

# SF SURVEY

# SF

## CULTURAL RESOURCES SURVEY



San Francisco  
**Planning**

HPC Hearing  
November 17, 2021  
Q4 Update  
[cpc.survey@sfgov.org](mailto: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.

**HISTORIC CONTEXT STATEMENT**

Intro, Methodology, SF Periods of Development

Contexts, Sub-Contexts, and Themes with Evaluative Frameworks

I. Thematic Contexts

II. Cultural Contexts

III. Architectural Contexts



**CULTURAL RESOURCES SURVEY**

Pre-population Data Collection

In-Field Survey

In-Office Evaluation



**SURVEY FINDINGS**

Determinations made through Citywide Lens

Organized by Neighborhood (now 41)

- Each Neighborhood divided by Micro-Neighborhoods
- Appx: Adopted Geographic HCSs for Micro-Neighborhoods

*In Progress:*

- *Intangible Cultural Heritage Methodology*
- *Community Outreach Strategy*



## 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**

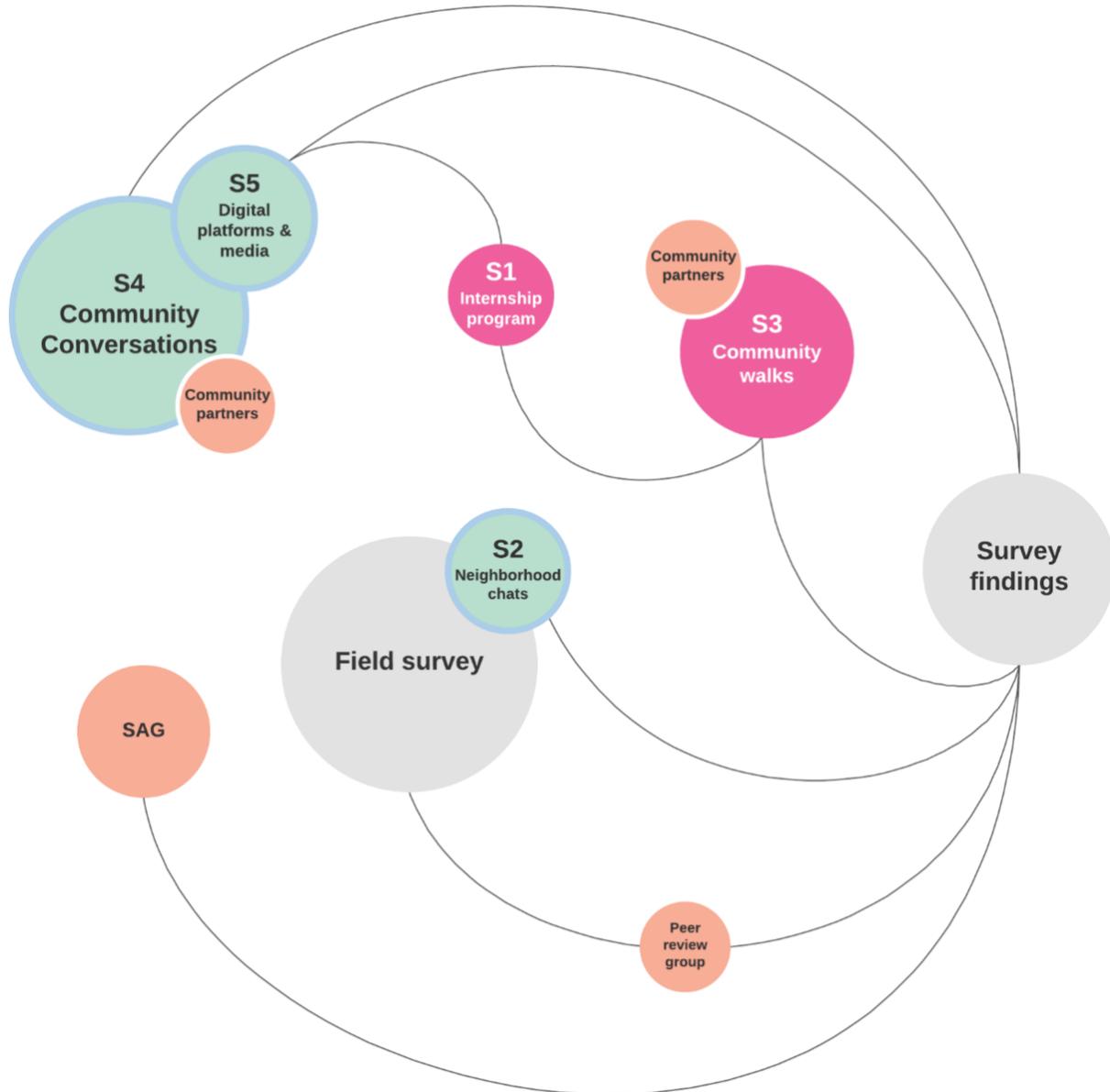
Identifies key institutions, groups, and existing programs that may be able to sustain the community's engagement with SF Survey over a long-term implementation process. Provides a description of engagement strategies.

