



December 19, 2014

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Mr. David Van Sunder, President
The Heritage Society of Pacific Grove
P.O. Box 1007
Pacific Grove, CA 93950

Dear Mr. Van Sunder,

Congratulations! The Community Foundation has approved a grant to your organization for the **Point Pinos Lighthouse Museum Interpretive Plan**. Enclosed please find a check in the amount of \$15,500 from the **Engracia Irene Murray Field of Interest Fund of the Community Foundation for Monterey County**. We ask that the grant be listed in this way in all newsletters, annual reports, press releases, and other communications. Please feel free to publicize this award by sending your own press release to the local media.

The grant funds must be spent within 11 months, for the project stated above, unless the Foundation authorizes a change in writing. This grant may not be used for expenses incurred prior to the grant date. A completed grant report is due no later than **November 20, 2015** to advise us of the outcomes of your work. This consists of a completed Impact Evaluation form, submitted as part of your grant application, and responses to the Reporting Questions, provided in the Common Grant Application. Completion is required before a grantee is eligible to receive additional funding from our Community Impact Grant program.

To confirm your receipt of this check and your agreement to the terms of the grant, **please sign, date and return the enclosed copy of this letter within one month (before January 19, 2015)**.

We very much welcome your photographs reflecting the program(s) made possible by this grant. A Photo Release Form is enclosed.

The Community Foundation inspires philanthropy and is a catalyst for strengthening communities throughout Monterey County. We are pleased to be able to help your organization fulfill its mission as well as ours.

Sincerely,

Julie Drezner, Vice President of Grants and Programs

Enclosures: Check and copy of letter for Grant #20140776; Photo release form

Received by (*Print name*) _____

Signature _____

Title _____ Date _____



Here for Good

Community Foundation
for Monterey County

PHOTO RELEASE FORM
The Heritage Society of Pacific Grove #20140776

The Community Foundation for Monterey County is pleased to support the work of your organization. We would like your help in showing how the funds are being used. We do this by putting photos on display at community gatherings, in our newsletters or annual reports, or on our website. Please send us one or more photographs that we can keep and use. Please also fill in the following information.

Photo #1 (Describe activities or event)

Photo credit/photographer _____

Photo #2 (Describe activities or event)

Photo credit/photographer _____

Photo #3 (Describe activities or event)

Photo credit/photographer _____

We hereby grant permission to publish photographs given by us to the Community Foundation for Monterey County for possible use in:

Displays, poster boards, slide shows/PowerPoint®	yes _____	no _____
Publications such as newsletters and annual reports	yes _____	no _____
Videos	yes _____	no _____
CFMC website	yes _____	no _____

We have obtained signed releases from the individuals pictured and have them on file: yes _____ no _____

Signed _____ Date _____

Print Name and Title _____

**Please return with your photos to the Community Foundation for Monterey County,
2354 Garden Road, Monterey CA 93940.
Thank you!**



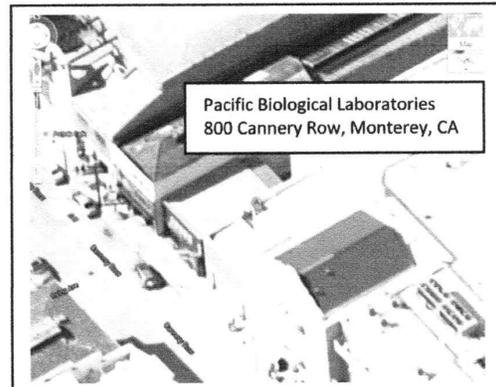
**CITY OF MONTEREY
REQUEST FOR PROPOSALS**

**PROFESSIONAL SERVICES FOR
PACIFIC BIOLOGICAL LABORATORIES MUSEUM INTERPRETIVE PLAN**

Proposal Request: February 12, 2014

Proposals Due: March 28, 2014

The City of Monterey received a grant from the Thomas Doud, Sr. and Anita M. Doud Fund I of the Community Foundation for Monterey County to develop and produce a museum interpretive plan for the Pacific Biological Laboratories, the laboratory and home of marine biologist Edward F. Ricketts and, subsequently, the club house of the Pacific Biological Laboratory Members located at 800 Cannery Row, which is listed on the National Register of Historic Places. The City of Monterey is seeking proposals from qualified museum interpretive professionals to develop and produce the Pacific Biological Laboratories Museum Interpretive Plan.



Pacific Biological Laboratories (Ed Ricketts' Lab)

Pacific Biological Laboratories, the Ed Ricketts' Lab, is the most significant remaining resource associated with innovative marine biologist Edward F. Ricketts and a major contributor to the Literary Core District, a collection of fishing and canning and other commercial properties on Cannery Row eligible for the National Register. The Lab is also significant as the central location for the friendship and collaborations of author John Steinbeck and Ricketts, and was

the focal point for Steinbeck's Cannery Row novels. Ricketts also served as a model for several of the "Doc" characters in various Steinbeck stories and novels.

The Lab building is also important as the gathering place for the men's social club, Pacific Biological Laboratory, for over fifty years. The club, named in honor of Ricketts' laboratory, began meeting in the building in 1956 and continued as a gathering place for artists, writers, businessmen, and intellectuals. Its members included several nationally known cartoonists and artists and the club's members were instrumental in establishing the Monterey Jazz Festival.

Purpose

The Pacific Biological Laboratories has two major stories associated with the site. Most significantly, the Lab was the physical location "where much of the literary vision of both [Ricketts and Steinbeck] germinated and grew." Based on his research, Ricketts created the first definitive source book for studying intertidal marine life on the Pacific Coast ; co-authored with Steinbeck, *The Log from the Sea of Cortez*, the philosophical and scientific account of their expedition to collect specimens in the Gulf of California; conducted marine biological research; promoted an ecological vision of life and science; enjoyed ongoing friendships with a circle of artists and writers; and operated his biological supply company. Because of his friendship with Steinbeck he "became the first, and only, marine biologist to attain heroic status in American letters."

A few years after Ricketts' death in 1948, teacher and jazz supporter Harlan Watkins regularly invited his friends to the Lab. In 1958, Watkins' friends formed a club, purchased the building, and during a meeting at the Lab initiated the Monterey Jazz Festival. In December 1993, the Pacific Biological Lab members sold the Lab to the City of Monterey in order to preserve and safeguard the property and its heritage. Through an agreement, the club members continue their use of the Lab for gatherings until December 2015 and the City provides tours which tell the story of the Lab, Ricketts and Steinbeck, and their significance. Pacific Biological Laboratories is a relatively small historic site on Cannery Row with limitations on the number of visitors in the building at any one time. Over 1,300 people visited Pacific Biological Lab last year, including individuals, school classes, and educational and cultural groups, representing various ages and ethnicities. The constituency is a wide-ranging public who treasure the stories of Pacific Biological Lab, its residents, and its historic ambience. Given our diverse and increasing number of visitors and the building's physical challenges, the City seeks to assess and enhance current and future visitors' experience through the use of the best practices in interpretive planning while preserving the historic fabric of the site.

The goal of interpretive planning for Pacific Biological Laboratories is to identify resources, media, historic furnishings, and exhibits for visitors' enjoyable and rewarding experiences. The museum interpretive plan project will be completed with the assistance of an experienced museum interpretive specialist who will provide the guidelines and recommendations for interpreting Pacific Biological Laboratories for current and future audiences.

Scope of Work

The museum interpretive plan will include: identifying the scope of the plan; identification of themes and historical resources; assisting staff in soliciting input from key community stakeholders; assessing current interpretive conditions, including visitor information, staff interpretative activities; collection materials including furnishings, archival and artifact materials, exhibits; physical environment; programs and visitor access within a two-story historic building; and recommendations on the best ways to achieve interpretive goals and provide desired visitor experiences.

The successful consultant will complete an assessment of the interpretive value of various elements and resources of Pacific Biological Laboratories. The consultant will be responsible for reviewing existing research and materials related to Pacific Biological Laboratories, including general historic information, images, and past and current reports and articles related to Pacific Biological Laboratories. The assessment will evaluate the interpretive potential of the Pacific Biological Laboratories as a museum and provide recommendations for engaging and relevant interpretive planning.

The consultant is responsible for furnishing all labor, materials, tools, equipment, and methods required to prepare the Pacific Biological Laboratories Museum Interpretive Plan.

The City anticipates the following general tasks:

Task 1: Attend a pre-meeting with City Museum and Cultural Arts staff to finalize the scope of work, schedules, and define the standards to be met. Museum and Cultural Arts staff will direct the consultant to existing City resources, City records, and research files on Pacific Biological Laboratories, Ricketts, and the PBL club.

Task 2: Evaluate the interpretive potential and best interpretive models for Pacific Biological Laboratories. Provide an assessment of the range of interpretive stories and themes it can convey and audiences it could serve with recommendations based on analysis of those stories/themes which would have the broadest appeal. The recommendations should include the unique historical elements, staff and visitor interactions and exhibits including furnishings, displays, and an evaluation of the potential role of technology in implementing the recommendations or interpretation. An assessment of the benefits, challenges, and up-front and annual costs of the recommendations should be included.

Task 3: Consult with staff and community stakeholders who can provide input to develop a profile of community and visitor information through key stakeholder planning sessions and other sources.

Task 3: Prepare and submit draft Pacific Biological Laboratories Museum Interpretive Plan to the City for review.

Task 5: Present final report and findings to staff.

Note: All reports and studies prepared by the consultant shall become the property of the City, with the City able to enjoy all rights of ownership including reproduction of the same.

Qualifications

The consultant will have a background in history, education, museums studies or a closely related field, plus professional interpretive planning experience. In particular: previous demonstrable experience with interpretive assessment of unique historic resources, experience producing interpretive plans and experience working with organizations to determine the most appropriate interpretive plan for their site or resources. Knowledge of and previous experience in California is preferred.

SUBMITTAL REQUIREMENTS

A. Proposals

Five hard copies and one electronic copy of the technical proposal are to be submitted in one envelope or package clearly marked on the exterior as to this solicitation, technical proposal, and due date and time. One copy of the fee schedule must be in a separate envelope or package, clearly marked as the fee schedule for this solicitation, with the due date/time.

B. Due Date/Time

Proposals will be received by the City's Colton Hall Museum **until 4:00 p.m., March 28, 2014**. Submit to:

Dennis Copeland
Museums, Cultural Arts and Archives Manager
City of Monterey
570 Pacific Street
Monterey, CA 93940

Proposal Submission

To be considered for the work, interested museum consultants must submit a proposal to the City to include:

1. A statement describing the museum consultant's skills and experience in all tasks associated with producing a high quality plan;
2. Examples of previous museum interpretive planning work;
3. At least three recent references with telephone numbers;
4. A price quotation for the interpretive planning costs in a separate sealed envelope.

