COMMERCE + INTERPRETATION: Possibilities, Pitfalls, and Principles of Shared Use at Cooper-Molera Adobe

Katherine Malone-France, Douglas Wiele, and Paul Edmondson

SEPTEMBER 26, 2017
Speakers

• Katherine Malone-France, Vice President for Historic Sites, National Trust for Historic Preservation

• Douglas Wiele, Founder, Foothill Partners, Inc.

• Paul Edmondson, Chief Legal Officer and General Counsel, National Trust for Historic Preservation
EXISTING CONDITION

PROPOSED CONDITION

new kitchen should defer to Red House in setback. Shift rake board placement back.

COOPER-MOLERA ADOBE
MONTEREY, CA
CONCEPT DESIGN - MASSING
ADOBE BUILDINGS ADDITION
JUNE 18, 2012

AVILA DESIGN
Preservationists Take Hardline Against Restaurant in Cooper Molera Adobe

John O'Neill: Fate of Monterey's historic Cooper-Molera Adobe calls for local action

Plans to Develop Historic Cooper Molera Adobe Take Shape, Monterey
Preservationists Push Back

MSHPA asks for "serious listening"
Stakeholder Meetings 2013-2014

Alliance of Monterey Area Preservationists
Architectural Resources Group
California State Parks
City of Monterey
Cooper Family Descendants
Monterey Commercial Property Owners Association
Monterey State Historic Park Association
Old Monterey Business Association
Old Monterey Foundation
Eric Abma
Debra Crawford Annis
Julie Work Beck
Matt Bishoff
James Bryant
Toy Bryant
Kim Bui-Burton
Elizabeth Caraker
Julianne Burton-Carvajal, PhD
Patricia Clark-Gray
Peter Coniglio
Monica Cromarty
Betty Crowder
Kim Cole
Wayne Dalton
Anthony Davi, Sr.
Mike Dawson
Libby Downey
Sharon Dwight
Maria Eldridge
Pat Friedrich
Mat Fuzie
Jane Garrettson
Charles Granquist
Betsy Griffin
Rick Johnson
Alan Haffa
Christy Hopper
Jan Houser
Virginia Howard
Monica Hudson
Kip Hudson
Gini Huffman
Major General Anthony L. Jackson
Bende Kelly
Alan Kemp
Todd Lewis
Jill Nelson Lynch
Mike Marotta
Bob Massaro
Fred Meurer
Dee MacDonald
Michael McCarthy
James McCord
Therese McNevin
Nattalia Merzoyan
Susan Miller
Vince Michael
Naomi Miroglio
Mike Mosebach
Mark Norris
John O’Neil
Gayle Paul
Michelle Pearce
Lindy Perez
Samuel Phillips
Kris Quist
Bob Reese
Chip Rerig
Clyde Roberson
Carol Roland-Nawi
Anne-Marie Lang Rosen
Jovanna Rosen
Nancy Runyon
Nancy Selfridge
Suzanne Siegelman
Mary Wright
Shared Use is a Tradition at Cooper-Molera
Cooper Adobe maintained in museum use, operated by National Trust

Diaz Adobe used as shared space between museum and bakery
Learning garden serves educational uses, herbs for restaurant, etc.

National Trust office centrally located in the Red House
Telling new stories at Cooper-Molera
Accidental Interpretation at Cooper-Molera
Cooper-Molera Preservation Principles:

• Cooper-Molera’s inherent warmth, beauty, and authenticity will be maintained, and it will remain a part of the Monterey State Historic Park.

• To preserve Cooper-Molera’s organically-developed character and support a range of shared uses, all new interventions and finishes throughout the site—in historic structures, new construction, and the landscape—will be minimal and compatible.

• Commercial operations will be carefully designed and actively controlled by the National Trust—now and into the future—to ensure that they will not diminish the historic character and integrity of the property, and allow successful integration with public interpretation and educational programming.