### **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



**CULTURAL  
RESOURCES  
SURVEY**

# **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.”

## II. CULTURAL CONTEXTS (BY STATUS)

### Priority

#### 1. **American Indian HCS**

### Adopted Contexts

1. **JCHES** (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

## DATA COLLECTION & DATA MANAGEMENT

### OBJECTIVE

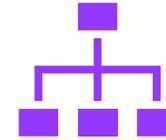
To **collect** information in the **field**



# DATA COLLECTION & DATA MANAGEMENT

## OBJECTIVE

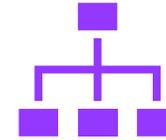
To **collect** information in the **field**, refer to the **Historic Context Statement**



# DATA COLLECTION & DATA MANAGEMENT

## OBJECTIVE

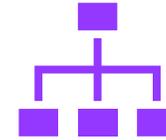
To **collect** information in the **field**, refer to the **Historic Context Statement**, and to efficiently organize our **research and existing documentation**



# DATA COLLECTION & DATA MANAGEMENT

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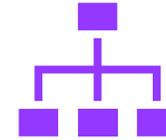
To **collect** information in the **field**, refer to the **Historic Context Statement**, and to efficiently organize our **research and existing documentation** for **individual properties**



# DATA COLLECTION & DATA MANAGEMENT

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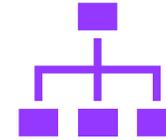
To **collect** information in the **field**, refer to the **Historic Context Statement**, and to efficiently organize our **research and existing documentation** for **individual properties, districts**



# DATA COLLECTION & DATA MANAGEMENT

## OBJECTIVE

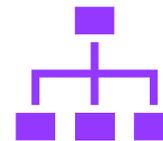
To **collect** information in the **field**, refer to the **Historic Context Statement**, and to efficiently organize our **research and existing documentation** for **individual properties, districts,** and **intangible resources**



