WHO ARE DEPARTMENT STAFF?

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METHODOLOGY
COMMUNITY OUTREACH \ STRATEGY
HISTORIC CONTEXT STATEMENT
DATA COLLECTION & MANAGEMENT
PHASING & SCHEDULE
NEXT STEPS
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.
I. Thematic Contexts

II. Cultural Contexts

III. Architectural Contexts

In Progress:
- Intangible Cultural Heritage Methodology
- Community Outreach Strategy

Determinations made through Citywide Lens

Organized by Neighborhood (now 41)
- Each Neighborhood divided by Micro-Neighborhoods
- Appx: Adopted Geographic HCSs for Micro-Neighborhoods
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?
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.

Pause and ask the community what do they want?
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

Who makes up the survey team?
• 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

S4 Community Conversations
- Community partners

S5 Digital platforms & media

S1 Internship program
- Community partners

S3 Community walks

Field survey
- SAG

Survey findings
- Peer review group

inform › consult › engage › collaborate › empower

PUBLIC PARTICIPATION SPECTRUM*
* International Association for Public Participation
CITYWIDE HISTORIC CONTEXT STATEMENT
(1848-1989)
<table>
<thead>
<tr>
<th>I. THEMATIC CONTEXTS</th>
<th>SUB-CONTEXTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Residential (1848-1989)</td>
<td>A. Single-Family</td>
</tr>
<tr>
<td></td>
<td>B. Multi-Family</td>
</tr>
<tr>
<td>2. Commercial (1848-1989)</td>
<td>A. Downtown Core</td>
</tr>
<tr>
<td></td>
<td>B. NCDs</td>
</tr>
<tr>
<td>3. Industrial (1848-1989)</td>
<td>- no sub-context--</td>
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<tr>
<td></td>
<td>B. Planning &amp; Engineering</td>
</tr>
<tr>
<td></td>
<td>C. Military Presence</td>
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<tr>
<td></td>
<td>D. New Deal Era</td>
</tr>
<tr>
<td>5. Private &amp; Public Institutional (1848-1989)</td>
<td>A. Houses of Spirituality</td>
</tr>
<tr>
<td></td>
<td>B. Private Education</td>
</tr>
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<td></td>
<td>C. Recreation &amp; Culture</td>
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<td></td>
<td>D. Health &amp; Medicine</td>
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<td></td>
<td>E. Burial &amp; Memory</td>
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<td></td>
<td>F. Mass Media &amp; Communications</td>
</tr>
<tr>
<td>6. Events that Shaped the City (1848-1989)</td>
<td>- no sub-context--</td>
</tr>
<tr>
<td>7. Other</td>
<td>A. Artistic Expression</td>
</tr>
<tr>
<td></td>
<td>B. Landscapes</td>
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<tr>
<td></td>
<td>A. Single-Family</td>
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<td>A. Artistic Expression</td>
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<td>B. Landscapes</td>
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</tbody>
</table>
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)

<table>
<thead>
<tr>
<th>Priority</th>
<th>In-Progress Contexts</th>
<th>In-Progress Data Collection</th>
<th>To Be Started Context/Data</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>1. Latino HCS</td>
<td>1. Irish American</td>
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<td></td>
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<td>2. <strong>African American HCS</strong> (reqs. outreach)</td>
<td>2. South Asian (India/Pakistan/Bangladesh/Sri Lanka)</td>
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<td>3. <strong>Chinese-American HCS</strong></td>
<td>3. Southeast Asian (Thailand/Vietnam/Cambodia)</td>
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<td>4. <strong>Italian-American</strong> history documented through:</td>
<td>3. Middle East/North Africa (MENA)</td>
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<td>a. North Beach HCS</td>
<td>4. Pacific Islander</td>
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<td>b. <strong>Excelsior/Portola HCS</strong> (intern project)</td>
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<td>5. <strong>Russian HCS</strong> (intern project)</td>
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<td>6. <strong>Counter-Culture</strong> (Haight/Citywide NR MPD)</td>
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<td></td>
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<td></td>
<td>1. <strong>JCHESS</strong> (ad. 2014)</td>
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<td></td>
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<td></td>
<td>2. <strong>LGBTQ HCS</strong> (ad. 2015)</td>
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<td>3. Filipino Addendum to SoMa HCS (ad. 2013)</td>
</tr>
</tbody>
</table>

- **Bolded text** indicates under contract, in-progress, or completed documentation.
**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
DATA COLLECTION & DATA 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.
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.
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.
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.
**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.
A comprehensive information and task management platform for heritage institutions

**Data Management**
- Collect & Share: Mobile app: on/off-line collection, Robust import/export with notifications
- 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, Granular (node level) permission control, Detailed audit of changes to data, Provisional (unpublished) data; data review
- Spatial Data / GIS: Integrate 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**
- Reports: Customizable reports using Report Manager
- Viewers: IIIF viewers and image annotations
- Annotations: High-resolution image support, Extended 3-D viewers

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

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

**Arches**
archesproject.org
**Initial System Design**
- Drafting all models and working through data transformation needs

**Data Collection**
- Completed in-field testing and will start Pilot in January

**QA/QC**
- Cleaning up each of our datasets prior to data migration
Online Platform Development

Resource Manager

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

<table>
<thead>
<tr>
<th>Historic Context Statement &amp; Adoption of contexts</th>
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</thead>
<tbody>
<tr>
<td>Completion of HCS framework internally and by consultants, review and adoption by HPC</td>
</tr>
<tr>
<td>50% HCS staff focus on legacy data</td>
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</tbody>
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<tr>
<th>Field Survey &amp; Evaluation &amp; Research</th>
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</tr>
<tr>
<td>Pilot Survey &amp; Phase 1 Draft Findings</td>
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<tr>
<td>Phase 2 Draft Findings</td>
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<td>Final Findings; Adoption Hearings (1 phase per quarterly meeting)</td>
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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
THANK YOU!!