



**CULTURAL
RESOURCES
SURVEY**



HPC Hearing
November 17, 2021
Q4 Update
cpc.survey@sfgov.org

WHO ARE DEPARTMENT STAFF?

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METHODOLOGY

COMMUNITY OUTREACH STRATEGY

HISTORIC CONTEXT STATEMENT

DATA COLLECTION & MANAGEMENT

PHASING & SCHEDULE

NEXT STEPS

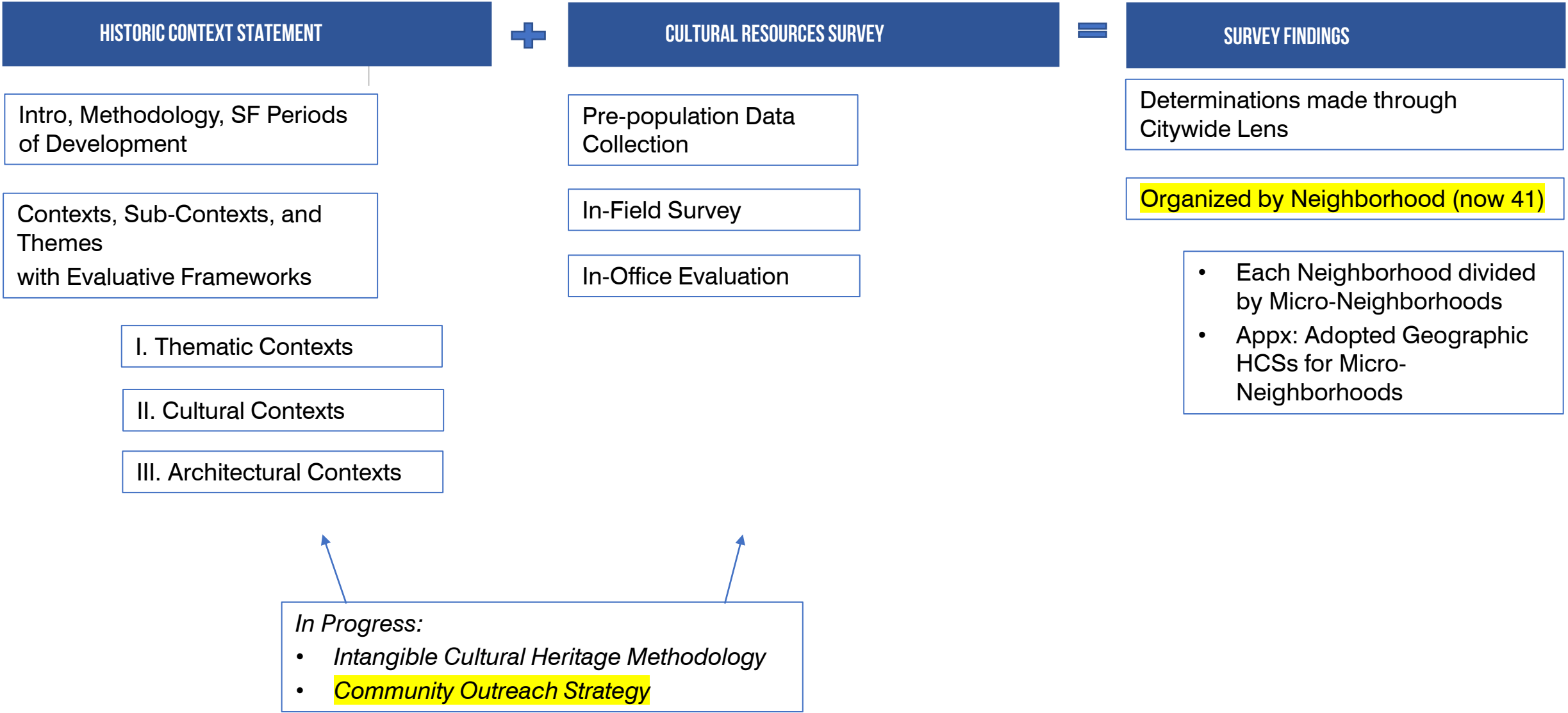


METHODOLOGY

San Francisco is a culturally layered and dynamic place.

By bringing people together to honor, share, and celebrate their histories, SF Survey aims to sustain San Francisco's cultures. 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.

As well as raising public awareness of cultural resources, **SF Survey findings will guide the Planning Department's decisions on new development, area plans, and building permit applications.** Cultural resources, such as buildings, structures, objects, and areas of historic significance, may also qualify for protections and incentives.



WHAT IS THE INTANGIBLE CULTURAL HERITAGE METHODOLOGY?

Guiding Document for SF Survey Practices, that:

- **Defines** Tangible Resources vs. Intangible Assets
- **Responds** to communities' ideas of ICH and sharing history
- Makes **Recommendations** on
 - how to engage with communities,
 - what data each group wants collected (events, sites) and
 - places the power to decide what is shared and how into the hands of the knowledge bearers. (for arches/in-field survey)
- **Establishes** methods for capacity-building and buy-in for each respective group
- **Acknowledges** that staff are planning professionals, by placing decision-making into the hands of the knowledge bearers.



Pause and ask the community what do they want?



Pause and ask the community what do they want?