# DATA COLLECTION & DATA MANAGEMENT

## OBJECTIVE

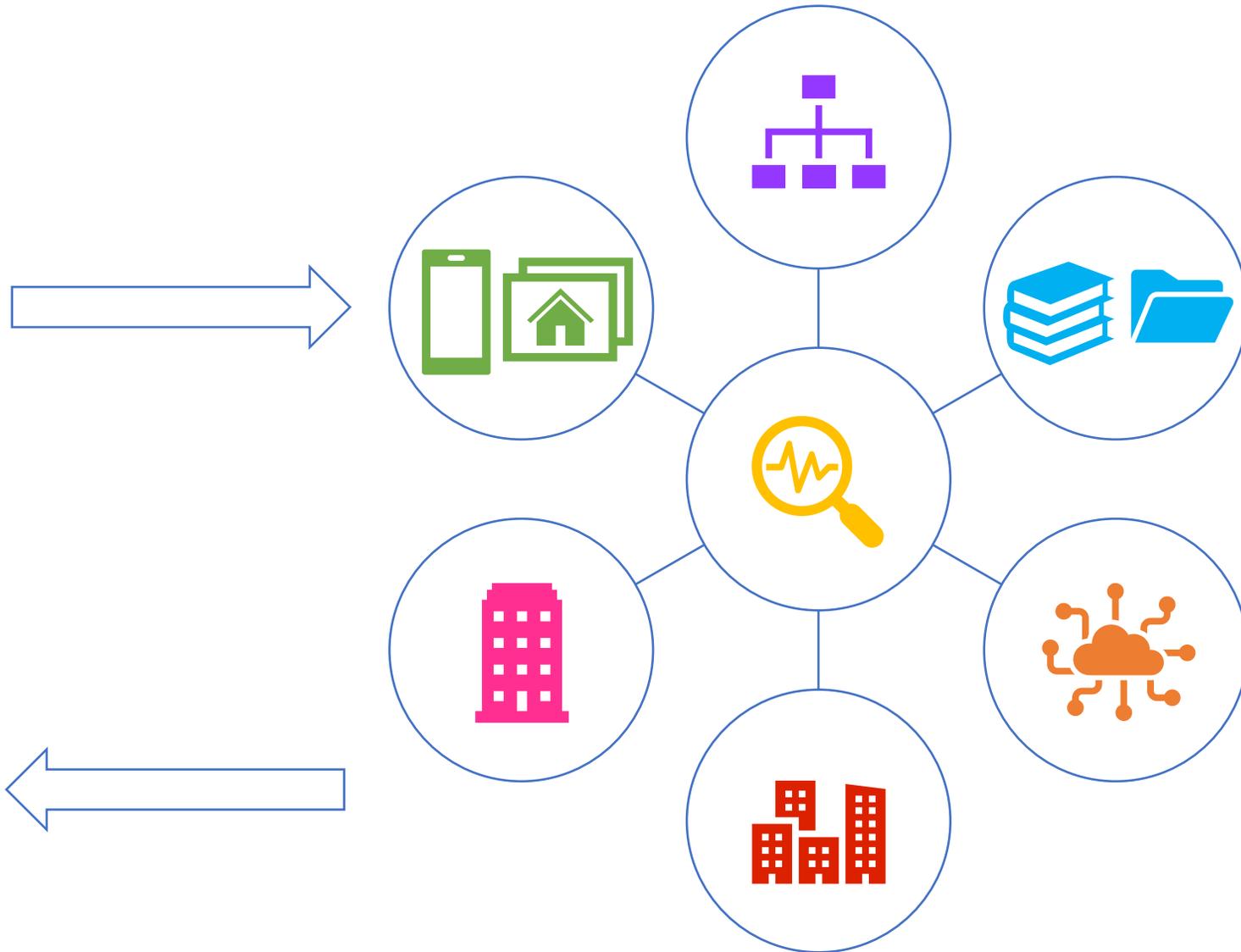
To **collect** information in the **field**, refer to the **Historic Context Statement**, and to efficiently organize our **research and existing documentation** for **individual properties, districts,** and **intangible resources** so that we can develop **findings** and a **dynamic cultural resources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

