



Midpeninsula Regional  
Open Space District

## **PLANNING AND NATURAL RESOURCES COMMITTEE**

R-14-41  
February 18, 2014

### **AGENDA ITEM 4**

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Acceptance of Consultant Reports and Direction to Initiate Partnership Development for the Hawthorn Historic Complex at Windy Hill Open Space Preserve

#### **GENERAL MANAGER'S RECOMMENDATION(S)**

1. Accept the Historic Resource Study, Structure Conditions Assessment, and Findings for the Hawthorn Historic Complex at Windy Hill Open Space Preserve.
2. Direct the General Manager to prepare and release a Request for Letters of Interest and provide copies of the reports listed above to solicit potential partnerships with outside entities for the restoration, reuse, and maintenance of the Hawthorn Historic Complex.

#### **SUMMARY**

The following detailed reports regarding the Hawthorn Historic Complex at Windy Hill Open Space Preserve are complete: 1) a Historic Resource Study and 2) a Structure Conditions Assessment (see Attachments 1 and 2 for summaries). With the completion of these reports, the General Manager is seeking Committee direction to release the information along with a Request for Letters of Interest (RLOI) (see Attachment 3 for an outline) to solicit proposals for potential partnerships from outside entities that may be interested in restoring, reusing, and maintaining the Hawthorn Historic Complex. The RLOI would provide the District with conceptual proposals for the restoration and reuse of the property and include sufficient detail to understand the financial viability of each proposal.

#### **DISCUSSION**

##### **Background**

The Hawthorn Historic Complex is located on a 79-acre triangular piece of land located between Alpine and Los Trancos Roads in the Town of Portola Valley. The property became a part of Windy Hill Open Space Preserve in 2011, when the District acquired the property, historically known as "Hawthorn", from the estate of Frederick N. Woods, III. The hilly terrain includes a roughly north-to-south ridgeline that bisects the property through the center. The land to the east side of this ridgeline contains the historic residential and agricultural complex associated with the late 19th and early 20th century development of the site by the Allen and Woods families (referred to as the Hawthorn Historic Complex). Generally, other than a later residence (added in 1952) and an overgrown olive grove (in the southwestern corner of the property), the western portion is undeveloped.

To prepare the District in developing potential partnerships for the rehabilitation of the Historic Complex, the District hired Knapp Architects to survey and evaluate the history and condition of the historic structures. Attachments 1 and 2, summaries of the Historic Resource Study and Structure Conditions Assessment, present the key findings of this work.

**Hawthorn House**

The most notable structure, the Hawthorn house, which forms part of the Historic Complex, is an approximately 9,000 square foot, wood-framed, shingle-style, two-story residence constructed in 1887. Overall, the structure is in fair condition, despite years of abandonment, and holds promise for potential reuse. According to the Historic Resource Study, the house represents the social, agricultural and architectural history of an era when many wealthy and prominent San Francisco families owned estate property on the Peninsula both for use as a year round family house and as a summer retreat. The structure retains a remarkable level of historic integrity. While other buildings and some of the landscape features within the Historic Complex are in poor condition, they still retain important components of the required aspects of integrity including: location, design, setting, materials, workmanship, feeling, and association. The Historic Complex appears eligible for the National Register of Historic Places at the local level as an historic district under Criterion A (broad patterns of history) with importance in the areas of agriculture, architecture, and social history.

**Prior Stabilization Work**

Since the District's ownership of the property in 2011, the District has focused on implementing site stabilization measures to temporarily halt the deterioration of the historic structures until surveys and reports could be completed to inform the future reuse of the site. These measures have included: sealing window and door openings to prevent trespassing, rodent control, extensive bee hive removal, debris removal, tree trimming, and shrink wrapping the roof to prevent moisture intrusion. These stabilization measures are not intended to be long-term solutions.

**Potential Partnerships**

With the completion of the Historic Resource Study and Structure Conditions Assessment, the District now has the necessary background documentation regarding the condition of the buildings and their potential historic significance to initiate meaningful discussions with potential partners regarding the future rehabilitation and reuse of the Historic Complex. The General Manager recommends releasing a Request for Letters of Interest (RLOI) to solicit potential partnership proposals for the rehabilitation, reuse, and maintenance of the site.