Proposals must be received no later than Friday, March 28, 2014, at 4:00 p.m. by the City's Colton Hall Museum, 570 Pacific Street, Monterey, CA 93940. Proposals should be sent to the attention of Dennis Copeland, Museums, Cultural Arts and Archives Manager.

Evaluation

Evaluation of proposals will be based on cost as well as the ability of the museum interpretive consultant to produce a museum interpretive plan for Colton Hall. The most qualified respondent may be invited, at the City's discretion to, to an interview with the City representatives.

General

The City reserves the right to reject any or all proposals or to waive any irregularities or informalities in any proposal. Attached is a sample of the City's professional services contract. Firms desiring additional information may contact **Dennis Copeland, Museums, Cultural Arts and Archives Manager** at **(831) 646-3741**.

CONTRACT FOR PROFESSIONAL SERVICES

PROFESSIONAL SERVICES FOR Colton Hall Museum Interpretive Plan Agreement

THIS AGREEMENT is executed this ____ day of _____, 2014, by and between the CITY OF MONTEREY, a municipal corporation, hereinafter called "City", and [Name of Consultant], hereinafter called "Consultant".

IT IS HEREBY MUTUALLY AGREED AS FOLLOWS:

1. Scope. Consultant hereby agrees to provide to the City of Monterey, as the scope of services under this Agreement, the following services: [General description of the scope of work], as further described on the following attachments: City's Request for Proposal which outlines the scope of services and work under this contract (attached hereto as Exhibit "A"), and the approved Consultant's Proposal dated [insert date] (attached hereto as Exhibit "B"). In case of any conflict between these documents, the Request for Proposal shall take first precedence over the Consultant's proposal.

2. Timely Work. Consultant shall perform all tasks in a timely fashion, as set forth more specifically in paragraph 3 below. Failure to so perform is hereby deemed a material breach of this Agreement, and City may terminate this Agreement with no further liability hereunder, or may agree in writing with Consultant to an extension of time.

3. Term. The work under this Agreement shall commence [Start date of contract] and shall be completed by [End date of contract] unless City grants a written extension of time as forth in paragraph 2 above.

4. Compensation. City agrees to pay and Consultant agrees to accept as full and fair consideration for the performance of this Agreement, an hourly fee as set forth in Consultant's Proposal (Exhibit B), in a total amount not to exceed _____ Thousand Dollars (\$_____.00). Compensation under this Agreement shall become due and payable 30 days after City's approval of Consultant's submission of [a written invoice] or [monthly written invoices] to the _____ (name/title of City representative). Written invoices shall clearly show the account numbers for each project and shall include a copy of timesheets or invoices from sub-consultants. The payment of any compensation to Consultant hereunder shall be contingent upon performance of the terms and conditions of this Agreement to the satisfaction of the City. If City determines that the work set forth in the written invoice has not been performed in accordance with the terms of this Agreement, City shall not be responsible for payment until such time as the work has been satisfactorily performed.

5. Additional Services. In the event that City should request additional services not covered by the terms of this Agreement, said services will be provided by Consultant and paid for by City only after a fee for said services has been agreed upon between Consultant and City project manager and the project manager provides written authorization for the additional work.

6. Schedule for Performing Services. For the project subject to this Agreement, Consultant shall perform the services in accordance with the following phases and/or milestone dates:

[List phases and/or milestone dates or attach Design Schedule as Exhibit "C" to this Agreement to include: specific milestones, funding, design, design review, construction and other deadlines]

7. Staffing Plan. Consultant shall provide City with the names of the key professional personnel assigned to perform the services under this Agreement as well as a general description of the services they will be assigned to perform in Exhibit "D" *Consultant's Staffing Plan*. The plan shall also identify the names and contact information of Consultant's representative(s) authorized to act on their behalf with respect to this Agreement.

8. Subconsultant Plan. If Consultant intends to utilize the services of any subconsultants to perform the services under this Agreement, the names of those subconsultants and a general description of the services they will be assigned to perform shall be attached hereto as Exhibit "E" *Subconsultant Plan*.

9. Meet and Confer. Consultant agrees to meet and confer with City or its agents or employees with regard to services as set forth herein as may be required by City to insure timely and adequate performance of this Agreement.

10. Indemnification. Consultant hereby agrees to the following indemnification clause:

To the fullest extent permitted by law (including, without limitation, California Civil Code Sections 2782 and 2782.6), Consultant shall defend (with legal counsel reasonably acceptable to the City of Monterey), indemnify and hold harmless the City of Monterey and its officers, designated agents, departments, officials, representatives and employees (collectively "Indemnitees") from and against claims, loss, cost, damage, injury expense and liability (including incidental and consequential damages, court costs, reasonable attorneys' fees, litigation expenses and fees of expert consultants or expert witnesses incurred in connection therewith and costs of investigation) to the extent they arise out of, pertain to, or relate to, the negligence, recklessness, or willful misconduct of Consultant, any Subconsultant, anyone directly or indirectly employed by them, or anyone that they control (collectively "Liabilities"). Such obligations to defend, hold harmless and indemnify any Indemnitee shall not apply to the extent that such Liabilities are caused in part by the negligence, or willful misconduct of such Indemnitee.

Notwithstanding the provisions of the above paragraph, Consultant agrees to indemnify and hold harmless the City from and against any and all claims, demands, defense costs, liability, expense, or damages arising out of or in connection with damage to or loss of any property belonging to Consultant or Consultant's employees, contractors, representatives, patrons, guests or invitees.

Consultant further agrees to indemnify City for damage to or loss of City of Monterey property to the proportionate extent they arise out of Consultant's negligent performance of the work associated with this agreement or to the proportionate extent they arise out of any negligent act or omission of Consultant or any of Consultant's employees, agents, contractors, representatives, patrons, guests or invitees; excepting such damage or loss arising out of the negligence of the City.

[CITY OF MONTEREY CONTRACT TRANSMITTER: THIS IS AN ALTERNATE PROVISION THAT REPLACES THE ABOVE LANGUAGE (FIRST 3 PARAGRAPHS) IF YOUR CONSULTANT IS A DESIGN PROFESSIONAL. IF THE CONSULTANT IS NOT A DESIGN PROFESSIONAL, DELETE THIS BRACKETED BOLDDED TEXT. A DESIGN PROFESSIONAL, FOR EXAMPLE, INCLUDES AN ARCHITECT; LANDSCAPE ARCHITECT; PROFESSIONAL ENGINEER OR PROFESSIONAL LAND SURVEYOR (MORE PRECISE DEFINITIONS AND CODE REFERENCES ARE FOUND AT CALIFORNIA CIVIL CODE SECTION 2782.8(c)), YOU MUST INCORPORATE THE FOLLOWING INDEMNIFICATION PROVISION IN LIEU OF THAT SET OUT ABOVE:

To the fullest extent permitted by law (including, without limitation, California Civil Code Sections 2782 and 2782.6), Consultant shall defend (with legal counsel reasonably acceptable to the City of Monterey), indemnify and hold harmless the City of Monterey and its officers, designated agents, departments, officials, representatives and employees (collectively "Indemnitees") from and against claims, loss, cost, damage, injury expense and liability (including incidental and consequential damages, court costs, reasonable attorneys' fees, litigation expenses and fees of expert consultants or expert witnesses incurred in connection therewith and costs of investigation) to the extent they arise out of, pertain to, or relate to, the negligence, recklessness, or willful misconduct of Consultant (collectively "Liabilities"). Such obligations to defend, hold harmless and indemnify any Indemnitee shall not apply to the extent that such Liabilities are caused in part by the negligence, or willful misconduct of such Indemnitee.

Notwithstanding the provisions of the above paragraph, Consultant agrees to indemnify and hold harmless the City from and against any and all claims, demands, defense costs, liability, expense, or damages arising out of or in connection with damage to or loss of any property belonging to Consultant or Consultant's employees, contractors, representatives, patrons, guests or invitees, if such claims arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of the Consultant.

Consultant further agrees to indemnify City for damage to or loss of City of Monterey property to the proportionate extent they arise out of Consultant's negligent performance of the work associated with this agreement or to the proportionate extent they arise out of any negligent act or omission of Consultant or any of Consultant's employees, agents, contractors, representatives, patrons, guests or invitees; if such claims arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of the Consultant, and excepting such damage or loss arising out of the negligence of the City.]

11. Insurance. Consultant shall submit and maintain in full force all insurance as described herein. Without altering or limiting Consultant's duty to indemnify, Consultant shall maintain in effect throughout the term of this Agreement a policy or policies of insurance with the following minimum limits of liability:

Commercial general liability insurance including but not limited to premises, personal injuries, bodily injuries, products, and completed operations, with a combined single limit of not less than \$1,000,000 per occurrence and \$2,000,000 in the aggregate.

Professional Liability Insurance with limits of not less than \$1,000,000 per claim and \$2,000,000 in the aggregate. Consultant will either maintain or cause to be maintained professional liability coverage in full force or obtain extended reporting (tail) coverage (with the same liability limits) for at least three years following City's acceptance of the work.

Commercial automobile liability insurance covering all automobiles, including owned, leased, non-owned, and hired automobiles, used in providing services under this Agreement, with a combined single limit of not less than \$1,000,000 per occurrence.

Workers' Compensation Insurance. in accordance with California Labor Code section 3700 for employer's liability in an amount not less than \$1,000,000 per occurrence.

Other Insurance Requirements

- A. All insurance required under this Agreement must be written by an insurance company either:
- admitted to do business in California with a current A.M. Best rating of no less than A:VI;
 - or
 - an insurance company with a current A.M. Best rating of no less than A:VII.

Exception may be made for the State Compensation Insurance Fund when not specifically rated.