Data Discovery & Visualization

Project/Task 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



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

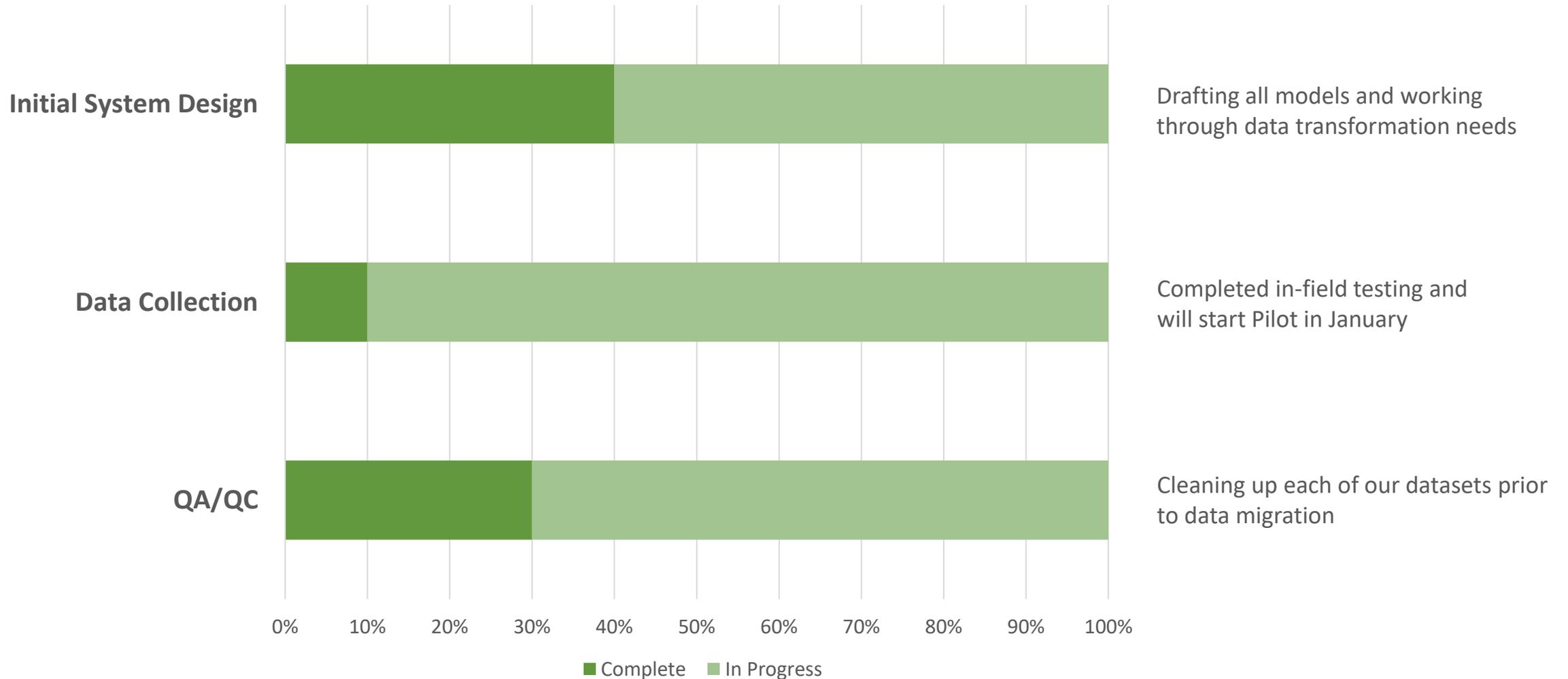
- Customizable reports using *Report Manager*
- IIIF viewers and image annotations
- High-resolution image support
- Extended 3-D viewers
- Interactive spectra charts with comparisons
- Customizable dashboards



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

The screenshot displays the 'Resource Manager' interface. At the top, there is a search bar with the text 'Find Resources'. Below this, a grid of ten resource creation options is presented, each in a light blue box with a darker blue footer. Each option includes an icon, a title, a brief description, and a 'Create Resource' button.

Resource Type	Description
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, obje...

# ARCHES QUICK LOOK



## Data Clean-Up

Preservation Data Clean-Up

Overview List Board Timeline Calendar Dashboard Messages Forms Files

11 tasks completed today

All tasks Filter Sort Customize

Search

MS MB MD ? Share

Requests

- Historic district update (Medium)
- Other (Medium)
- Mills Act property (Medium)
- Change Category A/B/C (Low)

Category A, B, C

- Confirm PIM logic / prioritization (High, In Progress)
- Ensure all properties 45+ years old show as Bs (Medium, In Progress)
- Add line in PIM to explain determination (reason) (Medium)
- Fix properties in eligible historic districts that have manual changes to As (Medium, In Progress)
- Review and revise manual changes (Medium, In Progress)
- Resolve 6Z due to not meeting minimum age at time of survey (High, In Progress)
- Confirm PUC properties are not all As (High, In Progress)
- Update PIM with new final determinations based on Mike's code (Low)

Article 10 and 11

- Assist with landmarks audit (Medium, In Progress)
- Simplify GIS feature classes (Medium, In Progress)
- Update dynamic Landmarks Map (High, In Progress)
- Update PIM (Medium, In Progress)
- Capture blurb to describe each landmark (High, In Progress)
- Add HCS / cultural associations (High, Completed)
- Develop spreadsheet of work program properties (Medium, Need to Start)
- Prepare Article 10 and 11 data for Arches (High, In Progress)

