



MEMO TO THE HISTORIC PRESERVATION COMMISSION

HEARING DATE: April 20, 2022

April 20, 2022

Case Number: 2016-013156SRV-05
Project Address: SF Survey Community Engagement Framework
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Recommendation: Informational

Project Description

The San Francisco Citywide Cultural Resources Survey (SF Survey) is a multi-year effort to identify and document places and resources of cultural, historical, and architectural importance to San Francisco's diverse communities. The findings of SF Survey will help guide the Planning Department's work on future landmark designations, heritage-based initiatives, environmental review, new development projects, area plans, and building permit applications. Planning Department staff provided an update on SF Survey during the Historic Preservation Commission (HPC) hearing on March 16, 2022. To view related documents or contact information for SF Survey, please visit <https://sfplanning.org/sfsurvey>.

The SF Survey project team has developed a *Community Engagement Framework* (Draft – April 2022) to serve as an internal roadmap of the engagement and collaboration strategies that will guide and inform SF Survey findings. The document aligns with [HPC Resolution No. 1127: Centering Preservation Planning on Racial and Social Equity](#), forging innovative civic partnerships to include and engage communities typically underrepresented in historic preservation. The draft document provides context; equity and participation goals; five unique strategies with partnerships; and a list of tools and guidelines. The strategies are 1) internship program 2) neighborhood chats 3) community walks 4) community conversations and 5) collaborative digital platforms and media. Priority groups for community engagement include (but are not limited to) the following communities and their intersecting racial and social identities and experiences: youth; American Indian, Black, and other communities of color; low-income communities; and communities with limited English proficiency. This multi-layered community engagement approach seeks to further connect with the public and priority communities across the public participation spectrum: inform, consult, engage, collaborate, and ultimately empower. Planning aims to develop partnerships with other city agencies, historic preservation peers, community-based organizations, Cultural Districts, and other culture bearers.

The proposed community engagement strategies are informed by HPC Resolution No. 1127, as well as community feedback from ongoing Planning Department efforts, such as the development of historic context statements and focus group findings for SF Survey's Intangible Cultural Heritage Methodology. Additionally, the strategies build on lessons learned from outreach for the Housing Element Update 2022.

Racial and Social Equity Analysis

On July 15, 2020 the HPC adopted Resolution No. 1127: Centering Preservation Planning on Racial and Social Equity. Understanding the benefits, burdens, and opportunities to advance racial and social equity that proposed Preservation Planning documents provide is part of Planning's Racial and Social Equity Initiative. This is also consistent with the Mayor's Citywide Strategic Initiatives for equity and accountability and with the Office of Racial Equity, which required all departments to conduct this analysis.

The proposed *Community Engagement Framework* (Draft – April 2022) makes no substantive policy changes to the Planning Code or the Planning Department's procedures. The document would further racial and social equity in the following ways:

- Expand the engagement of underrepresented communities, including American Indian, Black, and other communities of color, youth, low-income communities, and communities with limited English proficiency in preservation planning matters.
- Engage Cultural Districts, community-based organizations, community members, and historic preservation peers in the co-creation of more inclusive processes related to cultural heritage and preservation planning through community-led conversations.
- Develop dynamic partnerships and collaborations with Cultural Districts, culture bearers, historic and cultural advocacy organizations and institutions, Planning, and the HPC. Collaborations will aim to build capacity and foster the transmission of cultural heritage through knowledge-sharing events and programming.
- Create deeper partnerships that allow collaboration on evolving or "living" tools where a greater need for community ownership is required.

Staff does not foresee any direct or unintended negative consequences from the *Community Engagement Framework* as the SF Survey project team will follow the "Recommendations for an Updated Approach to Preservation" section of the *Community Engagement Framework*.

Issues and Other Considerations

- SF Survey's engagement consultant, Erika Uribe from incommon, worked closely with Planning staff members Maggie Smith, Frances McMillen, and Melanie Bishop to develop the *Community Engagement Framework* (Draft – April 2022). Susan Parks and Marcelle Boudreaux assisted with the early development of the document.
- Planning staff members Rich Sucre, Shelley Caltagirone, Dré Torrey, Shannon Ferguson, and the communications team reviewed the *Community Engagement Framework*. Staff also shared the draft document with the Survey Advisors Group (SAG) for review. SAG members include Gwyneth Borden,

Head of Public Policy at Ground Floor Experiences; Robert Cherny, Professor emeritus of History at San Francisco State University; Sophie Hayward, Principal at Urban Praxis; Woody LaBounty, Vice President of Advocacy & Programs for SF Heritage; Diane Matsuda, Historic Preservation Commission President; Vince Michael, Ph.D, Executive Director of the San Antonio Conservation Society; Mark Ryser, San Francisco Beautiful; and Lydia So, Historic Preservation Commissioner.

