

Appendix A - Scope of Services

Town of Jackson Character District #1 LDR and TCHPB Historic Preservation Program
Town of Jackson (TJ), Teton County Historic Preservation Board (TCHPB)
April 29, 2019

Phase #1

Step 1: Existing Conditions

This step in the scope currently under contract with the TCHPB.

Objective:

- To develop a general understanding of the existing conditions related to Historic Preservation in the Town of Jackson and Teton County.

Tasks:

TCHPB TJ
funds funds

Tasks:	TCHPB funds	TJ funds
1.1 Research programs in peer communities		
1.2 Meet with TCHPB to review issues and opportunities (Trip #1)	✓	
1.3 Conduct tour of sample conditions (Trip #1)	✓	
1.4 Review Jackson and Teton County's existing historic preservation tools	✓	
1.5 Develop case studies of existing conditions	✓	
1.6 Prepare summary report of existing conditions and programs in peer communities	✓	

TJ and TCHPB Assignments:

- Provide background information including base maps
- Identify and schedule meeting space
- Notice public meetings
- Distribute materials to participants
- Post announcements, documents, etc. to web site

Consultant Deliverables:

- Existing conditions report

Phase #2

Step 2: Assess Community Opinions

This step in the scope is divided into two components to reflect the objectives of the two parties, the TCHPB and the TJ. Note: Step 2 is partially under contract with TCHPB.

Objectives:

- To identify historic resources valued by the community.
- To test the community's interest in historic preservation.
- To identify what "Western Character" means to the community.
- To identify Character District #1 Boundaries.

This step includes a community outreach effort that includes both a community workshop and online surveys. The workshop will be structured in two parts: the first part will focus on "taking

the temperature” in terms of the community’s (town/county) values for historic resources and heritage in general. The exercise will be tailored such that participants can focus on the town or county. In the second part of the workshop, participants will assist in identifying what the term “Western Character” means to the Town of Jackson and how it applies to Character District #1 core and outer ring boundaries. In addition, they will discuss the boundaries.

We will also develop a two part online survey that refines the high level questions from the workshop: the first part we will ask about the types of historic resources that people value and the role that preservation should play in the town and county. In the second part of the survey, we will ask about the meaning of “Western Character.” This will build on information in the Comprehensive Plan and the workshop findings. We will also develop a survey for visitors that asks similar questions; however, this will be tailored to the visitor experience. This will be available online and as a handout that can be completed at the hotel, museum, visitor center, and/or other location. The survey distribution will be lead by staff.

Workshop Description (To be fine-tuned with staff and TCHPB)

PART 1:

A. Historic Preservation Program Presentation: (20 minutes)

Objective: To enhance the communities understanding of Historic Preservation programs

- Preservation 101 (what is historic preservation, tools of successful programs, etc.)
- Current role of preservation in the community today (surveys, demo ordinance, plaque program, etc)
- The role the community can play
- Existing conditions
- Introduce group activities

B. Activity 1 (Individual-15 minutes): Mapping Historic Areas in Jackson/Teton County

Objective: To understand where meaningful historic resources are located.

- Each participant will be given an 11x17 map of the town and will have an opportunity to identify three areas they think have historic merit, and that could be addressed in a preservation program. Participants will also identify site design and building elements that typify the historic character of the area(s) selected.

C. Activity 2 (Group-20 minutes): Case Study Properties

Objective: To understand what types historic resources should be preserved, issues confronted in preserving historic resources, and any ideas about how to preserve historic resources.

Each group will receive one case study property. These properties will include:

- Commercial
- Residential
- Residential with historic structure in back
- Mid-century residential
- Mid-century hotel
- Rural landscape

Each group will discuss the following questions regarding the property:

- How important is it to preserve this property?
- What are the obstacles to preserving the property?
- What ideas/incentives do you think would help in preserving the property?

PART 2

A. Character District #1 LDR Update Presentation: (15 minutes)

Objective: To introduce Character District #1 LDR update and current issues.

- What is the Character District #1 LDR Update and why are we talking about it.
- Existing LDRs for Character District #1 and Design Guidelines that apply
- Comprehensive Plan Goals
- Potential issues
- Introduction to activities

B. Activity 1 (Group): Goals and Issues in Character District #1 (20 minutes)

Objective: To understand the goals and issues for Character District #1.

- On the map provided identify any subareas within Character District #1.
- List three goals for each subarea within Character District #1
- List three issues/concerns for each subarea within Character District #1 that could be encountered in the future.

C. Activity 2 (Individual-15 minutes):

Objective: To understand what “Western Character” means to the community.

From the photograph sheet provided identify key features within Character District #1 that represent “Western Character.” You can identify features in addition to those noted below and/or exclude features.

- Streetscape
- Park/Open Space
- Building forms and types
- Materials
- Building features (storefronts, canopies, entries, etc.)

D. Activity 3 (Group 15 minutes): Character District #1 subarea design

Objective: To identify Character District #1 subarea design considerations.