**Request for Letters of Interest**

The proposed Request for Letters of Interest would include background information about the Hawthorn property and establish clear development parameters for the historic site and structures (see Attachment 3, RLOI summary outline). The RLOI would also describe the minimum partnership requirements and specific responsibilities of each party, and include examples of potential lease options that the District may consider. Moreover, the RLOI would also specify the requirements that would need to be submitted as part of each Letter of Interest, which would include:

- Description of the proposed use and development of the site;
- Detailed conceptual budget, including anticipated budgets for design and engineering, structural repairs, habitability improvements, hazardous materials abatement, environmental review, and permitting, and any other cost associated with the proposed use;
- Description of any fundraising requirements;
- Schedule for completion of the proposed rehabilitation and reuse; and,
- Proposal for ongoing maintenance and management of the site once the work is complete.

**FISCAL IMPACT**

Partnership Development for the Hawthorn Property is included in the proposed Fiscal Year 2014-15 Action Plan for the Planning Department as a Priority 1 project. Project costs vary depending on the success of the partnership development. If no suitable partner is interested or has the capacity to restore and maintain this property, the District would need to consider implementing additional building stabilization for long-term weatherization ("mothballing"). These costs would be borne from the endowment fund and are anticipated to be \$130,000. Should a suitable partnership be developed,

depending on the final terms of the agreement, the partner may assume responsibility for all building rehabilitation and ongoing maintenance costs.

**PUBLIC NOTICE**

Public notice was provided as required by the Brown Act. Interested parties and neighbors within 300-feet of the property have also been notified.

**CEQA COMPLIANCE**

The proposed actions do not constitute a physical change to the environment, and are therefore not subject to the California Environmental Quality Act (CEQA). Any future proposal to make improvements or renovations to the structures would be subject to CEQA review prior to implementation.

**NEXT STEPS**

If the proposed Request for Letters of Interest approach is agreed to by the Committee, the General Manager would prepare a Board FYI to inform the full Board of the proposed approach for partnership development and the upcoming release of a Request for Letters of Interest (RLOI). The General Manager would subsequently direct staff to release the RLOI to solicit proposals from potential partners and to provide copies of the Historic Resource Study and Structures Conditions Assessment to potential proposers as background information. Notice of the RLOI would be provided to the Town of Portola Valley, neighbors, and interested parties. Once proposals are submitted and scored, staff would return to the Committee with a recommendation for selection of a partner/proposal and an outline of the proposed terms and conditions for the partnership agreement. The Committee would then forward a recommendation for entering into a partnership agreement to the full Board for review and consideration. If a suitable partner is not identified before the onset of the next rainy season, the District would need to consider implementing additional stabilization and/or long-term weatherization (“mothballing”) measures to prevent further deterioration.

**Attachments**

1. Summary of Findings: Hawthorn Historic Resource Study
2. Summary of Findings: Hawthorn Historic Complex - Structure Conditions Assessment
3. RLOI outline

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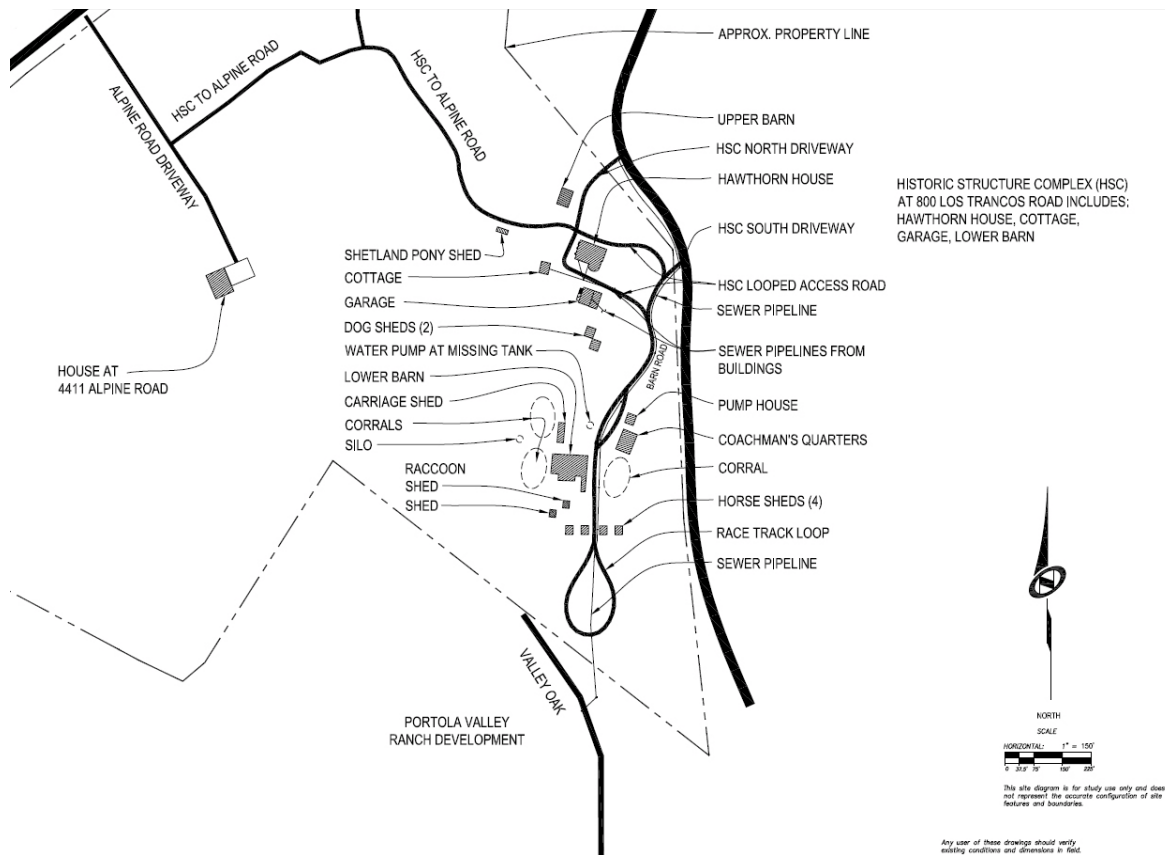
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**HAWTHORN PROPERTY  
WINDY HILL OPEN SPACE PRESERVE**