What should we expect to hear?

- Each group will have **different ideas**,
- Each group **different levels of trust**, and
- Each group will have **different ownership concerns**.
- **To collect different data** for each group in response to that
- To follow this approach as we make our future findings by **engaging with knowledge bearers**.



WHO MAKES UP THE SURVEY TEAM?

PRESERVATION PLANNING STAFF

- Produce and review contexts/theme studies
- Develop data collection tools
- Gather and import legacy data
- Conduct survey fieldwork
- Research properties
- Conduct community outreach
- Internal Working Group

CONSULTANTS & INTERNS

- Produce contexts/theme studies
- Gather and import legacy data
- Conduct survey fieldwork
- Conduct community outreach
- Establish Cultural Heritage Methodology

HISTORIC PRESERVATION COMMISSION

- Representative on SAG
- Review proposed survey methodology
- Review contexts/themes
- Adopt contexts/themes
- Adopt survey findings

SURVEY ADVISORS GROUP (SAG)

- Core SAG (Academic/ Planning Professionals)
- Rotating SAG (Community Members/ Organizers)
- Review proposed survey methodology
- Review Draft Documents/Eval. Frameworks
- Provide expertise during survey

TECHNICAL SUPPORT

- Getty Conservation Institute (GCI)
- Farallon Geographics, Inc.
- SF Planning IT Staff
- SF Planning Community Equity Team
- InCommon (Cultural Heritage Methodology)
- Outreach Consultants (Future)

PUBLIC

- Participate in focus groups
- Participate in Community Meetings/HPC hearings
- Provide information through engagement activities/website
- Interactive Arches Platform
- Serve on SAG

SURVEY ADVISORS GROUP (SAG)

- **Core SAG**

- 7 members:**

- HPC Commissioner(s): Commissioner Matsuda
 - SF Heritage/Advocacy: Woody LaBounty
 - HPFC: Mark Ryser
 - Cultural Heritage: Vincent Michael
 - SF Historian: Bob Cherny
 - Public Policy: Gwyneth Borden
 - Preservation Planner: Sophie Hayward

- **SAG rotating:**

- 3-4 members/phase:**

- Supervisor Selection of representatives from neighborhood groups
 - Community stakeholders
 - Community historians
 - Historical and cultural societies
 - Cultural District representatives





COMMUNITY OUTREACH STRATEGY

Community Outreach Strategy

The purpose of this document is to serve as an internal roadmap of the community outreach and engagement goals and strategies that will guide and inform SF Survey. The first draft documents goals and strategies developed as a collaboration between InCommon and SF Planning staff from September to October 2021.

The proposed strategies are informed by community feedback and lessons learned from relevant Planning Department efforts including: *Comprehensive survey methodology for tangible and intangible cultural heritage assets*, and *Phase 2 Outreach of the Housing Element Update 2022*.

The following sections are included in this draft document:

Challenges and Lessons Learned

Summary of challenges and lessons learned in developing Historic Context Statements and key findings from focus groups with culture bearers and advocates as part of the Comprehensive survey methodology for tangible and intangible cultural heritage assets project.

Project Background

Concise messaging to be shared with members of the public through various outreach materials. Clearly defines project purpose and serves as a compass for the community outreach strategies.

Equity and Engagement Strategies

Defines equity and participation goals, and provides an overview of target communities and engagement strategies.

