

HSPV 701 HISTORIC PRESERVATION STUDIO

Fall 2021

Tuesday & Thursday 1:45-5:45pm

Meyerson 406 and 412

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PREFACE

The learning objectives of the Preservation Studio center on decision-making methodology, integrating the many skills and topics relevant to preservation decisions, connecting documentation and analysis to design, and applying all this work to devising futures for actual sites.

The challenge with Preservation Studio this fall is to do what's needed in terms of preservation curriculum while also responding to contemporary social and political crises through our work. To meet this challenge of societal relevance, we have designed the studio to address systemic racism, fractious politics, and economic and environmental imperatives behind adaptive reuse.

Studio begins with a few weeks of skill- and issue-centered workshops before launching into 12-week projects through which student teams will embrace the challenges of two heritage particular sites, one in Philadelphia and one in Montgomery, Alabama. We feel this format best meets the learning objectives of the course while responding to the pandemic-induced constraints we already know about (as well as the potential changes no one can anticipate).

1. COURSE OVERVIEW, PROCESS, OBJECTIVES AND SITES

What separates the management of heritage sites from other forms of property management is that the fundamental purpose of cultural heritage management should be to preserve the values ascribed to a site—be they aesthetic or historical or social.... [A] conservation management plan is a document that sets out the significance—or values—of a site and how that significance will be retained in any future use, alteration, repair, or development. The plan development process usually involves several stages, which include understanding the site, assessing values, looking at issues or vulnerability (e.g., condition), and identifying policies and strategy.

Kate Clark, “Preserving What Matters: Value-Led Planning for Cultural Heritage Sites.” 2001.

“Everyone designs who devises courses of action aimed at changing existing situations into preferred ones.... Design, so construed, is the core of all professional training; it is the principal mark that distinguishes the professions from the sciences.”

Herbert Simon, “The Sciences of the Artificial.” 1969.

The Historic Preservation Studio centers on the importance of sound and creative decision-making as a hallmark of every preservation professional’s practice.

The Studio is an applied course using planning methods as a means of devising and supporting decision-making in many types and scales of project. Known internationally as “conservation planning,” this is common methodology in the field. Though they take many forms, conservation plans of one type or another are used to guide decisions about all kinds of heritage places (buildings, archaeological sites, urban places, landscapes) across the full range of management situations (public, private and NGO sectors). As a common methodology used to advise clients, recommend public policies, shape development and curate sites of cultural significance, conservation planning is part of the core MSHP curriculum.

The Studio calls on many of the ideas, skills, and issues covered in the first year of the MSHP curriculum. You will apply preservation ideas, tools and methods to real sites and the processes shaping them. Research, field work, consultation, analysis and design are brought to bear, formulating strategies, plans and interventions to advance the preservation of our subject sites and the roles these sites play in community context. The semester’s work is organized around basic conservation planning methodology – the Burra Charter process is the most well-known version – mastery of which is a key learning objective of the course.

Guiding owners, public officials, and other site stewards in making decisions is a central competency for any preservation professional. Those working in every branch of the field must be prepared to create plans for heritage sites of any type or scale—from individual structures to larger landscapes—handling issues across the spectrum of preservation. We want to emphasize the central role of decision-making (and the planning methods for organizing it) to everyone in the field no matter what one’s area of specialization. The projects will therefore give you practice with making decisions in complex and real situations, and pitching preservation as both an end in itself (commemorative, archival) and a means to achieve clients’ other goals quite directly (economic prosperity, community well-being, social justice, affordable housing, environmental benefits, etc.).

The planning methods we’ll employ are driven by values-based conservation and described in more detail in a later section of the syllabus. In addition to our description, and several works of scholarship we’ll ask you to read, we present the planning process in the form of a diagram (see page 7 below) and a list of deliverables produced in the course of a project (pages 7-8). This process is not a simple recipe to be followed unthinkingly. It is a framework, underlain by a series of principles, and must be adapted to the challenges and resources of individual sites and projects. It always remains centered on conserving the values (plural) of the place, protecting cultural significance, weaving in concerns about context, and ultimately serving a range of stakeholders (present and future).

The work of the Studio is pursued both collectively and individually. We'll work with actual sites, communities and partners; we'll most often work in teams to undertake research, analysis, design, and communication tasks. Teams of students will be formed to work on different projects and sites, and all teams will be guided by faculty and follow the same basic methodology and schedule. The complications of working with teammates, clients, stakeholders, incomplete research, fragmentary knowledge, constrained time and resources, and the threats and opportunities attending to actual historic resources make the Studio a valuable experience in "practicing preservation in public."

Learning outcomes for the course include:

- understanding and applying values-centered preservation planning methodology;
- immersion in "real-world" preservation situations, with the attendant clients, co-workers, logistical constraints, stakeholders, available data, and unknowns;
- gaining practical experience in researching, documenting, analyzing and responding to a site, under constraints typical in practice;
- engaging collaborators, clients and other stakeholders, and including their intelligence in crafting conservation plans and intervention strategies;
- responding to the full range of a site's values (heritage, social and societal) by employing a range of material, policy, interpretive and programmatic interventions;
- applying the creative, design, technical and political operations core to preservation practice;
- practicing the formulation of significance, strategy, policies and interventions (design, interpretive, programming, conservation, development, etc.) and connecting them in an overarching plan;
- making proposals that creatively, practically and effectively communicate the work; and
- delivering professional-quality presentations and documents.

Most of the semester will be devoted to working in depth on two heritage places – Paul Robeson House & Museum in West Philadelphia, and the Peacock Tract neighborhood and Loveless School in Montgomery, Alabama. Here are some brief notes on the significance, challenges and opportunities of both sites:

The **Paul Robeson House and Museum** inhabits a 1911 corner twin at 50th and Walnut, a West Philly neighborhood near campus that has witnessed quite a lot of change in recent decades. Robeson (1898-1976) was an internationally famous artist, athlete, political activist and cultural icon. It would be hard to overstate the many accomplishments that brought him fame. His politics, however, made him a target of McCarthyism, and as an African-American public figure he faced racial discrimination.