**HISTORIC RESOURCE STUDY – SUMMARY OF FINDINGS**

**INTRODUCTION**

A Historic Resource Study was completed by Knapp Architects and Denise Bradley in the summer of 2013 for the Hawthorn Historic Complex, located on the Hawthorn Property within Windy Hill Open Space Preserve in the town of Portola Valley, California. A summary of the key findings from the Historic Resource Study are provided below.



*Hawthorn Historic Complex map, courtesy of Knapp Architects*

**SUMMARY OF KEY FINDINGS:**

- 1. The Hawthorn Historic Complex (HHC) as a whole appears eligible for the National Register of Historic Places under Criterion A, broad patterns of history, at the local level. No one structure is deemed historically significant alone. The HHC demonstrates importance in the areas of:**
  - a. Agriculture
  - b. Architecture
  - c. Social History

2. **The HHC retains a remarkable and unique level of historic integrity**, even though some of the buildings and landscape features are in poor condition.
  - a. **The HHC remains relatively intact since the 1920s.** The Allen family purchased property in 1886 from the Martinez family. It was a small portion of the Martinez's Rancho El Corte de Madera. The Allen family sold to the Woods family in 1916. Woods completed additions and renovations to the estate in the 1920's. Since that time, little to no upgrades have occurred and the estate is relatively intact, closely resembling its appearance in the 1920s. The result is a high level of historic integrity, providing a strong sense of time and place.
  - b. Integrity features include:
    - i. Location
    - ii. Design
    - iii. Setting
    - iv. Workmanship
    - v. Feeling
    - vi. Association
  
3. **The Hawthorn HHC meets the definition of a Historic District Resource under the California Environmental Quality Act (CEQA).**
  
4. **Specific Historic & Cultural Defining Features include:**
  - a. **Excellent example of the "Gentleman's Farm":**
    - i. Serves as an example of small farming estates that merged agricultural uses and recreational activities.
    - ii. Lifestyle attracted middle and upper class families of San Francisco to the peninsula – facilitated by the development of the railroad.
    - iii. Cultural / landscape defining features of the Gentlemen's farm that are still extant at Hawthorn include:
      - Hawthorn House -built by Allen family in 1886-87
      - Barn - age unknown; likely built by Allen family at same time as House
      - Cottage - age unknown; assumed to pre-date House
      - Olive Orchard – planted by Allen family
      - Road System - gravel/dirt roads appear to all be of original Allen family period
      - Stone walls – appear to be constructed by Allen family
      - Fences – from both Allen and Woods family era
  - b. **Woods Era use of HHC reflects the change in pattern of settlement** on the peninsula from summer and weekend retreat to full-time residence. Although the Woods family retained a home in San Francisco, they eventually settled full time at Hawthorn.