Strategic Partnerships Framework

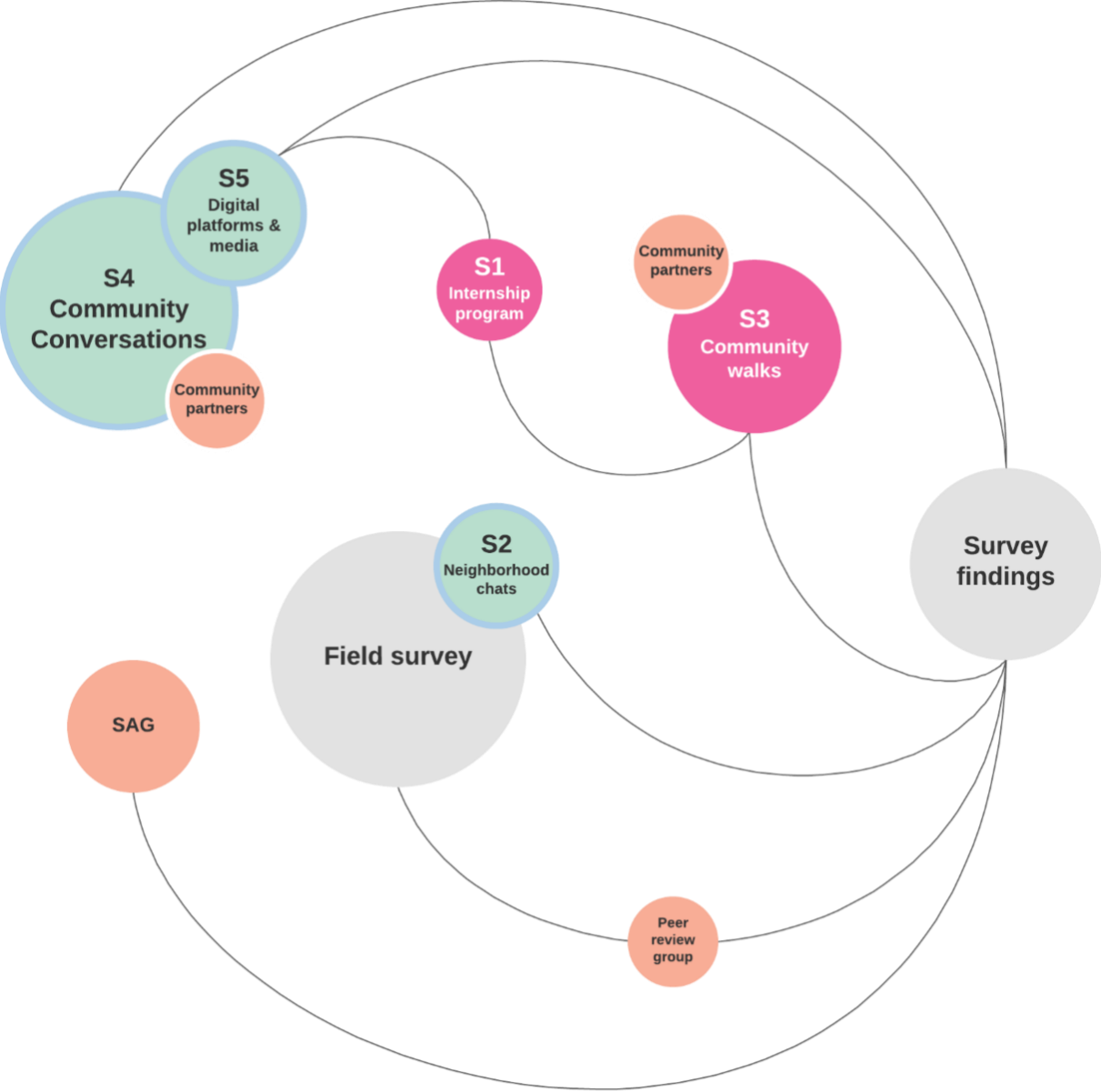
Identifies key institutions, groups, and existing programs that may be able to sustain the community's engagement with SF Survey over a long-term implementation process. Provides a description of engagement strategies.

Ethics and Transparency Guidelines

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

Tools and materials Outlines key tools and materials. Please note these will need to be co-designed with strategic partners and may not be defined within this strategy document.

COMMUNITY OUTREACH



inform > consult > engage > collaborate > empower

PUBLIC PARTICIPATION SPECTRUM*

* International Association for Public Participation



CITYWIDE HISTORIC CONTEXT STATEMENT

(1848-1989)

I. THEMATIC CONTEXTS

SUB-CONTEXTS

1. Residential (1848-1989)

A. Single-Family

B. Multi-Family

2. Commercial (1848-1989)

A. Downtown Core

B. NCDs

3. Industrial (1848-1989)

– no sub-context –

4. Government, Planning, &
Infrastructure (1848-1989)

A. Municipal & Federal Buildings

B. Planning & Engineering

C. Military Presence

D. New Deal Era

5. Private & Public Institutional
(1848-1989)

A. Houses of Spirituality

B. Private Education

C. Recreation & Culture

D. Health & Medicine

E. Burial & Memory

F. Mass Media & Communications

6. Events that Shaped the City
(1848-1989)

– no sub-context –

7. Other

A. Artistic Expression

B. Landscapes

What is the Evaluative Framework?

- Statement of Significance
- Period of Significance
- Justification of Period of Significance
- Geographic Boundaries
- Related Themes of Significance
- Criteria for Eligibility
- Associated Property Types
- Property Type Descriptions
- Eligibility Standards
- Character-Defining Features
- Integrity Considerations

“Historic context statements are intended to **provide an analytical framework for identifying and evaluating resources**...explaining what aspects of geography, history, and culture significantly shaped the physical development of a community...what important property types were associated with those developments, why they are important, and what characteristics they need to have to be considered an important representation of their type and context.”

-- California Office of Historic Preservation

II. CULTURAL CONTEXTS (BY STATUS)

Priority

1. American Indian HCS

Adopted Contexts

1. **JCHESS** (ad. 2014)
2. **LGBTQ HCS** (ad. 2015)
3. **Filipino Addendum to SoMa HCS** (ad. 2013)

In-Progress Contexts

1. **Latino HCS**
2. **African American HCS** (reqs. outreach)
3. **Chinese-American HCS**
4. **Italian-American** history documented through:
 - a. **North Beach HCS**
 - b. **Excelsior/Portola HCS** (intern project)
5. **Russian HCS** (intern project)
6. **Counter-Culture** (Haight/Citywide NR MPD)

In-Progress Data Collection

1. **Women's Rights HCS** (intern project)
2. **Jewish** (separate context statement) documented through:
 - a. **Russian HCS** (intern project)
 - b. **Excelsior Portola HCS** (intern project)
3. **German** spreadsheet

To Be Started Context/Data

1. Irish American
2. South Asian (India/Pakistan/Bangladesh/Sri Lanka)
3. Southeast Asian (Thailand/Vietnam/Cambodia)
3. Middle East/North Africa (MENA)
4. **Pacific Islander**

- **Bolded text** indicates under contract, in-progress, or completed documentation.