• All changes to the property must be approved by the National Trust and must be consistent with the Secretary of the Interior’s Standards for Preservation.
And...construction is underway!
Shared Use at Cooper-Molera: A Developer’s Perspective
Cooper-Molera Aerial Locator
Monterey, CA
Corner Store and 1983 Addition used for commercial retail
Spear Warehouse becomes a small restaurant, with outdoor seating in the Warehouse yard.
Barns, now closed, renovated for public and private event use
New infill kitchen serves restaurant and catering needs
Gardens and grounds shared by educational and commercial uses
Gates are open, windows unshuttered, the public is invited in...
Shared Use at Cooper-Molera: Legal Issues

THRESHOLD LEGAL QUESTIONS

• Owner’s authority: Are there restrictions under which the property is held?
• Land Use: Is the proposal consistent with land use laws and regulations?

STRUCTURE AND IMPLEMENTATION

• Structure of the deal – parties and their roles, financing, nonprofit issues
• Implementing “Shared Use” through the legal framework.
Owner’s Authority: Donor restrictions
Monterey County judge clears way for Cooper-Molera Adobe restaurant

By Philip Molnar
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@philipmolnar on Twitter

MONTEREY >> The historic Cooper-Molera Adobe is a great landmark, but imagine how much greater it would be with a sandwich.

Last week, a Monterey County Superior Court judge lifted a 42-year restriction on selling food and beverages at the 5-acre downtown site. Now, the owners of the property, The National Trust for Historic Preservation, are gearing up plans for a restaurant to raise what they say is badly needed revenue.

“(The plan) includes continuing to operate the adobe as historic sites but allowing use of some portions of the property for more profitable income-producing activities,” said Paul Edmondson, an attorney for the Washington, D.C.-based organization.

Cooper-Molera has been largely closed to the public for years because of limited funding from California State Parks. The trust, which has owned the site since 1972 and leases it to the state, said its new “shared use” model will keep the doors open while commercial operations bring in funds.
Land use restrictions


Archaeological Approach

Introduction
The Cooper-Molera Adobe is a complex of residential and commercial buildings in downtown Monterey. Construction of this complex of adobe and frame buildings began in the 1820s as part of the American community that grew up around the Monterey Presidio following the Mexican War of Independence. The Cooper-Molera Adobe Complex is listed on the Monterey and Natural History District, and designated as a National Historic Landmark in 1970. The National Trust for Historic Preservation owns the site. Although the government agency now known as the California Department of Parks and Recreation has managed the site since the 1970s, management is now reverting to the National Trust.

To make the site suitable for historic interpretation, what was then known as California State Parks undertook major restoration work of the Cooper-Molera Complex between 1979 and 1981. This work had significant consequences for the archaeological resources. Restoration-related archaeological work conducted from the mid-1970s through the early 1980s provided the site with valuable archaeological and architectural data. The work excavated and restored a range of features and deposits present on the site. This digger discusses the regulatory background of the project, the historical context and resources at the Cooper-Molera Adobe. This digger also describes the methods used to identify and evaluate the significance of the archaeological features that potentially could be affected by ground-disturbing activities taking place at the time of the development. The digger presents an analysis of the alternative actions and evaluates the impact of the proposed project on the site. The digger also describes methods to recover significant data that the archaeological features embody before they are affected by development activities.
Cooper-Molera Simplified Development Structure

- **Investor Partner**
  - Equity
  - Returns

- **Foothill Partners/Affiliate Developer & Managing Partner**
  - Equity
  - Returns & Fees

- **Master Tenant: Cooper-Molera Preservation LLC**
  - Sublease Rents
  - Master Leases
  - Improvements & Allowances

- **NTHP Owner/Museum Operator & Master Lessor**
  - Master Leases
  - Improvements & Allowances

- **Mortgage Lender**
  - Debt Financing
  - Debt Service

**Structure of the Deal**
Implementing Shared Use through the Legal Framework

- Master Lease Agreement
- Sublease Agreements
- "Traditional" Lease Form
- Shared Use Agreement
  (Cooperative Agreement covering shared use spaces and operational relationships)
A Shared Use Toolkit

We have collected a number of documents on the Preservation Leadership Forum website that may be helpful to those interested in learning more about our experience in exploring a “shared use” approach at Cooper-Molera Adobe, including:

- This PowerPoint
- Links to 3 Shared Use blog posts
- Our Cooper-Molera concept paper
- Link to a video that the city of Monterey made about the project
- Interpretation matrix
- Cooper-Molera’s shared use principles
- National Trust Sites vision
QUESTION AND ANSWER

Use the chat box on the bottom right to ask questions of the speakers.
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