*Hawthorn House, Allen era, north façade. Credit: G.T. White, 1893, Town of Portola Collection*

**5. The HHC includes a number of **primary and secondary structures, as well as landscape features that lend significance to the site as a Historic District.****

- a. Primary structures:
  - i. Hawthorn House
  - ii. Cottage
  - iii. Garage
  - iv. Lower Barn
- b. Secondary structures:
  - i. Upper Barn
  - ii. Shetland Shed
  - iii. Dog Sheds
  - iv. Carriage Shed
  - v. Pump House
  - vi. Coachman's Quarters
  - vii. Raccoon Sheds
  - viii. Horse Sheds
- c. Landscape features:
  - i. Natural Topography – how structures/facilities were developed into site contours
  - ii. Olive Grove
  - iii. Clustering of Structures
  - iv. Internal Road network
  - v. Rock walls & edging
  - vi. Free-standing brick oven

**HAWTHORN PROPERTY**  
**WINDY HILL OPEN SPACE PRESERVE**

**STRUCTURE CONDITIONS ASSESSMENT – SUMMARY OF FINDINGS**

**INTRODUCTION**

A Structure Conditions Assessment (SCA) was completed by Knapp Architects in 2014 for the Hawthorn Historic Complex, located on the Hawthorn Property within Windy Hill Open Space Preserve in the town of Portola Valley, California. The historic structures on this property have not been inhabited, utilized, nor maintained for many years and have sustained considerable deterioration. Documentation of their general design and construction condition is essential to inform future development of the site as a whole, as well as improvements to individual structures. The SCA focuses on the conditions of the historic site and the four major structures that are located within it. A primary objective of the SCA is to provide information to potential partners who are assessing the viability of rehabilitation and reuse of the site and structures.

The SCA assumes that the California Historical Building Code (CHBC) may be applied so that the historic fabric can be maintained to the greatest extent possible; application of the regular California Building Code (CBC) may otherwise jeopardize the historic integrity of the site. (Note: use of the CHBC would need to be evaluated by potential partners if use thereof facilitates their proposed site reuse; local jurisdictions would need to be consulted to determine application of the CHBC versus CBC). Code requirements will vary depending on the rehabilitation and reuse plans proposed for the site.

A summary of the SCA findings are provided below.

**SUMMARY OF KEY FINDINGS:**

**A. Site Conditions**

1. The site is in considerable disrepair; landscaping and structures have not been maintained for decades.
2. Site Access – the HHC is accessed from two entry drives off Los Trancos Road.
  - The entry drives will need to be widened and site-lines assessed, and repaved with compacted aggregate baserock.
  - The larger network of roads would need to be assessed for improvement on a case-by-case basis.
3. Surface Drainage
  - Improvements will be required to address erosion control and the potential for runoff to Los Trancos Creek.
4. Site Utilities
  - Electrical - PG&E service is available on site; new services would need to be installed at structures and service extended.
  - Sewer – the House, Garage and Cottage appear to have formerly been on a septic system; although a sewer main runs through the site, there is no current hook-up to this system. Depending on proposed rehabilitation and reuse plans, the site could be either served by a new septic system or connected to the sewer main.

- Water – no existing water source exists on site. A new water service would be required and is available from a water main located in Los Trancos Road.
- Gas – no existing gas service exists on site. A new gas service could be extended from the main in Los Trancos Road. Depending on the proposed rehabilitation and reuse plans, propane may be an option.

5. Site geology and structural stability

- The House and Garage are set on stable, unconsolidated granular material and the Cottage is underlain by stable bedrock.
- There is the potential for strong to very strong ground shaking due to a seismic event on one of the nearby faults.
- Structures have evidence of some distress as a result of undersized footings and settlement.
- New foundations should be reset on stable or engineered backfill with adequate depth and adequate drainage.

**B. Primary Structures**

1. Hawthorn House

- Built in 1887
- Fair condition; good candidate for reuse

2. Garage

- Built in 1916
- Fair condition; good candidate for reuse

3. Cottage

- Built in early 1880s
- Fair-to-poor condition; stabilize for exterior viewing

4. Lower Barn

- Built in early 1880s
- Fair-to-poor condition; stabilize for exterior viewing

**C. Recommendations for primary structures:**

1. Replace roofs with new asphaltic roofing that matches the aesthetic of original shingles.
2. Strengthen roof framing.
3. Repair external additions and staircases that have deteriorated.
4. Repair or replace siding and shingles and repaint structures; match historic aesthetic.
5. Repair doors and windows and replace broken glazing.
6. Repair and refinish interior walls, ceilings, and floors as necessary, matching historic standards.
7. Implement pest intrusion and prevention measures.
8. Reinforce or replace foundations and bring up to code.
9. Replace deteriorated, inadequate, or dangerous system components in all structures with new electrical, plumbing, heating and ventilations systems.
10. Potentially add HVAC systems to the Cottage and Barn if reuse is planned.
11. Retain and repair historic lighting and plumbing fixtures when feasible. Select new fixtures that are compatible with the historic building.