IN-PROGRESS CONTEXT/THEME DOCUMENTS

Ongoing

- New Deal Era
- Residence Parks
- African-American

Consultant-Produced

- Modern Addendum, 1965+
- Panama Pacific Int'l Expo & the Marina, 1910-1930
- Private Institutions (Housing Element)
- Neighborhood Commercial Buildings (Housing Element)
- Flats & Small Apartments (Housing Element)
- Chinese-American (Housing Element)
- Early Residential Development (1848-1880) (Housing Element)

Thematic

- Redevelopment Agency Projects (pending outreach)
- Earthquake Shacks (HPC Adoption – today)
- Mass Media: Telephone and Telegraph Sites
- Mass Media: Newspapers & Publishing
- Mass Media: Broadcast Stations
- Murals
- Transit Infrastructure
- Architect Biographies (Men & Women) (Early 2022 Adoption)

Architectural Styles

- Gilded Age Styles (Early 2022 Adoption)
- Mediterranean/Spanish Colonial Revival
- Period Revival Styles
- American & California Styles



DATA COLLECTION & MANAGEMENT

OBJECTIVE

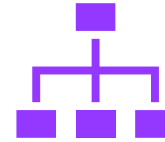
To **collect** information in the
field



DATA COLLECTION & DATA MANAGEMENT

OBJECTIVE

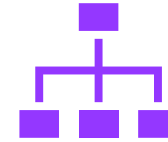
To **collect** information in the **field**, refer to the **Historic Context Statement**



DATA COLLECTION & DATA MANAGEMENT

OBJECTIVE

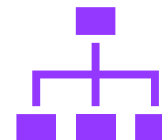
To **collect** information in the **field**, refer to the **Historic Context Statement**, and to efficiently organize our **research and existing documentation**



DATA COLLECTION & DATA MANAGEMENT

OBJECTIVE

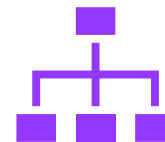
To **collect** information in the **field**, refer to the **Historic Context Statement**, and to efficiently organize our **research and existing documentation** for **individual properties**



DATA COLLECTION & DATA MANAGEMENT

OBJECTIVE

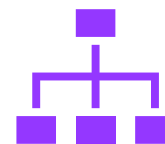
To **collect** information in the **field**, refer to the **Historic Context Statement**, and to efficiently organize our **research and existing documentation** for **individual properties**, **districts**



DATA COLLECTION & DATA MANAGEMENT

OBJECTIVE

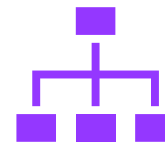
To **collect** information in the **field**, refer to the **Historic Context Statement**, and to efficiently organize our **research and existing documentation** for **individual properties**, **districts**, and **intangible resources**



DATA COLLECTION & DATA MANAGEMENT

OBJECTIVE

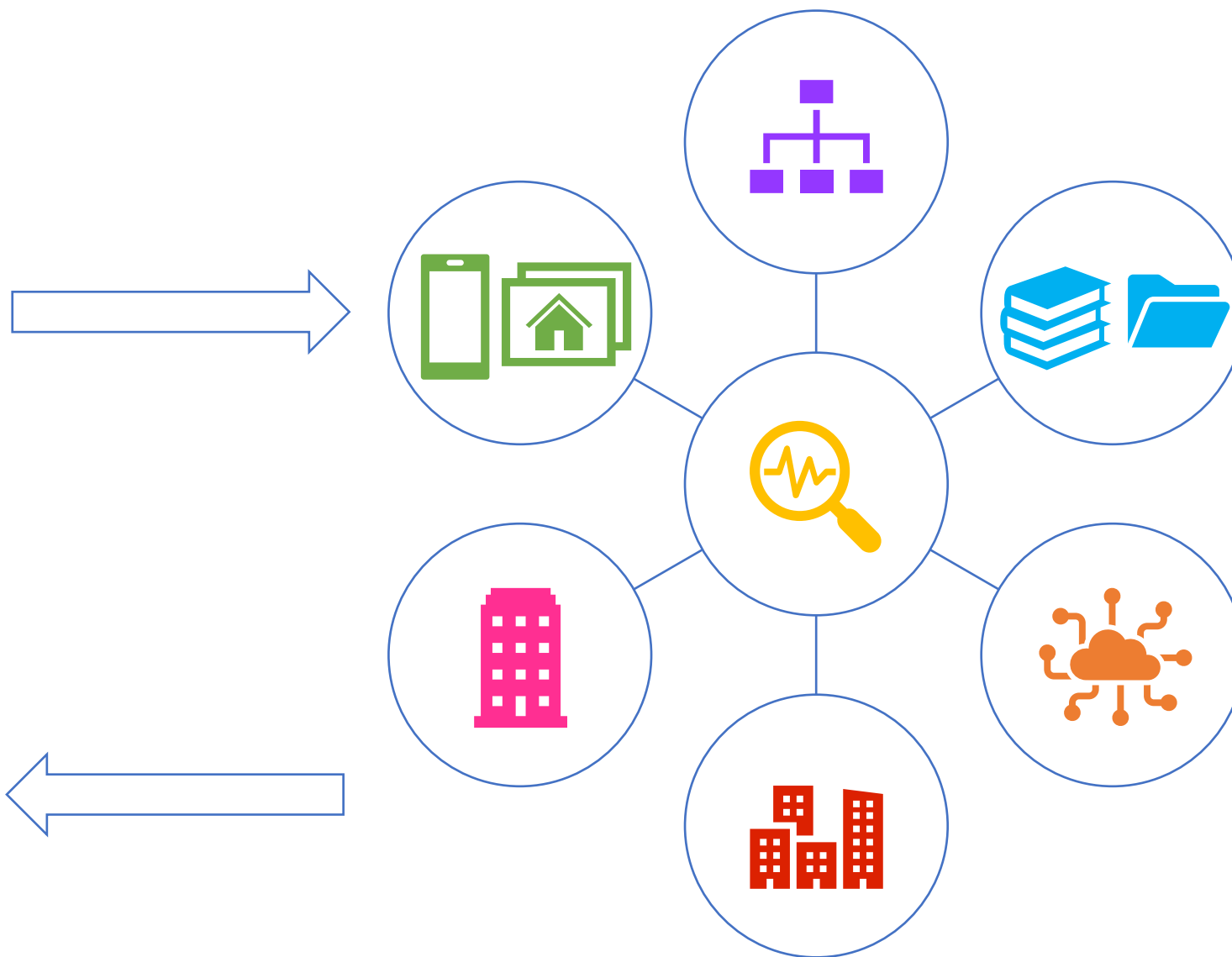
To **collect** information in the **field**, refer to the **Historic Context Statement**, and to efficiently organize our **research and existing documentation** for **individual properties, districts,** and **intangible resources** so that we can develop **findings** and a **dynamic cultural resources inventory** for years to come.