- B. Each insurance policy required by this agreement shall be endorsed to state that City of Monterey shall be given notice in writing at least thirty days in advance of any cancellation thereof, except 10-day notice for nonpayment of the premium.
- C. The general liability and auto policies shall:

- Provide an endorsement naming the City of Monterey, its officers, officials, and employees as additional insureds under an ISO CG 20 10 07 04 or ISO 20 37 07 04 or their equivalent.
 - Provide that such insurance is primary and non-contributing insurance to any insurance or self-insurance maintained by the City.
 - Contain a "Separation of Insureds" provision substantially equivalent to that used in the ISO form CG 00 01 10 01 or their equivalent.
 - Provide for a waiver of any subrogation rights against the City via an ISO CG 24 01 10 93 or its equivalent.
- D. Prior to the start of work under this Agreement, Consultant shall file certificates of insurance and endorsements evidencing the coverage required by this agreement with the City of Monterey Risk Management Office. Consultant shall file a new or amended certificate of insurance promptly after any change is made in any insurance policy which would alter the information on the certificate then on file.
- E. Neither the insurance requirements hereunder, nor acceptance or approval of Consultant's insurance, nor whether any claims are covered under any insurance, shall in any way modify or change Consultant's obligations under the indemnification clause in this Agreement, which shall continue in full force and effect. Notwithstanding the insurance requirements contained herein, Consultant is financially liable for its indemnity obligations under this Agreement.
- F. Any deductibles or self-insured retentions must be declared to and approved by the City of Monterey. At the option of the City of Monterey, either: the insured shall reduce or eliminate such deductibles or self-insured retentions as respects the City of Monterey, its officers, officials, employees and volunteers; or Consultant shall provide a financial guarantee satisfactory to the City of Monterey guaranteeing payment of losses and related investigations, claim administration, and defense expenses.

12. Ownership of Work and Copyrights. Upon completion of the work under this Agreement, ownership, title and copyrights to all materials and deliverables produced as part of this Agreement will automatically be vested in the City and no further agreement will be necessary to transfer ownership to City.

13. Licensing – Standard of Care. Consultant represents as follows: that it is experienced in the professional services and a specialist in the work performed under this Agreement; is duly organized, existing and in good standing under applicable state law; and is properly licensed and/or certified to perform the work specified under this Agreement, including but not limited to possession of a current City business license, and will only employ persons and subconsultants with all required licenses and certifications.

14. Substitution of Consultant Personnel. The key personnel of Consultant or any subconsultants listed in Consultant's proposal or in *Consultant's Staffing Plan* and

Subconsultant Plan (Exhibits D and E hereto) and assigned to perform the work under this Agreement may not be substituted with or replaced by other personnel or subconsultants without the advance written consent of City.

15. Termination. City may terminate this Agreement upon ten days' written notice. The amount of damages, if any, as a result of such termination may be decided by negotiations between the parties or before a court of competent jurisdiction.

16. Agency. In performing the services specified under this Agreement, Consultant is hereby deemed to be an independent Consultant and not an agent or employee of City.

17. Entire Agreement. This Agreement constitutes the entire Agreement between the parties hereto and supersedes any and all prior agreements, whether oral or written, relating to the subject matter thereof. Any modification of this Agreement will be effective only if it is in writing signed by both parties hereto.

18. Validity. If any provision in this Agreement is held by a court of competent jurisdiction to be invalid, void or unenforceable, the remaining provisions will continue in full force without being impaired or invalidated in any way.

19. Assignment of Interest. The duties under this Agreement shall not be assignable, delegable, or transferable without the prior written consent of City. Any such purported assignment, delegation, or transfer shall constitute a material breach of this Agreement upon which City may terminate this Agreement and be entitled to damages.

20. Conflict of Interest. Consultant hereby certifies that it does not now have, nor shall it acquire any financial or business interest that would conflict with the performance of services under this Agreement.

21. Counterparts. This Agreement may be executed in multiple originals, each of which is deemed to be an original, and may be signed in counterparts.

22. Laws. Consultant agrees that in the performance of this Agreement it will reasonably comply with all applicable State, Federal and local laws and regulations. This

Agreement shall be governed by and construed in accordance with the laws of the State of California and the City of Monterey.

IN WITNESS WHEREOF, this Agreement is entered into by the parties hereto on the day and year first above written in Monterey, California.

CITY OF MONTEREY

CONSULTANT

Mayor or City Manager

Consultant Name

[Name of Signatory; Title]

Approved as to form:

City Attorney's Office

MONTEREY COUNTY AREA GRANTMAKERS
Common Grant Application Form

Please provide the information requested on this form **completed on these two pages only**. Please do not type "see attached" on any item. You may print this form on your computer, or type directly on the form. Please do not bind your application or put your application in a presentation folder. Clip the application together with a single clip - do not use staples.

A. ORGANIZATION AND PROGRAM/PROJECT INFORMATION

1. Legal organization name: The Heritage Society of Pacific Grove

2. Year organization was founded: 1976

3. Tax status: Tax ID # (EIN): 94-2346852

501 (c) (3) nonprofit

501 (c) () Specify: _____

Other status: _____

4. Organization address: Mailing address: PO Box 1007, Pacific Grove, CA 93950
Building address: 605 Laurel Ave, Pacific Grove, CA 93950

5. Telephone: 831-372-2898

6. Fax: N/A

7. Organization website: www.pacificgroveheritage.org

8. Executive Director or principal officer (Name and Title): David van Sunder, President

9. Email: david@vansunder.com

10. Contact for this proposal: Bill Peake, Secretary

11. Daytime telephone: 831-915-6985

12. Email: wtpe@hotmail.com

13. Mailing address, if different from above: 40 Quarterdeck Way, Pacific Grove, CA 93950

14. Amount requested: \$20,000

15. Period grant will cover: November 1, 2014 to July 1, 2015

16. Type of request (check all that apply):

General Support Program/project support
 Capital Project Organizational Development Other _____

17. Program/Project Title: Point Pinos Lighthouse Museum Interpretive Plan

18. Total Project Budget: \$25,000

19. Total organizational budget (current year): \$38,580

20. Percentage of budget spent on fundraising (derive from Part IX, 5.D on the organization's 990): \$7,000 total expenses for 2 fundraising events.

21. Fiscal Year ending date: December 31

22. Summary of the organization's mission (two to three sentences):

Our mission is to record Pacific Grove's historical background and preserve its important architectural structures; to maintain the beauty and individuality of Pacific Grove; and to educate its citizens and inspire pride in its neighborhoods.

23. Summary of the project or grant request (two to three sentences):

Develop an Interpretive Plan for the Point Pinos Lighthouse Museum, similar to that of other nearby history museums such as Colton Hall and Doc Ricketts Labs in Monterey. This Plan will guide the development of interesting, provocative, educational and interactive exhibits in the lighthouse museum. The Plan will use museum best practices to create key themes which focus on the culture and development of Monterey from the mid 1800's to early 1900's.

24. Who will be served by the project or grant {demographics, direct number served and service area(s)}?

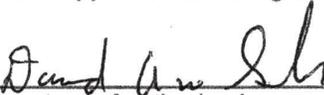
Visitor demographics to the lighthouse span a wide range including elementary school classes, youth groups (elementary), and families with children, and elderly couples. The annual number of visitors to the lighthouse is approximately 20,000. School and youth groups are from Monterey Peninsula cities. Many families and couples visiting the lighthouse come from Monterey Peninsula cities or Monterey County. Other visitors are from California.

B. BOARD OF DIRECTORS INFORMATION

1. What is the minimum and maximum number of Board members required by your organization's Bylaws?
The number of Board members is fixed at 15.
2. How much money did the Board of Directors (your organization's governing board) contribute to the organization in the most recent fiscal year? \$1110
3. What percentage of the Board of Directors donated funds? 100%

C. ORGANIZATION AGREEMENT and SIGNATURE

The organization hereby agrees that funds, if granted, will be used only for the purpose described above unless written approval from the grantmaker is received.



Signature of authorized representative

David van Sunder,
President, The Heritage Society of Pacific Grove
Print Name and Title

August 1, 2014
Date Application Submitted



The Heritage Society of Pacific Grove

P.O. Box 1007 Pacific Grove, California 93950 tel. (831)372-2898
info@pacificgroveheritage.org • www.pacificgroveheritage.org

July 28, 2014

I approve this grant application to the Community Foundation for Monterey County for the Point Pinos Lighthouse Museum Interpretive Plan.

A handwritten signature in black ink, appearing to read "David van Sunder", is written over a horizontal line.

David van Sunder, President
The Heritage Society of Pacific Grove

Proposal Narrative:

Introduction and Background of Organization (incorporating the following points:)

1. Briefly describe your organization's history and major accomplishments
2. Describe your current programs and activities
3. Who is your constituency (be specific about demographics such as race, gender, ethnicity, age, sexual orientation and people with disabilities)? How are they actively involved in your work and how do they benefit from this program and/or your organization?

The Heritage Society was created in 1976 in response to the demolition of significant historic buildings in Pacific Grove. Major accomplishments are:

1. Publication, at least several times a year, of a newsletter and/or preservation pamphlet.
2. Tours of historic bed and breakfast inns during the holidays.
3. Sponsored a book of photographs from Pacific Grove's history.
4. Heritage Home Awards given to recognize outstanding examples of preservation and restoration.
5. Sponsored Historic Home Tours for the public to see historic homes and buildings.
6. Placement of over 700 historical markers on homes and buildings in the city that reflect their original architectural features.
7. The Society has had a school outreach program and given scholarships.
8. The Society has conducted preservation and restoration at the Point Pinos Lighthouse.
9. The Society operates a Point Pinos Lighthouse gift shop.
10. The Society maintains a small museum dedicated to Pacific Grove in an historic building called Ketcham's Barn.
11. The Society has conducted a lecture series.

2014 programs and activities include:

1. Publish a quarterly newsletter of Society events.
2. Heritage Home Awards were given to recognize outstanding examples of preservation and restoration of the city's historic buildings.
3. A Historic Home Tour will be held in October for the public to see inside historic homes and buildings in Pacific Grove.
4. Placement of 7 historical markers on homes and buildings in the city that reflect their original architectural features.
5. The Society has ongoing preservation and restoration projects at the Point Pinos Lighthouse.
6. The Society operates the Point Pinos Lighthouse gift shop.
7. The Society maintains a small museum dedicated to Pacific Grove in an historic building called Ketcham's Barn.
8. The Society has a lecture series (4-5 lectures) to bring interesting and educational speakers to the membership.

The demographics of the Society's constituency are: (1) its Society members who are from Pacific Grove and skewed to the older age groups and (2) lighthouse visitors.

- (1) The racial makeup of Pacific Grove in 2010 was 84% White, 1% African American, 0.5% Native American, 6% Asian, 0.3% Pacific Islander, 3% other, and 4% two or more. Hispanic were 11%.

Households are: 22% with children under 18, 42% opposite-sex married couples, 9% female householder with no husband present, 3% male householder with no wife present, 5% unmarried opposite-sex partnerships, and 1% same-sex married couples or partners.

The population was 16% under 18, 7% aged 18 to 24, 23% aged 25 to 44, 32% aged 45 to 64, and 22% aged 65+.