Robeson lived with his sister in the western half of the twin (4951 Walnut) which is now used as a museum on the first two floors. The 3rd floor has a rental apartment. Robeson lived here for the last ten years of his life. This address is listed on the National Register of Historic Places. The West Philadelphia Cultural Alliance (WPCA) acquired the building in 1994 and had restored the building by 2015. The eastern half of the twin (4949) is unrestored, not linked directly to Robeson, and used for museum support + rental apartment.

Robeson narrative is unquestionably significant, though the property is not listed locally. The museum building was restored building by WPCA several years ago, the result of decades of dedicated preservation and development work by founder Frances Aulston and later Executive Director Vernoca Michael. The Paul Robeson House and Museum is a classic example of the long journey some sites face to ensure financial sustainability and maximum cultural impact. The organization is working to professionalize their systems and staffing with the goal of advancing to the next level of site stewardship.

Earlier this year, a new Executive Director – Janice Sykes-Ross – was hired with the support of a grant from the African American Cultural Heritage Action Fund of the National Trust for Historic Preservation. She recognizes the opportunity (and need) to pursue alternatives to the management model of a sole-building museum. She has also been in conversation with Penn's Sachs Fund for Arts Innovation about possible partnerships.

Issues and opportunities include:

- supporting new management and thinking creatively and holistically about preservation-centered business models

- evaluating and refining the museum experience through interpretive, conservation, restoration, and other work;
- adaptive rehabilitation of 4949 (the non-museum half of the twin) to support the museum and its mission by generating revenue and supporting programming directly;
- exploring programming and uses that responds to the historic neighborhood context and present needs of the local community and surrounding residents;
- rethinking programming (with support from Sachs Fund for Arts Innovation and perhaps other Penn and Philadelphia partners)
- making additional partnerships and connections;
- undertaking a strategic building assessment (while the building has few visible conservation issues, and generally seems in good repair, some elements of the building need further investigation); and
- considering cyclical maintenance strategies (the place needs a holistic material and systems investigation and a prioritized plan for maintenance and repair).

Peacock Tract is an historically Black community in Montgomery, Alabama, in need of repair in several senses. Established in the late 19th century as a neighborhood of homeowners, businesses and civic institutions just southwest of downtown Montgomery, Peacock Tract was decimated by interstate highway construction in the 1950s-60s. The destruction of the neighborhood was purposeful and directly related to Montgomery's leading role in civil rights issues (especially voting rights).

Fragments of Peacock Tract remain, despite the intrusion of the interstates. The place is located not far from the popular EJI National Memorial for Peace and Justice, which sits just above and on the edge of downtown, and represents a later chapter in the ongoing struggles over the civil rights of Black Americans. A combination of groups has begun collaborating to reactivate and repair the neighborhood through preservation, reuse, creative placemaking, and community agriculture; these include the Alabama African American Civil Rights Heritage Sites Consortium, the City of Montgomery, Tuskegee University, and neighborhood residents.

The principal focal point of our work is the Loveless Elementary School, a 1923 public school presently abandoned (a few years ago) but in reasonably good condition. Henry Loveless was a Black businessman and community leader in Montgomery. The building has been used as high, middle and elementary school. The 1965 Selma-Montgomery March passed by the front door (the road is still called, Jeff. Davis Highway). It stands in the shadow of the I-65 and I-85 crossing, next to an active community center to the east and ample open land on the west.

Loveless is a classic example of the historic-school-as-community landmark, in need of repurposing, reprogramming and refinancing. A charter school organization from Memphis is considering purchase of Loveless but not sure it can use all the space; AAACRHSC sees opportunity for community museum/archive.

A second, smaller, abandoned building complex at the corner of Mobile and Mildred (formerly a gas station and repair shop) may also be included in the studio project. This small complex is located between Loveless and the EJI memorial. It has been offered for community use by the City of Montgomery, and AAACRHSC would like us take up the challenge of reusing and reprogramming it in connection with a nearby Tuskegee-led community agriculture project and some other initiatives.

Issues and opportunities include:

- adaptive rehabilitation of the school complex and small gas station/repair shop; their location, fitness and range of programming options seem to be a good fit for tactical preservation;
- reckoning with preservation's role in community repair at multiple scales;
- addressing the national debates over repair and reparation for purposeful destruction by highway construction or other urban renewal
- contributing to research efforts (in WSOD and elsewhere) on the repair and reuse of public schools as civic infrastructure; and
- helping give shape to a partnership of community, city and other groups to sustain Peacock Tract preservation and development momentum, generating advice on the management, administration, and business modelling to lift and sustain this cross-sector, collaborative effort.

2. APPROACH

The central activity of the Studio is gaining familiarity and experience with the comprehensive process of project/site decision-making through planning. As elaborated below, the process we teach (and practice with) is informed by the Burra Charter and the Getty Conservation Institute's adaptations of it.

The Fall 2021 Preservation Studio starts with some preliminary, skill-building talks and workshops (first three weeks), then pivots to 12-week-long team projects organized around three phases of work following the Planning Diagram and Deliverables.

Practically, we are assuming that students will be on campus/in Philadelphia for the Fall semester, available to work in small teams and to collaborate in-person for site visits. We believe in-person collaboration is an important ingredient of successful preservation planning process, so we will judiciously take advantage of our ability to work in small groups, within the public health guidance in force by the University and the City of Philadelphia. We are also assuming that in-person travel to our Studio sites will be practicable and within risk tolerances.

Throughout the Studio we discuss and debate the ideal processes of planning and decision-making, while constantly adjusting the actual site/project planning process to meet the time, personnel and other resources available and respond to the clients and contexts of the place. Such constraints are typical in practice – it is rare to have what seems like “enough” resources to carry out a full preservation planning process. Here are a few ways we will be adapting the ideal process to our actual Studio projects, as faculty guide the small working groups through the workflow on each project:

Preservation planning approach:

Values-based conservation serves as our underlying theory of preservation; a planning framework, adapted from the Burra Charter, is our methodology. The Burra Charter/GCI framework is organized around a number of discrete analytical steps (and corresponding outputs), following in sequence, as an ideal decision-making process for a heritage site. Determinations of cultural significance rest at the core of the framework; several analyses of values, contexts, conditions and comparable sites support the understanding of cultural significance that underpins all proposals for intervention. Gaining practice with this Burra Charter process means gaining skill in crafting products of each stage of the process (documentation, analysis, response). Connections between different stages in the planning process will be emphasized.