DATA COLLECTION & DATA MANAGEMENT

OBJECTIVE

To **collect** information in the **field**, refer to the **Historic Context Statement**, and to efficiently organize our **research and existing documentation** for **individual properties, districts,** and **intangible resources** so that we can develop **findings** and a **dynamic cultural resources inventory** for years to come.



Data Management



Collect & Share

- Mobile app: on/off-line collection
- Robust import / export with notifications



Controlled Vocabularies

- Thesauri management — *Reference Data Manager (RDM)*



Structure & Storage

- Semantic, self-describing, & sustainable data structure
- Dynamic UI-generation
- Multiple ontologies—e.g., CIDOC CRM
- Cloud/server deployable
- API & linked data support
- Multiple data types supported



Controlled Access, Audit & Review

- User & group secure access management
- Granular (node level) permission control
- Detailed audit of changes to data
- Provisional (unpublished) data; data review

Data Discovery & Visualization



Search

- Semantic & thesauri-enhanced searches
- Searchable annotations
- Support for custom indexing
- Export search results
- Geospatial search
- Saved and Advanced searches



Spatial Data / GIS

- Integrates GIS functionality
- Seamless management of Arches data in external GIS — e.g., esri
- Changeable basemaps—e.g., historical maps
- Overlays supported
- Satellite imagery



Relationships

- Explore relationships between resources — e.g., people, materials, activities, historic events, objects, iconography
- Discovery of previously unknown connections / new knowledge



Time

- Temporal search
- Fuzzy date support
- Visualization of time distribution in entire dataset — *Timewheel*



Reports, Viewers & Annotations

- Customizable reports using *Report Manager*
- IIIF viewers and image annotations
- High-resolution image support
- Extended 3-D viewers
- Interactive spectra charts with comparisons
- Customizable dashboards