- (2) We do not have demographics for lighthouse visitors, however, lighthouse visitor log books indicate a majority of visitors are residents of Monterey Peninsula and County. Generally lighthouse visitors arrive in multi-age groups of family and friends. The lighthouse does not appear to attract any ethnic group in particular. Other lighthouse visitors are grade school classes and youth groups.

The Society solicits volunteers to assist in many of its programs and projects listed above. They provide a variety of tasks, but predominately those assisting the public during lectures and tours. Other volunteers provide lighthouse restoration, gift shop clerical assistance, and gardening assistance.

The Society constituency benefits by becoming more knowledgeable of local culture and heritage. Our programs celebrate the individuality and accomplishments of those who came before us. We recognize ongoing individual efforts to restore the city's architectural heritage and, in doing so, encourage others to take pride in their neighborhood and community at large.

The Society's larger constituency is served by the lighthouse. Through our efforts the lighthouse is preserved and restored to prior times when it was an important aid to navigation and commerce for the Monterey Peninsula. Without Society efforts the City of Pacific Grove would find it difficult to keep the building from further deterioration and possible loss of this national register historic place.

The lighthouse provides a very tangible history lesson, one where visitors can touch and feel what it was like to be a part of early central California. The museum is a means to let people understand 'how we got here' and the challenges people faced in the late 1800's.

Describe Your Request (incorporating the following points):

1. Problem statement: what problems, needs or issues are addressed, and how was this determined?
2. How does your work address and/or change the underlying or root causes of the problem?
3. If other than general operating support, describe the program for which you seek funding, why you decided to pursue this project and whether it is new or an expansion of an existing program
4. Include a list of all other grant requests (pending and approved) for this project, showing funding source and amount requested

The Point Pinos Lighthouse is a gem of an historic building, but the potential of the lighthouse as a valued cultural and historic asset - tourist attraction, educational venue, and social gathering place has yet to be fully tapped. An Interpretive Plan will help significantly to move us towards that goal. The Point Pinos lighthouse is the oldest existing lighthouse on the West Coast, is 159 years old and listed on the National Register of Historic Places.

In recent years collaborate efforts by the City of Pacific Grove and the Heritage Society have resulted in a partially restored lighthouse (work in progress) and reconstruction of two outbuildings which serve as a gift shop and restroom. We've installed ADA compliant sidewalk and parking.

However, over the last 20 years the interior exhibits and artifacts have been overlooked and now many are out of date. Where current exhibits are unfocused or fail to tell a story, they need to be refocused and put in historical context. We need to bring them up to today's museum standards to create a new, more attractive, and informative museum space. The aim of the Interpretive Plan is to create exhibits and displays that add to the story of the Monterey Peninsula and provide a high quality visitor experience, e.g. an enjoyable and rewarding visit.

Similar to efforts at Colton Hall and Doc Rickett's Lab in Monterey, an interpretive plan will be a roadmap which outlines and guides decisions about lighthouse interpretive programming and design of exhibits. It will describe what and how visitors will learn, see, do, and feel during their visit.

The interpretive plan will identify themes to be presented to the visitor. Themes explain to the visitor historical context and meaning of the place or relevancy to herself/himself. Multiple themes may be described, in hierarchal fashion, starting with an overarching museum theme down to the exhibit or artifact level.

In mechanical terms an interpretive plan is the blueprint from which exhibits will be created, signage posted, visitor path assigned, etc. Exhibits could consist of audio, video, text, photographs or artifacts. They could be static, dynamic or interactive.

The lighthouse interpretive plan should utilize museum interpretive best practices such as:

- Be educational and provocative; visitors want to be inspired or excited by the experience. Establish connection with visitors including: asking visitors questions that engage their personal impressions, thoughts, and feelings; prompting exchange and sharing with others; and encouraging them to try new activities or consider different perspectives.
- Relate what is at the lighthouse to the visitors' experience. Give visitors the chance to make their own meaning from objects and stories.
- Provide a coherent visitor experience as promoted through global and cascading themes and not a simply a mélange of facts
- Engage as m any senses as possible including audio and video technology and hands-on exhibits
- Contains specific exhibits geared towards youth

There are no other outstanding grant requests for funding of the Lighthouse Interpretive Plan.

**MONTEREY COUNTY AREA GRANTMAKERS
Common Impact Evaluation Form**

**Community Foundation for Monterey County, First 5 Monterey County, and United Way Monterey County -
Impact Plan and Reporting Form- Funding Areas Cover Sheet**

On this page, check the funder to whom this application is directed, and fill in the requested information. This sheet will accompany the Impact Plan and Reporting Form through the application process. You will fill out more than one copy of this page if you are applying to two or more of the local funders, one for each application. However, you will only need to fill out one Impact Plan and Reporting form if you are proposing to conduct the same evaluation activities.

- Community Foundation for Monterey County (Please indicate one):
 - Building Blocks Wellness Cultural Experiences and Creativity Heritage
 - Community Engagement Economic Opportunity Healthy Places and Spaces
 - Environmental Engagement Animal Welfare
- First 5 (Please indicate one):
 - Parents Feel Competent, Well-Informed and Capable of Supporting their Child
 - Families Have Quality, Affordable Early Care and Education of Choice
 - Children are Mentally and Physically Healthy

- United Way (Please indicate one of the four Priority areas and one community outcome under the area checked - Refer to the United Way Monterey County Priority Areas document for details)
 - Basic Needs Self-Sufficiency Crisis to Stability Successful Kids/Strong Families
 - Food Life Skills Intervention Girls/Mothers' H.S. Education
 - Shelter Education Prevention Family Rel/Natural Environment
 - Access/Info Affordable Housing Child/Teen Leadership, Skills, Confidence, Relationships

**MONTEREY COUNTY AREA GRANTMAKERS
Common Impact Evaluation Form**

**Community Foundation for Monterey County, First 5 Monterey County,
United Way Monterey County-
Impact Plan and Reporting Form**

Organization Name: The Heritage Society of Pacific Grove
Name of Program/Project Described Below: Point Pinos Lighthouse Museum Interpretive Plan
Date Plan Created: August 1, 2014

Program Outcome: Increase visitor understanding and awareness of the heritage of the lighthouse and Monterey Peninsula.

Target Population: Groups of families and friends throughout Monterey County of all ages and ethnicity. Also grade school and youth groups (summers) from the Monterey Peninsula.

EXPECTED ACTIVITIES	INDICATORS	DATA COLLECTION	EXPECTED RESULTS	ACTUAL ACTIVITIES	ACTUAL RESULTS
Develop hierarchical themes to explain how the people and technology evolved	Level of visitor satisfaction (ease of understanding + what visitor wanted to see)	Prepare a self- developed survey that is conducted annually (or when exhibits are changed) by lighthouse docents	Most visitors reviewed all exhibits		
Develop detailed exhibit descriptions that tie to themes	Awareness of local heritage	Time spent at individual exhibits	High visitor satisfaction		
Develop coherent plan for visitor movement to maximize comfort, understanding and enjoyment	Provocative exhibits which made visitors think or perhaps change their perceptions	Total time spent at the lighthouse	Exhibits easy to understand and interact with.		
		Ability to understand exhibit.	Visitors developed better understanding of local heritage		
		If interactive, how did visitors interact?	Previously held ideas were challenged		
		What was learned?			
		Did exhibits challenge pre-conceived notions?			

Project Budget

Organization Name: The Heritage Society of Pacific Grove

Project Name: Point Pinos Lighthouse Museum Interpretive Plan

Project Date: 11/1/14 – 7/1/15

Request to: Community Foundation for Monterey County

Project costs are consultant fees for a professional interpretive/exhibit specialist with history museum experience. Bids will be solicited and we plan to hire locally, if possible. The role of the consultant would be to conduct all major steps leading up to a final interpretive plan. Consultant tasks are listed below. The consultant will be supervised by a 3 person interpretive plan committee comprised of knowledgeable lighthouse volunteers who will also actively participate by providing historical research and guidance.

	Tasks	Cost
1	Consultant and Interpretive Planning Committee finalize the scope of work, schedules, and define the standards	\$300
2	Research lighthouse history. Visit the lighthouse during normal visitation hours and assess current status.	\$3,000
3	Craft options for a unifying theme which is an overarching umbrella idea under which all themes and stories in the exhibition fit. Prepare an Interpretive Outline. Provide content: interpretive stories and topics and audiences it could serve. Develop a visitor flow path.	\$6,000
4	Consultant and Interpretive Planning Committee finalize themes.	\$500
5	Consultant and Interpretive Planning Committee meet with stakeholders to obtain their input. Stakeholders to include: City Staff, docents, community members and local museum professionals	\$500
6	Design components of each exhibit including location, displays, historical elements, staff and visitor interactions, and the potential of audio and/or video technology. Describe how exhibit design ties to themes. Describe lighthouse grounds signage. Provide rough cost estimate for each.	\$13,000
7	Prepare draft Interpretive Plan report and submit to Interpretive Planning Committee for review.	\$1,400
8	Present Interpretive Plan final report to key stakeholders.	\$300
		\$20,000

The Heritage Society has a lighthouse fund which is separate from other Heritage Society monies. This lighthouse fund can only be used for lighthouse related uses such as for preservation and restoration costs, gift shop operation, and interpretation/exhibits. Fund revenue is generated from donations, gift shop profits and grants.

No taxes are used to support the lighthouse, however, the City of Pacific Grove also manages a lighthouse fund whose revenue comes from donations and grants. This is also a restricted fund, to be used solely for lighthouse related purposes.

Income:	<u>This Request</u>	<u>Other Proposals</u>	<u>Program Revenue</u>	TOTAL	<u>Actual</u> (Leave this column blank until the final grant report)
Community Foundation for Monterey County	\$20,000			\$20,000	
City of Pacific Grove or Heritage Society of Pacific Grove		\$5,000		\$5,000	
	\$20,000	\$5,000	\$0	\$25,000	

Expenses:	Community Foundation for Monterey County	<u>City of Pacific Grove or Heritage Society of Pacific Grove</u>		TOTAL	<u>Actual</u> (Leave this column blank until the final grant report)
<u>One-time:</u> Professional Fees	\$20,000	\$5,000	\$0	\$25,000	
	\$20,000	\$5,000	\$0	\$25,000	

Organizational Structure

The Heritage Society has no staff – it is completely volunteer run. Board members are listed below.

The Heritage Society has a formal agreement with the City of Pacific Grove to: (1) conduct lighthouse preservation and restoration, (2) operate a lighthouse gift shop, and (3) develop and implement a lighthouse interpretive plan. All major aspects of Heritage Society actions at the lighthouse are approved by the City, as the City owns the lighthouse and its grounds.

