The Corporation of the City of Kawartha Lakes

Agenda

Committee of the Whole Meeting

COW2020-05

Tuesday, September 1, 2020

Open Session Commencing at 1:00 p.m. - Electronic Public Participation

Council Chambers

City Hall

26 Francis Street, Lindsay, Ontario K9V 5R8

Members:

Mayor Andy Letham
Deputy Mayor Patrick O'Reilly
Councillor Ron Ashmore
Councillor Pat Dunn
Councillor Doug Elmslie
Councillor Tracy Richardson
Councillor Kathleen Seymour-Fagan
Councillor Andrew Veale
Councillor Emmett Yeo

Note: This will be an electronic participation meeting and public access to Council Chambers will not be available. Please visit the City of Kawartha Lakes YouTube Channel at https://www.youtube/c/CityofKawarthaLakes to view the proceedings.

Accessible formats and communication supports are available upon request. The City of Kawartha Lakes is committed to accessibility for persons with disabilities. Please contact Agendaltems@kawarthalakes.ca if you have an accessible accommodation request.

| | | Pages |
|-------|---|----------|
| 1. | Call to Order | |
| 2. | Adoption of Agenda | |
| 3. | Disclosure of Pecuniary Interest | |
| 4. | Deputations | |
| 4.1 | COW2020-05.4.1 | 14 - 26 |
| | Overview of the 2020 Budget Companion Document for Lake Simcoe Region Conservation Authority Mike Walters, Chief Administration Officer, Lake Simcoe Region Conservation Authority | |
| 5. | Presentations | |
| 5.1 | COW2020-05.5.1 | 27 - 57 |
| | Standards and Guidelines for the Conservation of Historic Places in Canada Presentation Emily Turner, Economic Development Officer - Heritage Planning | |
| | That the presentation by Emily Turner, Economic Development Officer - Heritage Planning, regarding Standards and Guidelines for the Conservation of Historic Places in Canada, be received. | |
| 5.1.1 | Report ED2020-017 | 58 - 348 |
| | Adoption of the Standards and Guidelines for the Conservation of Historic Places in Canada Emily Turner, Economic Development Officer - Heritage Planning | |
| | That Report ED2020-017, Adoption of the Standards and Guidelines for the Conservation of Historic Places in Canada, be received; | |
| | That the Standards and Guidelines for the Conservation of Historic Places in Canada be adopted as the City's conservation standard for heritage properties; and | |
| | That this recommendation be brought forward to Council for consideration at the next Regular Council Meeting. | |

| 5.2 | COW2020-05.5.2 | 349 - 355 |
|-----|---|-----------|
| | Charitable Road Tolls Presentation Aaron Sloan, Manager of Municipal Law Enforcement and Licensing | |
| | That the presentation by Aaron Sloan, Manager of Municipal Law Enforcement and Licensing, regarding Charitable Road Tolls , be received. | |
| 5.3 | COW2020-05.5.3 | 356 - 361 |
| | Backyard Chickens Presentation Aaron Sloan, Manager of Municipal Law Enforcement and Licensing | |
| | That the presentation by Aaron Sloan, Manager of Municipal Law Enforcement and Licensing, regarding Backyard Chickens, be received. | |
| 6. | Reports | |
| 6.1 | CA2020-001 | 362 - 367 |
| | Update on Development Charges and Community Benefits Charges Adam Found, Manager of Corporate Assets | |
| | That Report CA2020-001, Update on Development Charges and Community Benefits Charges, be received; | |
| | That 2020 special project 921204601 (Community Benefits Charges Strategy) be renamed "Development Charges Background Study", have its budget reset to \$70,000, financed 90% by the Administration Studies Account of the Development Charges Reserve and 10% by the Contingency Reserve, and have its timeframe extended to June 30, 2022; and | |

That this recommendation be brought forward to Council for consideration at the next Regular Council Meeting.

6.2 PLAN2020-042 368 - 379

New Road Names for Portions of Old Highway 7 at Meadowview Road Richard Holy, Manager of Planning Joel Watts, Deputy Clerk That Report PLAN2020-042, New Road Names for Portions of Old Highway 7 at Meadowview Road, be received;

That the new service road (formerly Highway 7) created by the Ministry of Transportation north of Meadowview Road with its realignment of Highway 7 in the former Township of Emily be renamed to (**select one**):

- Guiry Court
- McCumber Court
- McQuade Court; or
- Switzer Court

That the new service road (formerly Highway 7) created by the Ministry of Transportation south of Meadowview Road with its realignment of Highway 7 in the former Township of Emily be renamed to (**select one**):

- Guiry Place or Road
- McCumber Place or Road
- McQuade Place or Road; or
- Switzer Place or Road

That the Office of the City Clerk send notice to all affected parties regarding the renaming of the service roads in accordance with the Notice By-law;

That subject to any significant objections raised from the affected parties in the notice period, that a by-law to rename both service roads be prepared, approved, and adopted by Council; and

That this recommendation be brought forward to Council for consideration at the next Regular Council Meeting.

6.3 ED2020-018 380 - 421

Amendments to Non-Compliant Heritage By-laws
Emily Turner, Economic Development Officer - Heritage Planning

That Report ED2020-018, Amendments to Non-Compliant Heritage Bylaws, be received;

That By-laws 2000-024, 2010-091, 2010-092, 2010-093, and 2010-094 be amended to be brought into compliance with the current requirements of the Ontario Heritage Act;

That the necessary amending by-laws be brought forward for adoption; and

That this recommendation be brought forward to Council for consideration at the next Regular Council Meeting.

6.4 ED2020-019 422 - 435

Deferral of the Cultural Centre Task Force

Donna Goodwin, Economic Development Officer - Arts, Culture and Heritage

That Report ED2020-019, Kawartha Lakes Cultural Centre Task Force, be received;

That the request for deferral received from the Kawartha Lakes Arts Council and the Kawartha Cultural and Heritage Network of the Kawartha Lakes Cultural Centre Task Force and the 2020 Cultural Centre Feasibility study be granted;

That the \$50,000 budgeted for the project be extended to reflect the new timeframe;

That the Term of the Taskforce be extended one year to March 31, 2022; and

That this recommendation be brought forward to Council for consideration at the next Regular Council Meeting.

6.5 RS2020-011 436 - 443

Proposed Surplus Declaration, Closure, and Sale of a Portion of Shoreline Road Allowance adjacent to 68 Greenwood Road, Kirkfield Laura Carnochan, Law Clerk - Realty Services That Report RS2020-011, Proposed Surplus Declaration, Closure, and Sale of a Portion of Shoreline Road Allowance adjacent to 68 Greenwood Road, Kirkfield, be received;

That the subject property, being the shoreline road allowance adjacent to 68 Greenwood Road, Kirkfield and legally described as Part of the Shoreline Road Allowance Lying in Front of Lot 8, Concession 4, in the Geographic Township of Laxton, City of Kawartha Lakes, be declared surplus to municipal needs;

That the closure of the portion of road allowance and sale to the adjoining landowner be supported, in principle, in accordance with the provisions of By-Law 2018-020, as amended, and the Municipal Act, 2001, and subject to the parties entering into a conditional Agreement of Purchase and Sale;

That staff be directed to commence the process to stop up and close the said portion of road allowance;

That a by-law (with any amendments deemed necessary) to close the road and authorize its disposition shall be passed if appropriate;

That a deeming by-law be passed contemporaneously with the disposition;

That the Mayor and Clerk be authorized to sign all documents to facilitate the road closing and conveyance of the lands; and

That this recommendation be brought forward to Council for consideration at the next Regular Council Meeting.

6.6 RS2020-013 444 - 451

Proposed Surplus Declaration, Closure, and Sale of Portions of Shoreline Road Allowance adjacent to 72-76 Greenwood Road, Kirkfield Laura Carnochan, Law Clerk - Realty Services

That Report RS2020-013, Proposed Surplus Declaration, Closure, and Sale of Portions of Shoreline Road Allowance adjacent to 72-76 Greenwood Road, Kirkfield, be received;

That the subject property, being the shoreline road allowance adjacent to 72-76 Greenwood Road, Kirkfield and legally described as Part of the Original Shore Road Allowance Along Rush Lake Lying in Front of Lots 26, 27, and 28 on Plan 366, in the Geographic Township of Laxton, City of Kawartha Lakes, City of Kawartha Lakes, be declared surplus to municipal needs;

That the closure of the portion of road allowance and sale to the adjoining landowner be supported, in principle, in accordance with the provisions of By-Law 2018-020, as amended, and the Municipal Act, 2001, and subject to the parties entering into a conditional Agreement of Purchase and Sale;

That staff be directed to commence the process to stop up and close the said portion of road allowance;

That a by-law (with any amendments deemed necessary) to close the road and authorize its disposition shall be passed if appropriate;

That a deeming by-law be passed contemporaneously with the disposition;

That the Mayor and Clerk be authorized to sign all documents to facilitate the road closing and conveyance of the lands; and

That this recommendation be brought forward to Council for consideration at the next Regular Council Meeting.