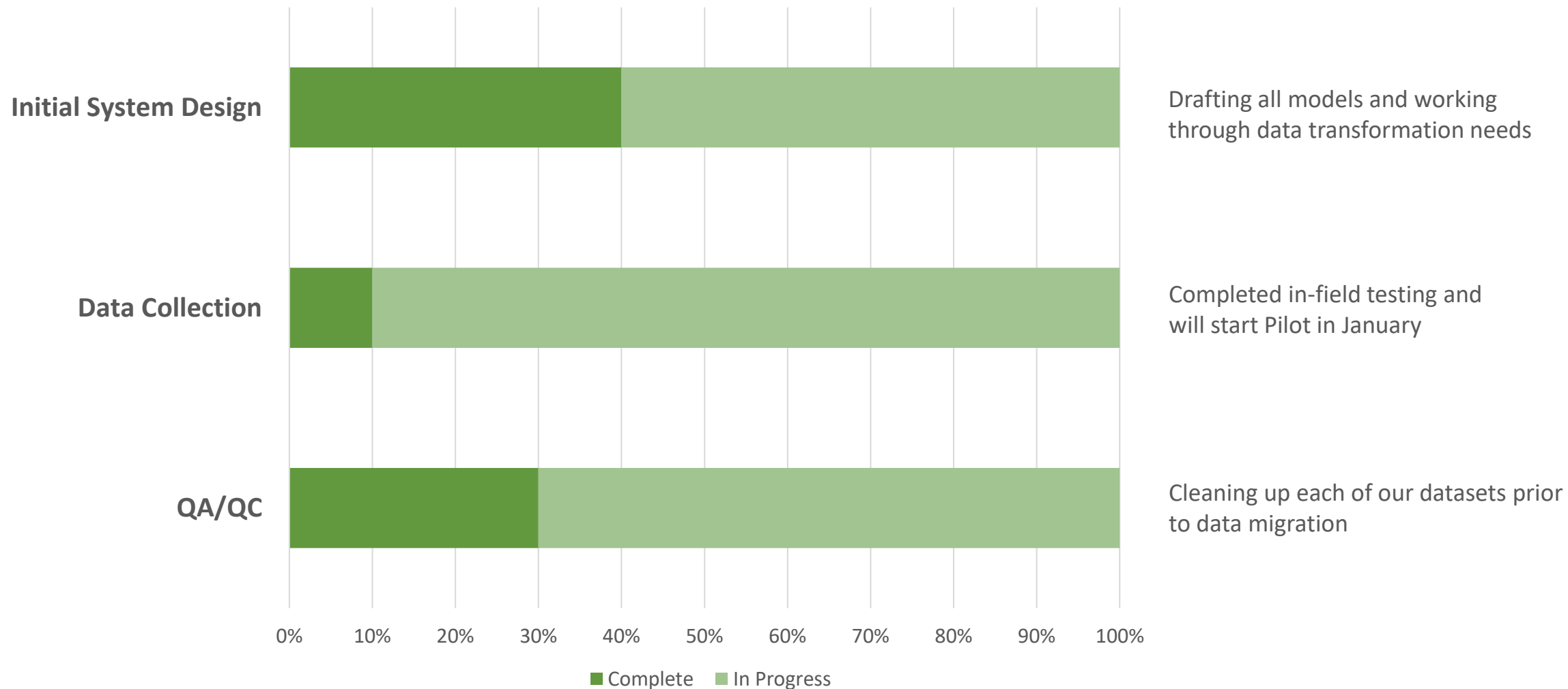
Project/Task Management



Workflows

- Comprehensive, flexible workflow (i.e., process) management
- Task tracking
- Notifications
- *Project Status* plugin
- Correspondence management and tracking
- Letter templates with auto completion

ARCHES PROGRESS





Online Platform Development

Resource Manager

Find | Resources

<p>Activity</p> <p>This resource model describes a survey, designation, or evaluation activity.</p> <p>Create Resource</p>	<p>Community Input</p> <p>This resource model captures information shared by the public.</p> <p>Create Resource</p>	<p>Cultural District</p> <p>This resource model describes cultural districts.</p> <p>Create Resource</p>	<p>District</p> <p>This resource model documents and evaluates each district.</p> <p>Create Resource</p>	<p>Draft Historic Context Statement</p> <p>This resource model outlines and links to the Citywide Historic Context Statement.</p> <p>Create Resource</p>
<p>Intangible Heritage or Practice</p> <p>This resource model describes an intangible heritage or practice that may..</p> <p>Create Resource</p>	<p>Organization or Institution</p> <p>This resource model provides information on organizations or...</p> <p>Create Resource</p>	<p>Person</p> <p>This resource model provides information on people.</p> <p>Create Resource</p>	<p>Research Source</p> <p>This resource model captures all sources used during research.</p> <p>Create Resource</p>	<p>Unit</p> <p>This resource model documents and evaluates each building, structure, obje...</p> <p>Create Resource</p>

ARCHES QUICK LOOK



Data Clean-Up

Preservation Data Clean-Up

OverviewListBoardTimelineCalendarDashboardMessagesFormsFiles

11 tasks completed today

All tasksFilterSortCustomize

Search

MS

Requests

Historic district update

Medium

Dec 30

1

Other

Medium

Yesterday

1

Other

Low

MS

1

Mills Act property

Medium

MS

1

Change Category A/B/C

Low

MS

1

Category A, B, C

Confirm PIM logic / prioritization

High

In Progress

MS

1

Ensure all properties 45+ years old show as Bs

Mike Wynne

Medium

In Progress

MS

1

Add line in PIM to explain determination (reason)

Mike Wynne

Medium

In Progress

MS

1

Fix properties in eligible historic districts that have manual changes to As

Mike Wynne

Medium

In Progress

MS

1

Review and revise manual changes

Mike Wynne

Medium

In Progress

MS

1

Resolve 6Z due to not meeting minimum age at time of survey

Mike Wynne

High

In Progress

MS

1

Confirm PUC properties are not all As

Mike Wynne

High

In Progress

MS

1

Update PIM with new final determinations based on Mike's code

MS

1

Article 10 and 11

Assist with landmarks audit

Planner

Low

Complete

MS

1

Simplify GIS feature classes

Mike Wynne

Medium

In Progress

MS

1

Update dynamic Landmarks Map

Mike Wynne

High

In Progress

MS

1

Update PIM

Mike Wynne

Medium

In Progress

MS

1

Capture blurb to describe each landmark

Planner

High

In Progress

MS

1

Add HCS / cultural associations

Planner

High

Complete

MS

1

Develop spreadsheet of work program properties

Planner

Medium

Need to Start

MS

1

Prepare Article 10 and 11 data for Arches

Planner

High

In Progress

MS

1

Historic Districts

Confirm historic district names

Planner

Low

Complete

MS

1

Confirm NR and CR listed vs. eligible and add to names in GIS/PIM

Mike Wynne

High

In Progress

MS

1

Confirm boundaries for all historic districts

Mike Wynne

Medium

In Progress

MS

2

Incorporate new HDs, discontinuous HDs, and multiple property districts

Mike Wynne

High

In Progress

MS

7

Confirm contributors for districts

Planner

Medium

In Progress

MS

1

Capture blurb to describe each HRER/CEQA district to put into PIM

Planner

Low

In Progress

MS

1

Update All HD spreadsheet (CDFs, etc)