The City of Pacific Grove manages the lighthouse through the Public Works Superintendent. The Superintendent reports to the City Manager, who in turn, reports to the City Council. Public Works has a docent program coordinator that is a half-time employee.

Board Members - The Heritage Society of Pacific Grove				
1	Jean Anton		Retired school teacher	126 16th Street Pacific Grove, CA 93950
2	Dennis Tarmina		Retired business manager	830 Seventeen Mile Dr. Pacific Grove, CA 93950
3	Michael Groshong	Treasurer	Retired Fire Chief	615 Wood Street Pacific Grove, CA 93950
4	Steve Honegger		General Contractor	750 Bayview Ave. Pacific Grove, CA 93950
5	Donna Stewart		Retired business owner	225 Lobos Ave. Pacific Grove, CA 93950
6	Don Beals		Retired	116 11th Street Pacific Grove, CA 93950
7	Bill Peake	Secretary	Retired engineer	40 Quarterdeck Way Pacific Grove, CA 93950
8	David van Sunder	President	Business owner	375 Central Ave. Pacific Grove, CA 93950
9	Rick Steres		Architect	230 Fountain Ave. Suite 6 Pacific Grove, CA 93950
10	Adrienne M. Jonson		Business owner	1265 Luxton St. Seaside, CA 93955
11	Carrol Patterson		Retired	26245 Carmel Rancho Blvd. #12 Carmel, CA 93923
12	Jim Hogan		Retired bank officer	138 Pacific Ave. Pacific Grove, CA 93950
13	James Newhall Smith	Vice Pres.	Architect	211 Grand Ave. Pacific Grove, CA 93950
14	Nina Grannis		Retired business owner	169 Pacific Ave. Pacific Grove, CA 93950
15	vacant			

The Heritage Society of Pacific Grove Budget 2014	General Fund	Lighthouse Fund	Total
<u>Income</u>			
General Donations	2,000	2,000	4,000
Membership Dues	15,000	-	15,000
Lecture Income	500	-	500
Artists in Chautauqua	1,750	-	1,750
Home Tour	6,600	-	6,600
Sale of Products	600	7,500	8,100
Royalties Revenue	200	-	200
Grants	-	20,000	20,000
Total Income	26,650	29,500	56,150
<u>Expense</u>			
Business Fees	70	70	140
Memberships and Dues	700	50	750
Insurance	2,000	-	2,000
Bank Charges	15	600	615
Business Promotion	250	-	250
Whistle Stop Lease	250	-	250
Fire Alarm	550	-	550
Storage	300	-	300
Office Supplies	350	-	350
Computer Equipment	500	300	800
Printing & Postage	250	-	250
Sewer	350	-	350
Water	275	-	275
Telephone	1,400	-	1,400
Internet	50	-	50
Electric & Gas	900	-	900
Newsletter Printing & Postage	4,000	-	4,000
Lectures Printing & Postage	1,000	-	1,000
Membership Renewal Printing & Postage	500	-	500
Lecture Fees and Hall Rental	1,750	-	1,750
Facility Rental	500	-	500
Accounting Fees	3,000	3,000	6,000
Publicity Services	500	-	500
Maintenance & Repair	500	-	500
Historic Plaques	300	-	300
Program related expenses	200	-	200
Home Tour Expenses	5,300	-	5,300
Artists in Chautauqua Expenses	1,700	-	1,700
Good Old Days Booth	100	-	100
Merchandise Purchases	-	3,000	3,000
Museum Professional Fees		4,000	4,000
Total Expenses	27,560	11,020	38,580
			-

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15	vacant			

<u>Net Income</u>	(910)	18,480	17,570
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The Heritage Society of Pacific Grove
Balance Sheet Prev Year Comparison
As of December 31, 2013

Accrual Basis

	Dec 31, 13	Dec 31, 12	\$ Change
ASSETS			
Current Assets			
Checking/Savings Banks			
Chase Accounts			
Chase Checking Account	6,127.48	3,265.05	2,862.43
Chase Savings Account	14,001.99	13,000.69	1,001.30
Total Chase Accounts	20,129.47	16,265.74	3,863.73
Union Bank - Lighthouse	18,716.18	68,996.41	(50,280.23)
Total Banks	38,845.65	85,262.15	(46,416.50)
Total Checking/Savings	38,845.65	85,262.15	(46,416.50)
Total Current Assets	38,845.65	85,262.15	(46,416.50)
Fixed Assets			
Pre-paid Expenses	200.00	0.00	200.00
Total Fixed Assets	200.00	0.00	200.00
TOTAL ASSETS	39,045.65	85,262.15	(46,216.50)
LIABILITIES & EQUITY			
Liabilities			
Current Liabilities			
Other Current Liabilities			
Accrued Revenue	3,187.00	0.00	3,187.00
Sales Tax Payable	1,208.79	1,060.00	148.79
Total Other Current Liabilities	4,395.79	1,060.00	3,335.79
Total Current Liabilities	4,395.79	1,060.00	3,335.79
Total Liabilities	4,395.79	1,060.00	3,335.79
Equity			
Fund Reversal of Net Income	49,552.29	(31,852.15)	81,404.44
Heritage Society Net Assets	17,098.83	16,213.74	885.09
Lighthouse Net Assets			
Gift Shop Equity	13,283.11	8,493.13	4,789.98
Quilts Equity	3,889.83	3,175.83	714.00
Restoration Donations	378.09	56,319.45	(55,941.36)
Total Lighthouse Net Assets	17,551.03	67,988.41	(50,437.38)
Net Income	(49,552.29)	31,852.15	(81,404.44)
Total Equity	34,649.86	84,202.15	(49,552.29)
TOTAL LIABILITIES & EQUITY	39,045.65	85,262.15	(46,216.50)

The Heritage Society of Pacific Grove
Profit & Loss
 January through December 2013

Accrual Basis

	Jan - Dec 13
Ordinary Income/Expense	
Income	
General Contributions	
Plaque Donation	140.00
Quilts Donations	714.00
Donation Box	135.00
Donations for Lighthouse Reno	12,337.00
General Donations	4,300.67
Total General Contributions	17,626.67
Program Revenue	
Membership Dues	12,326.00
Lecture Income	0.00
Artists in Chautauqua	
Artists Silent Auction	351.00
Artists in Chautauqua - Other	1,360.00
Total Artists in Chautauqua	1,711.00
Lighthouse Fundraiser	
Lighthouse Silent Auction	1,558.00
Lighthouse Fundraiser - Other	6,443.19
Total Lighthouse Fundraiser	8,001.19
Registrations	10.00
Total Program Revenue	22,048.19
Sales Revenue	
Gift Shop Sales	13,738.00
Sales of Products	593.36
Total Sales Revenue	14,331.36
Grant Revenue	
Lighthouse Grants	30,000.00
Heritage Society Grants	1,000.00
Total Grant Revenue	31,000.00
Other Revenue	
Interest Revenue	1.30
Royalties Revenue	205.46
Total Other Revenue	206.76
Total Income	85,212.98
Cost of Goods Sold	
Costs of Goods Sold - Giftshop	7,826.11
Total COGS	7,826.11
Gross Profit	77,386.87
Expense	
General Operations Expenses	
Business Fees/City License	102.25
Memberships and Dues	796.56
Insurance Expense	2,866.00
Bank Charges	777.37
Total General Operations Expenses	4,542.18

The Heritage Society of Pacific Grove
Profit & Loss
 January through December 2013

Accrual Basis

	Jan - Dec 13
General Barn Expenses	
Fire Alarm Lease	546.86
Office Supplies	533.53
Computer Improvements	238.00
Scanner & Computer Improvements	128.00
Misc. Printing and Postage	3,746.38
Sewer Expense	301.38
Water Expense	275.94
Telephone, Telecommunications	1,329.55
Internet Expense	21.90
Electricity and Gas	886.34
Total General Barn Expenses	8,007.88
Outreach/Promotion Expenses	
Facility Rental	1,350.00
Total Outreach/Promotion Expenses	1,350.00
Contract Services	
Accounting Fees	1,637.50
Publicity Services	500.00
Maintenance & Repair	400.00
Total Contract Services	2,537.50
Program Related Expenses	
House and Building Plaques	180.00
Other Program Related Expenses	139.37
Repairs - Lighthouse	100,657.79
Framing	125.76
Lecturers	1,741.50
Total Program Related Expenses	102,844.42
Fundraising Expenses	
Home Tour Expenses	100.00
Lighthouse Fundraiser	5,185.50
Artists in Chautauqua Expenses	1,681.21
Good Old Days Booth Expenses	76.37
Total Fundraising Expenses	7,043.08
Other Types of Expenses	
Event Expenses	614.10
Other Types of Expenses - Other	0.00
Total Other Types of Expenses	614.10
Total Expense	126,939.16
Net Ordinary Income	(49,552.29)
Net Income	(49,552.29)

The Heritage Society of Pacific Grove
Balance Sheet
As of June 30, 2014

Accrual Basis

	Jun 30, 14
ASSETS	
Current Assets	
Checking/Savings	
Banks	
Chase Accounts	
Chase Checking Account	5,494.52
Chase Savings Account	20,001.81
Total Chase Accounts	25,496.33
Union Bank - Lighthouse	20,434.79
Total Banks	45,931.12
Total Checking/Savings	45,931.12
Total Current Assets	45,931.12
TOTAL ASSETS	45,931.12
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Credit Cards	
Chase Card	(68.95)
Total Credit Cards	(68.95)
Other Current Liabilities	
Sales Tax Payable	571.66
Total Other Current Liabilities	571.66
Total Current Liabilities	502.71
Total Liabilities	502.71
Equity	
Fund Reversal of Net Income	(10,778.55)
Heritage Society Net Assets	25,710.37
Lighthouse Net Assets	
Gift Shop Equity	17,252.17
Quilts Equity	3,889.83
Restoration Donations	(1,423.96)
Total Lighthouse Net Assets	19,718.04
Net Income	10,778.55
Total Equity	45,428.41
TOTAL LIABILITIES & EQUITY	45,931.12