6.7 RS2020-014 452 - 459

Proposed Surplus Declaration, Closure, and Sale of a Portion of Road Allowance Known as Deane Street, Lindsay
Laura Carnochan, Law Clerk - Realty Services

That Report RS2020-014, Proposed Surplus Declaration, Closure, and Sale of a Portion of Road Allowance Known as Deane Street, Lindsay, be received;

That the subject property, being a portion of road allowance known as Deane Street, and legally described as Deane Street on Plan 8P between Holtom Street and Dobson Street, Except Part 3 on Plan 57R-9577, in the Geographic Town of Lindsay, City of Kawartha Lakes, designated as Part 2 on Plan 57R-9577, be declared surplus to municipal needs;

That the closure of the portion of road allowance and sale to the adjoining landowner be supported, in principle, in accordance with the provisions of By-Law 2018-020, as amended, and the Municipal Act, 2001, and subject to the parties entering into a conditional Agreement of Purchase and Sale;

That Council set a price of \$15,000.00 as consideration for the subject portion of road allowance;

That staff be directed to commence the process to stop up and close the said portion of road allowance;

That a by-law (with any amendments deemed necessary) to close the road and authorize its disposition shall be passed if appropriate;

That the Mayor and Clerk be authorized to sign all documents to facilitate the road closing and conveyance of the lands; and

That this recommendation be brought forward to Council for consideration at the next Regular Council Meeting.

6.8 RS2020-015 460 - 470

Proposed Direct Sale of City-Owned Property – Juniper Street, Fenelon Falls

Laura Carnochan, Law Clerk, Realty Services

That Report RS2020-015, Proposed Direct Sale of City-Owned Property – Juniper Street, Fenelon Falls, be received;

That the sale of the City-owned property located on Juniper Street, Fenelon Falls and legally described as Lots 247, 248, 249, and 256 on Plan 57; Subject to R283173; Blake Street on Plan 100 Closed By R274935 Between Rock Street and Hill Street; Part of Hill Street on Plan 100 Closed by R274935; designated as Part 7 on Plan 57R-6341, in the Geographic Village of Fenelon Falls, City of Kawartha Lakes to the Fenelon Community Housing Initiative, be supported, in principle, in accordance with the provisions of By-Law 2018-020, as amended, and the Municipal Act, 2001, and subject to the parties entering into a conditional Agreement of Purchase and Sale;

That the subject property be sold for no less than the appraised value, plus all costs associated with the transaction;

That a by-law (with any amendments deemed necessary) to authorize disposition of the subject property shall be passed if appropriate;

That the Mayor and Clerk be authorized to sign all documents to and conveyance of the lands; and

That this recommendation be brought forward to Council for consideration at the next Regular Council Meeting.

6.9 RS2020-016 471 - 487

Proposed Amendments to the Real Property Acquisition Policy Sharri Dyer, Manager, Realty Services

That Report RS2020-016, Proposed Amendments to Real Property Acquisition Policy, be received;

That Policy 205 CAO 044 be amended in accordance with Appendix A; and

That this recommendation be brought forward to Council for consideration at the next Regular Council Meeting.

6.10 HH2020-003 488 - 510

2019 Annual Housing and Homelessness Plan (HHP) Report Hope Lee, Manager of Housing

| That Report HH2020-003 | 3, 2019 Annual Housing | and Homelessness | Plan |
|--------------------------|-------------------------------|------------------|------|
| (HHP) Report, be receive | ed for information; and | | |

That this recommendation be brought forward to Council for consideration at the next Regular Council Meeting.

7. Correspondence

8. Memorandums

8.1 COW2020-05.8.1

511 - 546

Memorandum Regarding an Update on the Economic Recovery Task Force

Mayor Letham

That the Memorandum from Mayor Letham, regarding an Update on Economic Recovery Task Force, be received;

That the Lindsay Downtown Phase 3 Reconstruction Project, and the Fenelon Falls Downtown Reconstruction Project, be included as priority projects for consideration in the 2021 budget; and

That this recommendation be forwarded to Council for consideration at the next Regular Council Meeting.

8.2 COW2020-05.8.2

547 - 549

Memorandum Regarding Community Pandemic Recovery Task Force Rod Sutherland, Director of Human Services

That the Memorandum from Rod Sutherland, Director of Human Services, Update from Community Pandemic Recovery Task Force, be received for information purposes; and

That this recommendation be brought forward to Council for consideration at the next Regular Council Meeting.

8.3 COW2020-05.8.3

550 - 550

Memorandum Regarding Heights Road from Highway 7 to Mount Horeb Road

Councillor Ashmore

That the Memorandum from Councillor Ashmore, regarding Heights Road from Highway 7 to Mount Horeb Road, be received;

That staff report back by Q4, 2020 on short term options for improvement of this road section including pulverizing to gravel, or life cycle extension consideration in the 2021 budget; and

That this recommendation be forwarded to Council for consideration at the next Regular Council Meeting.

8.4 COW2020-05.8.4

551 - 552

Memorandum Regarding Online Petitions

Councillor Ashmore

That the Memorandum from Councillor Ashmore, regarding an Online Petition Option, be received;

That Staff create an online petition option, in addition to the current hard-copy process, for bringing petitions to Council;

That Staff report back by Q4, 2020 with options for an online petition that meet the requirements of the Municipal Act; and

That this recommendation be forwarded to Council for consideration at the next Regular Council Meeting.

8.5 COW2020-05.8.5

553 - 553

Memorandum Regarding Grassy Road Lifecycle Extension Program Councillor Ashmore Councillor Richardson

That the Memorandum from Councillor Ashmore and Councillor Richardson, **regarding Grassy Road Lifecycle Extension Program**, be received;

That Grassy Road from Emily Park Road to Hawke Drive be considered for the Lifecycle Extension Program for 2021; and

That this recommendation be forwarded to Council for consideration at the next Regular Council Meeting.

8.6 COW2020-05.8.6

554 - 554

Memorandum Regarding Logie Street Park Traffic Calming Deputy Mayor O'Reilly

That the Memorandum from Deputy Mayor O'Reilly, regarding Logie Street Park Traffic Calming, be received;

That concerns regarding both vehicular and pedestrian traffic entering and leaving Logie Street Park be considered;

That staff be directed to compare and contrast available traffic calming measures and report back to Council in Q1, 2021; and

That this recommendation be forwarded to Council for consideration at the next Regular Council Meeting.

8.7 COW2020-05.8.7

555 - 556

Memorandum Regarding 2021 Lindsay Legacy CHEST Fund Grant Awards

LeAnn Donnelly, Executive Assistant, Community Services

That the Memorandum from the Lindsay Legacy C.H.E.S.T. Fund Grant Committee, regarding 2021 Lindsay Legacy CHEST Fund Grant Awards, be received;

That the grant award and distribution process for the 2021 year for the Lindsay Legacy C.H.E.S.T. Fund be suspended so funds can be utilized to assist with relief efforts to charitable and non profit organizations within the Town of Lindsay; and

That this recommendation be brought forward to Council for consideration at the next Regular Council Meeting.

8.8 COW2020-05.8.8

557 - 558

Memorandum Regarding Open Air Burning and Fireworks Mark Pankhurst, Chief, Fire Services

That the September 1, 2020 Memorandum from Mark Pankhurst, Fire Chief, **regarding open air burning and the discharge of fireworks**, be received;

That staff bring forward a by-law to restrict the times of discharge of consumer fireworks to between dusk and 11 pm:

- 1. Victoria Day
- 2. the day immediately preceding Victoria Day
- 3. the day immediately following Victoria Day
- 4. Canada Day
- 5. the day immediately preceding Canada Day or
- 6. the day immediately following Canada Day.

That the bylaw include the following regarding the sale of fireworks:

- 1. No person shall sell any firecrackers
- 2. No person shall sell any prohibited fireworks
- 3. No person shall sell consumer fireworks except on the following days:
 - 3.1 Victoria Day and Canada Day and
 - 3.2 each of the seven business days immediately preceding Victoria Day and Canada Day

That staff bring forward a by-law to prohibit open air burning in Lindsay as follows:

 No open air burning permitted in the built up geographical area of Lindsay; and

That this recommendation be forwarded to Council for consideration at the next Regular Council Meeting.

- 9. Closed Session
- 10. Matters from Closed Session
- 11. Adjournment



Request to Make a
Deputation/Presentation to
Council/Committee
City of Kawartha Lakes
City Clerk's Office
26 Francis Street, PO Box 9000
Lindsay, ON K9V 5R8
705-324-9411

| Name: * | | |
|---|---------------------------|---|
| Mike Walters | | |
| Address: * | | |
| 120 Bayview Parkway | | |
| City/Town/Village: | Province: * | Postal Code: |
| Newmarket | Ontario | L3Y 3W3 |
| Telephone: * | Email: * | |
| | s.ingott@lsrca.on.ca | |
| There can be maximum of two speakers for each de who will be speaking. The names that are listed here Mike Walters, CAO, Lake Simcoe Region Conservation Auth | e will be included on the | e name(s) of the individual(s) e Council Meeting Agenda: * |
| | | |
| Please provide details of the matter to which you wi | sh to speak: * | |
| Mike would like to provide a brief outline of our 2020 Budget | Companion document (Pow | verPoint). |
| | | |
| | | |
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| Information only. | | |
|-------------------|--------------|--|
| | | |
| Signature: | Date: | |
| Michael | July 2, 2020 | |

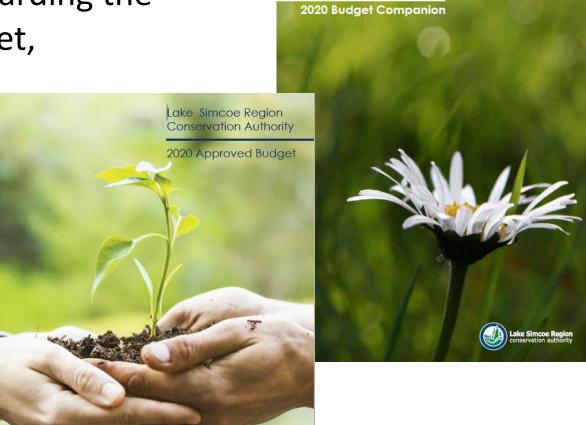
Please complete this form and return to the City Clerk's Office: Fax: 705-324-8110 Email: agendaitems@kawarthalakes.ca

The personal information is being collected by the City of Kawartha Lakes for the principal purpose of a request to make a deputation to Committee or Council pursuant to Section 10 of City of Kawartha Lakes By-law 2014-266. This information may be circulated to members of Council, staff and the general public. Questions about the collection of this information should be directed to the City Clerk or Deputy Clerk at 705 324-9411 ext. 1295 or 1322.