The planning diagram and deliverables tables (see Appendices) represent the ideal stages and outputs of the process. Each project will adapt the process appropriately. This real-time, on-the-ground adaptation is important learning outcome of the Preservation Studio – in concert with understanding the ideal concepts behind the process.

Building/site assessment approach:

Among the challenges of the preservation planning process is synthesizing information on physical conditions and potential for future change with all the other analyses of history, values, social contexts, enabling environment, and client/owner capacities that factor into decisions.

Within the studio planning process, students will undertake first-level, triage-like assessments of the sites. Guided by faculty, you will build an appropriate understanding of the materials and conditions of the buildings/sites within the Studio process by relying on (1) careful interpretation of existing documentation, (2) limited in-person site investigation (two visits to sites envisioned for Phase 3) coupled with remote assessment (i.e., Google earth, L&I records, etc.), (3) analysis of building fitness, integrity and character-defining elements; and (4) syncing the existing conditions with the proposed policies and interventions for the buildings/sites.

Community engagement approach:

Engagement with a variety of actors with a stake in our projects is standard practice, for several reasons: different stakeholders bear different intelligence about the site (know it in different ways) making engagement

essential to building a robust understanding of a place; engagement is essential politically, in that it helps foreground politics and build coalitions for implementation; and ethically, because prevailing social theories teach us the risks and weaknesses of centralizing power (including expertise) and the greater benefits of “decolonizing” who decides and who benefits from conservation.

The ideal approach to stakeholder engagement is being fully embedded in a community, developing relationships with citizens, deploying our expertise in a setting where power is shared among all sides (clients, funders, citizens, advocates, experts). This is impractical as part of a single-semester course.

Our pedagogical strategy for engagement in the studio, given the limits of time and commitment, is three-fold:

- First: we try to clarify the ideal by discussing engagement and co-design conceptually;
- Second: practically, we adapt the ideal process to more limited versions of engagement based on working through proxies and identifying a small number of citizens/activists/engaged preservationists with whom we can have thoughtful conversations about co-design, about the expectations citizens have of historic preservation, and about navigating expertise;
- Third, ethically, we evolve our ethical guidelines toward a more decentralized, decolonized modes of practice (actually shared power over decisions, as opposed to assuming that we have or can find all the answers on our own using our expertise) and build expectations of these sort of political outcomes into our design interventions and recommendations for how they could be implemented.

(It is worth mentioning that learning how to conduct meaningful engagement, working relationships and collaboration online is something that we all have been struggling with since March, and is likely to continue even after COVID is no longer an issue. The course challenges all of us to explore virtual skills as a way of meeting the basic requirements of professional practice.)

In the first few weeks, we'll consult the literature on cultural competence, inherent bias, community-engaged design (co-design) and rapid ethnography tools, and hear directly from practitioners working directly on engagement in community contexts like those we'll be working in this semester. And each of the long projects will have a small number of client/community contacts to learn from; research may reveal others, and we'll have to decide on how much time to devote to deeper consultations in relation to other tasks.

3. LOGISTICS

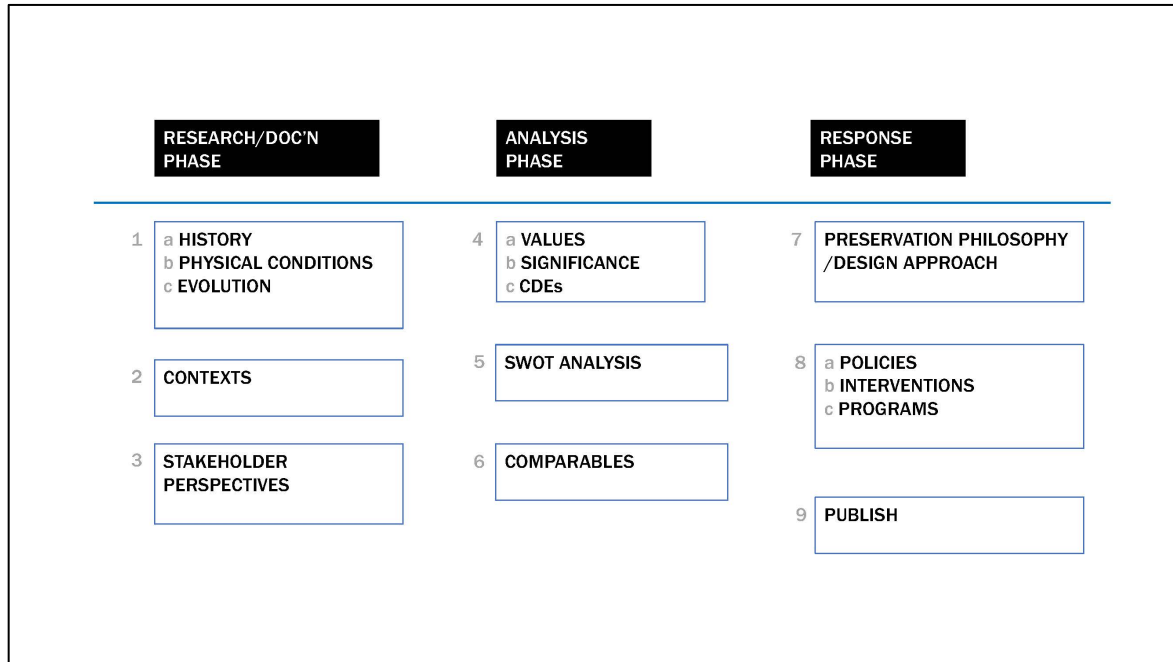
Class sessions and team work sessions will be conducted in person, held either in Meyerson Hall or as small-project-team site visits in Philadelphia and Montgomery. Depending on evolving public health guidance, we may take advantage of working online, via Zoom. Travel expenses for the Montgomery project will be funded by the School. The only out-of-pocket costs envisioned for students will be individual and team printing costs.