Historic Districts

- Confirm historic district names (Low, Complete)
- Confirm NR and CR listed vs. eligible and add to names in GIS/PIM (High, In Progress)
- Confirm boundaries for all historic districts (Medium, In Progress)
- Incorporate new HDs, discontinuous HDs, and multiple property districts (High, In Progress)
- Confirm contributors for districts (Medium, In Progress)
- Capture blurb to describe each HRER/CEQA district to put into PIM (Low, In Progress)
- Update All HD spreadsheet (CDFs, etc) (Medium, In Progress)
- Update GIS feature classes (Low, In Progress)

Legacy Business

- Update legacy business spreadsheet of cultural associations for first four years (Medium, Complete)
- Add HCS / cultural associations (Intern, High, Complete)
- Find and review GIS data, possibly update if we have access (Intern, Medium, In Progress)
- Prepare Legacy Business data for Arches (High, Need to Start)
- Bulk upload LBR applications & nominations to M-Files (Medium, Need to Start)

Individual NR and CR Resou...

- Confirm names (Medium, In Progress)
- Confirm NR and CR listed vs. eligible (High, In Progress)
- Update GIS feature classes (High, In Progress)
- Add as separate layer and header in PIM (Low, In Progress)
- Add HCS / cultural associations (High, In Progress)
- Prepare Individual Resources data for Arches (High, In Progress)
- Bulk upload individual NR and CR nominations/documentation to M-Files (Medium, Need to Start)

HRERs and HRAs

- Update individual or district field in Preservation Info tab in PPTS (High, In Progress)
- Review all HRAs and catalog architect, building, cultural group, person, event, etc. (High, Need to Start)
- Review all HRERs and catalog architect, building, cultural group, person, event, etc. (High, Need to Start)
- Add HCS/cultural associations metadata in M-Files (Medium, Need to Start)
- Prepare HRER and HRA data for Arches (High, In Progress)
- Link ALL final documents in PIM (Intern, Medium, Need to Start)
- HRER and HRA findings audit (Intern, Medium, Need to Start)

Historic Context Statements

- Review recent HRERs/HCS to create Neighborhood Summaries (Low, Complete)
- Finish creating spreadsheets of associated properties for HCS (Medium, In Progress)
- Transfer existing context documents from I: drive to M-Files new reference views (Medium, In Progress)
- Locate reference documents for remaining context/themes and upload to M-Files (Medium, In Progress)
- Prepare HCS data for Arches (High, In Progress)
- Upload Monday info to Asana (High, Complete)

Old Surveys

- Confirm adopted vs. informational (Medium, In Progress)
- Fill in missing dates (to help PIM include them in the logic/code, i.e. NATIONAL REGISTER examples) (Intern, Medium, In Progress)
- Double-check Here Today results and scan pages for PIM (Intern, Low, Need to Start)
- Continue to work on previously surveyed areas / areas with info map (Medium, In Progress)
- Review old survey data before bringing into Arches (Medium, In Progress)
- Prepare Old Surveys data for Arches (High, In Progress)
- Find final adopted documents (survey reports, DPR forms, final motion) & upload into M-Files (Medium, Need to Start)

OHP, NWIC, and NPS

- Reconcile NPS records with ours (High, In Progress)
- Reconcile OHP records with ours (Low, Need to Start)
- Reconcile NWIC records with ours (Low, Need to Start)
- Prepare reconciled OHP, NWIC, and NPS data for Arches (Low, Need to Start)