 Produced annually to provide more detail regarding the approved budget,



Lake Simcoe Region

Conservation Authority

- Outlines all LSRCA Services Areas and programs,
- Easy to navigate, read and is transparent,

| SRCA | Profile | 4 | Green | space Services | 20 |
|-------|--------------------------|-----------|-------|---|-----------|
| | | | 21 | Land Management | |
| Corpo | rate Services | 6 | 22 | Property Services | |
| | Corporate Communication | ns | 23 | Recreation | |
| | Facility Management | | 24 | Land Securement | |
| | Financial Management | | | | |
| | Governance | | | ng & Development | 25 |
| | Human Resource Manager | ment | 26 | | |
| 12 | Information Management | | 27 | Permitting and Enforcer | ment |
| colog | jical Management | 13 | Water | Risk Management | 28 |
| 14 | Ecosystem Science and Mi | onitoring | 29 | Flood Management an | d Warning |
| 15 | Forestry Services | | 30 | | |
| 16 | Restoration and Regenera | tion | | Water Management/Re | |
| | ion o Francisco | 17 | 32 | Water Science and Mo | nitoring |
| | tion & Engagement | 17 | Water | abad Chindian C Churchan | ulaa 22 |
| | Community Programming | | | shed Studies & Strates | gies 33 |
| 17 | School Programming | | | Climate Change Research and Innovation | 20 |
| | | | | Watershed Planning | J11 |
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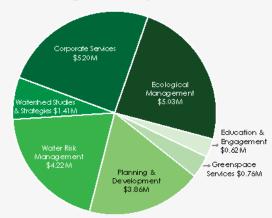
General overview
 of the budget
 summarizing all of
 the 7 service areas,



Our employees uphold our mandate under the following 7 Service Areas, which are detailed in the pages that follow:

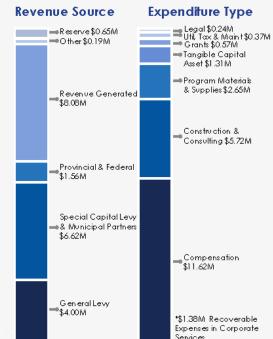
- · Corporate Services
- Ecological Management
- Education & Engagement
- · Greenspace Services
- Planning & Development Services
- · Water Risk Management
- Watershed Studies & Strategies
 19

2020 Budget Summary \$21.10M



Operating and Capital Split





 Each service area is then discussed in detail,

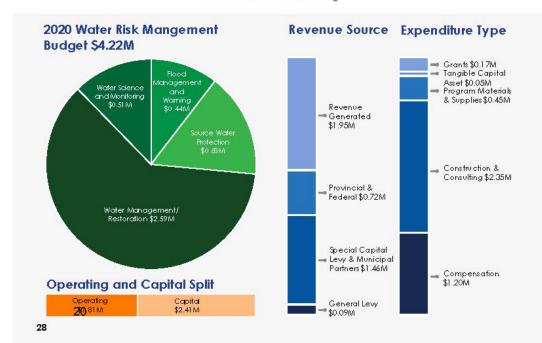


Water Management/ Restoration \$2.59M

2.6 FTEs

Water Science and Monitoring \$0.52M 2.A FTEs The goal of Water Risk Management is to reduce the risks associated with water, to ensure that we have a safe, clean and adequate supply of drinking water, to undertake restoration projects to protect and manage water and to engage in research activities to inform decision making. Water Risk Management consists of the following program areas:

- Flood Management and Warning
- Source Water Protection
- · Water Management/Restoration
- Water Science and Monitoring



- It also reviews the specific programs comprising each service area,
- Highlights past achievements - focuses on the year ahead.

Fast Facts

- The 2019 spring freshet (melt) resulted in extended high lake levels and drawdown time from March through May, impacting the shoreline and infrastructure of Lake Simcoe
- We have expanded our Flood Event Photo Database so that it now includes 372 pictures of flood events going back as far as February 1, 1929

Flood Management and Warning

The goal of the Flood Management and Warning program is to reduce the risk to people, property and infrastructure (roads, bridges, etc.) from hazards due to flooding and to reduce social disruption.

2020 Focus

- Continue to monitor weather forecasts and watershed conditions
- Maintain and improve monitoring system and issue messages when warranted
- Expand GIS database of event photo documentation of flood prone areas of the watershed
- Complete regular inspections of dams and coordinate a structural assessment of the Pefferlaw Dam to address recommendations identified in the 2019 dam inspection report

Outlook

 Our changing climate is creating more extreme weather events and increasing the likelihood of winter runoff flooding due to unseasonable temperatures, as well as more ice damage to our properties

Service Pressures

- Increased pressure on staff and resources to respond to flood events
- Reduced resources due to provincial funding cuts







Proposed AOP
Activities for 2020

Floodplain Emergency Mapping/ Flood Relief Program

Climate Change Adaptation and Mitigation Strategies

Asset Management Plan

Enhance service delivery – Plan Review and Regulation

Scanlon Creek Operations Centre

Fundraising for Education Centre



Our Path Ahead Remains Clear

- Improve water quality & quantity
- Increase our natural heritage systems
- Make communities safer, healthier, and more connected to the natural environment
- Engage our communities to achieve a balance/ between social, economic and ecological needs
- Achieve success through partnerships, innovation and engagement
- Monitor & report our progress to our partners and the community

Questions



Standards and Guidelines for the Conservation of Historic Places in Canada

Committee of the Whole September 1, 2020



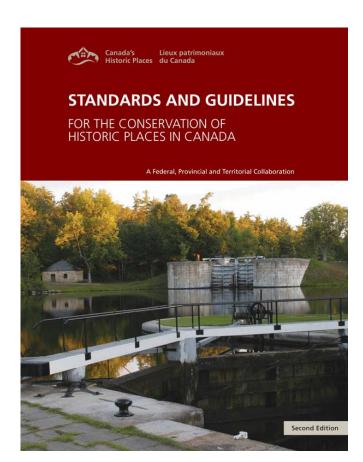
Objectives

- The scope of the document
- Role of the Standards and Guidelines in the conservation process
- Standards and Guidelines in the municipal and Kawartha Lakes context



What are the Standards and Guidelines?

- Federal document developed by Parks Canada in 2003 and revised in 2010
- Pan-Canadian benchmark for heritage conservation



What are the Standards and Guidelines?

- General principles and practice advice to guide decision making for planning interventions on an historic place
- An approach based on the conservation of the historic values of a place and its character defining elements
- A set of guidelines and processes as opposed to a technical manual or prescriptive instructions



Usage

- The Standards and Guidelines are used by the federal government and agencies with regard to their own historic properties
- Adopted and endorsed by most provinces and provincial bodies
- Adopted by many municipalities across Canada
- Used by professionals across the heritage sector to help guide their decision making processes



Conservation Phases

The conservation process has three phases:

- Understanding
- Planning
- Intervening

The Standards and Guidelines speak primarily to the Planning phase, while other polices, legislation and guidelines inform understanding and intervening



Understanding

- Refer to character defining elements and historic value
- Investigate and document conditions

Achieved through historical studies, condition assessments, etc.



Planning

- Maintain or select an appropriate or sustainable use
- Identify project requirements
- Determine the primary treatment
- Review the standards
- Follow the guidelines



Intervening

- Undertake the project work
- Carry out regular maintenance



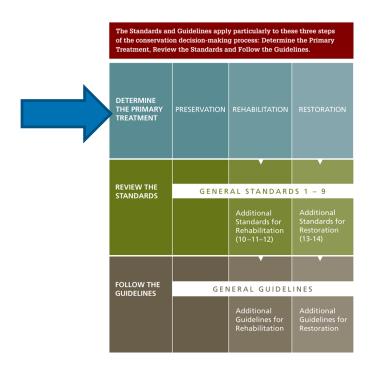
Conservation Decision-making Process

The Standards and Guidelines apply particularly to these three steps of the conservation decision-making process: Determine the Primary Treatment, Review the Standards and Follow the Guidelines.