The central gathering point for information for the studio will be the Canvas page for HSPV701 (<https://canvas.upenn.edu/>). Assignments, readings, slides, recordings, deliverables will all be shared and stored on the course's Canvas site. For intra-team sharing during project work, Box is the preferred platform for sharing and especially archiving data and completed work. Project teams will also be asked to use Slack, GroupMe or Teams for intra-team communication.

For on-campus sessions, two studio rooms in Meyerson are available for our use: 412 and the ex-Lab. During our scheduled class sessions on Tuesday and Thursday afternoons, HSPV701 has exclusive use of these spaces; at other times, HSPV students are allowed to share the spaces. [See School rules about accessing Meyerson](#); While working together in-person (in Meyerson or at study sites), everyone is required to abide by physical distancing rules, strict use of personal protection equipment, OpenPass, and of course the usual (non-pandemic) site-safety protocols. Everyone must take the [online site-safety training module](#) prepared by Penn's EHRS office before any field visits. Here are some useful links to [WSOD](#) and [Penn Wellness](#) websites for all things pandemic- and health-related.

4. PLANNING PROCESS DIAGRAM / DELIVERABLES LIST

The following diagram represents the sequential process for our Long Projects; the Deliverables list outlines the products due for each stage in the process. (The diagram and list are available as separate, one-page pdfs on Canvas.)



Deliverables List

PHASE		DELIVERABLE DESCRIPTION
1a	History	Short narrative (5-7pp); timeline (single-page graphic); supporting illustrations as needed (capturing key moments of change, previous conditions, etc.)
1b	Physical conditions	Base graphic documentation (plan and elevation drawings; exterior and interior photography); Bullet list of materials and problematic conditions; annotated photographs/drawings; brief narrative synthesis.
1c	Evolution	Maps, plans or diagrams outlining physical change of the site over time
2	Contexts	Memo summarizing research on enabling environment and contemporary dynamics affecting preservation futures (public policies, recent developments gleaned from media) (bulleted paragraphs; 3-5pp)
3	Stakeholder perspectives	Narrative synthesis of interviews and research; list of stakeholders/"power map" or other diagram; this can be added to throughout the project
4a	Values	Typology/list of relevant values; 1-2 paragraph description of each; a diagram illustrated dynamics between the place's values (template provided)

4b	Significance	Succinct narrative statement (typically 3-6 paragraphs) synthesizing and prioritizing values into a comprehensive rationale for preservation and development of the site
4c	CDEs (character-defining elements)	Memo summarizing tangible and intangible factors bearing significance Annotated illustrations of physical features reflecting significance in fabric (combing short narrative, bullet point summaries, and captioned images as needed)
5	SWOT	Group workshop synthesizing all the team's research and other insights on the site and its contexts; (These workshops will be convened in Meyerson with faculty; we'll provide instructions laying out the procedure for a +/- two-hour team workshop.)
6	Comparables	Research on other sites with similarities to the study site, strategically chosen to inform the formation of preservation philosophy (#7) (slides presenting each comparable; takeaways of the cases to be summarized in a memo)
7	Preservation Philosophy/ Design Approach	Succinct narrative statement establishing guidance for all your proposals (1-2pp) (The next assignments – 8a, then 8b&c – elaborate on and implement the philosophy.)
8a	Policies	Policies are strategies. Organize them by sector (interpretation, structures, surfaces), by spatial component (interiors, façade, adjoining public space, etc.), or by some other scheme. (8a, 8b and 8c are progressively more detailed recommendations, “nested” within one another.)
8b	Interventions	Specific material actions; prioritized and phased; bullet-point descriptions; illustrated as needed.
8c	Programs	Specific programmatic, functional actions; prioritized and phased; bullet-point descriptions; illustrated as needed. (Together, 8b and 8c should address all aspects of the site: interpretation, conservation, other design changes, economic activities, community impacts, environmental linkages, etc.)
9	Publish	Final report and presentation: specifications to come – at least a slideset plus memos/report.

5. FORMAT AND SCHEDULE

OVERALL SCHEDULE (details below)

Week	Phase	Tuesdays		Thursdays	
1	Startup	Aug 31	Intros	Sep 2	RM talk Op-ed assignment due
2		Sep 7	PH talk Intro Box 4 exercise	Sep 9	BL talk
3		Sep 14	Debrief Box 4 exercise Box 4 Assignment due Intro Building assessment exercise (JS/MR)	Sep 16	Engagement/Co-design 1 (RM): readings discussion Engagement/Co-design 2 Kenyatta McLean (3:30) Self-assessment assignments due
4		Sep 21	Building assessment exercise - due & presented today (JS/MR)	Sep 23	Graphics and project management workshop Ethics journal entry due Long Projects kickoff
5	Long Projects	Sep 28	Phase 1 begins	Sep 30	
6		Oct 5	Research pin-up	Oct 7	
7		Oct 12	Travel week	Oct 14	Travel week
8		Oct 19		Oct 21	
9		Oct 26	Presentation: Assignments 1, 2, 3 due	Oct 28	Phase 2 begins
10		Nov 2		Nov 4	
11		Nov 9	Presentation: Assignments 4,5,6 due	Nov 11	Phase 3 begins
12		Nov 16		Nov 18	
13		Nov 23		Nov 25	No Class (Thanksgiving)
14		Nov 30		Dec 2	
15		Dec 7	Pre-final pin-up: Assignments 7, 8, 9 due in draft	Dec 9	
Finals		Final review TBD, sometime Dec 13-17			

START-UP: MODULES, WORKSHOPS, & SKILL-BUILDING

The first few weeks of the studio will cover several topics that underpin the use of Burra-Charter-based preservation planning methodology. These include exploring the structure, rationale and use of the methodology itself; rationale, principles and methods of community engagement and participatory design (or co-design); quick assessment of building conditions as an input to site-centered planning methods

Aug 31: Introductions

COURSE INTRODUCTION (RM, PH, BL):