- From the images provided, select those images that reflect the type of design character that is appropriate for each subarea.

Tasks:	TCHPB funds	TJ funds
2.1 Prepare workshop materials and review with TJ & TCHPB		
• General activity about preservation in the community	✓	
• Character District #1 activities		✓
2.2 Conduct on-site community workshop to explore opinions (Trip #2)	✓	✓
2.3 Conduct on-site key stakeholder meeting(s) - DRC and one other (Trip #2)	✓	
2.4 Prepare summary of initial community input		
• Summary about preservation in the community	✓	
• Summary about Character District #1		✓
2.5 Develop Draft #1 online survey		
• Historic Preservation survey	✓	
• Character District #1 survey		✓
• Visitor survey		✓
2.6 Review Draft #1 online survey with staff & TCHPB	✓	✓
2.7 Staff & TCHPB provide consolidated comments	✓	✓
2.8 Develop Final surveys	✓	✓

TJ and TCHPB Assignments:

- Notice workshop
- Print workshop handout materials
- Reserve and set-up meeting rooms
- Provide GIS base map Information
- Provide and manage project web site
- Distribute and collect visitor surveys
- Post announcements, documents, etc. to web site
- Participate in community workshop

Consultant Deliverables:

- Workshop announcement
- Workshop logistics sheet
- Workshop handout materials
- Presentation
- Draft and Final online survey (Historic Preservation, Character District #1)
- Draft and Final visitor survey (online, handout)
- Workshop summary

Meetings: 10 hours

- Staff review sessions x 2 (1 hour each)
- Other staff admin. meetings x 2 (1 hour each)
- TCHPB x 2 (1 hour each)
- Study session and key stakeholder meeting x 2 (1 hour each)
- Community workshop (2 hours+)

Step 3: Historic Preservation Program and Character District #1 Strategy Paper

This step in the scope is contracted with the TJ.

Objectives:

- To enhance the community's understanding of best urban design practices for creating pedestrian-friendly downtowns.
- To develop a historic preservation strategy that is tailored to the Town of Jackson.
- To provide a user-friendly documents so the community is provided an opportunity to make informed decisions regarding the initiation of a historic preservation program, Character District #1 LDR updates, and/or other LDR update recommendations.
- To recommend an appropriate historic preservation program and set the direction for LDR standards in Character District #1, and other LDR updates as identified by the community outreach process.

In this step, we will identify a strategy for a Historic Preservation Program and for Character District #1 LDR. The strategy paper will include a summary of the online findings. For example we will identify the type of resources that people value as historically significant. We will also define "Western Character" and how this might influence design in Jackson. In addition, we will identify a range of incentives that may be utilized in a preservation program, regulatory tools options (conservation and/or preservation), and other LDR updates that may be utilized by the Town of Jackson. We will also outline LDR options for Character District #1. The strategy paper will consider the community outreach summary and the online survey findings from Step 2. The Character District #1 strategy will also incorporate up to five models to test the threshold for infill in the core and outer ring boundaries. We will present the strategy to the community in second workshop to determine the preferred regulatory tools for a potential historic preservation program and Character District #1 LDR updates. We will also identify where other existing LDR sections are in potential conflict with the historic preservation program recommendations once we have an understanding of the communities direction.

As a part of the strategy effort, we will work with our sub-consultant Urban Advisors to test the feasibility of economic incentives and the potential effects of any proposed regulatory actions. The financial analysis of the economics related to preservation will help inform the discussion. Urban Advisors will run pro formas of some theoretical projects to help us understand how regulations and incentives may affect preservation strategies. For example, they might test the impacts for a selection of residential, commercial and other locations in town for:

- The financial dynamics of demolishing a historic building and redeveloping the site with all new buildings (which is the current trend)
- Retaining the existing historic building on the site and constructing and addition or adding new building in a compatible manner (which might include development bonuses or other code incentives)
- Donating a conservation easement for all, or a part of, potential development rights on a site (and thereby taking a charitable gift donation)

Other scenarios are likely to emerge during the consideration of alternative tools. This financial analysis would help decision-makers understand that certain incentives are likely to be useful for one particular class of projects while a different set of incentives may be useful for another class. These would reflect different land use types, ownership positions and zone districts.