The Heritage Society of Pacific Grove
Profit & Loss
 January through June 2014

Accrual Basis

	Jan - Jun 14
Ordinary Income/Expense	
Income	
General Contributions	
Donations for Lighthouse Reno	300.00
General Donations	2,094.48
Total General Contributions	2,394.48
Program Revenue	
Membership Dues	15,148.00
Lecture Income	215.00
Artists in Chautauqua	1,250.00
Total Program Revenue	16,613.00
Fundraising Revenue	
Raffle Revenue	12.00
Total Fundraising Revenue	12.00
Sales Revenue	
Gift Shop Sales	6,273.01
Sales of Products	536.85
Total Sales Revenue	6,809.86
Other Revenue	
Interest Revenue	1.81
Royalties Revenue	119.41
Miscellaneous Revenue	128.00
Total Other Revenue	249.22
Total Income	26,078.56
Cost of Goods Sold	
Costs of Goods Sold - Giftshop	1,417.84
Total COGS	1,417.84
Gross Profit	24,660.72
Expense	
General Operations Expenses	
Business Fees/City License	120.25
Memberships and Dues	220.00
Bank Charges	374.81
Total General Operations Expenses	715.06
General Barn Expenses	
Fire Alarm Lease	184.95
Office Supplies	553.41
Scanner & Computer Improvements	199.95
Misc. Printing and Postage	382.84
Water Expense	160.07
Telephone, Telecommunications	646.57
Website Expense	14.99
Electricity and Gas	478.02
Total General Barn Expenses	2,620.80
Outreach/Promotion Expenses	
Printing and postage for Newsl.	1,973.44
Printing and Postage - Lectures	124.78
Misc. Print & Postage - Renewal	1,677.53
Lecture Fees and Hall Rental	950.00
Total Outreach/Promotion Expenses	4,725.75
Contract Services	
Accounting Fees	1,812.50
Publicity Services	100.00
Total Contract Services	1,912.50

The Heritage Society of Pacific Grove
Profit & Loss
January through June 2014

Accrual Basis

	<u>Jan - Jun 14</u>
Program Related Expenses	
Gift Shop Decorations	132.70
Other Program Related Expenses	98.18
Repairs - Lighthouse	199.31
Lighting Fixtures and Installat	1,902.74
Total Program Related Expenses	<u>2,332.93</u>
Fundraising Expenses	
Home Tour Expenses	1,510.03
Good Old Days Booth Expenses	65.10
Total Fundraising Expenses	<u>1,575.13</u>
Other Types of Expenses	<u>0.00</u>
Total Expense	<u>13,882.17</u>
Net Ordinary Income	<u>10,778.55</u>
Net Income	<u><u>10,778.55</u></u>

The Heritage Society of Pacific Grove

Top 10 largest financial gifts in 2013

1. Mary Lou and Emil Kissel - \$1,100
2. Ruth Hartmann - \$1,000
3. Tom and Kip Gutshall - \$1,000
4. Maureen Mason - \$1,000
5. Tracy Gibbons - \$1,000
6. The Upjohn California Fund - \$1,000
7. Anonymous - \$1,000
8. Ken and Margaret Hinshaw - \$1,000
9. Carl Stewart / GE - \$1,000
10. Bill Peake / Chevron - \$1,000



Point Pinos Lighthouse Interpretive Plan Justification and Creation July 11, 2014

Introduction

The Point Pinos Lighthouse is a gem of an historic building, even when compared to other historic buildings on the Monterey Peninsula. But the potential of the lighthouse as a valued city asset - tourist attraction, educational venue, and social gathering place has yet to be fully tapped. An Interpretive Plan will help significantly to move us towards that goal.

In recent years collaborate efforts by the City of Pacific Grove and the Heritage Society have resulted in a partially restored lighthouse (i.e. in progress) and reconstruction of two outbuildings which serve as a gift shop and restroom. Lighthouse grounds are also being improved (ADA compliant sidewalk and parking, landscaping). These results prove our ability to successfully tackle a significant project and produce excellent results.

However, over the last 20 years the interior exhibits and artifacts have been overlooked and now many are out of date. Where current exhibits may be unfocused or fail to tell a story, they need to be refocused and put in historical context. We need to bring them up to today's museum standards to create a new, more attractive, and informative museum space. The aim of the Interpretive Plan is to create exhibits and displays that add to the story of the Monterey Peninsula and provide an high quality visitor experience, e.g. an enjoyable and rewarding visit.



1885 - Pat Hathaway Collection



2014 - Kristen M. Fletcher

Background

The Point Pinos Lighthouse is the oldest continuously operating lighthouse on the West Coast. The building, lantern and Fresnel lens are all original and together constitute an irreplaceable treasure. Since February 1, 1855, the lighthouse has been a guide to ships traveling off the rocky California Coast. It is listed in the National Register of Historic Places #77000312.

The US Coast Guard began licensing the lighthouse to the City of Pacific Grove in 1967 with the stipulation that it would be used as a museum open to the public. Ownership was formally transferred to the City in 2006. Initially The Pacific Grove Museum of Natural History administered the lighthouse however currently it is administered by the Public Works Department.

In 2010 the City entered into a service agreement with The Heritage Society of Pacific Grove to guide and facilitate restoration efforts. This agreement was expanded in 2013 to include development and implementation of an Interpretive Plan.

The mission of the lighthouse is to provide an understanding of the people, challenges, and technology that helped shaped early California on the Monterey Peninsula.

Definition

An interpretive plan is a management document which outlines and guides decisions about a museum or historic site's interpretive programming and exhibits. It describes what and how visitors will learn, see, do, and feel during their visit.

The interpretive plan identifies themes to be presented to the visitor. They explain to the visitor historical context and meaning of the place or relevancy to herself/himself. Multiple themes may be described, in hierarchal fashion, starting with an overarching museum theme down to the exhibit or artifact level.

In mechanical terms an interpretive plan is the blueprint from which exhibits will be created, signage posted, visitor path assigned, etc. Exhibits could consist of audio, video, text, photographs or artifacts. They could be static, dynamic or interactive.

Goal

Over 15,000 people visit the lighthouse each year, including individuals, school classes, and youth groups, representing various ages and ethnicities. The constituency is a wide-ranging public from lighthouse aficionados to casual sightseers who come from nearby towns as well as across the globe. Given our numerous and diverse visitors, the Heritage Society seeks to enhance visitors' experience through the use of interpretive planning best practices while preserving the historic fabric of the site. And in doing so, make the lighthouse a more highly valued asset to the community.

Expectation

A lighthouse interpretive plan should utilize museum interpretive best practices. For example:

- Be educational and provocative; visitors want to be inspired or excited by the experience. Establish connection with visitors including: asking visitors questions that engage their personal impressions, thoughts, and feelings; prompting exchange and sharing with others; and encouraging them to try new activities or consider different perspectives.

- Relate what is at the lighthouse to the visitors' experience. Give visitors the chance to make their own meaning from objects and stories. Take into account previous visitor experiences and the entire experience in the museum on the visitor's "meaning making".
- Provide a coherent visitor experience as promoted through global and cascading themes and not a simply a mélange of facts
- Engage as m any senses as possible including audio and video technology and hands-on exhibits
- Contains specific exhibits geared towards youth

In addition, the interpretive plan should:

- Consider mainly the interests and expectations of the average visitor to the Monterey Peninsula, not a lighthouse aficionado.
- Address the needs of the mobility impaired
- Assume a self-guided tour, although docent augmented tours may be available
- Include in the scope the visitor experience starting where the visitor arrives

Tasks

The interpretive plan will include:

- identification of themes and historical resources
- input from key community stakeholders
- assessing current interpretive conditions, including visitor information and staff interpretive activities; collection materials, archival and artifact materials, exhibits; physical environment; programs and visitor access
- recommendations on the best ways to achieve interpretive goals and provide desired visitor experiences

The following steps are needed to complete a lighthouse interpretive plan:

1. A pre-meeting of consultant with City and/or Heritage Society representatives to finalize the work arrangement / contract.
2. A meeting of consultant with Interpretive Planning Committee to finalize the scope of work, schedules, and defines the standards to be met. Lighthouse volunteers will direct the consultant to resources on lighthouse history and its keepers.
3. Research lighthouse history. Visit the lighthouse during normal visitation hours and assess current status.
4. Craft options for the "Big Idea". A "big idea" is an overarching umbrella idea under which all themes and stories in the exhibition fit. Included is the main message and goal or and learning objective for each room. Prepare an Interpretive Outline. Provide content: interpretive stories and topics and audiences it could serve. Develop a visitor flow path.
5. A meeting of consultant with Interpretive Planning Committee to finalize themes.
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7. Design components of each exhibit including location, displays, historical elements, staff and visitor interactions, and the potential of audio and/or video technology. Describe exhibit challenges and demonstrate how exhibit design ties to themes. Describe lighthouse grounds signage. Provide rough cost estimate for each.
8. Preparation of draft Interpretive Plan report and submission to Interpretive Planning Committee for review.
9. Presentation of Interpretive Plan final report to key stakeholders.

Resources

The Interpretive Plan will be completed with the assistance of an experienced and qualified museum interpretive specialist. This specialist will provide the guidelines and recommendations for interpreting the lighthouse and Interpretive Plan preparation. Direction will be provided by the Heritage Society's Interpretive Plan Committee. Interpretive Plan preparation will include inputs from lighthouse docents, community members, City of Pacific Grove Staff, Pacific Grove City Council, and local museum professionals.

Timing

Interpretive planning can begin as early as agreement is obtained to hire the specialist consultant and the consultant's availability. There is no deadline for starting or ending, however, work is expected to be completed in a timely fashion and no later than 2015.

Authors

The Heritage Society of Pacific Grove
Ken Hinshaw, Fred Sammis, Bill Peake, and Natasha Fraley (consultant)

Stakeholders

- 1 - Visitor
- 2 - Communicators (Docents & graphic material)
- 3 - Preservation Group
- 4 - Questors
- 5 - City

Interpretive Plan's Job

Accumulate information and synthesize into a presentation format.

Bare bones approach \$15,500 -

<u>Task</u>	<u>Cost</u>
3 focus group sessions with visitors	\$1,500
2 meets with docents	1,000
1 meet with Questors	500
1 meet with city	500
5 meets with historical resources	2,500
sub total	\$6,000
Prepare & produce report	\$9,500
	<hr/>
	\$15,500



Point Pinos Lighthouse Interpretive Plan Justification and Creation July 11, 2014

Introduction

The Point Pinos Lighthouse is a gem of an historic building, even when compared to other historic buildings on the Monterey Peninsula. But the potential of the lighthouse as a valued city asset - tourist attraction, educational venue, and social gathering place has yet to be fully tapped. An Interpretive Plan will help significantly to move us towards that goal.

In recent years collaborate efforts by the City of Pacific Grove and the Heritage Society have resulted in a partially restored lighthouse (i.e. in progress) and reconstruction of two outbuildings which serve as a gift shop and restroom. Lighthouse grounds are also being improved (ADA compliant sidewalk and parking, landscaping). These results prove our ability to successfully tackle a significant project and produce excellent results.

