS FOR SIMPLE PLAQUES, ADORNED PLAQUES, MARKERS, AND SITE ACCESSORIES AND AMENITIES

1. **Written Proposal:** After an initial feasibility of the applicant's proposed memorial has been established, the applicant will be requested to submit a written proposal with as much information as possible as to the design, size, materials, appropriateness of preferred site, map identifying the proposed site, plaque wording, sketches, renderings, a rendering of the plaque or site accessory at the proposed site, and estimated costs. A maintenance plan must also be submitted prior to final approval.
2. **Proposal Review:** The requesting party is required to complete the following steps before presentation to the HPC for recommendation:
 - a. Prepare any additional submission requests as required by staff.
 - b. Provide evidence of financing or fund raising activities.
 - c. Submit proof of insurance requirements, and a written statement of knowledge and intent to post the necessary surety for long-term maintenance.
 - d. Provide site plans, detailed designs, and schematic drawings. (Any engineering, structural, or site impact questions raised by Staff must be addressed before the proposal can be placed on the HPC agenda for recommendation.)
 - e. Submit information about the materials, coatings and patinas to be used.

Once all of the requirements listed above have been completed, the proposal will be placed on the next available HPC agenda. The HPC will consider all information, including the staff recommendation, the written proposal and concepts, and public testimony in its decision making process. The HPC may approve the placement of the proposed plaque, marker or site accessory, or the HPC may request additional information on the proposal, or deny the proposal.

Following an approval by the HPC, the requesting party will be required to enter into a contractual agreement with the City of Calabasas prior to the commencement of any work. No work may begin unless the applicant can provide evidence of funding sufficient to cover 100% of all costs associated with the design, construction, and placement of the memorial. The applicant must also provide evidence of funding of a maintenance surety or endowment equal to 10% of the total cost of the memorial. All construction documents applicable to the project must be submitted and reviewed by the appropriate City departments before construction may begin.

APPROVAL PROCESS FOR COMPLEX AND LARGE-SCALE MEMORIALS

1. **Written Proposal:** After an initial feasibility of the applicant's proposed memorial has been established, the applicant will be requested to submit a written proposal with as much information as possible as to the design, size, materials, appropriateness of preferred site, map identifying the proposed site, plaque wording, sketches, artists renderings and/or models, a rendering of the memorial at the proposed site, and estimated costs. A maintenance plan developed and approved by a qualified professional submitted prior to final approval.
2. **Proposal Review:** All written proposals shall be reviewed by staff and a recommendation shall be made.
3. **Conceptual Approval, Approval with Modification, or Disapproval:** Upon completion of the City staff review, a written report will be forwarded to the HPC recommending either acceptance and approval, denial, or modifications to the proposal. The requesting party is required to complete the following steps before presentation to the HPC for approval:
 - a. Prepare any additional submission requests as required during proposal review.
 - b. Provide evidence of financing or fund raising activities.
 - c. Submit proof of insurance requirements.
 - d. Provide site plans, detailed designs, and schematic drawings.
 - e. Any engineering, structural, or site impact questions must be addressed before the proposal can be placed on the HPC's agenda for action.
 - f. Submit information concerning the type of materials to be used, the type of coatings and patinas, and the involved artists or design professionals.

Once all of the requirements listed above have been completed, the proposal will be placed on the next regularly scheduled meeting agenda. The HPC will consider all information, including the staff HPC recommendation, the written proposal and concepts, and public

testimony in its decision making process. The HPC may recommend approval of the placement of the proposed memorial, request additional information on the proposal, or recommend denial of the placement of the memorial.

After a recommendation of approval is received from the HPC, the recommendation will be forwarded to City Council for final review. Following an approval by the City Council, the requesting party will be required to enter into a contractual agreement with the City of Calabasas prior to the commencement of any work.

No work may begin unless the applicant can provide evidence of funding sufficient to cover 100% of all costs associated with the design, construction, and placement of the memorial. The applicant must also provide evidence of funding of a maintenance endowment equal to 10% of the total cost of the memorial. All construction documents applicable to the project must be submitted and reviewed by the appropriate City departments before commencing construction.

DEFINITIONS

Distinctions are made between simple plaques and markers, versus more elaborate memorials. The various types of memorials are categorized as follows:

Simple Memorials and Plaques

1. Simple Plaques are those mounted flush with the ground, flush with a wall, or flush with some other existing durable support object (such as an existing exterior wall, post, boulder, or rock outcropping). The size of the plaque should be appropriately designed to suit the limitations and consideration of the setting.
2. Adorned Plaques are those installed within, and as part of, a larger, more intricate setting. These include plaque installations within, and inclusive of, a decorative surround or frame; and plaque installations which include a new durable support object or base (for example, plaques mounted on a raised pedestal, boulder, wall, or other vertical element, where the support object is proposed new, as a component of the overall monument proposal.
3. Markers are small scale, conspicuous, stand-alone objects used to distinguish or mark something.
4. Basic Site Accessories and Amenities include landscaping, benches, seating, picnic tables, drinking fountains, sundials, shade structures, mosaics, unique pathways, etc.

Complex and Large-Scale Memorials

5. Memorials are medium scale and serve as a remembrance of a person or an event.
6. Monuments are large scale and venerated for their enduring significance or association with an especially notable past person or event.
7. Fountains can range from being fairly simple to large and complex features combining other site accessories, sculptural elements, and landscaping. And all fountains require supportive plumbing and electrical systems. Fountains therefore require additional consideration and review because of the infrastructure required, additional maintenance implied, and possible environmental issues. Some monuments or memorials will incorporate a fountain element as part of the overall design.
8. Memorial gardens and plazas may include one or more of the objects listed above, but will also include an overall spatial experience that usually includes elaborate landscaping.
9. Other Memorials is a category to cover proposals that may not fit into any of the categories previously described.