Planner

Medium

In Progress

MS

1

Update GIS feature classes

Planner

Low

In Progress

MS

1

Legacy Business

Update legacy business spreadsheet of cultural associations for first four years

Planner

Medium

Complete

MS

1

Add HCS / cultural associations

Planner

High

Complete

MS

1

Find and review GIS data, possibly update if we have access

Planner

Medium

In Progress

MS

1

Prepare Legacy Business data for Arches

Mike Wynne

High

Need to Start

MS

1

Bulk upload LBR applications & nominations to M-Files

Planner

Medium

Need to Start

MS

1

+ Add task

Individual NR and CR Resou...

Confirm names

Planner

Medium

In Progress

MS

1

Confirm NR and CR listed vs. eligible

Planner

High

In Progress

MS

1

Update GIS feature classes

Planner

High

In Progress

MS

1

Add as separate layer and header in PIM

Mike Wynne

Low

In Progress

MS

1

Add HCS / cultural associations

Planner

High

In Progress

MS

1

Prepare Individual Resources data for Arches

Planner

High

In Progress

MS

1

Bulk upload individual NR and CR nominations/documentation to M-Files

Planner

Medium

Need to Start

MS

1

+ Add task

HRERs and HRAs

Update individual or district field in Preservation Info tab in PPTS

Planner

High

In Progress

MS

1

Review all HRAs and catalog architect, building, cultural group, person, event, etc

Planner

High

Need to Start

MS

1

Review all HRERs and catalog architect, building, cultural group, person, event, etc

Planner

High

Need to Start

MS

1

Add HCS/cultural associations metadata in M-Files

Planner

Medium

Need to Start

MS

1

Prepare HRER and HRA data for Arches

Planner

High

In Progress

MS

1

Link ALL final documents in PIM

Planner

Medium

Need to Start

MS

1

HRER and HRA findings audit

Planner

Medium

Need to Start

MS

1

+ Add task

Historic Context Statements

Review recent HRERs/HCS to create Neighborhood Summaries

Planner

Low

Complete

MS

1

Finish creating spreadsheets of associated properties for HCS

Planner

Medium

In Progress

MS

29

Transfer existing context documents from I: drive to M-Files new reference views

Planner

Medium

In Progress

MS

1

Locate reference documents for remaining context/themes and upload to M-Files

Planner

Medium

In Progress

MS

1

Prepare HCS data for Arches

Planner

High

In Progress

MS

1

Upload Monday info to Asana

Planner

High

Complete

MS

1

+ Add task

Old Surveys

Confirm adopted vs. informational

Planner

Medium

In Progress

MS

1

Fill in missing dates (to help PIM include them in the logic/code, i.e. NATIONAL REGISTER examples)

Planner

Medium

In Progress

MS

1

Double-check Here Today results and scan pages for PIM

Planner

Low

Need to Start

MS

1

Continue to work on previously surveyed areas / areas with info map

Planner

Medium

In Progress

MS

3

Review old survey data before bringing into Arches

Planner

Medium

In Progress

MS

1

Prepare Old Surveys data for Arches

Planner

High

In Progress

MS

1

Find final adopted documents (survey reports, DPR forms, final motion) & upload into M-Files

Planner

Medium

Need to Start

MS

1

+ Add task

OHP, NWIC, and NPS

Reconcile NPS records with ours

Planner

High

In Progress

MS

1

Reconcile OHP records with ours

Planner

Low

Need to Start

MS

1

Reconcile NWIC records with ours

Planner

Low

Need to Start

MS

1

Prepare reconciled OHP, NWIC, and NPS data for Arches

Planner

Low

Need to Start

MS

1

+ Add task

Demolished and Vacant Pro...

Find demolished and vacant properties

Planner

Low

In Progress

MS

1

Review "A"s for projects with i) fully demolished buildings or ii) partial demo/ some remnant/ mitigation/ interior/ etc

