



Appendix B: Draft Heritage Conservation Plan Terms of Reference

Heritage Conservation Plan Terms of Reference

1.0 Purpose

Heritage Conservation Plans (“HCP”s) are one of the key components for the consideration and conservation of cultural heritage resources in the planning and process. Cultural heritage resources consist of built heritage resources, cultural heritage landscapes, and archaeological resources.

The purpose of a HCP is to provide a detailed overview and guidance on how a cultural heritage resource can and will be conserved as part of, or when adjacent to, a development proposal under the *Planning Act*. HCPs may be informed by the results of a Heritage Impact Assessment (“HIA”) that was completed before the HCP; in these instances the HCP is to build on the findings of the HIA and implement its recommendations. In other instances the HCP will be prepared as a standalone document.

2.0 When is a Heritage Conservation Plan required?

When a property is the subject of a *Planning Act* application, a Heritage Conservation Plan will be requested from the development proponent when a corresponding Heritage Impact Assessment has been required and the HIA recommends a HCP be completed, or where Staff are of the opinion that there is a reasonable likelihood of negative impacts from development on a cultural heritage resource.

City Staff will most often identify the need for a HCP at the Pre-consultation stage or as part of comments on a *Planning Act* application where a Heritage Impact Assessment has been completed. It will often be the case that the HCP is required as part of a subsequent *Planning Act* application, or as a condition of approval. Other projects, such as Environmental Assessments will have their own triggers to complete a HCP or related study.

2.1 A Note on Archaeological Resources and Assessments:

Though archaeological resources are cultural heritage resources, they will most often be dealt with in an Archaeological Assessment. Archaeological Assessments must be prepared in accordance with the Province’s



Standards and Guidelines for Consultant Archaeologists (2011), as may be amended or any successor, by a licensed archaeologist. In the event that a Heritage Conservation Plan is required for archaeological resources, then the HCP must be prepared by or with the input of a licensed archaeologist and must bear their signature.

3.0 Who Can Prepare a Heritage Conservation Plan?

Heritage Conservation Plans must be completed by a qualified professional with demonstrated experience in cultural heritage resource evaluation and conservation. The qualified professional should be registered and in good standing with the Canadian Association of Heritage Professionals and must operate at arms-length from the development proponent and other consultants working for the proponent.

Given the nature of HCPs, the qualified heritage professional may need input and advice from other professionals with subject matter expertise (e.g. an Engineer, who provides a building condition report). While it is recommended that all professionals who provide input into the HCP are registered and in good standing with the Canadian Association of Heritage Professionals, it is recognized that this may not always be the case.

If the HCP author is not a member of the Canadian Association of Heritage Professionals, it will be even more important for them to demonstrate their **direct experience** in heritage resource conservation in an appended curriculum vitae, and relate that experience to the project being discussed.

4.0 Required Contents of a Heritage Conservation Plan

A Heritage Conservation Plan must address the matters set out in the subsections below. In some instances, the City may waive or scope the study requirements set out below based on the nature of the project being considered and any prior related Heritage Impact Assessment.

4.1 Introduction and Identification of Cultural Heritage Resources:

- A) Provide an overview of why the Heritage Conservation Plan is being prepared. Be sure to identify:



- 1) The cultural heritage resource(s) that are the subject of the HCP. Include references to existing heritage recognition, such as inclusion on a Municipal, Provincial, or Federal register, designation under the *Ontario Heritage Act* or Federal legislation, or the relevant cultural heritage landscape recognition.
 - 2) The property owner(s) of the cultural heritage resources discussed in the HCP;
 - 3) Name and background of the qualified heritage conservation professional and other professionals who provide input into the HCP. A Full CV for each professional should be included as an appendix to the HCP, or the relevant study they prepared.
- B) In addition to the details in A) above, where the HCP implements the recommendations of a prior Heritage Impact Assessment, provide a brief overview of the reason (or trigger) for the HIA, any development proposal the prior HIA was prepared to address (including the proponent), and provide an excerpt of the HIA's recommendations.
- C) With respect to A) and B) above, in some instances it may be sufficient to prepare one HCP for all cultural heritage resources that may be impacted. In other instances, it may be more appropriate to prepare separate HCPs for each impacted cultural heritage resource. The primary consideration in this case is ensuring that the analysis and recommendations for each cultural heritage resource are clear and confusion between conservation approaches for different resources is avoided.
- D) If the HCP is a standalone document, provide a brief overview of the project or works that have been proposed for the cultural heritage resource.
- E) Include contextual mapping (location maps and/or aerial photos) and a site plan of the property as it exists.
- F) This section of the HCP should also briefly reference the policy context regarding heritage conservation; be sure to refer to the appropriate policies within the City of Brantford's Official Plan in addition to any other policies referenced.