- outline, schedule, goals
- planning as a methodology for informing & making decisions
- abiding issues of acutely disadvantaged, majority Black neighborhoods and institutions
- opportunities for using heritage for community strengthening – whether tactical preservation as a community-centered, creative-placemaking informed, triage-like refinement of adaptive reuse or creating more sustainable business models for heritage-stewardship organizations
- RM: planning not Planning; a plan is a framework to help make decisions; role of studio in curriculum and in practice; meeting the moment
- PH: identifying and engaging stakeholders in the planning process, and using values to craft strategies which will resonate with them and with funders to maximize potential for success
- BL: challenges and opportunities facing Black heritage places and organizations
- introduce study sites (RM)

INTERACTIVE DISCUSSION (in-class) among students on generating a “mission statement” for the work this semester. How do we situate ourselves in the preservation field and vis-à-vis our partners and collaborators? How we articulate our expectations, values and ethics is a first step in aligning with our clients, partners, and collaborators. Beyond the strict learning objectives of the Studio, which have little political edge or individual expression, what do we mean to achieve with our work? What does this work mean for students personally and as a cohort of young professionals?

POST-CLASS INDIVIDUAL ASSIGNMENT: Write a one-page “op-ed” (personal reaction paper) answering the question, “How should historic preservation address the urgent societal issues of the moment?” Students can draw on the mission statement exercise, their own reading and opinions, and the readings assigned below. Due by Thursday, September 2, at noon, via Canvas.

Readings (in Canvas):

- Donna Graves and Gail Dubrow, “Taking Intersectionality Seriously,” [The Public Historian](#).
- Starr Herr-Cardillo, “[Why do we save white monuments and let Black history rot?](#)” PlanPhilly
- Randall Mason, “Engaged Preservation” [Journal of Architectural Education](#)
- Andrea Roberts, “When Does It Become Social Justice? Thoughts on Intersectional Preservation Practice,” Forum/National Trust for Historic Preservation
- Inga Saffron, “[Buildings Matter Too](#)” Philadelphia Inquirer

Sep 2: Values-based preservation planning

RM SLIDE TALK

DISCUSSIONS AND PRESENTATIONS IN CLASS:

- Discuss “op-ed” assignment
- What is values-based preservation planning? Reading and discussing the Burra Charter framework and considering some related scholarship (RM)

- Review our planning process diagram and deliverables table; do a very quick run-through of a hypothetical project (RM)
- Reviewing and critiquing some preservation plans; fitting the scope and inquiry to the resource and the values (PH: examples from Getty Keeping It Modern projects)

PRE-READINGS: (on Canvas)

- Burra Charter and Burra Practice Note;
- Mason & Avrami and Demas in Corinth;
- Clark in GCI
- supplementary: Macdonald et al, Values in Heritage Management; Clark, Heritage Games; Kalman, Heritage Planning

ASYNC videos on Canvas available for viewing (totally optional):

- Public policy and governance issues, how to quickly assess them: matrix; governance; five public policy types (Randy ASYNC)
- Urban planning 101: primer on basic concepts and tools: “crossing the street”; punch list of tools and how they work (Randy ASYNC)
- Reviewing and critiquing preservation plans (Pamela ASYNC)

LONG PROJECT PREFERENCE FORMS: These are due before the next class session on Sep 7 (email them to rfmason@design.upenn.edu)

Sep 7: Pamela Hawkes introductory talk

PH SLIDE TALK

Highlighting stakeholder and client values – Ft Adams and other projects

INTRO POST-CLASS TEAM ASSIGNMENT: Determining Significance: the “Box 4” assignment

- The assignment asks you to carry out the analyses of “Box 4” from our preservation planning process diagram.
- Each three-person team will be assigned a Penn campus building, for which some basic historical documentation will be provided. Focusing on the exterior of the building, you’ll work through the stepwise process of:
 - (a) listing and characterizing value types (refer to Burra Charter or GCI publications for a starting list)
 - (b) synthesizing these into a short (2-3 paragraph) statement of significance, and
 - (c) presenting a visual glossary of the character-defining elements – those elements or features that embody the cultural significance of the place in fabric
- Faculty will run through the exercise in-class on September 7, give some guidance, and field questions.
- Product is a short slide deck (pdf, uploaded to Canvas). Due in one week (9/14), discussed in class on 9/21 along with Building assessment presentations/debriefs.

Sep 9: Brent Leggs introductory talk

BL SLIDE TALK

Challenges and success stories in preserving African American heritage places

POST-CLASS ASSIGNMENT: due 9/16, submit to Canvas

- Collaboration self-assessment form; find the form on Canvas, submit as an assignment.

Sep 14: Significance / Building Assessment 1

DEBRIEF ON RESULTS OF THE “BOX 4” ASSIGNMENT about values, significance and character-defining elements

BUILDING ASSESSMENT

- Jessica Senker/Melanie Rodbart TALK: building assessment/diagnosis/triage: protocols; materials and systems identification; some preservation-planning case studies centered on materials considerations; informing the kinds of decisions we are advising/making, about strategies, priorities, adaptive reuse pathways; emphasis on triage; understanding what conditions are deal breakers and how condition might impact where and how to re-use a site
- virtual “in-class” exercise: students develop a methodology for performing a conditions assessment of 1 or 2 buildings; work in small groups to do this, then reconvene and discuss as a group.

POST-CLASS TEAM ASSIGNMENT: Building Conditions Assessment

- The three-person teams that worked together for the “Box 4” assignment will use an assigned Penn campus building and perform an exterior building conditions assessment, recording the following information:
 - (a) building materials/components;
 - (b) general conditions of each material/component;
 - (c) identification of highest priority condition(s) and why they are a priority
 - (d) issues/items needed further study or consultation
- Faculty members are available to visit the sites with the student groups to provide guidance during the assessment process, but this must be coordinated with faculty in advance.
- Product is a short slide deck outlining the above information presented during class on 9/21 and also uploaded to Canvas (as a PDF). Presentation should be concise and not exceed 10-15 minutes.