Determine the Primary Treatment

- What is the primary goal of the conservation project?
- Projects may include a combination of preservation, rehabilitation, or restoration
- Most major contemporary projects are rehabilitation projects that involve upgrading older buildings and/or giving them a new, sustainable use



Conservation

Present

Past

Future

Restoration

Action or process of accurately revealing, recovering, or representing the state of a historic place or of an individual component as it appeared at a particular period in its history while protecting its heritage value

Preservation

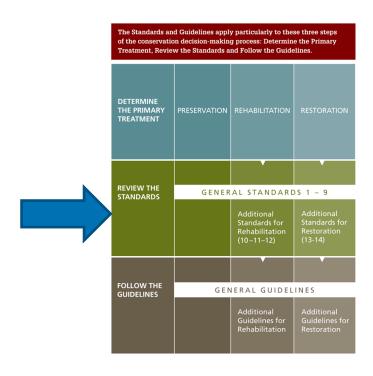
Action or process of protecting, maintaining, and/or stabilizing the existing materials, form and integrity of a historic place or of an individual component while protecting its heritage value

Rehabilitation

Action or process of making possible a continuing or compatible contemporary use of a historic place or an individual component while protecting its heritage value

Review the Standards

- Conservation principles based on internationally accepted charters
- High-level standards intended to conserve the heritage values of historic places
- 9 general standards which should be applied to all projects
- 3 additional standards for rehabilitation
- 2 additional standards for restoration



Standard 1

- Conserve the heritage value of an historic place
- Do not remove, replace, or substantially alter its intact or repairable character defining elements
- Do not move a part of an historic place if its current location is a character defining element



Standard 5

 Find a use for an historic place that requires minimal or no change to its character defining elements



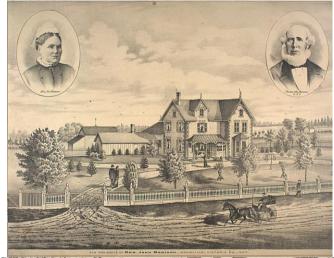
Standard 11

- Conserve the heritage value and character defining elements when creating new additions to an historic place
- Make the new work physically and visually compatible with, subordinate to and distinguishable from the historic place



Standard 14

 Replace missing features from the restoration period with new features whose forms, materials, and detailing are based on sufficient documentary and/or oral evidence





General Standards

- 1. Conserve the values
- 2. Conserve changes
- 3. Minimal intervention
- 4. No false impressions
- 5. Find an appropriate use
- 6. Stabilize, protect archaeological resources
- 7. Evaluate condition
- 8. Maintain and repair
- 9. Identifiable interventions

Additional Standards for Rehabilitation

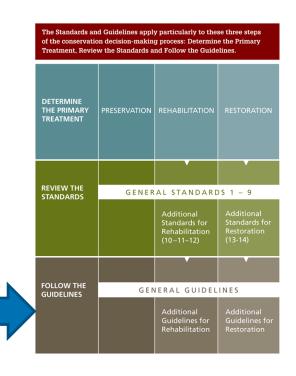
- 10. Repair or replace deteriorated features
- 11. Compatible, distinguishable, subordinate additions
- 12. Reversible additions

Additional Standards for Restoration

- 13. Replace deteriorated features
- 14. Recreate missing features

Follow the Guidelines

- Guidelines offer guidance on how to plan interventions
- Identifies Recommended and Not Recommended interventions
- They do not suggest specific methods/products as these continually change and must also be tailored to site specific needs



Cultural Landscapes

- Evidence of land use
- Evidence of traditional practice
- Land patterns
- Spatial organizations
- Visual relationships
- Circulation
- Ecological features
- Vegetation
- Landforms
- Water Features
- Built Features



Archaeological Sites

- Archaeological sites
- Sites in urban environments
- Industrial sites
- Sites in cultural landscapes
- Sites in protected natural areas
- Sites underwater
- Rock art and culturallymodified trees
- Culturally-sensitive places



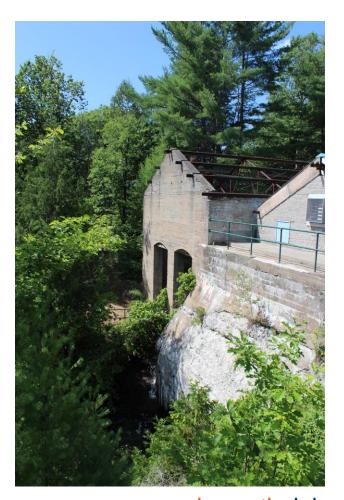
Buildings

- Exterior form
- Interior arrangement
- Roofs
- Exterior walls
- Windows, doors, and storefronts
- Entrances, porches, and balconies
- Interior features
- Structural systems
- Mechanical and electrical systems



Engineering Works

- Constructed elements
- Functional arrangement



Materials

- All materials
- Wood and wood products
- Masonry
- Concrete
- Architectural and structural materials
- Glass and glass products
- Plaster and stucco
- Miscellaneous materials



Case Study: Accessibility Upgrades

- Most historic buildings are not accessible by today's standards (stairs, heavy doors, small washrooms, etc.)
- Upgrading historic properties to be accessible increases inclusivity in our communities
- Upgrades should be sympathetic in design, use compatible materials, minimize visual impact, have minimal impact on existing materials
- Visual compatibility



Case Study: Historic Property

Redevelopment

- Redeveloping historic properties can add new density, create new and positive uses for old buildings
- Promotion of visually compatible and subordinate additions
- Distinguishable from the heritage properties
- Preservation and restoration of heritage features



Municipal Use

- Guide decision making processes on municipal heritage properties
- Used as an standard for evaluation of applications
- Supporting document for policy development
- Adopted formally by many municipalities on Ontario as the benchmark document for conservation practice



Operational Impacts

- Municipal projects effectively follow guidelines already
- Use of guidelines for evaluating permit and development applications already in place
- Adoption of guidelines provides a framework for demonstrating how we make decisions as opposed to changing how we make decisions
- Supports the development of policies/studies to guide heritage conservation in the municipality

Evaluation of Applications

- Provides a clear decisionmaking framework for evaluation incoming applications regarding heritage properties
- Particularly important for heritage impact assessments
- Benchmark for funding heritage-related projects



Why adopt the Guidelines?

- Transparency in decision-making
- Alignment with federal standards
- Adoption of a municipal best practice
- Supports current policies and long-term proactive policy development

Thank you

The Corporation of the City of Kawartha Lakes Committee of the Whole Report

Report Number ED2020-017

| Meeting Date: | September 1, 2020 | | |
|--|--|--|--|
| | n of the Standards and Guidelines for the Conservation of Historic n Canada | | |
| Description: | Adoption of the Standards and Guidelines for the Historic Places in Canada as the municipal standard for historic preservation | | |
| Ward Number | : All | | |
| Author and Ti | tle: Emily Turner, Economic Development Officer – Heritage Planning | | |
| Recommend | dation(s): | | |
| That Report ED2020-017, Adoption of the Standards and Guidelines for the Conservation of Historic Places in Canada, be received; | | | |
| That the Standards and Guidelines for the Conservation of Historic Places in Canada be adopted as the City's conservation standard for heritage properties; and | | | |
| | nmendation be brought forward to Council for consideration at the council Meeting. | | |
| Department H | ead: | | |
| Financial/Leg | al/HR/Other: | | |
| Chief Administrative Officer: | | | |

Background:

In fall 2019, staff brought forward the Standards and Guidelines for the Conservation of Historic Places in Canada to the Kawartha Lakes Municipal Heritage Committee for proposed adoption as the municipal standard for heritage conservation in Kawartha Lakes. Members of the committee reviewed this document, which was authored by Parks Canada as a national standard for heritage conservation. At its meeting of January 9, 2020, after reviewing the document, the Kawartha Lakes Municipal Heritage Committee adopted the following resolution:

KLMHC2020-06 Moved By A. Adare Seconded By M. Sloboda

That Report KLMHC2020-02, Adoption of the Standards and Guidelines for the Conservation of Historic Places in Canada, be received;

That that the Municipal Heritage Committee endorse the Standards and Guidelines as the municipal standards for heritage preservation; and

That this recommendation be forwarded to Council for adoption.

Carried

This report addresses that direction.

Rationale:

The Standards and Guidelines for the Conservation of Historic Places in Canada is a federal document that was first developed by Parks Canada in 2003 and expanded and amended in 2010. This document is intended to provide practical guidance and best practices for heritage planners, conservation practitioners, and stewards of heritage properties throughout the country. It outlines in-depth guidelines for the preservation, restoration, and management of a wide-array of historic properties, landscapes, structural types, and materials and established a sound decision making process for undertaking and assessing heritage properties.

The Standards and Guidelines is a nationally-recognized document which has been adopted at federal, provincial, and municipal levels to help guide the conservation of historic properties across the country. In Ontario, it has been adopted by the Councils of many major municipalities which have robust heritage programs. It provides agencies with a benchmark for assessing heritage treatments and can form the basis for assessment, review and sound-decision making regarding proposed projects on heritage properties.

The adoption of the Standards and Guidelines provides staff and the Municipal Heritage Committee with a clear, transparent, and nationally accepted framework for: evaluating applications to alterations to heritage properties; reviewing development applications and applications to municipal financial incentive programs to ensure best practices in the treatment of heritage properties; and for providing advice to property owners regarding conservation and management of heritage properties. It also provides accepted, professional advice to property owners on practices in the preservation, rehabilitation, and restoration of heritage properties to assist in their stewardship of the municipality's heritage resources as well as outlining the decision making process and standards that the municipality expects with regard to heritage properties. Adoption of the Standards and Guidelines as the municipal standard for heritage conservation will bring the City in line with other municipalities across Ontario with regards to best practice in this area.

In practice, the best practices and conservation decision-making process outlined in the Standards and Guidelines are already in use in Kawartha Lakes in the review of heritage alteration applications, development alterations related to heritage properties and districts, and applications to financial incentive programs which involve heritage properties. By adopting the Standards and Guidelines as the official municipal preservation standard, the City will be open and transparent about its processes and expectations with regards to the preservation of heritage properties within Kawartha Lakes. In particular, the adoption of this document as the municipal standard for preservation will provide clarity for potential large scale development projects that involve designated heritage properties in order to guide their preservation, modification and/or restoration.

When alterations to historic buildings are proposed, the Standards and Guidelines provides recommendation, guidance and best practices with regard to how to approach certain types of projects but does not offer specific solutions because it is recognized that all heritage properties and proposed alterations are unique and have their own context and limitations. Proposed projects involving heritage properties will still be reviewed and assessed on a case by case basis to ensure that proposed alterations are both appropriate to the nature of the heritage property and reflect its realistic contemporary use.

Other Alternatives Considered:

No alternatives are recommended.

Financial/Operation Impacts:

There are no financial implications resulting from the recommendations of this report.

Relationship of Recommendation(s) To The 2020-2023 Strategic Plan:

The adoption of policies and procedures supporting heritage preservation in the municipality supports the strategic priority of an Exceptional Quality of Life by supporting and promoting arts, culture and heritage. The adoption of the Standards and Guidelines supports long-term heritage conservation and planning.