Public Engagement

Planning staff provided a 20-day public notice of this SF Survey Community Engagement Framework item on the HPC Hearing Agenda to neighborhood groups and organizations across the city. Staff encouraged feedback and meetings to share more about the SF Survey project, the *Community Engagement Framework*, and opportunities for organizations to partner with the project. Staff reached out to participants from the Intangible Cultural Heritage focus groups, including San Francisco's Cultural Districts. Staff also worked with SF Heritage to publish an article on the SF Survey project and *Community Engagement Framework* in SF Heritage News for April-June 2022 and share content through social media. A copy of the *Community Engagement Framework* is available on the Planning Department's website and is accessible to the general public here:

https://sfplanning.org/sites/default/files/documents/preserv/SFsurvey/sfsurvey_community_engagement_framework_draft.pdf.

Next Steps

The SF Survey project team will address feedback from the HPC, begin to implement the strategies outlined in the *Community Engagement Framework*, and focus on partnership development. Staff is not seeking formal adoption of the *Community Engagement Framework* as the document is intended to evolve over the timespan of SF Survey. The project team will continue to co-design the proposed (draft) engagement strategies in consultation with community partners and will provide regular updates to the HPC on the implementation and evolution of the *Community Engagement Framework*.

Recommendation

No action will be taken at this hearing as this item is informational. Planning staff request HPC review of and comment on the *Community Engagement Framework* (Draft – April 2022) for SF Survey.

Attachments

Community Engagement Framework (Draft – April 2022) for SF Survey



COMMUNITY ENGAGEMENT FRAMEWORK

SAN FRANCISCO CITYWIDE CULTURAL RESOURCES SURVEY

DRAFT - APRIL 2022

CONTENTS

01 Introduction

Describes the project purpose and approach to [Historic Preservation Commission Resolution No. 1127: Centering Preservation Planning on Racial and Social Equity](#). This section also introduces a concise project narrative to be shared with members of the public through various outreach materials.

02 Context

Summarizes recent community engagement efforts guiding the *SF Survey* Community Engagement Framework.

03 Equity and Participation Goals

Describes equity and participation goals and provides an overview of target communities and participation strategies.

04 Community Engagement Strategies and Partnerships

Outlines the strategic partnerships needed to sustain the community's engagement with *SF Survey* and other preservation efforts over a long-term implementation process. Provides a description of engagement strategies.

05 Tools and Materials

Outlines key tools and materials to be co-designed with strategic partners.

06 Ethics and Transparency Guidelines

Defines principles of engagement with the public. Provides transparency and consent guidelines for data collected.

01 Introduction

The *San Francisco Citywide Cultural Resources Survey (SF Survey)* is a multi-year effort to identify and document places and resources of cultural, historical, and architectural importance to San Francisco’s diverse communities. These places and resources include tangible aspects of our environment, such as buildings, structures, objects, sites, and districts. *SF Survey* provides an opportunity to take steps to center preservation in racial and social equity, better reflecting the dynamic cultural resources¹ that make San Francisco unique. The findings of *SF Survey* will help guide the Planning Department’s work on future landmark designations, heritage-based initiatives, environmental review, new development projects, area plans, and building permit applications.

In parallel, the Planning Department is researching a survey approach to consider the non-physical aspects of a community’s cultural heritage, also known as Intangible Cultural Heritage, which include oral traditions and expressions; performing arts; social practices; rituals and festivals; and traditional crafts. Initial research involved the engagement of Cultural Districts, culture bearers, and advocates, as well as other city agencies through focus groups that explored why and how to document Intangible Cultural Heritage. Preliminary findings from this engagement process have shaped the *SF Survey* Community Engagement Framework and are summarized in Section 02 Context.

The *SF Survey* Community Engagement Framework is designed to support the dialogue between these two interdependent projects and to develop the civic partnerships that can sustain long-term public engagement in historic preservation and cultural heritage conservation efforts. The *SF Survey* project team will continue to co-design the proposed (draft) engagement strategies in consultation with community partners.

Premise

San Francisco has a history of implementing discriminatory policies, programs, and practices that perpetuate racial inequities “compounded by the intersection of race with class, gender, sexuality, immigration status, linguistic accessibility, disability, and other social identities and experiences.”² The City, its Historic Preservation Commission, and Planning Department, have implemented land use and zoning policies that “segregate, displace, disposes and extract wealth, land, and resources from American Indians, Blacks, and other communities of color.”³ Discriminatory institutional and systemic mechanisms have facilitated the forced removal, exclusion and erasure of property, history, heritage, and culture belonging to these communities. Today we share a built environment that “more often reflects the accomplishments and narratives of white people rather than the accomplishments and narratives of American Indian, Black and other peoples of color.”⁴

The Planning Department, Historic Preservation Commission, and the historic preservation profession have been responsible for assessing the cultural and historical “value” of places through a regulatory process known as “evaluation of significance.” These “expert” driven evaluations have excluded American Indian, Black, and other communities of color from decision-making processes, resulting in a narrow and incomplete approach to the interpretation and preservation of what is collectively valued and protected. As this regulatory framework continues to drive sensitive conversations and decisions related to cultural heritage, racial and social inequities are now being challenged. In 2020, the Historic Preservation Commission directed the Planning Department to

¹ Cultural resources are buildings, structures, objects, sites, and districts that are culturally, historically, and architecturally important to our communities and the city.