However, over the last 20 years the interior exhibits and artifacts have been overlooked and now many are out of date. Where current exhibits may be unfocused or fail to tell a story, they need to be refocused and put in historical context. We need to bring them up to today's museum standards to create a new, more attractive, and informative museum space. The aim of the Interpretive Plan is to create exhibits and displays that add to the story of the Monterey Peninsula and provide an high quality visitor experience, e.g. an enjoyable and rewarding visit.



1885 - Pat Hathaway Collection



2014 - Kristen M. Fletcher

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Authors

The Heritage Society of Pacific Grove
Ken Hinshaw, Fred Sammis, Bill Peake, and Natasha Fraley (consultant)

August, 5, 2013

**POINT PINOS LIGHTHOUSE
Interpretative Program Proposal**

File copy

RECOMMENDATION

Expand the agreement between the City of Pacific Grove and the Lighthouse Preservation Committee/Heritage Society of Pacific Grove (LPC/HS) for the Point Pinos Lighthouse to include interpretation within scope of work.

DISCUSSION

Since September 2010 the City has had a partnership with the LPC/HS to oversee and participate in the restoration and preservation of the Point Pinos Lighthouse. This partnership, to date, has been very successful as demonstrated by the greatly improved condition of the lighthouse. Deterioration of the buildings has essentially been stopped. Multiple restoration/reconstruction projects have been completed. The construction of a gift shop and restrooms will soon be underway.

A properly crafted interpretive program for our Point Pinos Lighthouse should help visitors understand, appreciate and emotionally connect with its rich cultural heritage and that of the City of Pacific Grove. An interpretive program guides the selection of exhibits, the manner in which they are displayed, and how they are explained to the visitor. Our plans for an updated interpretive program will help visitors value their experience and be more appreciative of our cultural heritage.

Under the direction of the Pacific Grove Museum of Natural History, an interpretive program for the lighthouse was developed in the 1990's. This program has served us well but is now in need of updating and improvement. An updated program would complement ongoing lighthouse restoration and permit implementation of new ideas. We have the benefit of years of experience with the current interpretative program to draw upon.

The LPC/HS is willing to take on the added responsibility for developing this interpretive program. The committee can draw upon experienced lighthouse docents (Point Pinos Lighthouse and Point Sur State Historic Park) and interpretive specialists from CA State Parks in Asilomar and Big Sur. The potential cost of consultants, if any, would be minimal and funded through our ongoing fundraising program(s).

To formalize this additional responsibility the Agreement between the City and the LPC/HS should be modified by a simple addendum/exhibit that would define an interpretive program under the Scope of Work. Specifically, the Committee will: (a) seek / obtain funding for an interpretive program and (b) engage in and supervise an interpretive program.

FISCAL IMPACT

There is no impact on the City's finances.

ATTACHMENTS

Point Pinos Lighthouse Interpretive Program

Respectfully,

Bill Peake & Dennis Tarmina, Heritage Society of Pacific Grove

*Submitted to Dan
from 8/5/13*

Point Pinos Lighthouse Interpretive Program

A. Project Nature and Scope

Lighthouse Overview: To complement our preservation efforts an updated and improved interpretive plan will help move us toward a vision of a first-class small museum that the City can be justifiably very proud of and attracts an increasing number of visitors.

Reasons for Attention Now: Lighthouse interior restoration has begun. Recently completed are the 'Watch' room and 'Emily Fish's' bedroom. Restoration is underway in the 'WWII Beach Patrol' room and 2nd floor hallway and stairs. In a relatively short time the gift shop and restrooms will be completed. These changes provide a natural opportunity to rethink the dated interpretive program.

The opportunity is in how to best utilize the newly restored rooms or spaces to enhance visitor experience. With a new interpretive program we can make the necessary adjustments to highlight the attributes of each restored space. We have already seen benefits from the synergy between restoration and how the rooms are best interpreted. An opportunity would be lost if we merely return old exhibits back as they were prior to restoration without an in depth analysis.

Objectives and Criteria for Success: Our vision of a first-class museum requires an interpretive program with an aim to improve and enrich visitor experience. The interpretive program will facilitate understanding of the historical and cultural significance of the lighthouse and Pacific Grove. It should promote a connection between the past and visitors personal experience. The visitor should come away with a deeper appreciation of life at the lighthouse in times past. Best museum practice today includes the implementation of interesting and compelling themes to convey the sense of place.

B. Project Execution

Technical Approach: Initial discussions of an updated and improved interpretation were recently begun within volunteers. The new program would build on the current program as implemented by the PG Museum of Natural History in the 1990's. Interpretive programs developed by professionals for Point Sur State Historic Park will be a valuable guide and benchmark for program quality.

The interpretive program will complement ongoing restoration efforts. By necessity, interior and exterior lighthouse and grounds restoration require a range of 'restore to' dates. The chosen dates for the exterior restoration are 1935 through 1947. For example, the rear dormers added in 1935 means the exterior of the lighthouse will not appear as built in 1855. However interior restoration periods are less restrictive (acceptable under the Secretary of the Interiors Guidelines). For example the WWII Beach Patrol room is being restored to early 1940's, while Emily's bedroom has been restored to appear much as it did in the early 1900's. These are examples of how the interpretive program can draw upon these different periods in lighthouse history and complement how the lighthouse is being restored.

Museum best practice today utilizes interpretive themes to explain the significance of historical or cultural resources to visitors. Multiple themes will help visitors to understand and identify with the lighthouse from different perspectives.

Constraints: There are no major constraints on development of an interpretive program except for financing. The interpretive program will focus on many of the existing exhibits and the specific restoration period(s) of the building so that should minimize finance problems. The cost of an outside consultant, if needed, should be relatively minor. The cost of new exhibits can be managed by maximizing use of existing exhibits, seeking donated exhibits and using volunteer labor to create new exhibits. We are currently in contact with a local former museum curator to seek his input and guidance.

Work Breakdown and Schedule:

- **Phase 1: Years 1-2**
 - Develop preliminary interpretive program including major themes and locations of themes within the lighthouse
 - Begin modifying existing exhibits or building new exhibits in accordance with preliminary interpretive program
- **Phase 2: Year 3-4**
 - Create a video of the lighthouse and lantern to be used to assist visitors with mobility impairment
 - Purchase new high impact exhibits as funds permit
- **Phase 3: Year 5-6**
 - Complete updated exhibits in accordance with final interpretive program

Program Cost:

Most of the interpretive program can be completed by utilizing volunteers and using materials that are currently available. This includes existing exhibits, furnishings, panels, archives, and training materials. It is expected that some tasks will need to be done by a professionals.

The estimated total cost of this program should be between \$10,000 and \$40,000. The wide range of total cost is due to the amount of work done by volunteers versus professionals. Further examinations of tasks are necessary and cost estimates or bids would have to be obtained to more accurately understand the costs.

The total cost of implementation of a new interpretive program including new exhibits, depends greatly on the cost and amount of exhibits purchased, if any. There is flexibility on what might be purchased and the possibility of exhibits donated by individuals or groups such as the Adobe Chapter of the Questers.

Funding: The Heritage Society has applied for restoration grants and this is another avenue to raise funds for an interpretive program. There are grants available for lighthouse restoration from many agencies such as, Department of Transportation, National Parks Service, State Grants, Historic Museum Grants, County Grants, and City Grants. Future information can be obtained regarding grants as the program progresses.

Fundraising efforts by the Lighthouse Preservation Committee/ The Heritage Society of Pacific Grove (LPC/HS) have been successful. Grant applications are an ongoing program at the HS.

It is the goal of the HS that the interpretive program, like the restoration, will be completed with no

cost to the City except for contributions from Fund 27 (the City controlled Lighthouse Maintenance and Restoration Fund). The lighthouse interpretive program will be financially self-sufficient through donations, visitor donations, grants and LPC/HS sponsored fundraisers.

C. Structure, Staffing and Support

The LPC/HS propose to be project lead with the support of City management. City staff support would be minimal.

The committee that would be most involved would be the LPC/HS. It is comprised of volunteers who have done extensive work at the lighthouse and have decent experience at the lighthouse and Point Sur State Historic Park. The committee would enlist other volunteers to assist as required.

Select members of The Heritage Society Board would be involved, as needed, to ensure that all aspects of the program are historically appropriate and correct. As stated in a prior paragraph the LPC/HS would seek involvement from The Questers/Adobe Chapter and other qualified members of the community.

Respectfully Submitted,
Lighthouse Preservation Committee
Dennis Tarmina, Chair
Jeff Becom
Ken Hinshaw
Steve Honegger
Lowell Northrop
Bill Peake

D. References

Point Sur State Historic Park Interpretive Themes, CA Department Parks and Recreation, 2011

PROPOSED INTERPRETATIVE PLAN FOR POINT PINOS LIGHTHOUSE

Planning Assumptions:

That by mid 2014 the newly added admissions/gift shop will be in place and functioning.

That all clerical and sales functions will be relocated to this facility.

The prime objective of the reinterpretation of the lighthouse museum message is to enhance the visitor experience by expanding the scope of what is covered while not losing any of the currently popular ambiance.

Broadly speaking, the lighthouse story is composed of two elements, one human and one mechanical.

Human:

The stories of the keepers and their lives before, after and during their tenure at Point Pinos and how they were effected by the times in which they lived.

Mechanical:

Emphasis on how the light functioned in early periods and the challenges faced by the early keepers and then following the development of solutions to resolve these difficulties.

A logical and easy way to explain the proposed enhanced interpretative plan is to follow a hypothetical visitors path from entrance to completion of the visit.

1. The visitor is greeted by a docent in the gift/admissions building where fees are collected and a brief explanation of the self guided tour is given along with an appropriate brochure. Hopefully an audio tour device or some other individual tour enhancement can be made available at this time.
2. Following the path which leads from the entry point to the front door of the lighthouse the visitor is confronted with a series of waist high signs which will present a time line history of the lighthouse in conjunction with parallel events on the Monterey Peninsula and in California. Similar signage will be placed alongside other outdoor exhibits on the grounds.
3. Upon entering the building the first exhibits will be located upon the walls of the entry hall. These will be a selection of the commendations received and certificates of recognition for contributions made to the preservation of the facility .
4. The visitor is next greeted by a docent stationed in the current reception area and welcomed to the facility. This "south room" will contain exhibits relating to the human side of the Point Pinos with emphasis on keepers Layton (s), Wasson, Luce, Fish , Jeffery and Nelson. This is to be accomplished in a manner which will allow the room to serve as a meeting space as well as an exhibit area. The space would be enhanced with furnishings which are typical of the post Civil War period.