Sep 16: Community Engagement and Co-Designing

ENGAGEMENT/CO-DESIGN 1

- Intro lecture (RM): “participatory design”/co-design, not just “community engagement”; mapping out the ideals and opportunities with some published works: Arnstein; PennPraxis; Low on REAP; de la Pena, et al. [Design as Democracy](#)
- Group process: ground rules... responsibility and accountability... “the conductor-less orchestra” (RM)

PRE-READINGS on Canvas:

- Arnstein, “Ladder of Citizen Participation” (read pdf)
- PennPraxis [Community Preservation Toolkit](#) (pdf)
- Low on ethnography and REAP methodology (pdf)
- [Design as Democracy](#) (available as PennLib ebook) – choose 2-3 of the short chapter examples

ENGAGEMENT/CO-DESIGN 2

- Live (virtual) workshop with Kenyatta McLean, urban planner and co-founder, Blackspace Collaborative

PRE-READING:

- Blackspace Manifesto (<https://www.blackspace.org/>)
- Brownsville Heritage Conservation Playbook

POST-CLASS ASSIGNMENT: write a short “Journal entry” on ethics – due Sep 23 on Canvas
Write a brief statement about ethical and personal responsibility as a preservationist and as a member of Studio teams. What are your responsibilities to yourself and to your teammates? No more than 500 words.

Resources available on Canvas: various ethical codes for conservation, preservation and related fields used in HSPV 661 last year

Sep 21: Significance / Building Assessment 2

Presentation and discussion of Building Conditions Assessment assignments [led by PH and JS/MR]

Sep 23: Project Management and Graphics

SLIDE TALK

- Project management, decision-making, collaboration and running effective projects (PH)

GRAPHICS WORKSHOP

- Practical instructions on making annotated axons and values diagrams

LONG PROJECTS: PRESERVATION PLANS FOR ROBESON HOUSE and PEACOCK TRACT/LOVELESS SCHOOL

Goal is proposing holistic preservation strategies/plans/design studies for the site/organization...

Working in teams of 7-8 people; each team will work on one site for the entire phase.

As the phase begins, students will be asked to express their preferences regarding which site they want to work on.

Each of the sites will have a significant amount of documentation to work from.

This project lasts about 12 weeks

Workflow will progress through the same preservation planning diagram, and will be paced by a series of due dates for deliverables: October 26, November 9, November 19, December 13-17 [exact **date TBD**] final review.

See detailed session-by-session schedule below, and overall Graphic Schedule.

Assignments correspond to the numbered tasks on the preservation planning diagram; assignment specifications are laid out in the Deliverables document. Out-of-class workflow will be supported by a Slack channel and designated team leaders. Generally, each group will have a scheduled meeting with lead faculty once a week (generally Tuesdays) and other times by request; these scheduled meetings should have an agenda and be led by an identified team-member.

Faculty leadership structure:

- RM and PH will each lead a project, handling day-to-day questions and issues about the overall planning process;
- BL will consult with each project team, advising groups on matters of preservation philosophy/design approach and its connections to earlier analyses and subsequent responses
- JS/ML will consult with each project, handling questions related to materials, building conditions and issues stemming from them.

Intra-group leadership structure:

- Each group will use a Slack channel or GroupMe group to exchange, discuss, share, coordinate.
- Volunteer team leaders will take responsibility as coordinators, liaisons to faculty and keepers of meeting agendas; leaders will rotate during the project;
- The collaboration can be managed both in person and online (using Zoom or other platform).
- Establish a 4th-Floor Studio base for displaying and storing project material and convening team meetings

Site visit preparation checklist: (assign one team member to coordinate):

- PPE, vests, hardhats; closed-toed shoes, long pants and sleeves;
- Complete site safety training (individuals have responsibility for this);
- documentation prep (drawings/maps to sketch on)
- documentation gear (cameras, notebooks/clipboards, distos/tapes, flashlights, binoculars, audio recorder)
- data-sharing framework for post-visit processing

PHASE 1

Sep 28 / 30

GROUP WORK:

- Introduce assignment
- Additional briefing and run-through on sites
- Reading and discussion on the overarching studio theme and goals for these projects
- Goal-setting and team-organization

ASSIGNMENTS:

- READ background research!!
- Individual groups meet to assess info dossier, discuss priority data needs, begin prep for site visits (safety gear, equipment)

WORKFLOWS:

- Research
- Site visits #1 or site visit prep
- Community and expert interviews
- Identify additional research needs

Oct 5 / 7

- Informal pin-up review of research in progress – both groups meet with PH and RM in the Studio
- Continue research, fieldwork, interviews

Oct 12 / 14

- Research, fieldwork, interviews – in close consultation with faculty leads
- Montgomery team travelling for part of the week

Oct 19 / 21

GROUP WORK:

- Thumbnail history: assembling and analyzing research to write a short history; product: 3 pages plus a one-page graphic timeline)
- Physical Conditions memo (summarizing site visit), including diagrams of priority areas for re-use/adaptation
- Graphic summary of overall site evolution
- Explore current issues & contexts: policy, politics, recent events
- Interviews to inform stakeholder perspectives
- Identify comparables

- Montgomery group will schedule a meeting with JS/MR on October 19 to debrief on building assessments

Oct 26

ACTIVITIES:

- Assignments 1, 2 and 3 due and presented in class (slide decks and printed graphics as needed)
- Internal critics also invited (from Penn faculty)

PHASE 2

Oct 28

GROUP WORK

- Generate Values typology and assessments
- Draft Statement of Significance
- Document Character-Defining Elements and integrity statement
- Identify and divide up Comparables

Nov 2 / 4

- Finalize CDEs
- Nov 2 SWOT Analysis meetings: connecting analyses and assessments to planning/decision-making, following a methodology handed out and co-led by faculty; the output is a chart and short memo on priorities
- Draft, debate and write the preservation philosophy
- Finalize takeaways from comparables research
- Outputs: Final CDEs glossary slides; Comparables (one per person; three-slide "case" covering facts, issues, solutions); photos and memo summarizing SWOT; philosophy (1-2pp)