² Historic Preservation Commission, Resolution No. 1127 Centering Preservation Planning on Racial and Social Equity, hearing date July 15, 2020, 2.

³ Ibid., 2.

⁴ Ibid., 9.

center preservation planning on racial and social equity.⁵ Key recommendations to the Planning Department include (1) exploring creative approaches to “incorporate new ways of honoring and sustaining cultural heritage” and (2) expanding participation, building capacity, and funding partnerships with American Indian, Black, and other communities of color to ensure these communities can guide and lead the preservation of their historic resources and cultural heritage.

Purpose

The purpose of this document is to serve as a roadmap of the engagement and collaboration strategies that will guide and inform *SF Survey* and its approach to the intangible aspects of cultural resources and heritage. The goals of the Community Engagement Framework are to:

- Expand the engagement of underrepresented communities, including American Indian, Black, and other communities of color, youth, low-income communities, and communities with limited English proficiency in preservation planning matters.
- Engage Cultural Districts, community-based organizations, community members, and historic preservation peers in the co-creation of more inclusive processes related to cultural heritage and preservation planning through community-led conversations.
- Develop dynamic partnerships and collaborations with Cultural Districts, culture bearers, historic and cultural advocacy organizations and institutions, SF Planning, and the Historic Preservation Commission. Collaborations will aim to build capacity and foster the transmission of cultural heritage through knowledge-sharing events and programming.
- Create deeper partnerships that allow collaboration on evolving or “living” tools where a greater need for community ownership is required.

The following narrative defines the project purpose and serves as a compass for the proposed community engagement strategies. This concise narrative can be shared with members of the public through various outreach materials.

What is the San Francisco Citywide Cultural Resources Survey (SF Survey)?

SF Survey is a multi-year effort to identify and document places and resources of cultural, historical, and architectural importance to San Francisco’s diverse communities.

What are cultural resources?

Cultural resources are buildings, structures, objects, sites, and districts that are culturally, historically, and architecturally important to our communities and the city.

In the past, historic preservation efforts have been focused on “tangible cultural resources” – buildings, sites, objects, etc. Discriminatory policies and programs, and a narrow approach to preservation have resulted in a shared built environment that is more likely to exclude the accomplishments and narratives of American Indian, Black, and other communities of color. Locally (and globally) efforts to center preservation in racial and social equity are aligning with a growing need to foster and sustain other manifestations of culture, including oral traditions and expressions; performing arts; social practices; rituals and festivals; and traditional crafts. *SF Survey* will partner with community-based cultural

⁵ Ibid.

organizations to collectively honor, share, and celebrate the living qualities of heritage and the intangible aspects of our past that inform important spaces in our city.

Why are we doing SF Survey? Why does it matter?

San Francisco is a culturally layered and dynamic place.

The transmission of knowledge across generations brings continuity to the way of life and culture of communities. A deeper understanding of our histories and the contributions of those who came before us enhances our collective sense of belonging and agency in our communities. By bringing people together through community events and programming, *SF Survey* will contribute to sustaining San Francisco's diverse cultures.

The findings of *SF Survey* will help guide the Planning Department's work on future landmark designations, heritage-based initiatives, environmental review, new development projects, area plans, and building permit applications. Cultural resources may also qualify for preservation protections and incentives: <https://sfplanning.org/preservation-incentives>.

Where and when are we doing SF Survey?

Staff from the Planning Department will be gathering information in different neighborhoods throughout San Francisco from 2022 to 2026.

How are we doing SF Survey?

SF Survey will be completed through five interrelated components: Community Engagement; Citywide Historic Context Statement; Field Survey, Research, & Evaluation ; Findings & Adoption at the Historic Preservation Commission; and the culminating Cultural Resources Inventory.

For the Field Survey, our staff will be looking at the outside of buildings from the public right-of-way (such as streets and sidewalks) and will be wearing identifying gear. We will not ring your doorbell or ask to see the interior of your home.

Get Involved!

Everyone has a role in sharing and sustaining culture. If you see us in our identifying *SF Survey* gear, please feel welcome to come out, meet us, and share any photos or memories that you feel are important to the story of your community, neighborhood, and/or San Francisco. We will be collecting information on our survey devices, or you can share by contacting us (see below).

Subscribe to receive *SF Survey* updates, Historic Preservation Commission (HPC) Hearing presentations, and learn about *SF Survey* programs and events organized with community partners.

Contact Us

Get in touch with us by emailing CPC.Survey@sfgov.org or leaving a voicemail at (628) 652-7573. Visit our website: <https://sfplanning.org/sfsurvey>.