The adoption of the Standards and Guidelines also aligns with the municipality's guiding principle of Open and Transparent because it provides a clear and transparent framework for evaluation and sound decision-making regarding the alteration, restoration and/or redevelopment of heritage properties.

Consultations:

Municipal Heritage Committee

Attachments:

Appendix A – Standards and Guidelines for the Conservation of Historic Places in Canada



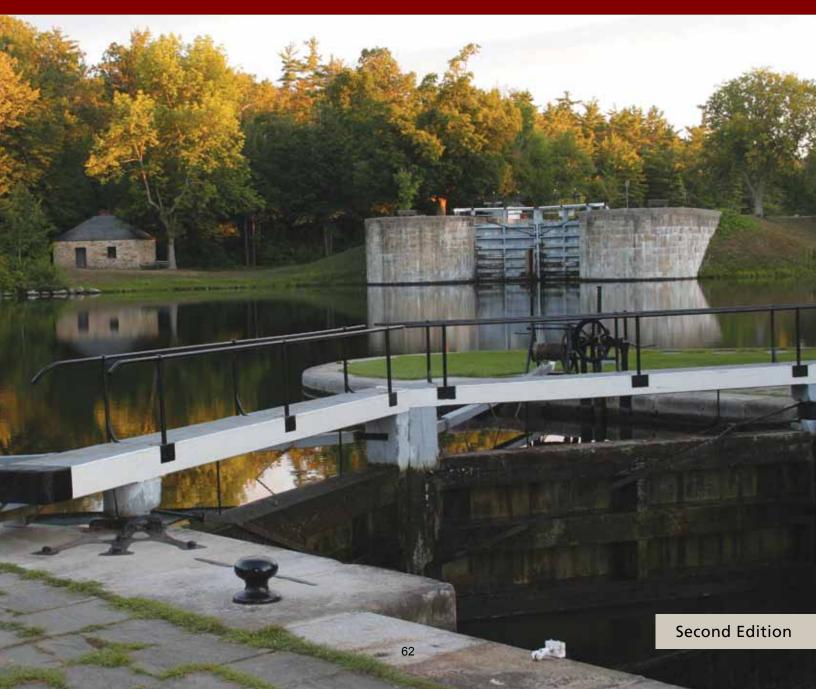
Department Head E-Mail: cmarshall@kawarthalakes.ca

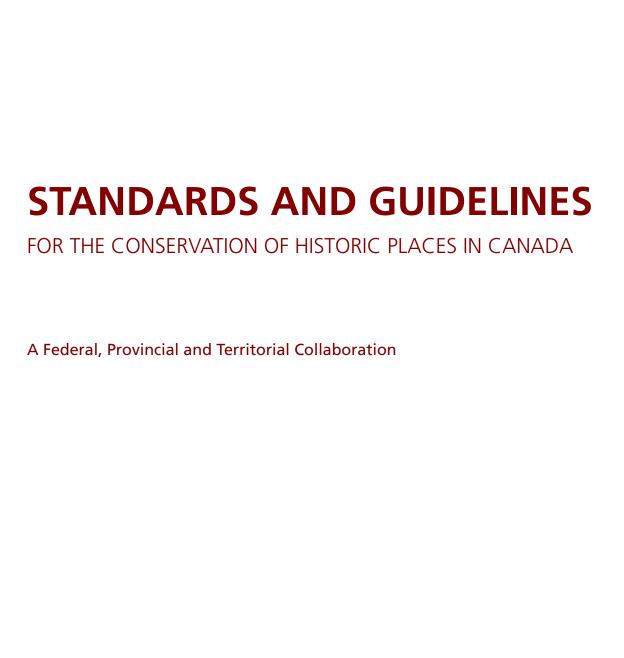
Department Head: Chris Marshall, Director of Development Services

STANDARDS AND GUIDELINES

FOR THE CONSERVATION OF HISTORIC PLACES IN CANADA

A Federal, Provincial and Territorial Collaboration





Second Edition

Front Cover photograph:

The Jones Falls lockstation is part of the Rideau Canal waterway in Ontario, a national historic site of Canada and a world heritage site. The site contains known archaeological resources, buildings and engineering works situated in a cultural landscape.

Back Cover photographs:

Clockwise, from top left: Lunenburg, NS; Beechey Island, NU; Britannia Mines, BC; Quebec City, QC

Compliance with the Standards and Guidelines for the Conservation of Historic Places in Canada does not, in and of itself, confer immunity from legal obligations.

The Standards and Guidelines for the Conservation of Historic Places in Canada is a pan-Canadian collaboration. The participating governments are:





























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www.historicplaces.ca

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FOREWORD

Canada's historic places are a living legacy for all Canadians. Ensuring a future for these treasures will allow the next generations to use these exceptional places in ways both old and new. This revised edition of the *Standards and Guidelines for the Conservation of Historic Places in Canada* constitutes an essential tool to guide decisions that will give historic places new life while protecting their heritage value.

The 2003 version of the Standards and Guidelines for the Conservation of Historic Places in Canada has been a tremendous success. It has been adopted by government bodies and major municipalities across Canada, thereby helping to create a culture of conservation to preserve Canada's unique and irreplaceable heritage for successive generations. Since then, regular use in the field by federal, provincial, territorial and municipal governments, heritage conservation professionals, heritage developers and many individual Canadians has provided the practical experience and insights to formulate additional guidance on categories of historic places such as cultural landscapes, archaeological sites, modern buildings and engineering works.

The development of this 2010 edition of the *Standards and Guidelines* has built on the strong foundation of the initial version using a similar collaborative, pan-Canadian approach. New categories and topics have been added and best practices updated. This federal, provincial, territorial collaboration ensures that the unique experiences of Canada's primary departments and organizations responsible for heritage were reflected in this important tool.

On behalf of Parks Canada, I am proud to adopt the 2010 edition of the Standards and Guidelines for the Conservation of Historic Places in Canada. This document will guide Parks Canada and its partners in heritage stewardship across the country and in the establishment of world class conservation practices that help conserve our national treasures and ensure that Canadians can learn about—and have extraordinary experiences of discovery at—these historic places.

Alan LatourelleChief Executive Officer
Parks Canada

PREFACE AND ACKNOWLEDGEMENTS

The primary purpose of the Standards and Guidelines for the Conservation of Historic Places in Canada is to provide sound, practical guidance to achieve good conservation practice. This document establishes a consistent, pan-Canadian set of conservation principles and guidelines that will be useful to anyone with an interest in conserving Canada's historic places. It also provides guidance to those interested in applying for financial incentives for the conservation of historic places.

The intent of the document is not to replace the role of conservation practitioners or provide detailed technical specifications appropriate to every situation. Instead, it offers results-oriented guidance for sound decision-making when planning for, intervening on, and using an historic place.

The Standards and Guidelines have already been adopted by a number of federal, provincial, territorial and municipal authorities as a benchmark for assessing proposed conservation interventions on the character-defining elements of an historic place. When adopted by a government or funding organization, the Standards and Guidelines may form the basis for review and assessment of a conservation project before the project starts, and again upon completion.

Since their publication in 2003, the Standards and Guidelines have become an essential tool for heritage conservation across Canada. Together with the Canadian Register for Historic Places, the practice of heritage conservation has been transformed, opening the door to new tools and programs that support the continued use and enjoyment by Canadians of the historic places around them.

CHANGES SINCE THE LAST EDITION

This second edition of the *Standards* and *Guidelines* expands and clarifies the information contained in the original 2003 edition. The revisions in this edition:

- Address comments received from users of the first edition of the Standards and Guidelines;
- Clarify the relationship between the Standards and Guidelines and a Statement of Significance;
- Better explain the conservation decision-making process;
- Provide interpretation of the fourteen Standards to clarify these important principles;
- Add guidance for typical sustainability-related interventions;
- Address new topics such as cultural landscapes, including heritage districts;
- Address recent heritage, including the specific issues of conserving modern materials and assemblies;
- Improve the guidance provided for engineering works; and
- Provide a more comprehensive set of Guidelines for Archaeological Sites generally, and in a specific setting.

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ACKNOWLEDGEMENTS

In 2003, the publication of the *Standards* and *Guidelines for the Conservation of Historic Places in Canada* provided, for the first time, all levels of government, conservation specialists, contractors and individuals with a pan-Canadian set of principles and guidelines for the conservation of buildings, archaeological sites, landscapes and engineering works.

This second edition of the *Standards and Guidelines* builds on this initial version. It was made possible by concerted analysis and review in order to update and enhance a document that has become an essential reference in the Canadian conservation world.

The second edition of the Standards and Guidelines was produced thanks to the efforts of many individuals. In particular, I would like to acknowledge the guidance and direction of Claude Charbonneau, chair of the Standards and Guidelines Standing Committee, and the participation of its members representing the federal government and all provincial and territorial jurisdictions across Canada. The Standing Committee members were: for the Federal Government, Christiane Lefebvre, Shannon Ricketts and Geneviève Charrois; for Newfoundland and Labrador, George Chalker; for Nova Scotia, Jeffrey Reed; for Prince Edward Island, Darin MacKinnon; for New Brunswick, Jim Bezanson and Carlo Laforge; for Québec, Gérald Savoie and Chantal Grisé: for Ontario, Deborah Hossack; for Manitoba, Susan Boissonneault and Marnie Gartrell; for Saskatchewan, Bernard Flaman, Ann De Mey, Bruce Dawson and Liberty Walton; for Alberta, Tom Ward; for British Columbia. Bob Parliament: for

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Yukon, Doug Olynyk and Brent Riley; for Northwest Territories, Tom Andrews; and for Nunavut, Ashley Fleischer and Shamus MacDonald.