Nov 9

- Assignments 4 and 6 due and presented in class on November 9

PHASE 3

Nov 11

- Team workshop session on November 11 to synthesize findings and feedback... identify gaps in analyzing site, spaces, stories and sustainability... finalize program details... finalize preservation philosophy... brainstorm responses as a group

Nov 16 / 18 [CPCRS virtual symposium this week]

- Pursue response projects individually or in small teams... individual meetings/deskcrits with faculty or other consultants as needed

Nov 23 / 25

- November 23: intra-team brainstorm/ideation session to revise Assignment 8, coordinate individual tasks and identify remaining research needs

- November 25: Thanksgiving holiday – no class

Nov 30 / Dec 2

- Continue individual and small-group work in consultation with faculty: crafting the presentation “pitch”; outlining the slide deck; preparing slides; assembling final report from memos
- Peer review sessions: when convenient, we’ll pair the groups (or subsets from each team) and have them cross-critique their final presentation work

Dec 7 / 9

- December 7 Informal pre-final pinup with faculty and peers – Assignments 7, 8, 9 due in draft
- Continue individual work, crafting the presentation “pitch”; outlining the slide deck; preparing slides; assembling final report from memos

FINAL REVIEW / Week of December 13-17
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- Exact date of the online review TBD
- December 22: Final slide decks and memos due to Canvas

6. WORKFLOW, ASSESSMENT AND GRADING

Day-to-day and week-to-week, studio work is quite varied. It involves a mix of collaboration and individual effort, including documentary research, field work, group analysis sessions, client and community meetings, and presentations. The work progresses through a series of studies, exercises, reports and reviews that will culminate in assessments of significance, a set of policy recommendations, implementation projects, and a multi-phase action plan for the sites we work on.

We know from the outset that there will be too little time for the research required to gain a deep understanding of the place (there will be little time for primary research); we will have too little time and too many constraints to engage stakeholders in ways that would be ideal; and there will be too little time to prepare presentations and reports. Despite these constraints, there is enough time, energy and skill to practice planning (decision-making) methods of research, analysis and designing interventions. Indeed, the principal pedagogical focus of Studio is applying and learning the processes of planning as decision-making so you're prepared to deploy it in your professional work.

Each teamwork project follows the three-stage conservation planning process derived from the Burra Charter, but adapts it to the particular demands and opportunities of the site. The detailed schedule above breaks down how our work will progress; keep in mind that each project will adjust and edit the process to some extent. And despite the structure of deadlines/reviews, the work of the studio will be intuitive and iterative – more creative than scientific. Professors' guidance will often be reactive to student work, not prescriptive. The specifics of each week's activities, topics, assignments, and goals may be refined and adjusted as we move through the course, so the detailed schedule (appended below) is more of an outline than a script.

Periodic and regular reviews of work-in-progress—sometimes within our teams, sometimes inviting outside critics and professionals to add their ideas—add immeasurably to the quality of studio work. The rigor and discipline of presenting one's work, and soliciting and listening to feedback, is an important aspect of professionalization. Realizing effective presentations requires collaboration that is hard work and is perhaps the single most common task in professional work.

Most class sessions will revolve around group meetings to organize our efforts, check progress and brief one another, or discuss important issues and decisions. In between class sessions, there will be a lot of research, fieldwork, meetings and other work to accomplish. There will always be more to do than time will allow – therefore prioritization will be a constant task. As with other courses at PennDesign, for every hour of scheduled class time (8 hours/week for Studio) we expect you'll spend about 1.5 hours working outside of class time (about 20 hours/week in total).

Every student's attendance is expected at each team and class meeting noted in the schedule. In the times officially scheduled for the class (Monday and Thursday, 2-6 pm), you should plan to be working on Studio. Monday class sessions will generally include group meetings to discuss progress, data needs, share insights, and work through issues and decisions. Thursday class sessions will generally be devoted to site visits, independent research, external meetings, or other, non-classroom work.

The work of the studio is best driven by the students and guided, but not dictated, by the faculty. The faculties' responsibilities include supporting, informing, encouraging and critiquing the work of groups and individuals – we aim to be both coaches and critics. The success of the project depends on your leadership and initiative. Your work (individually and collectively) outside of formal class meetings will thus be extremely important.

Leadership is always an issue in situations where teamwork is necessary. Some of us are natural leaders, but all of us have the capability of taking leadership in different ways. The Studio is meant to present opportunities for every student to grow their own capacity for leadership. It takes many forms and, of course, happens informally to some extent. In the week-to-week schedule for Studio we will also formalize some leadership positions by assigning “meeting leaders” who, for a particular internal workshop or team meeting, will take the lead in organizing, managing the work process. Because teaching and learning leadership is not a

straightforward matter, let's take every opportunity we can to discuss leadership, experiment, stretch and take risks in the supportive environment of school. This will begin in our very first meeting, using a leadership/collaboration self-assessment tool.

Evaluation centers on one's engagement with, and contributions to, the studio process. This includes the content and organization of your written work, participation in discussions and presentations (graphic and verbal), and contributions to collective work products. Just as significant, everyone is expected brings a constructive attitude toward collective and individual work, demonstrate leadership, and develop mastery of the concepts and ideas presented in the course. In all respects of the work, we abide by norms of professionalism, ethical practice, and safety.

In addition to faculty evaluation of completed work and work process, occasional peer reviews will be undertaken to help the groups and the faculty reflect on collaborative process and enhance everyone's learning experience. Insight from the peer reviews will be discussed individually on an as-needed basis.

The following guidelines will be followed in assigning course grades:

- Attendance and participation in group activities (including in-class work, fieldwork, research, peer reviews and other scheduled activities): 10%
- Demonstrated leadership in some aspect of the studio: 10%
- Individual, written assignments from Startup phase: 20%
- Your team's Long Project work and your individual contributions, including work products, meetings, presentations, research, and fieldwork: 60%

Final letter grades will be figured on the basis of these assignments and expectations. General guidelines for grades are as follows: A+ Exceptional; A Outstanding; A- Excellent; B+ Very good; B Good; B- Competent; C+ Fair; C Acceptable; C- Marginal; F Failure.

Use of wireless internet access during class time (on laptops, smart phones, tablets, or other devices) must be confined to course-related activities.