02 Context

The Historic Preservation Commission's and the Planning Department's efforts to safeguard San Francisco's built environment and heritage have increasingly focused on identifying and preserving cultural resources associated with communities of color and other marginalized groups.⁶ These efforts include community partnerships to collaborate on the development of historic context statements, many of which are still to be adopted and will require deeper community engagement. The adoption of these documents will give visibility to the significant contributions and stories of marginalized communities and help the City understand what needs to be protected.

Recognizing that many aspects of the cultural heritage of marginalized social, racial, and ethnic groups are not represented in the built environment, the Historic Preservation Commission has developed tools such as the Legacy Business Registry and the Cultural Districts Program, which aim to recognize and sustain the living aspects of culture.

The proposed community engagement strategies are informed by the Historic Preservation Commission directive to center preservation planning on racial and social equity. They are also based on community feedback from ongoing Planning Department efforts, such as the development of historic context statements and the research of an approach to intangible cultural heritage (key findings outlined below). Additionally, the community engagement strategies build on lessons learned from the implementation of the second phase of outreach for the *Housing Element Update 2022*.

Intangible Cultural Heritage Focus Group Findings

From September 2020 through February 2021, Planning organized conversations with Cultural Districts, culture bearers, and advocates.⁷ These conversations highlighted the need to address the reasons why material culture from marginalized communities is not represented in the built environment, and honor and support the continuous living aspect of their cultures. This approach challenges existing tools and criteria for identifying and documenting cultural resources that are not designed to capture the invisible histories that places hold, the histories held by community (oral traditions, relationships, moments in time), and the culture and way of life of oppressed and displaced communities.

Findings from these focus group conversations indicate that preservation processes with a "cataloguing" approach that are geared toward legislative action (adoption) are challenging to many cultural groups. Focus group participants discussed how, driven by prioritization, such top-down processes result in the exclusion of many communities and what they value. To some communities "cataloguing" can be traumatic (processing the loss of cultural knowledge and traditions), anxiety-inducing (perceived as a big responsibility that needs to be comprehensive), divisive (undermining of existing community-led efforts and confronting cultural groups to variants in memory), and extractive. Participants mentioned that some communities do not trust the government with their culture. They cautioned the role of government in developing a "comprehensive" catalogue of cultural values and traditions and reflected on how over-regulation could amplify harm to marginalized communities.

⁶ Historic Preservation Commission, Resolution No. 1127 Centering Preservation Planning on Racial and Social Equity, hearing date July 15, 2020, 6.

⁷ Focus groups held with culture bearers and advocates as part of the Intangible Cultural Heritage Methodology Project methodology for tangible and intangible cultural heritage assets project, September 2020 to February 2021.

Center Preservation in Racial and Social Equity

Focus group participants were highly concerned about racial and social equity in preservation matters. The cultural losses resulting from redevelopment, gentrification, displacement, genocide, and inequality, as well as the lack of opportunities to heal from such losses and sustain the way of life of their communities were common themes in these conversations. Participants recommended the following priorities should guide future preservation efforts:

- Recognize cultural loss and document what led to— and continues to—perpetuate such loss.
- Advance racial and social equity and amplify the voices of women and the most marginalized members within cultural groups.
- Foster cultural competency and protection of rights needed to ensure communities can exercise the right to express their culture and feel safe.
- Develop trust-based partnerships with communities by building relationships that honor and respect the layers of community knowledge and ancient traditions.
- Support allyship across cultural communities while respecting and acknowledging the distinctive role of the Ramaytush Ohlone as original inhabitants and stewards of San Francisco.
- Align resources and organizing capabilities behind community-driven efforts and initiatives.
- Develop clear and transparent communication and decision-making protocols, and manage information with accountability.

Focus group participants expressed the need for San Francisco to develop a shared framework that embraces a broader definition of cultural values and traditions, creating common language for the City and communities to approach cultural heritage. Participants also referred to this framework as a "cultural empowerment movement" or a "cultural history and cultural freedom movement."

Recommendations for an Updated Approach to Preservation

Recognizing that "community is the source of culture," culture bearers and advocates made recommendations for an updated approach to preservation that can support the community's ownership of dynamic histories and cultures. Key recommendations included:

- *Partnerships* – Working in partnership with other city agencies, community-based cultural organizations, and culture bearers. For example, formalizing collaborations related to cultural heritage between Planning and the San Francisco Public library, and funding of existing community-based initiatives, events, and cultural curriculum in public schools.
- *Knowledge-sharing and cultural awareness* – Providing assistance in transmitting and sustaining cultural heritage, with a focus on younger generations, marginalized communities, and groups beyond the culture holders. Raising awareness of diverse histories and cultural values across communities, and within City departments and the historic preservation profession. Developing a common language, framework, and values for the City and communities to approach cultural heritage.
- *Accountability and Transparency* – Correcting knowledge-sharing patterns that exclude certain groups by lifting barriers to access knowledge and information, implementing transparent engagement and data management processes, and managing information that belongs to the community *with the Community*. Planning should improve processes to remain accountable and respectful of the agency of culture bearers and cultural communities.