There is access to two potential storage areas from this room. It is proposed that one remain a storage area for gift shop merchandise and the other be transformed into a library/study area, housing the majority of the materials currently in the kitchen to the north of the stove.

5. The next logical location for the visitor to tour is the kitchen area located in the shed addition on the east side of the building. With the relocation of the materials to the north of the stove an opportunity exists to make the kitchen complete by reinstalling the kitchen sink and counter top which were originally in this area.

The bathroom would remain as it is with the exception of the addition of some decorative items which can be secured to prevent theft.

The displays on the western wall of the shed addition depicting various phases of the lighthouse's story will be reevaluated for their relevance to the revised interpretive plan and modified as necessary or moved to another more appropriate location.

6. To the visitors right is the rear entrance to the building. This small area must be kept clear as it serves as the emergency exit however the some of the walls are suitable for displaying large exhibits such as the copy of the original plans for the structure.

Additionally there are corners which might be appropriate for displaying objects which are of a vertical nature.

7. The stairway and walls to the basement exhibits are made of the same granite as the rest of the building and all or a portion of them should be returned to their original condition such that the visitor can enjoy the uniqueness of the buildings method of construction.

8. The navigational aids exhibits which occupy this area are probably the most popular with visitors of any area in the lighthouse. To a large part this is due to the interactive nature of the displays. No significant changes other than rehabilitating shopworn displays is anticipated. The possibility that the window at the western end of the room may be reinstalled will necessitate some rethinking of the wall hangings. The possibility also exists to extend the exhibit area northward into what is currently storage area.

9. Two rooms that the visitor will visit after leaving the basement are fully furnished with Victorian era pieces. Though these rooms can not be physically entered by visitors, views over the protective railings are adequate to view both the first floor parlor and the second floor northern bed room. The only suggested additions would be minor modifications to the lighting and the addition, in the form of signage, pointing out the significance of some of the major furnishings.

10. Upon climbing the stairs to the second floor landing, the visitor will be presented with two of the lighthouse's unique features. The watchroom has had the barrier to entry removed so the visitor can enjoy an unobstructed view of the ocean. The walls and window sill areas of this area will be decorated with excerpts from the keeper's logs and if possible appropriate memorabilia. Casual seating will also be provided for those who wish to linger over the view.

Immediately opposite the watchroom, in the stair well, mounted above eye level but tilted downward, will be a video monitor displaying a live birds eye view of the Fresnel lens. The monitor will be mounted on a hinged mount so that it can be swung out of the way for maintenance of the light area.

11. The final stop on the visitor's tour prior to departing (hopefully) through the gift shop, is the World War II room. This area will continue to honor the Coast Guard's presence during the war years, though existing graphics will be updated and made easier to read as well as making room for material from the first floor which is more appropriate in this location. Additionally those items currently displayed in the desk drawers which are virtually invisible now will be shown in a display case in the center of the room. Attention will also be given to communicating the importance of the model airplane campaign as a contributor to national defense.

POINT PINOS LIGHTHOUSE VISITOR PROGRAM

ASSETS

- Lighthouse building and grounds
- Proximity to other tourist attractions
- Affordable admission prices
- Skilled docent guides

LIABILITIES

- Competition from more sophisticated attractions
- Limited hours of operation vs competition
- Located "off the beaten path"
- Limited marketing budget

TARGET AUDIENCE

Visitors to the Monterey Peninsula who are attracted by other venues and look upon a visit to the Point Pinos Lighthouse as an adjunct to their other activities.

Only lighthouse visit collectors will make a trip with Point Pinos as the primary destination.

POST VISIT IMPRESSION

Ideally, the departing visitor will have been entertained and will have increased their level of knowledge of lighthouses and their place in California history.

....more than a story of the lighthouse, its the story of California.....

The Point Pinos Lighthouse visit is made up of the people's stories who lived and worked here. These stories are told and enhanced by objects and graphics which are on display at the site.

EXHIBITS

All of the stories of major importance are chronologically displayed along the visitors pre entry pathway to give them a frame of reference for the exhibits they are about to see. This time line will cover the period from the earliest European explorers thru the present.

Keeper's Stories:

Stories of the major keepers, their lives and achievements will be exhibited in what is currently the reception area.

Decorative Rooms:

The parlor, bedroom, bath and the eastern portion of the kitchen will remain as they are depicting life as it was at the turn of the twentieth century.

Aids to Navigation

This exhibit will continue to occupy the basement but will be enhanced and updated.

How the Light Worked

A chronological following of the light sources and their unique characteristics will be located along a portion of the western wall of the kitchen.

The Sea and the Stories

The watch room will be opened to the public and in addition to the spectacular view selected entries from keepers logs will be enlarged and on display.

Appreciation Gallery

The main entry vestibule will be the home of many of the plaques and tributes to those who have made the restoration possible.

INTERPRETIVE OUTLINE FOR POINT PINOS

"For an interpretive plan to succeed at a (sic) historic lighthouse, the administrating entity needs to have a clear vision of what they want visitors to understand about the site. This can only be done by first developing a concise interpretive plan that sets objectives for what story is to be told at the site and how it is told".

National Park Service Historic Lighthouse Preservation Handbook Pat V.C, Page 7

Planning Assumptions:

That by 2014 the newly added admissions/gift shop will be in place and functioning, freeing the lighthouse proper to become solely a museum.

Limitations:

The National Park Service suggests five methodologies for communication at historic lighthouses;

1. Interpretive panels (signage)
2. Pamphlets, brochures and published histories
3. Guided tours
4. Living history/plays
5. Audio/audiovisuals

The objective of the interpretive materials should be to tell the stories as succinctly as possible without losing the key elements.

The Point Pinos story is too long and complex to be related in it's entirety during any one visit even under the guidance of the most dedicated docent. Therefore it is the responsibility of the committee to isolate those factors which are essential to the story and must be included in the visitor experience.

Additionally, the physical building has its own special limitations since it was constructed as primarily a residence, not a museum. In short, there are too many doors, windows, changes in floor elevations and broken up wall spaces to effectively communicate all the material available.

Tone:

History is story telling. The key to a successful interpretive plan is to tell the story in a way that relates to something with which the audience has a frame of reference.

For example;

Fresnel developed his lens in 1822

- or -

Fresnel developed his lens the year after Napoleon died.

-or-

Fresnel developed his lens 191 years ago.

-or-

Fresnel developed his lens the year the first freed American slaves landed in Liberia.

The committee's task is to determine which frame of reference is most meaningful to the most visitors.

Theme:

The Point Pinos story is composed of two major elements, one human and one physical. The interrelation of these two elements over time is what has created the history that is the Point Pinos story.

Human: The lives of the keepers *before, during and after* their tenure at Point Pinos and how they were effected by the times in which they lived.

Physical: The evolution of the light and all the elements that supported its maintenance over the years.

For the purposes of this plan we will deal primarily with the interpretive panels, though as new information about Point Pinos is introduced it will trigger the necessity for new means of communication.

The current brochure should not require any significant changes though it can be modified to provide more information to help the visitor with their self guided tour.

One of the most challenging limitations is the actual physical space available for communication material. This limitation is currently partially compensated for by the visitors interaction with the docents however it in no way communicates the majority of the information available.

Every inch of display space is precious and must be allocated on the basis of it's best use in communicating the Point Pinos story.

Suggested Additions to the Interpretative Program

Time Line:

The addition of a **time line** covering important events from the first european discovery of Point Pinos to modern times and relating these to concurrent events in the "outside" world.

Keepers:

1. A **common thread** linking keepers Chas. Layton and Wason through the outlaws Garcia and Tiburico and the beginning of their association in 1854 Monterey.
2. The **Frontier Family**, Chas. Layton his widow and Harris keeping the light operating in the isolated environment of the earliest days..
3. Wason the **politician** and his carer as sheriff, Sargent at Arms for the California Senate, collector of customs for the Puget Sound area and as a Washington state representative.
4. Luce the **Renaissance man** and his accomplishments, long tenure and contributions to the community.
5. Fish the **sophisticate** with her experience from Civil War thorough "civilizing" the Point Pinos environs.
6. Jeffry's **last posting** after experience as keeper at Battery Point prior to coming south.
7. Nelson's **last posting** experience at Pt. Sur prior to moving north.
8. Keepers **duties** in 1871 handbook

Events:

1. The San Francisco **earthquake** of 1906
2. David Jack and the **repurchase** of the lighthouse by congress.

3. The **founding** of Pacific Grove

4. The lighthouse and keepers in **literature**. R.L. Stevenson's travels/Steinbeck's To a God Unknown, Cannery Row, Sweet Thursday.

Physical:

1. The **construction** of the original structure. What came around the horn, what was locally sourced and how it was all put together.
2. The **evolution** of the light source, fuel, lamps and technology.
3. Potable **water** and its history at the site.
4. The mostly missing **outbuildings** and how they supported the lighthouse .

Available Space:

If available wall space for communication is defined as a clear run from floor to ceiling, the lighthouse structure, because it was designed as living quarters not a museum, is quite limited. In the main rooms open to the public (excluding the basement) approximately 79 lineal feet are available for display material.(see attached) All of these spaces, with the exception of about 8 lineal feet in the entry hall currently are covered with exhibits.

If the interpretive plan is to be implemented the a hierarchy of importance must be undertaken and some of the existing materials will need to be consolidated or retired. Over time materials have been accumulated which if not a hindrance to the visitor experience, certainly complicate it.

One methodology for determining what goes and what stays is called zero based budgeting. Simply, all exhibits are virtually removed and then replaced one at a time, based upon their contribution to the visitors experience, until there is no more exhibit space available.

Another possibility is to expand the exhibit space by hanging light weight foam core panels from the ceiling in the reception area. These panels can be constructed so that if the entire system is suspended from rods on hooks and could be removed easily for those times when an uncluttered meeting space is needed.

Finally, utilizing individual audio tours could greatly expand the communication with visitors. Since wall space to tell the lighthouse's stories is so limited and the stories so numerous, the graphics need only indicate the subject matter and a location code and a tailored message could be delivered on demand.

Timing:

Once an overall plan is in place then the implementation of its various parts can take place as funding and materials become available. Some areas will experience significant change, others only minor disruptions.

Since restoration has proven to be a disruptive factor, at least from a visitors standpoint, it is likely best to not physically implement any change in an area until the room in question has been refreshed by the preservation group. As currently scheduled, the World War II room would be next on the list followed by the cellar stair alcove. Planning for these two areas can commence now with other areas to follow in lockstep with the restoration program.

* NUMBERS
 INDICATE
 AVAILABLE
 HORIZONTAL
 WALL SPACE
 IN INCHES

