

ITEM 8 - ATTACHMENT A

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

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 for placement on City property. 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 City of Calabasas.

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 City.

NOTE: These policies and procedures are not intended to address proposals of commemorative public artwork – works of public art installed as part of development projects 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 shall 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 and advise them 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 complex and large-scale 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.

In order to be considered, 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.
2. **Timelessness:** Memorial proposals should represent long-standing values and principles of the greater community, and offer meaning and relevance not only to the present-day citizenry, but also to future generations.
3. **Significance to the City of Calabasas:** Proposed projects should commemorate or to identify a particularly significant historic event, organization or person, and should appeal to the broader interests of the City of Calabasas. To ensure that the significance of a monument's subject will withstand 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 in cases of unusual and compelling circumstances, in the City Council's sole discretion.
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, in the City's sole judgment.
5. **Maintenance Planning:** Maintenance concerns should be an essential consideration, with adequate financial provision made for continued future maintenance. Permanent memorials must 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 and approval by the City, in its sole discretion.
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 can be pooled and the larger project(s) will appropriately recognize both individual and group donations.
7. **Ownership and Right to Modify or Remove:** All improvements made on City lands, including any donated monument, memorial, marker, or plaque, become the property of the City of Calabasas. The City may, in the exercise of its sole judgment as to the City's needs, move, remove, modify, or replace any improvement, including any monument,

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memorial, marker, or plaque, on City property at any time and in any manner.

8. **Structures Over Six Feet in Height:** Any proposed structure or improvement over six feet in height must be designed according to professional engineering practices and approved through a building permit, together with any other permits required by applicable law, in addition to being approved by the City through this policy.
9. **Calabasas Civic Center Plaza:** The Civic Center Plaza, which includes 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 aesthetic character as the individual buildings. This valuable resource requires special protection. In addition to the preceding standards, the following standards shall apply to any proposed new memorial within the Civic Center Plaza.
 - a. Approval of monuments, memorials, markers and plaques within the Civic Center campus will be under the jurisdiction of the City Council, following review and recommendation from the HPC.
 - b. California State Historical markers and markers pertaining to events or persons of national significance are permitted and may be considered, if mounted to walls or structures. Pole-mounted markers are not permitted.
 - c. 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. The City will approve all text. Plaques must be placed on or immediately adjacent to the improvement being recognized.
 - d. 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”). The City will approve all text. Memorial plaques for trees or other plantings are not permitted.
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 for approval.

CRITERIA FOR REVIEW OF DESIGN & PLACEMENT:

Memorials vary greatly in the impact they have upon the City and open space. The review process for allowing their placement on City 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 commensurate with the location or setting.
- The memorial should contribute 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 locating the memorial 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 costs excluded 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, in amounts and types as determined necessary by the City. 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 must 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 the initial feasibility of the applicant's proposed memorial has been established, the applicant shall 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. In its decision-making process, the HPC will consider all information, including the staff recommendation, the written proposal and concepts, and public testimony. The HPC may approve the proposal, 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 the initial feasibility of the applicant's proposed memorial has been established, the applicant shall 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, must be submitted prior to final approval.
2. **Proposal Review:** All written proposals shall be reviewed by City staff and a recommendation shall be made to the HPC.
3. **Conceptual Approval, 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. Address any engineering, structural, or site impact questions 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 HPC 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 proposal, request additional information on the proposal, or recommend denial of the proposal.

After a recommendation is rendered by the HPC, the recommendation will be forwarded to City Council for final review. Following 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 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 commencing construction.

CITY APPROVAL REQUIRED FOR ALL MONUMENTS, MEMORIALS, MARKERS AND PLAQUES

In all cases, written approval by the City is required for proposed monuments, memorials, markers, and plaques to be placed on City property. All City property is owned by the City and access to any City property for placement of a proposed monument, memorial, marker, or plaque requires written City approval, through the procedures in this Policy, as all City property is a government speech forum, not a public forum nor limited public forum. Whether to approve any proposed monument, memorial, marker, or plaque for placement on City property and acceptance as City speech is subject to the sole discretion of the City. This Policy is not an offer of access to City property and the City reserves the right to approve, modify, reject, conditionally approve, or remove any or all proposed monuments, memorials, markers, or plaques, in its sole judgment as to its needs. In exercising this judgment, the City will comply with all applicable law.

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 typically serve as a remembrance of a person or an event.
6. Monuments are large scale and typically venerate persons or groups for their enduring significance or association with an especially notable event or movement.
7. Fountains can range from being fairly simple to large and complex features combining other site accessories, sculptural elements, and landscaping. 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 may 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.