03 Equity and Participation Goals

Equity Goals

The community engagement framework implements the Historic Preservation Commission resolution to center racial and social equity in preservation planning by forging innovative civic partnerships to expand the engagement of American Indian, Black, and other communities of color, as well as youth, low-income communities, communities with limited English proficiency, and other marginalized groups.

Priority groups for community engagement include (but are not limited to) the following communities and their intersecting racial and social identities and experiences:

- Youth
- American Indian, Black, and other communities of color
- Low-income communities
- Communities with limited English proficiency

Participation Goals

A multi-layered community engagement approach will seek to further connect with community members across the public participation spectrum:

inform > consult > engage > collaborate > empower

PUBLIC PARTICIPATION SPECTRUM*

* International Association for Public Participation

- *Inform* and *consult* neighbors and community members about the *SF Survey* process.
- *Engage* communities, and local cultural/history advocacy groups in conversations about preservation of cultural heritage, and approaches to uplift and sustain intangible culture.
- *Collaborate* with local cultural/history advocacy groups, community organizers, and historic preservation peers in the co-design of cultural programming and events.
- *Empower* priority communities
 - (1) by increasing representation of American Indian, Black, and communities of color in careers related to cultural heritage such as preservation and planning;
 - (2) to share knowledge, history, and culture through partnerships with community-based institutions, organizations, and culture/knowledge bearers; and
 - (3) to evaluate and guide regulatory frameworks and decision-making processes.

On a periodic basis, *SF Survey* will share progress and seek review, comment, and document approval at Historic Preservation Commission Hearings. *SF Survey* will engage with the Board of Supervisors regarding phasing, events in their districts, and collaboration with community partners.

Prior to seeking review by formal city bodies, *SF Survey* will seek review, comment, and document approval from the Survey Advisors Group, which consists of eight members with expertise in preservation and cultural heritage, planning and policy, history, and community advocacy. Eight core members will support *SF Survey* throughout the life of the project while two additional members will rotate on during each geographic phase to provide expertise specific to relevant communities or topics.