I would also like to thank the consulting team without whom this document would have never come to fruition. The core team that helped coordinate, write, edit and select photos for the second edition was headed by Susan Ross, conservation architect, at the Heritage Conservation Directorate (HCD) of Public Works and Government Services Canada and included architect Susan Coles, engineer Bob Kirkhope, landscape architect Marie-Claude Quessy of HCD, and archaeologist Virginia Sheehan of Parks Canada. Engineer John G. Cooke, P.Eng. RSW, and architect Michael McClelland, OAA, FRAIC, took part in the review of the second edition from the private sector perspective. Additionally, a working group on cultural landscapes was formed under the leadership of Joann Latremouille. This group was comprised of Susan Buggey, Lyle Dick, James Douglas, Chantal Prud'homme, Wendy Shearer and John Zvonar. In addition to leading this working group, Joann Latremouille provided an inspired draft version of the revised Guidelines for Cultural Landscapes before her untimely passing in August, 2008. Lastly, I would like to acknowledge Christophe Rivet of Parks Canada who initiated the development, testing and review of the new Guidelines for Archaeological Sites.

I hope that you will find this new edition of the *Standards and Guidelines* useful in your daily activities as stewards and promoters of good conservation practice in Canada.

Larry Ostola

Director General National Historic Sites Directorate Parks Canada

INTRODUCTION

Whether you live in a town or city, you are likely not far from one of Canada's historic places. These legacies became historic places when an authority formally recognized their heritage value and character-defining elements, or when they were nominated to the Canadian Register of Historic Places.

The Standards and Guidelines for the Conservation of Historic Places in Canada is a tool to help users decide how best to conserve historic places. But to do so first requires an understanding of the historic place in question and why that place is significant. In other words, what is it about the historic place that is important to conserve? For the answer, we look to its values.

Conservation practitioners operate in what is referred to as a 'values-based context' using a system that identifies and manages historic places according to values attributed through an evaluation process. These values generally include the aesthetic, historic, scientific, cultural, social and/or spiritual importance of a place, and:

- May be singular or multiple;
- Are subjective, wide-ranging, and can overlap;
- Can be differently assigned by different groups, and may even change over time.

How can you establish the heritage value of an historic place? Values are usually identified by a community associated with a site, making the identification and management of historic places more publicly accessible. Canadian jurisdictions at the federal, provincial, territorial, municipal

and Aboriginal levels may review and formally recognize historic places within their respective authority. These agencies keep records of formally recognized sites and recently collaborated to create the *Canadian Register of Historic Places* (CRHP), a web-based record of historic places in Canada (www.historicplaces.ca).

The CRHP provides the base information against which the *Standards and Guidelines* can be applied. The publication of a value statement (referred to as a Statement of Significance, or SoS, in the CRHP) identifies the *heritage value* of an historic place and lists the *character-defining elements* that must be retained to preserve this value. The SoS allows professionals, planners, and the public at large to understand a community's recognition and valuation of the historic place.

Anyone carrying out an intervention at an historic place must be mindful of its overall heritage value, using the documented character-defining elements as a starting point and guide. This understanding, along with the *Standards and Guidelines*, provides both a conceptual and practical framework for how interventions should be carried out. While the public is increasingly engaged in the evaluation and management of historic places, there remains a need for skilled conservation specialists, especially when it comes to physical interventions to historic places.

The Statement of Significance and the Standards and Guidelines relate respectively to the phases of understanding and planning of the conservation decision—making process. When used together, the two become powerful tools in a values—based system that help ensure the conservation and ongoing use of historic places in the life of communities.

OVERVIEW OF THE STANDARDS AND GUIDELINES

The Standards and Guidelines for the Conservation of Historic Places in Canada contains four chapters:

Chapter 1: The Conservation

Decision-making Process includes a
description of the conservation decisionmaking process, a step-by-step guide to
understanding, planning and intervening
on an historic place as part of an ongoing
cycle of use, maintenance, repair, and
adaptation.

Chapter 2: The Conservation

Treatments introduces and explains the three conservation treatments: preservation, rehabilitation and restoration, as well as the notion of primary treatment.

Chapter 3: The Standards for the Conservation of Historic Places in

Canada introduces and explains the fourteen standards, with interpretations and illustrated examples.

Chapter 4: The Guidelines for the Conservation of Historic Places in

Canada forms the bulk of the document. The Guidelines are intended to assist in applying the Standards and determining whether their intent has been met in the context of specific interventions to historic places. There are five principal sections. The first four correspond to main categories of historic places (cultural landscapes, archaeological sites, buildings and engineering works) and the fifth, to materials.

The final section, **References**, includes a glossary of terms used in the *Standards and Guidelines*, a selected bibliography and the photo credits. Although the language of the Guidelines is intended for non-experts, certain terms may be unfamiliar. For this purpose, the glossary defines the words that appear in *italics*.

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THE CONSERVATION DECISION-MAKING PROCESS

1

THE CONSERVATION DECISION-MAKING PROCESS

Conservation activities can be seen as a sequence of actions—from **understanding** the historic place, to **planning** for its conservation and **intervening** through projects or maintenance. Because conservation is an ongoing and cyclical process, people involved in conservation must often retrace their steps to re-examine their approaches, namely, to assess the impacts of planned interventions on character-defining elements, or to obtain additional information.

Understanding an historic place is an essential first step to good conservation practice. This is normally achieved through research and investigation. It is important to know where the heritage value of the historic place lies, along with its condition, evolution over time, and past and current importance to its community. The traditional practices associated with the historic place and the interrelationship between the historic place, its environment and its communities should also be considered. The understanding phase can be lengthy and, in some cases, may run in parallel with later phases as the understanding of the place evolves and continues to inform the process. The information collected in this phase will be used throughout the conservation decision-making process and should remain accessible.

Planning is the mechanism that links a comprehensive understanding of an historic place with interventions that respect its heritage value. Planning should consider all factors affecting the future of an historic place, including the needs of the owners and users, community

interests, the potential for environmental impacts, available resources and external constraints. The most effective planning and design approach is an integrated one that combines heritage conservation with other planning and project goals, and engages all partners and stakeholders early in the process and throughout.

For historic places, the conservation planning process also needs to be flexible to allow for discoveries and for an increased understanding along the way, such as information gained from archaeological investigations or impact assessments. It is important to maintain a firm sense of the larger picture over the long term, and not to emphasize particular character-defining elements at the expense of others.

Intervening on an historic place, that is, any action or process that results in a physical change to its character-defining elements, must respect and protect its heritage value. Interventions can include:

- Preservation actions that are part of the ongoing maintenance of an historic place;
- Rehabilitation activities related to a new use or code upgrades;
- Restoration activities associated with the depiction of an historic place at a specific period in its history.

Intervening on archaeological sites may focus on:

- Preserving the physical integrity of fragile elements;
- Recording them;
- Providing access for public visitation;
- Integrating them into a new structure.

These three phases can further be defined through a series of steps. Although presented sequentially, these steps should be revisited regularly as part of the ongoing conservation decisionmaking process.

UNDERSTANDING

Refer to Heritage Value and Character-defining Elements

An historic place's heritage value and character-defining elements are identified through formal recognition by an authority or by nomination to the Canadian Register of Historic Places. If this has not yet been done, the first essential step in any conservation project is to identify and describe the character-defining elements that are important in defining the overall heritage value of the historic place. The essence of these elements is captured in a Statement of Significance (SoS) or equivalent document. For assistance in writing a SoS, consult the document Writing Statements of Significance at www.historicplaces.ca.

Investigate and Document Condition and Changes

On-site investigation as well as archival and oral history research should be carried out as a basis for a detailed assessment of current conditions and previous maintenance and repair work. Known changes should be documented in a chronology or report. If no existing plans are found, then a photographic survey should be carried out and drawings or sketches prepared to record current conditions.

The Standards and Guidelines apply particularly to these three steps of the conservation decision-making process: Determine the Primary Treatment, Review the Standards and Follow the Guidelines.

| DETERMINE THE PRIMARY TREATMENT | PRESERVATION | REHABILITATION | RESTORATION |
|---------------------------------------|-------------------------|---|---|
| REVIEW THE STANDARDS | | • | • |
| | GENERAL STANDARDS 1 – 9 | | |
| | | Additional Standards for Rehabilitation (10–11–12) | Additional Standards for Restoration (13-14) |
| FOLLOW THE GUIDELINES | | • | • |
| | GENERAL GUIDELINES | | |
| | | Additional Guidelines for Rehabilitation | Additional Guidelines for Restoration |

PLANNING

Maintain or Select an Appropriate and Sustainable Use

If the use of an historic place is part of its heritage value, every effort should be made to retain that use. Otherwise, a use compatible with its heritage value should be found. It is important to find the right fit between the use and the historic place to ensure this use will last and provide a stable context for ongoing conservation. A viable use better guarantees the long-term existence of an historic place and limits deterioration caused by human activity and the environment.

Identify Project Requirements

Defining the needs of existing or future users and determining the scope and cost of conservation work are essential in establishing realistic objectives. It may be necessary to define priorities and organize the work in logical phases. Contemporary considerations such as health and safety, security, accessibility and sustainability, and changes in use can substantially impact on the heritage value and character-defining elements of an historic place. It is important to assess these considerations together with all the other functional goals of the project, including upgrades to improve performance.

Determine the Primary Treatment

Based on the requirements identified above, the next step is to determine the conservation approach. To do so, it helps to determine a primary treatment. While any conservation project may involve aspects of more than one of the three conservation treatments, it helps to decide during the planning stage whether the project primarily falls under Preservation, Rehabilitation or Restoration. A clear idea of the project's primary focus or objective and the heritage value of the historic place will contribute to the success of the conservation project. The conservation treatments and selection of a primary treatment are explained in more detail in Chapter 2.

