
GUIDING PRINCIPLES FOR PLACE MANAGEMENT AND FISCAL SUSTAINABILITY (working draft; Oct. 15, 2012)

Purpose of the Guiding Principles

These guiding principles represent a shared statement about the nature of the Colorado Chautauqua and the manner in which its primary stewards (the City of Boulder and the Colorado Chautauqua Association) intend to collaborate in the planning and management of its future.

1 A Public Place

Chautauqua is a shared community resource and a public place. It is essential that it remain a place that is accessible, safe and welcoming to the general public.

2 A Historic Landmark

The Colorado Chautauqua is a recognized national and local historic landmark. Preservation of its historic character is a primary value shared by its stewards and is the highest priority when making decisions about its future.

3 A Historic Mission

Chautauqua supports cultural, educational, social and recreational experiences that are integral to its historic character and function. Preservation and perpetuation of its historic mission and supporting operations are paramount to sustaining the spirit of Chautauqua.

4 A Balanced Approach

Chautauqua encompasses multiple ownerships and missions; the needs and interests of many must be balanced in a manner that protects the site and spirit of Chautauqua, in keeping with principles 1, 2 and 3. At the same time, it should be managed and preserved in a manner consistent with the community's sustainability goals, with sensitivity to impacts on surrounding residential neighborhoods.

5 Collaborative Place Management

To achieve the balanced approach described in principle 4, the Chautauqua area (including the CCA leasehold and adjacent parks and open space) must be collaboratively managed. In particular, the following components of collaborative place management must be clearly defined and agreed to by the city and the CCA:

5a Roles and Responsibilities. The city and the CCA have the joint responsibility of preserving, perpetuating and improving the spirit and historic character of Chautauqua through collaborative stewardship and place management as well as the responsibility of managing specific public and private assets:

- *The Colorado Chautauqua Association* has the role of perpetuating the spirit and mission of the historic Chautauqua through production of cultural, educational, social and recreational experiences to benefit the Boulder

community and visitors to the area. The CCA also has the responsibility, under its lease with the city, of managing and programming certain public assets and CCA's owned cottages, lodges and other facilities in a manner consistent with its historic mission and these guiding principles.

- **The City of Boulder** has multiple roles, including: 1) **owner** of the underlying land throughout Chautauqua, three key historic buildings and an historic structure in the leasehold, serving in this role as landlord to the CCA; 2) **manager** of the public infrastructure throughout Chautauqua and of the public assets and lands outside the leasehold, including a public park and open space; and 3) **regulator** in terms of city laws. The city has the responsibility of representing the interests and priorities of the community at-large; maintaining safe and efficient access to and within the site; and coordinating policy and action in a manner consistent with these guiding principles.

OPTION 1:

5b Thresholds for Collaborative Processes. Effective collaboration among the multiple core entities responsible for the Chautauqua area's management is critical. To guide the development of collaborative frameworks and agreements, the following "thresholds for collaboration" will be defined and agreed to by the city and CCA:

- **Threshold 1: Minor Modifications.** These encompass site or facility changes that do not involve significant changes to the site or public building exteriors; are led and financed primarily by a single party; and are consistent with these guiding principles. Coordination and collaboration between the CCA and the city is essential, but successful precedents exist that can be clearly defined and followed to ensure transparency, mutual understanding and continued success. *Examples of this type of change include recent enhancements to site way finding and interpretive signage and current work to improve the bus pull-out and site circulation for improved pedestrian safety.*
- **Threshold 2: Significant Modifications Led by a Single Party.** These are changes to the site or facilities that significantly alter a city-owned building's exterior, involve new construction or demolition, significantly alter historic site patterns or designs, and/or represent a significant change in use. This level of change may be proposed by a single party but will require a higher degree of coordination and collaboration early in the process to address the concerns or needs of other parties and ensure consistency with these guiding principles. The resulting process may or may not lead to shared financial responsibility, but should ensure transparency, opportunities for public input and clarity and timeliness of decision making for the concerned party(ies). *Examples of this type of change include the potential addition of ADA-accessible bathrooms for the Chautauqua Auditorium and the concept of a new free-standing building.*

- **Threshold 3: Significant Modifications Requiring Multi-Party Investment.** These are changes similar in scope or impact to those in Threshold 2, but which would clearly benefit from joint investment in their design and implementation. Due to the shared investment, these may require an even higher degree of collaboration early and throughout the process. *An example of this type of change is the potential undergrounding of utilities around and through the National Historic Landmark area.*

OPTION 2:

5b Thresholds for Collaborative Processes. To guide the development of collaborative frameworks and agreements, “thresholds for collaboration” will be defined and agreed to by the city and the CCA as a next step to these guiding principles. In general, minor changes or modifications (e.g. interpretive and wayfinding signage, minor modifications to existing buildings) can proceed according to existing processes after coordination between CCA and city staff. More significant changes (e.g. additions, new freestanding structures, demolition, or major site infrastructure activities) will require a higher degree of coordination and collaboration to address the concerns or needs of other parties and ensure consistency with the guiding principles. For these significant changes, transparency, public access to information, and opportunity for public input are essential.

OPTION 3:

5b Thresholds for Collaborative Processes. Consistent with these Guiding Principles, it is recognized that changes to the site or building exteriors might range from minor modifications to more significant modifications or new structures entirely. Such changes might be initiated by CCA or by the city, or such changes might be jointly initiated and require investment by one or multiple parties. It is further recognized that as the scope of the proposed change increases and as the level of shared investment increases, the collaborative processes between CCA, the city and the public should proportionately increase so as to ensure transparency, mutual understanding and clarity regarding the objectives of such change and the continued success of Chautauqua as an important asset of the city.