Overview of Community Engagement Strategies & Goals

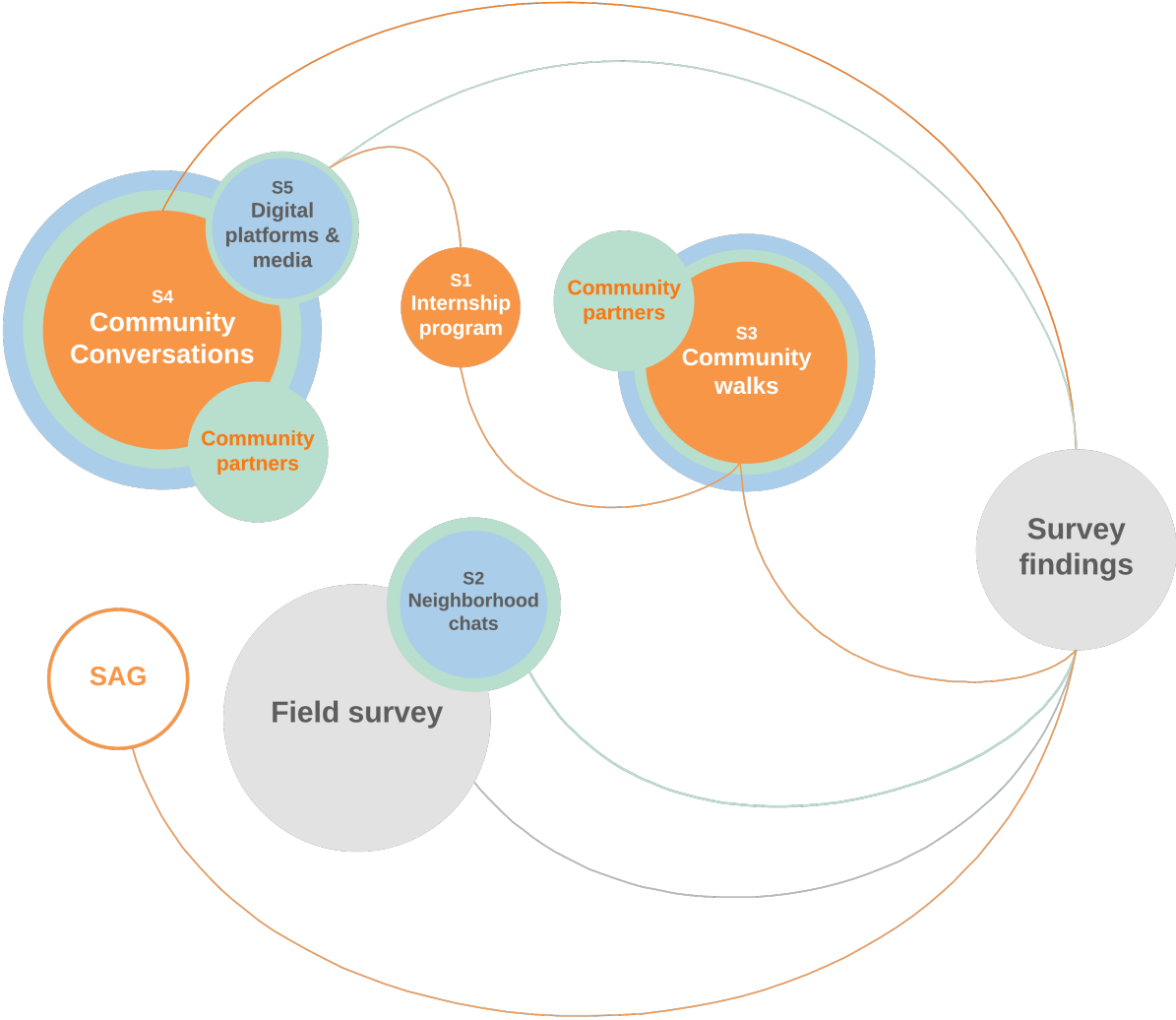


Diagram 1: Interconnected community engagement strategies

Table 1: Overview of community engagement strategies

Strategies	Participation and equity goals ⁸	Priority communities	Strategic partner(s)
Strategy 1 Internship program	<i>Empower: (1)</i> Increase representation of American Indian, Black, and other people of color in careers related to cultural heritage such as preservation and planning.	Youth, American Indian, Black, and other people of color	Planning’s summer internship program
Strategy 2 Neighborhood Chats	<i>Inform and consult</i> neighbors and community members about the <i>SF Survey</i> process.	Neighbors on survey route	Planning’s <i>SF Survey</i> team, community-based organizations
Strategy 3 Community walks	<ul style="list-style-type: none"> • <i>Inform and Consult</i> about the <i>SF Survey</i> process. • <i>Engage</i> priority communities in cultural heritage and preservation matters. • <i>Collaborate</i> with local cultural/history advocacy groups, community organizers, and historic preservation peers in the co-design of cultural programming and events. • <i>Empower: (1)</i> increase representation of priority communities in cultural heritage and preservation matters; and <i>(2)</i> share knowledge, through community-based partnerships and initiatives. 	Youth, American Indian, Black, and other people of color, low-income communities, communities with limited English proficiency	Cultural Districts, cultural advocacy groups, historic preservation peers, and community knowledge bearers
Strategy 4 Community conversations	4a <ul style="list-style-type: none"> • <i>Inform and Consult</i> about the <i>SF Survey</i> process. • <i>Engage</i> local cultural/history advocacy groups and historic preservation peers in conversations about preservation planning and approaches to uplift and sustain cultural heritage. • <i>Empower: (1)</i> increase representation of priority communities in cultural heritage and preservation matters; <i>(2)</i> share knowledge, through community-based partnerships and initiatives; and <i>(3)</i> evaluating and guiding regulatory frameworks and decision-making processes. 	Community members and community-based organizations with a cultural advocacy affiliation	Cultural Districts, cultural advocacy groups, and historic preservation peers
	4b <ul style="list-style-type: none"> • <i>Inform and Consult</i> about the <i>SF Survey</i> process. • <i>Engage</i> community members in conversations about preservation planning and approaches to uplift and sustain cultural heritage. 	General public with a focus on youth	City agencies with broad community reach, i.e., Public Library
Strategy 5 Collaborative digital platforms & media	<ul style="list-style-type: none"> • <i>Inform and consult</i> community members about the <i>SF Survey</i> process. • <i>Collaborate</i>: Create deeper partnerships that allow collaboration on evolving or “living” documents and tools, i.e., Historic Context Statement. 	General public; All priority communities	Planning’s communications and <i>SF Survey</i> teams; all of the above partners

⁸ Participation spectrum goals may vary within each strategy.

04 Community Engagement Strategies and Partnerships

Strategy 1: Internship Program

Partner(s): Planning's Summer Internship Program

Representation within Planning is a key component of centering preservation planning in racial and social equity and a major concern for priority communities. Areas of underrepresentation often include the design of community outreach efforts, the make-up of teams in direct contact with communities, as well as policy design and decision-making processes.

An internship program focused on creating opportunities for priority communities within the Planning Department, and more specifically in the field of cultural heritage and preservation planning, is a first step towards deeper representation. The internship program should be linked to further resources and access to career development, training, and knowledge-sharing opportunities.

The internship program could support the following activities:

- S2 Neighborhoods chats
- S3 Community walks
- S5 Digital platforms and media

Internship recruitment will be targeted to local high school seniors and higher education students.