Review the Standards

The Standards, which are the principles at the heart of this document, are central to the process of preserving, rehabilitating or restoring an historic place in a consistent manner. Because they provide the broader philosophical basis for conservation, it is important to review the Standards before the Guidelines. Note that the Standards are interrelated and should all be considered.

Nine General Standards (1 to 9) apply to all conservation projects. These nine standards also correspond to the standards for a *Preservation* project. This reflects that Preservation is core to all conservation projects because it extends the physical life of an historic place through proper care and maintenance. Three Additional Standards (10, 11 and 12) relate to Rehabilitation. All three must be considered in a *Rehabilitation* project, in addition to the nine General Standards. Two Additional Standards (13 and 14) relate to *Restoration*, both of which must be considered in a *Restoration* project, in addition to the nine General Standards. The Standards are explained in more detail in Chapter 3.

Follow the Guidelines

To ensure that conservation is based on a thorough understanding of an historic place and its character-defining elements, the Guidelines always recommend documenting and assessing the form, materials and condition of an historic place and its character-defining elements before any intervention decision and subsequent work.

KEY DEFINITIONS

Historic Place: a structure, building, group of buildings, district, landscape, archaeological site or other place in Canada that has been formally recognized for its heritage value.

Heritage Value: the aesthetic, historic, scientific, cultural, social or spiritual importance or significance for past, present and future generations. The heritage value of an historic place is embodied in its character-defining materials, forms, location, spatial configurations, uses and cultural associations or meanings.

Character-defining Element: the materials, forms, location, spatial configurations, uses and cultural associations or meanings that contribute to the heritage value of an historic place, which must be retained to preserve its heritage value.

Similar to the Standards, General Guidelines apply to all conservation projects. The General Guidelines also correspond to the Guidelines for a *Preservation* project. Additional Guidelines relate to *Rehabilitation* and *Restoration*, and where applicable, should be followed in addition to the General Guidelines.

There are specific Guidelines for four categories of historic places: Cultural Landscapes, Archaeological Sites, Buildings, and Engineering Works. These sections are divided into separate subsections that provide guidance on character-defining elements, such as landforms or windows. A fifth category of guidelines addresses the Materials that may be part of all these historic places.

The Guidelines should not be used in isolation. There may be heritage value in the relationships between cultural land-scapes, archaeological sites, buildings, or engineering works. These values should not be compromised when undertaking a project on individual character-defining elements of an historic place. The Guidelines are explained in more detail in the introduction to Chapter 4.

INTERVENING

Undertake the Project Work

The project work is a critical phase in the conservation process. It is equally important to have well-supervised people with the right skills undertake the work as it is to determine the right work to undertake. Every effort should be made to familiarize those working on the project with the planned conservation approach and to ensure they understand the scope of the project. Hiring processes for consultants and contractors should identify the need for heritage expertise and experience.

Carry out Regular Maintenance

While significant interventions may be necessary in a conservation project, the best long-term investment in an historic place is adequate and appropriate maintenance. It helps to develop and implement a maintenance plan that includes a schedule for regular inspection to proactively determine the type and frequency of necessary maintenance work. This assures a high degree of user satisfaction with the historic place, slows the rate of deterioration, and maximizes the long-term protection of heritage value.

APPLYING THE CONSERVATION DECISION-MAKING PROCESS TO THE GRIER BLOCK, A SMALL EARLY TWENTIETH CENTURY COMMERCIAL BUILDING

The Grier Block is a large, two-story commercial building prominently located within the historic commercial district of Fort Macleod, Alberta, Built in 1902. the building is notable for its imposing pressed metal front façade, a pre-fabricated system manufactured by the Mesker Brothers of St. Louis, Missouri, that was once widespread across North America but rare in western Canada. Historically home to a wide range of retail businesses, professional offices, and community organizations such as the Masons, the Grier Block is also significant for its role in the development of Fort Macleod prior to the First World War, then one of southern Alberta's fastest-growing communities. The Grier Block continues to be fully occupied by a variety of businesses on the main floor and tenants in the rehabilitated second floor residential suites.

UNDERSTANDING

Identify heritage value and character-defining elements

The heritage value of the Grier Block is identified in the Statement of Significance on the Canadian Register of Historic Places. Its heritage value lies in its "association with the development of the business district of [Fort] Macleod" and as an important example of "new construction materials for commercial and public buildings at the turn of the twentieth century." The building's character-defining elements include the pressed metal façade, with its prominent cornice and classical details such as egg-and-dart mouldings, engaged columns, and urns; and the brick masonry walls and sandstone window sills on the north and west elevations.



1906 photograph of Grier Block (at right) from southeast.

Investigate and document conditions and changes

Investigation of a small-town commercial building such as the Grier Block would include research into its construction. historical uses, and evidence of major alterations. This information might be found in historic photographs, architectural plans, and other information from such sources as municipal tax rolls and other records, local archives and museums, former owners and tenants, and members of the community. A detailed physical inspection of the building would look for evidence of these documented (and undocumented) changes and establish the building's overall condition. Professional expertise helps in assessing the state of a building's character-defining elements and overall condition and is essential where a building has experienced structural problems or is to undergo a major change of use that might trigger new building code requirements. The inspection results should be documented in a written report accompanied by drawings and photographs to guide future planning and interventions.

In the case of the Grier Block, no original blueprints of the building existed, but the historic design was recorded in old photographs and could be compared to pressed metal elements of Mesker facades elsewhere. The major alterations lay in the storefronts themselves, where the original recessed entrances typical of the period had been replaced by elements dating from the 1960s—a common occurrence with commercial buildings in communities both small and large. Inspection of the building by a conservation architect determined that, despite an early fire, the brick exterior walls and wood frame interior were essentially sound.



Circa 1910 photograph of Grier Block storefront, south bay. Photographs like this were an indispensable resource in developing the storefront restoration plans.

PLANNING

Select an appropriate and sustainable use

The owners had determined that continued use of the main floor by commercial tenants combined with residential occupancy on the second floor was most appropriate in the context of Fort Macleod's historic main street. Local demand for commercial space is steady, and second floor residential suites provide additional income, enhance security, and contribute to activity within the historic district. With these uses already well established in the Grier Block, the physical requirements of the historic building would remain fundamentally unchanged even though substantial upgrades would be needed to meet current building codes, provide better energy efficiency, and meet tenant requirements.

Identify project requirements

The rehabilitation goals for the Grier Block were to ensure the integrity of the building envelope, improve energy efficiency, and enhance the building's appeal to commercial and residential tenants in conjunction with the conservation of heritage value.

Although structurally sound overall, the rehabilitation was comprehensive in scope and included replacement of the roof membrane; replacement of the badly deteriorated windows with wood frame units matching the configuration of the original windows; masonry repairs; removal, cleaning, repainting and reassembly of the pressed metal façade; and restoration of the missing storefronts based on historic photographs.

The extensive interior work consisted of the addition of insulation and vapour barrier to the perimeter walls; complete upgrades to the building's electrical and mechanical systems; refinishing and replacement, where required, of the original wood floors; removal and reinstallation of original pressed metal ceilings for fire-rating purposes; and minor alterations to the floor plan to accommodate new functional requirements.



Before rehabilitation: east façade, looking southwest.



East façade after restoration of storefronts and preservation of pressed metal façade.

Maintenance (repainting) in progress.

Determine the Primary Treatment

The primary conservation treatment of the Grier Block was determined to be rehabilitation, since the wide-ranging interventions all aimed at enabling the continued commercial and residential use of the building while protecting its heritage value. Within a rehabilitation approach, the conservation program included the retention and repair of existing historic fabric such as the pressed metal façade (preservation); the alteration of existing elements and addition of new ones, such as the construction of fire-rated walls (rehabilitation): and the accurate representation of missing elements through reinstatement of the storefronts to the original design (restoration).

Review the Standards

The general standards 1 to 9 and additional standards for Rehabilitation 10 to 12 apply to rehabilitation projects such as the Grier Block. The restoration component of the work, rebuilding of the missing storefronts, was guided by Standards 13 and 14 for Restoration. Each aspect of the conservation program was referred to the applicable standards to identify interventions that optimized the conservation of heritage value while satisfying the project requirements within the resources available.

Follow the Guidelines

The appropriate Guidelines for Buildings (4.3) and Materials (4.5) were consulted for each intervention on the Grier Block. For example, the guidelines for Exterior Walls and Structural Systems (Buildings) and the guidelines for All Materials and Masonry (Materials) directed the conservation of the exterior brick masonry and the addition of insulation. The Additional Guidelines for Rehabilitation found throughout the Buildings section provide guidance on interventions related to sustainability, health, safety and accessibility requirements.



Detail of pressed metal facade after rehabilitation, showing the hallmarks of the original Mesker design. The work consisted of the following: removal of the metal panels, carefully identifying their original locations; removal of multiple layers of paint using a chemical bath; recoating with an epoxy-based paint system; and reinstallation in the original locations on furring strips according to a rain screen principle.

INTERVENING

Undertake project work

Conservation of the Grier Block progressed over nearly a decade, beginning with the rehabilitation of the retail bays and residential suites as revenue generators. Restoration of the pressed metal storefront was instrumental in the initial rehabilitation of the main floor commercial areas, which was followed by rehabilitation of the retail bays one-by-one, as resources and tenant opportunities presented themselves. The comprehensive rehabilitation plan prepared by a conservation architect and the construction expertise of the building owners contributed greatly to the successful and cost-effective implementation of the conservation program.