4.2 Analysis of Existing Conditions



- A) Where the HCP implements the recommendations of a prior Heritage Impact Assessment, refer back to the analysis of impacts and recommendations.
- B) For each cultural heritage resource discussed within the HCP:
 - 1) Provide a description and photo documentation of the as-found exterior and, where possible, interior of the resource or landscape. Make sure all heritage attributes or matters relating to any prior HIA recommendations are captured;
 - 2) As necessary, consider matters including: the site (landscaping, drainage, servicing); structural elements (foundations, load bearing components); building envelope (roof, walls, windows); mechanical, plumbing and electrical; fire safety; building/site security.
 - 3) Refer to any separate studies that may inform this analysis (e.g. a building condition report).
 - 4) Assess the condition of the cultural heritage resource's current conditions. Based on any known or anticipated impacts, consider any deficiencies or vulnerabilities (e.g. a stone foundation may be sound at the time of assessment, but vulnerable to certain thresholds of construction vibration).
- C) Based on the analysis conducted under B) above, identify the appropriate standards and guidelines for the conservation of the resource that will be considered such as Parks Canada's *Standards and Guidelines for the Conservation of Historic Places in Canada*; Ontario's *Eight Guiding Principles in the Conservation of Built Heritage Properties*, and *The Ontario Heritage Toolkit*; and any relevant City of Brantford policies or design guidelines such as Heritage Conservation District studies or urban design guidelines.

4.3 Recommended Conservation and Mitigation Measures

- A) Following the assessment of the impacts, resource condition, and appropriate standards and guidelines for conservation, the Heritage Conservation Plan must recommend conservation measures to be completed.
- B) As part of any recommendations, make sure to:
 - 1) Detail the recommend work, clearly identifying any deficiencies or vulnerability that is being addressed. Account not just for the work



itself, but any interim stabilization of the cultural heritage resource (e.g. if repairing stained glass windows, detail not just the restoration work but also how the window opening would be treated in the interim with the window removed; if disassembling part of a cultural heritage resource, how will the materials be stored and protected?).

- 2) Outline the timing of work with respect to the stages of the project. Clearly articulate which recommendations will need to be acted on in the near term, medium term, or long term, or any conditions to trigger such work (e.g. conduct vibration monitoring during the entire construction process, and detail the interval; undertake necessary masonry repairs to a foundation wall prior to other construction and vibration impacts; review a foundation's condition and undertake masonry repairs if necessary, following construction; if a cultural heritage resource is proposed to be designated, the timing of designation should be considered) .
- 3) Detail specific considerations for given work (e.g. appropriate mortar type, or potential sources of replacement brick or stone; time period/season during the year that work may need to be done). Where heritage attributes are being replicated in new material, provide rationale as to how the material is a suitable substitute and how it will be treated to replicate existing heritage attributes.
- 4) Detail any special qualifications for professionals recommended to do the work (e.g. an engineer with structural experience or geotechnical experience; a licensed archaeologist for any archaeological work; etc.).
- 5) Provide a reasonably detailed cost estimate for the recommendations (e.g. labour, reasonably anticipated rentals, materials). Cost estimates may form the basis of securities.
- 6) Clearly reference any contemporary related studies that are considered (e.g. archaeological assessments; landscape plans; urban design reports; etc.) in the formulation of the recommendations in addition to inclusion of those sources into the list of works cited.
- 7) Detail the timing of any monitoring schedule or follow-up inspections or implementing plans (e.g. a foundation could be inspected for damage following major milestones of construction and memoranda prepared to document the findings and any necessary or completed interventions).



- 8) Detail any other plans or studies where the recommendations of the HCP may be implemented (e.g. interpretive signage can be discussed in the HCP and its location and content would also be detailed on a building elevation drawing, site plan, or landscape plan).

4.4 Report Conclusion

- A) The Heritage Conservation Plan must conclude by:
 - 1) Clearly identifying the cultural heritage resources that were evaluated; and,
 - 2) Summarizing the impacts and recommended conservation measures.
- B) The professional(s) who prepared the HCP must include their signature and relevant professional accreditation.

4.5 Additional Contents and Appendices

- A) The Heritage Conservation Plan must include a works cited. While a specific style is not required, citations are required to be consistent throughout the document and a consistent format within the works cited.
- B) The HCP must include a *curriculum vitae* for the author(s).
- C) Appendices should reflect the order that they are referred to within the document.
- D) Where a study or report is referred to because it specifically informs the HCP (e.g. a building condition report) then the study or report must be appended to the HCP.
- E) Where a study is referred to by the HCP, and that study is associated with the same project or *Planning Act* application (e.g. a Heritage Impact Assessment, or a Site Plan), then the study can be referred to and cited without being appended to the HCP.