Strategy 2: Neighborhood Chats

Partner(s): Planning's SF Survey team, community-based organizations

Neighborhood chats are an extension of the fieldwork, integrating technical and community engagement processes to make preservation more accessible and friendly. More people are now working from home, providing an opportunity for the project team to casually meet and talk to residents in their own communities. Staff conducting the survey will make themselves visible by wearing an orange lanyard. A dedicated member of staff will be available during field surveys to answer neighbors' questions, engage in conversation and digitally collect materials, stories, or memories that residents wish to share.

Neighborhoods have a wealth of community organizations with boots on the ground that may be interested in accompanying the survey team, co-designing the facilitator guide, and guiding informal conversations with residents.

Materials and feedback collected through the survey devices will be added to the digital participation platform (Arches). Residents will be invited/recruited to participate in future *SF Survey* community events.

Tools: A facilitator guide will be developed to include FAQs, principles to engage in conversation, and instructions on how to digitally collect materials. Memorandum of Understanding (draft underway).

Strategy 3: Community Walks

Partner(s): Cultural Districts, cultural advocacy groups, historic preservation peers, and community knowledge bearers

Community walks are *SF Survey* sponsored events led by community partners. The walks weave together the histories and contributions of diverse San Francisco communities, participants' knowledge, the built and natural environment, and social and cultural movements. The walks provide an opportunity for Planning to inform community members about the *SF Survey* process, and for community members to share knowledge and feedback with Planning staff. Community walks may focus on the neighborhoods where *SF Survey* fieldwork has recently taken place, but other neighborhoods are also invited to participate.

Partners' role:

- Recruit participants with a focus on priority communities (estimated participants: 10-15; duration: 1.5 hours).
- Coordinate invitations and communications with participants.
- Co-design with Planning staff a community walk.
- Prepare collateral materials (as needed).
- Facilitate event.
- Help gather anonymized demographic data of participants.
- Provide translation services (as needed).
- Collect any post-event feedback, document walk (route) and highlights.

SF Planning's role:

- Co-design with Partner(s) a community walk.
- Provide financial support.
- Participate in walk, provide information about *SF Survey* in general and specific to properties surveyed in the neighborhood, and answer community members' questions.
- Learn from community members.
- Digitally collect materials, stories, or memories that community members wish to share.

Tools: Memorandum of Understanding (draft underway) outlining walk duration, location, structure, recruitment targets, roles, responsibilities, ethics, transparency, and financial support guidelines. Demographic survey.

Strategy 4a: Community Conversations

Partner(s): Cultural Districts, cultural advocacy groups, and historic preservation peers

Community Partners will convene and co-facilitate events with SF Planning as a co-host/special guest. Community conversations would be co-designed with Planning, and can be adapted to programming already in place in these organizations. Community partners would be responsible for convening, co-hosting, and co-facilitation.

Potential conversation topics:

- Overview of *SF Survey* process and findings.

- New approaches to uplift and sustain cultural heritage with a focus on the contributions and histories of underrepresented communities.
- Centering preservation planning in racial and social equity (policy and decision-making processes).
- San Francisco’s shared framework of cultural values and traditions that embraces a broader definition of cultural values and traditions, also referred to as "cultural empowerment movement" or “cultural history and cultural freedom movement.”

Partners’ role:

- Recruit participants with a focus on priority communities (estimated participants: 10-20; duration: 1-1.5 hours).
- Coordinate invitations and communications with participants (i.e., venue and/or digital platform details).
- Co-design with Planning staff a community conversation.
- Prepare collateral materials (as needed).
- Facilitate event.
- Help gather anonymized demographic data of participants.
- Provide translation services (as needed).
- Review of summary of findings from event.
- Collect any post-event feedback.

SF Planning’s role:

- Co-design of conversations.
- Co-design with Partner(s) a community conversation.
- Participate in conversation, provide information about *SF Survey* in general and specific to properties surveyed in the neighborhood, and answer community members’ questions.
- Learn from community members.
- Digitally collect materials, stories, or memories that community members wish to share.

Tools: Roadshow presentation (4a) and Memorandum of Understanding (draft underway).

Strategy 4b: Community Conversations

Partner(s): City agencies with a broad community reach (i.e., San Francisco Public Library)

Explore opportunities to co-design a series of events through existing programming. Events could be in-person or virtual and led by a community partner. Program could be targeted to youth and in-language options could be integrated depending on the community partner’s resources.

With a goal to inform and engage, events could be focused on knowledge-sharing and cultural awareness.

Potential conversation topics:

- Overview of *SF Survey* process and findings.
- Preservation and cultural heritage (what it is, why it matters and who is it for/ by).
- New approaches to uplift and sustain cultural heritage with a focus on the contributions and histories of underrepresented communities.

Tools: Roadshow presentation (4b) and Memorandum of Understanding (draft underway).