Tasks:	TCHPB funds	TJ funds
3.1 Develop Draft #S1a strategy paper		✓
3.2 Review strategy paper with staff (via video conference)		✓
3.3 Staff provide consolidated comments		✓
3.4 Develop Draft #S1b strategy paper per comments		✓
3.5 Review Draft #S1b strategy paper with key stakeholders x 2 (TCHPB and DRC via video conference)		✓
3.6 Review Draft #S1b strategy paper in a joint study session with Town Council & County Commissioners (via video conference)		✓
3.7 Review comments with staff		✓
3.8 Develop Final strategy paper per comments		✓
3.9 Prepare workshop materials		✓
3.10 Present Final strategy paper to the community in a workshop to identify preferred alternatives (Trip #3)		✓
3.11 Summarize workshop findings, and potentially identify where other existing LDR sections are in potential conflict with the communities recommendations		✓
3.12 Develop Economic Feasibility Study		✓

TJ Assignments:

- Review Draft #S1a strategy paper and provide consolidated comments
- Notice workshop and other meetings
- Print workshop handout materials
- Post announcements, documents, etc. to web site
- Reserve meeting rooms
- Participate in study sessions and community workshop

Consultant Deliverables:

- Survey analysis (incorporated into strategy paper)
- Draft #S1a, Draft #S1b and Final strategy paper (20 pages with graphics) to include:
 - Summary of the online findings
 - Identify the type of resources that people value as historically significant
 - Define “Western Character” and how this might influence design in Jackson
 - Identify a range of incentives that may be utilized in a preservation program
 - Identify regulatory tools options to address preservation and/or conservation options, and other LDR updates that may be utilized by the Town of Jackson
 - Identiy preferred tools through community outreach process
- Workshop announcement (1 page)
- Workshop logistics sheet (1 page)
- Workshop handout materials (map and activity sheet)
- Study session and key stakeholder meeting materials (agenda and questions)
- Presentations (PPTs)

- Workshop summary (6-8 page summary of findings)
- Draft #E1a, #E1b and Final Economic Feasibility paper (6-8 pages text with appendix of excel chart analysis)

Meetings: 9 hours

- Staff review sessions x 2 (1 hour each)
- Other staff admin meetings x 2 (1 hour each)
- Study session and key stakeholder meeting x 3 (1 hour each)
- Community workshop (2 hours)

Phase #3:

Step 4: Develop the Regulatory Tools

Objectives:

- To develop a historic preservation program that is tailored to the Town of Jackson (including ordinance, incentives, handbook and/or design guidelines).
- To provide Character District #1 LDR updates.
- To provide updates to the Town’s Design Guidelines to address “Western Character” and incorporate Historic Preservation design guidelines.

In this step, we will develop the actual regulatory tools for the Historic Preservation Program and Character District #1. This may include one or all of the following tools: a Historic Preservation Ordinance, Character District #1 LDRs, historic preservation incentives, and design guidelines update. We will present the draft regulatory tools in an Open House. We will develop a comment card to provide an opportunity for community input. We will update the materials per community input. We will conduct a study session and an adoption hearing.

Tasks:

	TCHPB funds	TJ funds
4.1 Develop Draft #T1a regulatory tools documents (Character District #1 LDRs, Design Guidelines edits, and Historic Preservation Program tools)		✓
4.2 Review Draft #T1a of regulatory tools documents with staff		✓
4.3 Staff provide consolidated comments		✓
4.4 Develop Draft #T1b regulatory tools documents per comments		✓
4.5 Review Draft #T1b regulatory tools documents with key stakeholders (DRC & TCHPB via video conference)		✓
4.6 Prepare Open House materials		✓
4.7 Present Draft #T1b of regulatory tools documents to community in an Open House (Trip #4)		✓
4.8 Review Draft #T1b of regulatory tools documents in a joint Town Council and Planning Commission Study Session (Trip #4)		✓
4.9 Develop final regulatory tools documents per comments		✓
4.10 Prepare adoption hearing materials		✓
4.11 Address final edits to documents (this is typically minor grammar and similar edits, not a change to graphics/approach)		✓

TJ Assignments:

- Review draft regulatory tools and provide consolidated comments
- Notice Open House
- Print Open House handout materials
- Post announcements, documents, etc. to web site
- Reserve meeting rooms
- Participate in Open Houses
- Conduct adoption hearings

Consultant Deliverables:

- Draft #T1a, #T1b and Final regulatory tools package to include:
 - Character District #1 LDR Design Standards
 - Design Guidelines Appendix to include: Historic Preservation Design Guidelines (20 pages) and Western Character Design Guidelines (20 pages)
 - Draft of Historic Preservation Ordinance (6 pages)
- Study session and key stakeholder meeting materials (agenda and questions)
- Open House logistics sheet
- Open House handout materials
- Presentations
- Open House summary
- Adoption hearing materials

Meetings: 9 hours

- Staff review sessions x 2 (1 hour each)
- Other staff admin meetings x 2 (1 hour each)
- Study session and key stakeholder meeting x 3 (1 hour each)
- Open House (2 hours)

Additional Service Option:

Historic Preservation Handbook. We will develop and publish a Historic Preservation Handbook for the Town of Jackson. This would serve as a tool to enhance the communities understanding of Historic Preservation in the community. It would include the following topics:

- Concise History of the Town of Jackson (graphic time-line); What historic preservation means to the community;
- What it means to own a historic resource;
- What incentives are available if I want to make improvements to my property;
- What is the process when making improvements to a historic resource;
- Listing of web-based historic preservation resources that are available to the public that identify best practices in historic preservation.