



National Trust  
Conference  
2018

## Workshop 1

### Implementing Heritage Surveys and Digital Inventories Workshop

National Trust Conference 2018

October 18, 2018 (9:00am – 4:00pm)

Fredericton Convention Centre, Fredericton (NB)

**Learn From Global Leaders at the Digital Cutting-Edge of  
Heritage Planning.  
Unlock heritage surveys and digital inventories as powerful  
tools for understanding and managing heritage in your community.**

#### WORKSHOP DESCRIPTION:

A fundamental principle in heritage management is that knowing and having up-to-date information on one's heritage is essential to its protection and promotion. This principle makes heritage inventories, and information fed into them from survey activities, critical tools to inform planning policies, processes, decision-making, the targeting of community investment, and heritage promotion. This workshop will cover practical considerations, approaches, and tools for heritage surveys and inventories – small and large, rural and urban.

In the morning session, presenters will discuss SurveyLA, Los Angeles' citywide historic resources survey, which was completed in 2017 and was the largest survey initiative ever completed in an American city. What lessons for other heritage organizations, both small and large, may be drawn from this initiative, and what are some of the challenges and opportunities to build upon survey information as a first step in creating a comprehensive historic resources inventory? Using SurveyLA as a case study, workshop presenters will provide an overview of planning for and implementing surveys while discussing various survey tools ranging from public outreach strategies, to applying historic contexts for historic resource evaluation, to field recording methods. Presenters will discuss how the needs for ongoing information management and online publishing were addressed through the customization and implementation of the open source Arches Heritage Inventory and Management platform as HistoricPlacesLA, the Los Angeles Historic Resources Inventory.

During the afternoon session, members of the Arches project team will demonstrate the functionality of Arches Version 4, and the online/offline Arches mobile data collection app (currently under development) for smartphone and tablet field data collection and data contributions including crowdsourcing with the new data-collection project manager tool. The Arches team will present a new module under development for building customized workflows, such as for tracking the status and outcomes of heritage resource designations and environmental impact assessments. Presenters will also

discuss steps for implementing Arches, including customizing the software to meet your organization's or project's needs. They will also present how Arches is being implemented by a range of heritage organizations and projects around the world, ranging from a historic veterans' residential campus, a rural village in Taiwan, cities in the U.S. and UK, a predominantly rural U.S. county, national heritage inventories in Asia and the Caribbean, and an Oxford-university-based project to record endangered archaeology across 20 countries in the Middle East and North Africa.

## **LEARNING OBJECTIVES:**

1. Understand the successes, challenges, and lessons learned from SurveyLA and how these may be applicable for heritage organizations in Canada.
2. Learn about the use of historic contexts to conduct heritage surveys and how they impact the range and the types of heritage resources recorded.
3. Learn about how the City of Los Angeles has implemented the Arches open source software platform as HistoricPlacesLA as the city's official heritage resource inventory to manage and publish its heritage resources data and as a tool to fully integrate heritage conservation into urban planning processes.
4. Learn about Version 4 of the Arches heritage inventory and management platform, about the forthcoming online/offline Arches mobile data collection app, about a range of implementations of Arches by other organizations and projects, and about approaches to implement the Arches software for both survey work and as an inventory system.

## **WORKSHOP AGENDA:**

### **Morning (9:00am – 12:00 noon)**

- Session Introduction (GCI/JH)
  - Heritage Surveys and Inventories as Effective Tools for Heritage Management
    - Overview of the topics to be presented, setting context that information collected through surveys over time should feed into an ongoing inventory
    - The essential utilities of surveys and inventories
- Heritage Surveys: Developing Survey Tools and Methods Using SurveyLA as a Case Study (JH/KH)
  - Planning Basics for Surveys in Jurisdictions Big and Small
  - Choosing Options for Public Outreach and Participation
  - Completing Context-Based Surveys: Recording architectural, Social, Cultural, and Ethnic significance
  - Implementing a Field Methodology
    - Surveying Outside the Box: Recording and Evaluating Non-Building Resources
    - Recording in urban and rural settings
    - Challenges and Lessons Learned from SurveyLA
  - Overview of HistoricPlacesLA: Developing the Inventory by Implementing Arches to Use, Manage, and Publish Data
- Questions

**Lunch Break (12:00noon – 1:00pm) – Provided**

**Afternoon**

- Arches Heritage Inventory and Management Platform (GCI/Farallon)
  - Background: Why the Getty Conservation Institute and World Monuments Fund built Arches
  - Demo of Arches version 4, including creating and managing data, geospatial capabilities, search functionality, and reporting
  - The Arches mobile data collection app for smartphone and tablet field data collection with or without network connectivity, and data contributions including crowdsourcing with the new data-collection project manager tool
  - Arches deployment considerations including platform installation and legacy data import, as well as new configuration tools, and customization of the platform through the new integrated Arches Designer
  - Arches implementation considerations
  - The Arches open source community, and how to participate
  - How Arches is being implemented by a range of heritage organizations and projects around the world.
  
- Questions

**WORKSHOP PRESENTERS:**

**SurveyLA/HistoricPlacesLA**

- Janet Hansen, Deputy Manager, City of Los Angeles Office of Historic Resources and Project Manager for SurveyLA
- Katie Horak, Principal, Architectural Resources Group, Los Angeles

**Arches**

- Alison Dalgity, Senior Project Manager, Getty Conservation Institute, Los Angeles
- David Myers, Senior Project Specialist, Getty Conservation Institute, Los Angeles
- Dennis Wuthrich, CEO, Farallon Geographics, Inc., San Francisco

**FURTHER INFORMATION**



The Getty Conservation Institute



For additional information on SurveyLA, visit: <https://preservation.lacity.org/survey>

To access HistoricPlacesLA, the Los Angeles Historic Resources Inventory and an implementation of the Arches open source platform, visit: <http://www.historicplacesla.org/>

To learn more about Arches™, visit: <http://www.archesproject.org/>