Strategy 5: Collaborative Digital Platforms & Media

“LIVING” DOCUMENT PROGRAM

A collaborative digital platform will be set up to make the Citywide Historic Context Statement (HCS) documents a living tool that is accessible to community experts, Planning staff, and the general public. This collaborative environment will support:

- Text and images
- Image upload and comments by the general public
- Commenting by community contributors
- Editing by community moderator and Planning staff
- Easy organization and access to references and research sources

DIGITAL COMMUNITY PLATFORM TOOLS

Visualization of community feedback, materials, and stories shared (can upload materials and input collected from Strategies 2 and 3) in Arches. The project team will develop an outline of questions to ask the community. These questions will provide structure to both online and in person community events. Moderating of comments may be required.

Other digital platforms and media *SF Survey* project webpage on the Planning website (sfplanning.org/sfsurvey) will have *SF Survey* updates, survey areas, and calendar of *SF Survey* community events. Updates can be shared via social media more regularly and funnel through to the website. Staff will post updates on social media from the field and events. Social media posts will be embedded in website. Staff will also share updates through various news media outlets.

Tools: Project webpage, Arches, social media platforms, and various newspapers.

DIGITAL COMMUNITY PLATFORM TOOLS

Visualization of community feedback, materials, and stories shared (can upload materials and input collected from Strategies 2 and 3) in Arches.

Project team will develop an outline of questions to ask the community. These questions will provide structure to both online and in person community events. Moderating of comments may be required.

Tools: Project webpage, Arches, social media platforms, and various newspapers.

05 Tools & Materials

POSTCARD

Postcard mailed to interested organizations, residents, and owners of property in upcoming survey areas to notify them of *SF Survey*.

FAQS / PRESS RELEASE

The Community Engagement Framework can be used as an outline for FAQs, press releases, news articles, and other communications.

DIGITAL PARTICIPATION FRAMEWORK

- Planning website updates
- Arches platform
- Social media platforms and various newspapers

ROADSHOW PRESENTATION

Draft underway, to be further developed with community partners.

NEIGHBORHOOD CHAT FACILITATORS' GUIDE

Draft underway, to be further developed with community partners.

STRATEGIC PARTNERSHIPS

Memorandum of Understanding (MOU) draft underway describing roles and responsibilities, financial supports, level of effort, and ethics and transparency guidelines.

06 Ethics and Transparency Guidelines

Selection of Community-Based Organizations (CBOs)

The *SF Survey* project team will use the following criteria to identify potential community partners:

- Can support a long-term partnership (2+ years).
- Are currently running community-focused programs that *SF Survey* can help further/expand.
- Hold community knowledge and are able to reach priority communities.
- Have experience developing community capacity-building programs that align with or further SF Planning's racial and social equity goals.
- Experience in preservation is not required, but partners should have boots-on-the-ground experience with running cultural, history or youth-focused programs, and/or the ability to deliver cultural programs in-language.

Participation

Participation is voluntary and participant CBO's can withdraw at any time and/or nominate other organizations to continue engagement with the project. Participation is not an endorsement of Planning's policies or processes.

Respect Human Dignity and Integrity

This community-led engagement pilot will foster a collaborative spirit and prioritize dignity, equity, and respect for people's way of life, culture and differences, while working within a human rights framework. Planning staff and participant CBOs will take into consideration the recognition of harm, intersectionality, racial and social equity, when engaging priority communities and vulnerable groups including, but not limited to, American Indians, Blacks, and other people of color.

The goal is to outline the civic partnerships required for long-term community engagement and to empower CBO participants and community members to progressively shape the process and its outcomes.

Privacy

Participants' details and personal information will be kept confidential with the exception of information included in the Memorandum of Understanding (MOU) draft underway which includes CBO name, point of contact, partnership type, and level of financial support offered. As part of the engagement process CBO partners will help collect demographic information from community members. This information will be anonymized.

Consent, Data Use, and Storage

All materials related to this engagement pilot will be public and part of the Community Engagement Framework, including the MOU (draft underway), records of financial support payments made to partner CBOs, and selection criteria for focus group community partners. These guidelines will apply to all partner CBOs.

Events may be recorded (audio and/or visual) for research and analytical purposes. Recording consent will be confirmed by the partner CBO and Planning staff with all participants prior to, and after each event; the use of

the recorded materials is limited to Planning Preservation staff for the purposes of this project. Recorded material and feedback will be stored on a secure internal Planning folder. Materials shared by participants (photos, histories, memories) will be securely stored on the Arches data management platform. Consent to publicly share these materials will be explicitly requested.

Financial Incentives

The financial support being offered is intended to cover some of the costs and burdens associated with the community work the CBO partners will perform, and as a recognition of their efforts.

Verification

This partnership framework aims to be adaptable to participants' needs, and responsive to feedback from CBO partners during planning and implementation, and a learning mechanism for meaningful community-led engagement. After the implementation of this pilot, SF Planning will request CBO partners to verify findings and provide additional feedback to help improve future community-led engagement efforts with the agency.