5c Guiding Policy Documents. To support a collaborative approach to management of the Chautauqua area, key policy documents should be jointly developed and adopted by the core parties. These include, but are not limited to, the Chautauqua Collaborative Stewardship Framework (which should be revised and finalized consistent with these guiding principles) and the Chautauqua Design Guidelines.

5d Public Information and Input. Because the management of Chautauqua is a shared responsibility across multiple entities, it can be difficult for the public to find complete and accurate information regarding planning and management-related issues for the area. A shared approach to providing public information and

opportunities for public input shall be developed and implemented to support these principles' goals for collaborative stewardship in the public interest.

6 A Cautious Approach to Change

While it is recognized that changes within and around Chautauqua will occur over time, decisions over these matters must be thoughtfully and cautiously considered, and collaboratively managed in accordance with these guiding principles to ensure the preservation of Chautauqua's historic character and unique sense of place.

7 Shared Financial Responsibility

Because the Chautauqua area is a shared resource with community-wide as well as interest-specific benefit, investments in its care and upkeep should be shared in accordance with the benefit provided to each interest or user group as well as the community at-large. This does not remove the possibility of significant changes being funded by a single party; however, when there are clear benefits to multiple entities, joint funding should be considered.

Definitions

Enhancement: to make greater, as in value, beauty, or effectiveness; augment; provide with improved, advanced, or sophisticated features. In the context of historic preservation, "enhancement" is usually used to refer to the repair, rehabilitation, restoration and, in some cases, the re-creation of historically documented features.

Historic character: those aspects of an historic property or historic district that accurately convey a sense of its past. The National Register defines seven aspects of integrity that are important components of historic character: location, design, setting, materials, workmanship, feeling, and association. National Historic Landmarks typically possess all of these aspects of historic character/integrity.

Historic preservation: an endeavor that seeks to preserve, conserve and protect buildings, objects, landscapes or other artifacts of historic, architectural or environmental significance.

Leasehold: the property held or managed under a lease agreement.

Manage: to have oversight and responsibility for the on-going affairs and/or the upkeep of a site, property, organization or business.

National Historic Landmark: a nationally significant historic place designated by the Secretary of the Interior because it possesses exceptional value or quality in illustrating or interpreting the heritage of the United States.

Place management: the process of preserving or enhancing an area in a manner that maintains its integrity as a "place" with a unique character and function. This is practiced through programs to improve a location or to maintain an already attained

desired standard of operation. Place management can be undertaken by private, public or voluntary organizations or a mixture of each. Despite the wide variety of place management initiatives, the underlying common factor is usually to best meet the needs of multiple users and interests (e.g., residents, visitors, and owners) in a manner consistent with the nature of the place.

Protect and preserve: broadly speaking, protecting and preserving is the process of determining and implementing appropriate actions to minimize change to identified historic properties or districts that would adversely affect their historic character.

Stewardship: the ethical overseeing and protection of something considered worth caring for and preserving.

NEXT STEPS

Purpose

The proposed “guiding principles” represent a shared statement about the nature of the Chautauqua area and the manner in which its primary stewards (the City of Boulder and the Colorado Chautauqua Association) intend to collaborate in the planning and management of its future. However, they are not intended to define the specific structures, processes or agreements needed to enact them. Subsequent work will evaluate options for putting the Guiding Principles into action, and define a “preferred option” prior to doing the detailed work necessary to “make it so” (e.g., revise the Collaborative Stewardship Framework; initiate lease discussions; and/or other implementation actions).

A Finalize the Principles (by January 2013)

Update city boards and check in with the CCA on the proposed Guiding Principles, with opportunity for public input prior to City Council action.

1. Boards

- a. Transportation Advisory Board – Nov. 5, 2012
- b. Landmarks Board – Nov. 7, 2012
- c. Colorado Chautauqua Association, Board of Directors – Nov. 12, 2012
- d. Parks and Recreation Advisory Board – TBD
- e. Open Space Board of Trustees – Nov. 14, 2012

2. Public Hearing and Council Action on Guiding Principles and Next Steps – Dec. 4, 2012

B Define and Evaluate Options (December 2012 through first quarter of 2013)

There are a variety of ways in which the Guiding Principles can be put into action. The purpose of this step is to ensure that alternative approaches are defined and evaluated before finalizing any single approach as the most desired.

B1 City and CCA Staff Working Groups

Organize CCA and city staff working groups to lead the options evaluation process:

- **Decision-making options** (defining roles/responsibilities; clarifying “threshold” standards and related processes/structures for public input and decision-making; etc.)
- **Access and parking management** (application of summer 2012 data collection and analysis to previous management alternatives, and recommendation on next steps)
- **City financial options** (defining alternative approaches to carrying out Principle #7 in relation to the other Guiding Principles and city or CCA financial tools and processes)
- **Contractual options** (how the relationships, responsibilities and/or processes defined in the Guiding Principles could be legally structured and managed—e.g., through a revised lease or by other means)
- **Guiding policy documents** (establishing direction for revision to the Stewardship Framework, Design Guidelines, and any other document identified as being necessary to support the decision-making process approaches)
- **Initiate planning for new ADA bathrooms at the Chautauqua Auditorium as test case.**

B2 Public Outreach and Board Input

Opportunity for public input - potentially using an online tool, or combination of in-person and online.

B3 CCA and Council Direction on Preferred Option

Community and board input; CCA board recommendation; public hearing and Council action.

C Make It So (remainder of 2013)

Based on the outcome of B3, implement the agreed upon changes.