Planner

Medium

In Progress

MS

1

Update individual sites that are confirmed fully demolished As to be Cs

Planner

Medium

In Progress

MS

1

Track demo data requests using Asana for 6 months to 1 year

Planner

Medium

In Progress

MS

1

Develop demo policy based on tracked requests

Planner

Low

Need to Start

MS

1

Develop vacant lot policy and how staff should handle for CEQA

Planner

Low

Need to Start

MS

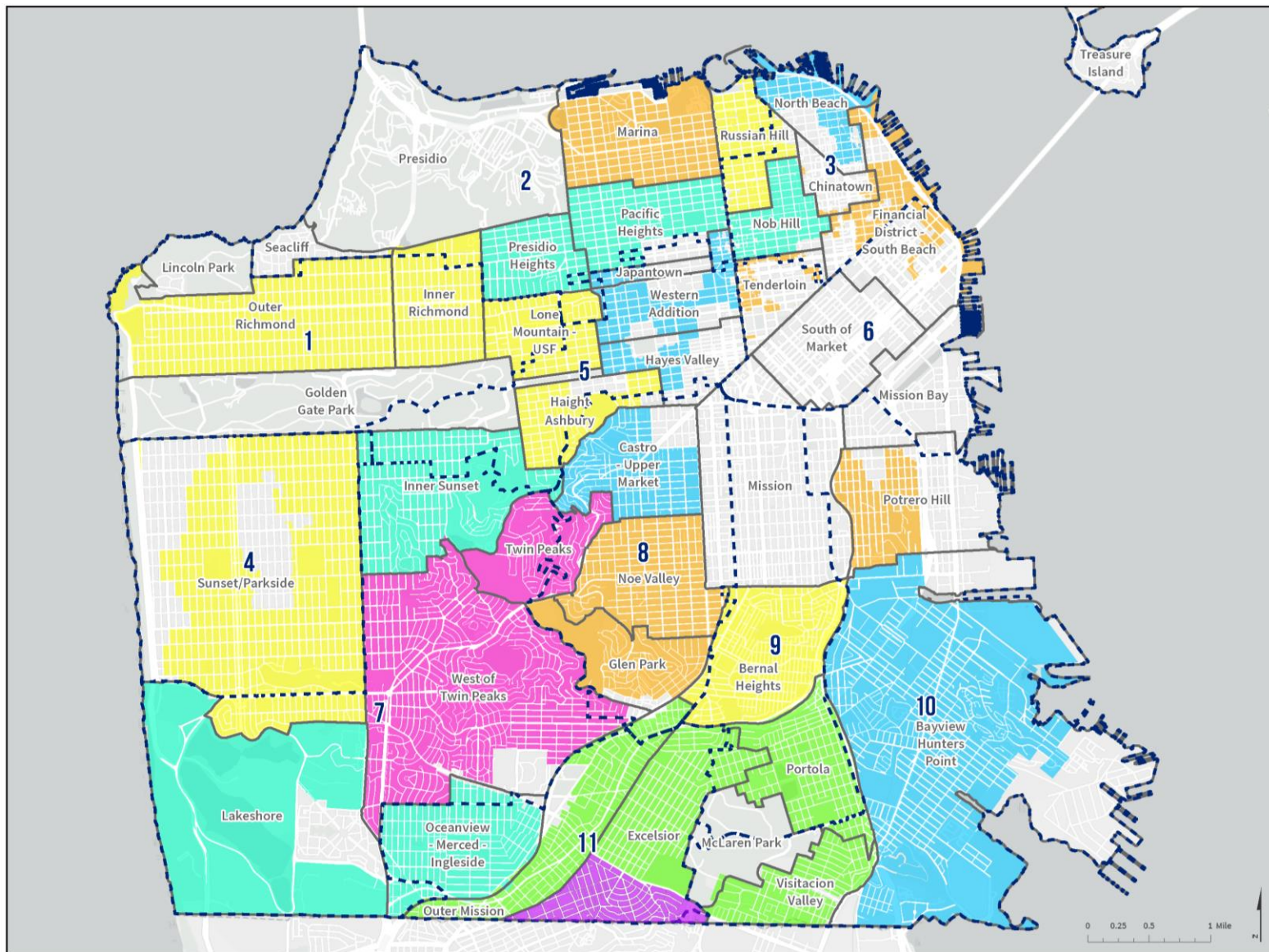
1

+ Add task



PHASING & SCHEDULE

SURVEY PHASES MAP — DRAFT NOT FINAL



LEGEND

- Pilot
- Phase 1
- Phase 2
- Phase 3
- Phase 4
- Phase 5
- Phase 6
- Previously Surveyed
- Neighborhoods
- Supervisor Districts

Anticipated phasing modifications:

- Priorities including Racial and Social equity
- Based on existing or planned contexts
- Staffing capacity
- Expanded phases to reflect the above, and include a Pilot
- Updated to 41 neighborhoods to better align with census tracts

SCHEDULE – Q4 2021 UPDATE

	2020	2021	2022	2023	2024	2025	2026		
Historic Context Statement & Adoption of contexts	Completion of HCS framework internally and by consultants, review and adoption by HPC					50% HCS staff focus on legacy data			
Field Survey & Evaluation & Research		Pilot Data Citywide: Building out Arches and Data Transformation	Pilot Survey & Phase 1	Phase 2	Phase 3	Phase 4	Phase 5	Phase 6	50% Field staff focus on legacy data
Findings & Adoption			Pilot Survey & Phase 1 Draft Findings	Phase 2 Draft Findings	Phase 3 Draft Findings	Phase 4 Draft Findings	Phase 5 Draft Findings	Phase 6 Draft Findings	



NEXT STEPS

NEXT STEPS

- RSAG finalization/Conversations with Supervisors
- Community Outreach Strategy Draft
- Sending notification postcards to Pilot area prior to in-field work
- Pilot Field Survey from January to April 2022
- Q1 SAG Meeting
- Q1 HPC Meeting



**CULTURAL
RESOURCES
SURVEY**



**San Francisco
Planning**



**THANK
YOU!!**