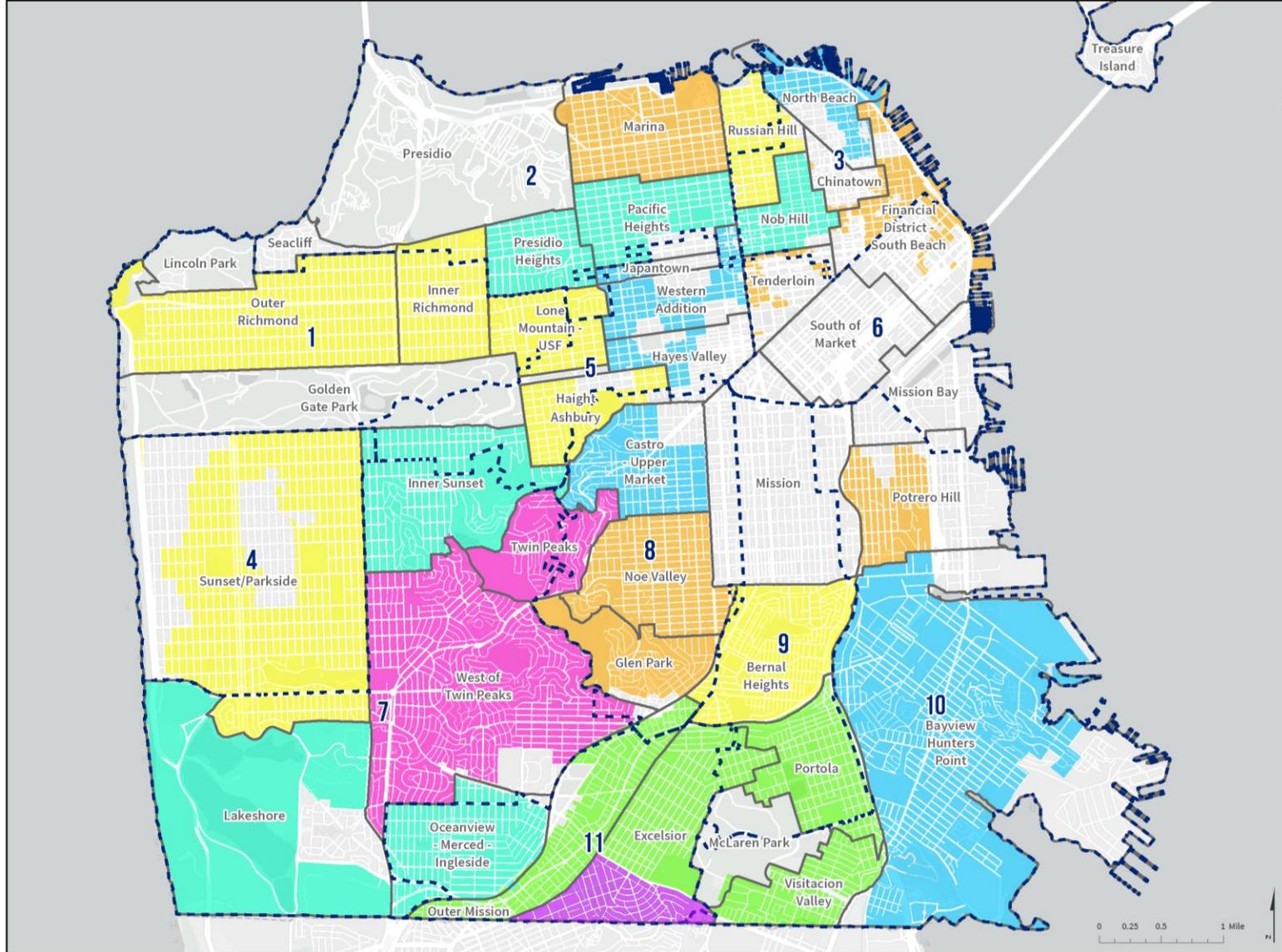
Demolished and Vacant Pro...

- Find demolished and vacant properties (Low, In Progress)
- Review "A"s for projects with i) fully demolished buildings or ii) partial demo/ some remnant/ mitigation/ interior/ etc. (Medium, In Progress)
- Update individual sites that are confirmed fully demolished As to be Cs (Medium, In Progress)
- Track demo data requests using Asana for 6 months to 1 year (Medium, In Progress)
- Develop demo policy based on tracked requests (Low, Need to Start)
- Develop vacant lot policy and how staff should handle for CEQA (Low, Need to Start)



# 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		
<b>Historic Context Statement &amp; Adoption of contexts</b>	Completion of HCS framework internally and by consultants, review and adoption by HPC						50% HCS staff focus on legacy data		
<b>Field Survey &amp; Evaluation &amp; Research</b>		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
<b>Findings &amp; Adoption</b>			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	Final Findings; Adoption Hearings (1 phase per quarterly meeting)



# 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

SF

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San Francisco  
**Planning**



THANK  
YOU!!