**D. Hawthorns Secondary structures and outbuildings** – all secondary structures have been deemed to be in either poor condition or deteriorated, and many have already collapsed; these structures pose a long-term maintenance issue as well as fire and safety concerns.

1. Upper Barn
2. Coachman's Quarters
3. Pump House
4. Silo  
Sheds

**E. Recommendations for secondary structures/outbuildings**

1. Photo-document each structure
2. Demolish most of the outbuildings.



*Hawthorns House circa 2013; photo courtesy of Knapp Architects*

# Request for Letters of Interest for Partner Selection

## Hawthorn Property

The following document outlines the proposed schedule and components for the proposed Hawthorn Partnership Development Process, including the timing of the Request for Letters of Interest (RLOI).

### Proposed Schedule:

- January – Prepare the proposed partnership approach and RLOI outline for Planning and Natural Resources (PNR) Committee review and agreement
- February – Present the partnership approach and RLOI to the PNR
- March – If agreed by PNR, submit a Board FYI on the proposed approach and issue the RLOI
- April through May – Review Letters of Interest (proposals)
- June – Present proposals, scoring, and recommended top proposal to the PNR for confirmation
- July through September – negotiate initial terms and conditions of agreement with potential Partner
- October – Present recommended partnership agreement to the full Board for review and consideration

### Proposed Components of the RLOI:

#### 1. General Background Information

- a. Description of District mission, goals, and objectives
- b. Examples of existing District-private partnerships on other properties
- c. Description of potential lease types / options for partnership
  - ex. i. Master site lease with a 15 initial year term and two options for extensions not to exceed 5 years in length for each extension
  - ex. ii. Life estate
- d. General description of property
  - i. Historic District parameters – reference Historic Resource Study
  - ii. Condition of structures – reference Structure Conditions Assessment

#### 2. General Property Requirements

- a. Development parameters
  - i. Town of Portola Valley
    1. Zoning requirements
    2. Permitting requirements
  - ii. Consistency with Historic District
  - iii. Consistency with surrounding neighborhood
  - iv. Consistency with future public use, access, and use of remainder of property

- b. Minimum Partner requirements and responsibilities
  - i. Hold public tours minimum twice a year;
  - ii. Maintain property lease area consistent with predetermined landscaping and maintenance requirements (i.e. exterior structure maintenance; tree trimming, defensible space clearing, etc.);
  - iii. No site development inconsistent with Historic District (i.e. no paved roads, swimming pools, spas, ornate gardens, large lawns, etc.);
  - iv. No interior remodel inconsistent with historic elements: no removal of walls, windows, finishes, etc. without appropriate review and approval by District
  - v. Use shall be consistent with that allowed and approved by Town of Portola Valley;
  - vi. Partner responsible for all costs associated with property use, including but not limited to renovations, permitting, infrastructure, etc.;
- c. District activities and responsibilities
  - i. District to maintain surrounding property as open space with native vegetation;
  - ii. District to have regular ranger patrols of the site (which may also include a ranger residing in the Alpine Road house located on the property);
  - iii. District may fund additional site stabilization measures, as required, to keep structures status quo, whether purposed for re-use by Partner or not, until Partner completes fund raising and implements work on site;

### **3. Letter of Interest Submittal Requirements**

- a. Summary Statement of intended use (residential, agricultural, commercial, other);
- b. Description of how proposed use aligns with District mission / objectives;
- c. Schedule outline for rehabilitation and reuse;
- d. Budget outline for proposed rehabilitation and site improvements (including funding sources and detailed funding plan);
- e. Statement of understanding that Partner would be financially responsible for all costs associated with development: design, engineering, environmental, regulatory, permitting and construction;
- f. Statement of understanding that Partner shall be responsible for all upkeep and maintenance costs associated with Partner's use of the premises;
- g. Statement of agreement to develop project in compliance with Historic District parameters;
- h. Statement of understanding that Partner would provide access for public tours at least twice a year;

### **4. Evaluation of Letters of Interest & selection of potential Partner**

- a. District would select a Partner based on the following, prioritized criteria:
  - i. Financial viability of Partner proposal;
  - ii. Site rehabilitation and reuse conformance with District mission and goals, zoning, surrounding character, and historic uses;

- iii. Expediency and timing - due to ongoing structures deterioration, time is of essence; higher score given to Partners with plans that can be executed more quickly;
- iv. Partner lease terms (e.g., proposed lease structure, proposed lease area, proposed lease terms and extensions).