Everyone, at all times, is expected to abide by the academic honesty principles set out in the [University's Code of Academic Integrity](#). You should also refer to the [PennDesign Student Handbook](#) for academic and other policies that must be followed.

The Stuart Weitzman School of Design's Commitment to Diversity ([Diversity at Weitzman](#)):

The University of Pennsylvania Stuart Weitzman School of Design is committed to creating an educational setting in which all students, faculty members, and staff members are valued. We strive to create an inclusive culture that celebrates difference and is strengthened by contributions from people of all races, religions, countries of origin, genders, ages, sexual orientations, physical abilities, learning differences, and socioeconomic backgrounds. We aspire to support and retain a student body, faculty and staff who are representative of the multiple communities and publics with which we collaborate and work. A diverse community here enhances our ability to prepare the next generation of artists, architects, landscape architects, planners, and preservationists to become leaders and innovators in a multicultural society. Preservation Studio faculty believe deeply in this commitment to diversity and welcome conversations about how to sustain it.

7. VALUES-CENTERED THEORY and PRESERVATION DECISION-MAKING METHODOLOGY

Simply put, planning is a disciplined, thorough, and transparent way of making decisions. Conservation planning helps make decisions small and large, simple and complex, near-term and long into the future about sites of significant cultural value. Acknowledging that sites have multiple values and stakeholder interests, there is no one best answer to “what should the future of this site be?” reachable by scientific method; by contrast, planning methodologies employ a multitude of tools, types of research and decision-making processes to balance the many issues and many possible solution paths to conserving a site. Planning also requires creativity, expects idiosyncrasy, and embraces the politics that shape the social construction of heritage.

All preservation projects and policies require planning; all preservation professionals must know how to plan. It is an essential tool for practitioners and managers—no matter whether they are public officials, private owners, consultants, or leaders of a nonprofit group, and no matter whether one’s primary concern is material conservation, economic development, interpretation, community empowerment, and so on. The basic insights, lessons, methods and issues of this course are applicable—in principle, and in method—to nearly every historic preservation project. As an aspect of preservation praxis, however, planning is often taken for granted. In the preservation fold, the expectation of certain outcomes too often precludes thinking much about the processes of research, contemplation, deliberation and decision that should lead to outcomes. The Studio focuses on these processes.

In contemporary preservation practice, one must deal with the varied values ascribed to a place, building, or landscape, and Studio work is designed to deal with these complexities. Heritage sites often have long histories of change, and multiple stakeholders and clients asserting claims. Every site is valued in a multiplicity of ways, and rarely can all values of a site be realized without conflict. Plans of action must be based on thorough research into the history and materiality of heritage places, sound analysis of contexts (urban, architectural, political, environmental, economic), and well-crafted interventions. Creativity plays a part in conservation plans, balanced against rigorous, logical, transparent research and planning methodology. Conservation planning is thus meant to be both creative and practical; balancing these goals is the central challenge met and skill developed in the Studio.

Values-centered preservation theory and best-practice in the planning field form the conceptual basis for the Studio. More specifically, the literature on conservation planning based on the Burra Charter framework and its emphasis on a broad understanding of cultural significance serves as a valuable resource. Just as valuable, however, is the professional experience and guidance provided by faculty, who, through their accumulated work, will lend perspective, pose questions, cajole, encourage and otherwise help problem-solve.

These few paragraphs outline some of the general features of values-centered preservation theory; more details can be found in the readings for the first week of the semester, including the Burra Charter.

Before determining how a place should be preserved and what kinds of interventions are needed, values-centered planning first explores the question, “How is this place valued”? Values-centered preservation planning explores the many, varied values of a heritage site—not just the ones that are most obvious or familiar to us. Because there are many aspects to a heritage place’s value, this exploration requires several kinds of methods, clear elaboration of the different values (which sometimes connect and sometimes conflict), and a deliberate phase of synthesizing the different appraisals of value.

Conservation plans work best when they respond to all the values of a site, while giving priority to its cultural significance. Understanding cultural significance—a notoriously varied and changeable concept—requires us to use a number of research, planning and design methods. Significance is constituted of different values, some of them easily discerned by scholarly research, others knowable only through consultation with communities and other stakeholders who value or participate in the stewardship of heritage sites.

Generically, conservation planning work is organized in much the same manner as city, environmental or other branches of planning – around three sequential phases of work:

- **Understanding** of the place through research and documentation
- **Analysis** and synthesis of this knowledge
- **Response** in the form of plans, projects and other interventions.

The **Understanding** phase is a period of immersion in the history, conditions, character, issues, and contexts of the place. You will be expected to research the history and physical evolution of the place, assess existing conditions, understand the positions of different stakeholders, and analyze development potentials, social issues and preservation priorities. This effort will include primary and secondary historical research, collection of historical and contemporary images, physical survey, mapping and other documentation, collection of socio-economic data, research on relevant public policies, media scans, and researching comparable sites in other locales. Research will also include consultation—some combination of interviews, presentations, meetings, surveys—with clients, experts, communities, and other stakeholders. Determining the specific research tasks for each section will be one of the first orders of business.

In the **Analysis** phase, pairs within each team will drill down on the detailed possibilities for particular sites or types. For each project, the pair will draft a “statement of significance” for their site, identify character-defining elements, carry out a SWOT analysis, entertain different preservation-design-planning scenarios, and formulate a general preservation “approach” or policy. It is a creative and collaborative process, generating a range of possibilities; there is no recipe or scientific methodology.

The **Response** phase results in specific projects and interventions, each of which will be refined in one-on-one work with faculty and pitched at the final presentation. All proposals – no matter how careful or adventurous – need to embody a cogent, thoughtful, ethical preservation strategy, honor the cultural significance of the place, and advance the interests of equitable development.

The products of all phases of work, taken together, will constitute the final plan documents (with the addition of an executive summary, appendices, and other material as appropriate). The last, and recurring, task of a conservation plan is a regime of ongoing monitoring – given the time-frame of our semester-long projects, this is beyond our practical scope but should be part of our strategic recommendations.

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