Carry out regular maintenance

Conservation is an ongoing process. In southern Alberta, where wind-driven sand scours paint and exposed wood and intense freeze-thaw cycles crumble masonry, regular maintenance is an important part of preserving the Grier Block's character defining elements and extending the service life of building systems and fabric. A maintenance plan helps with this, and it is good conservation practice to document both periodic rehabilitation and ongoing maintenance, and to store these documents in a well-identified, appropriate location.





Left: North façade window prior to rehabilitation showing eroded mortar joints, cracking due to frost action within the wet wall, and delamination of the sandstone sill.

Right: North façade window, after replacement with new wood units and repointing mortar joints and replacing damaged bricks with salvaged historic brick matching the original. The replacement sandstone sill reproduces the rock-faced appearance of the original unit but introduces a slope to improve drainage. (A drip edge is to be added.) Since the original quarry no longer exists, the stone itself is from a different source but is of the same type ("Paskapoo" sandstone) typical of buildings in Fort Macleod and southern Alberta generally. This specimen, selected to avoid the flaws that often contribute to delamination in this type of stone, will weather to a colour closer to that of the original element.

The decision was made to not remove the paint on the brick at this time, since it was weathering away of its own accord and appeared to be causing no moisture-related distress within the wall.





Left: Interior of west (rear) wall of north retail bay, showing as-found condition of load-bearing masonry after removal of the lath and plaster interior finishes for inspection purposes. Uncontrolled runoff from the roof had saturated the wall, washed out the mortar, and caused localized collapse around the window opening.

Right: Rear wall after masonry repairs. The 2x6 stud wall for insulation creates a small cavity to allow for the evacuation of any potential moisture.

HOW PRIVATE PROPERTY OWNERS CAN PRESERVE A HERITAGE DISTRICT: THE CASE OF GRAND-PRÉ RURAL HISTORIC DISTRICT, NOVA SCOTIA

Grand-Pré Rural Historic District, located on the shores of the Minas Basin of the Bay of Fundy in Nova Scotia, is one of the oldest settlements and evidence of land use patterns of two cultural groups of significance: the Acadians and the New England Planters. Commemorated as the centre of Acadian settlement from 1682 to 1755, the site is strongly identified with the 1755–1762 deportation of the Acadians. In 1995, the site was declared Canada's first rural historic district.

The district includes the Villages of Grand-Pré, Hortonville and North Grand-Pré, as well as the surrounding farmlands. vast stretches of tidal marshes—much of which was dyked to create arable land—and orchards extending to the uplands. Grand-Pré Rural Historic District is a good example of an organically evolved cultural landscape that illustrates the dynamics of human interaction with the landscape namely the successive occupations of different cultural groups. This unique rural landscape reflects the overlay of one cultural tradition onto another and contains archaeological evidence of Mi'kmag. Acadian and New England Planter peoples.



Contemporary agricultural activities by property owners at Grand-Pré continue traditional practices.



Grand-Pré Rural Historic District is an evolved cultural landscape.

UNDERSTANDING

Refer to Heritage Value and Character-defining Elements

As there may not be any Statement of Significance (SoS) for individual properties in a historic district, owners should refer to the heritage value of the historic district identified in the SoS on the Canadian Register of Historic Places. In the case of the Grand-Pré Rural Historic District. this document indicates that its heritage value of resides "in the blending of natural and built features, and in the retention and development of land use patterns originating with the Acadians (particularly in the spatial distribution of arable land, orchards, dykelands, and residential hamlets)." Its character defining elements include those related to "the preponderance of agricultural land use; the organization of the landscape into three primary zones (i.e. dyked marshlands, uplands, and open fields); the circulation patterns evident in pathways, roadways and the railway line which follow topographical features that create the informal boundaries of the three zones; the gently rolling topography of the dyked marshlands; and the system of drainage and dykes bordering the tidal flats."

Investigate and Document Condition and Changes

At this stage, the owner should contact and seek guidance from the relevant authority, in this case the Nova Scotia Special Places Program. Dialogue will confirm whether or not any information is available for the property in question. Subsequent discussions between parties will help the owner recognize and understand the characteristics specific to the site and to identify character-defining elements. Research should focus on the site's history, including the introduction of elements to the site and any evidence of significant alterations. This information can be obtained from town records, local archives and museums, through period photographs, site surveys, and insurance maps. Oral history obtained through former owners, tenants and other knowledgeable community members is also useful. The relationship between different components of past landscapes can be studied through the use of archaeology.



The system of drainage and dykes bordering the tidal flats is a character-defining element of Grand-Pré Rural Historic District.

Based on this research, if parts of the site are found to have archaeological potential, or to contain character-defining elements, careful site investigation should be undertaken by experts to determine its physical condition. Together, expert and local knowledge will help to properly evaluate and articulate recommendations for conservation needs. A written report amply illustrated with drawings and photographs should be prepared to guide future planning and interventions.

Because the district is an evolved cultural landscape, it is important that any character-defining element related to the successive occupations of the district be protected; for example, dyke facings from the 20th century.



The Acadians built aboiteaux as part of the system of drainage and dykes.

PLANNING

Maintain or Select an Appropriate and Sustainable Use

It is important that private owners confirm that the proposed use is appropriate and sustainable over the long term to minimize the impact on the heritage values expressed through the character-defining elements. For example, the continued use of traditional agricultural activities by property owners in Grand-Pré have made it the place it is today: a place that still boasts many of the character-defining elements of the original settlement. For this reason, many of these activities can still be performed while their impacts on the characterdefining elements of the historic place are mitigated.

Identify Project Requirements

At this phase of the project, the owner and relevant authority should have a good understanding of the scope of work and know the potential impacts on the character-defining elements of the site. When a project is planned in a zone identified as having archeological potential, most provinces or territories request or require that an archaeological investigation be undertaken prior to beginning the work.

Determine the Primary Treatment

It is expected that most interventions by private landowners will relate primarily to agricultural land use. Such interventions fall under *Preservation* as these projects continue a traditional practice that has existed for 300 years and contribute to protecting character-defining elements. In other cases, the primary conservation treatment would be considered *Rehabilitation*, such as the construction of a new barn.

Review the Standards

For a *Preservation* project, the General Standards 1 to 9 must be considered and applied where appropriate; for a *Rehabilitation* project, Standards 1 to 12 must be considered. Each standard should be reviewed in relation to the proposed work and the potential impact on the heritage value and character defining elements. The chosen approaches must balance the needs of the proposed land use development and the protection of the heritage value of the site.

Follow the Guidelines

For each intervention in the district, the appropriate Guidelines for Cultural Landscapes and Guidelines for Archaeological Sites should be consulted. For example, if a character-defining element of the historic district, such as a pathway, is affected by the intervention, then the guidelines for Circulation should be consulted. If archaeological remains are anticipated or encountered, the general guidelines for Archaeological Sites should be consulted as well as the guidelines for Sites in a Cultural Landscape.

INTERVENING

Undertake the Project Work

It is important that people who undertake the project work have the necessary knowledge and skills. A phased implementation of the work is critical, keeping in mind that *Preservation* (Stabilization) of the character-defining elements of the site should be the first priority.

Carry out Regular Maintenance

Maintenance is an important part of the *Preservation* process. Regular maintenance will preserve character defining elements and extend the service life of functional components.



The spatial organization of orchards contributes to the heritage value of the historic district.



Site investigation has found archaeological evidence of Mi'kmaq, Acadian and New England Planter peoples.

THE CONSERVATION TREATMENTS: PRESERVATION, REHABILITATION AND RESTORATION

2

THE CONSERVATION TREATMENTS: PRESERVATION, REHABILITATION AND RESTORATION

The overarching term for protecting historic places in Canada is *Conservation*, which is described as: all actions or processes aimed at safeguarding the *character-defining elements* of an *historic place* to retain its *heritage value* and extend its physical life. This may involve *Preservation*, *Rehabilitation*, *Restoration*, or a combination of these actions or processes. Reconstruction, or reconstitution of a disappeared historic place, is not considered conservation and is therefore not addressed in this document.

SELECTING A PRIMARY TREATMENT

While any conservation project may involve aspects of more than one of these three conservation treatments, it is important to decide during the planning stage whether the project falls under *Preservation*, *Rehabilitation* or *Restoration*. A clear idea of the project's primary focus or objective, as provided in a conservation plan, and the heritage values of the historic place will contribute to the success of a consistent and coherent conservation project.

Once the primary treatment type is established, it is important to refer consistently to the standards related to that treatment type for the overall project. If a different treatment is required for certain character-defining elements, then the related standards will guide interventions on those elements. For example, in a project where rehabilitation is the primary treatment, it may be appropriate to preserve certain character-defining elements, such as repairable original windows or archaeological soil layers,



The Swift Current Creek Petroglyph Boulder in Saskatchewan is an outstanding example of precontact rock art dating from at least 1,200 years ago. The pictographs are executed in rarely seen black pigment. One of the best preserved petroglyph sites in Saskatchewan, it is notable for its bison carvings and the occurrence of both petroglyphs and pictographs on the same rock. In order to maintain the fine condition of the petroglyphs, the boulder's physical properties were analyzed to assess possible *preservation* methods. Maintaining the confidentiality of the location of the site also helps protect against unauthorized activities.

or to restore certain missing or altered elements, such as a hedgerow or water wheel. In those cases, the *Preservation* or *Restoration* standards apply. The interventions specific to those character-defining elements can be considered as secondary treatments.

PRESERVATION

Preservation involves protecting, maintaining and stabilizing the existing form, material and integrity of an historic place or individual component, while protecting its heritage value. Preservation can include both short-term and interim measures to protect or stabilize the place, as well as long-term actions to stave off

deterioration or prevent damage. This will keep the place serviceable through routine maintenance and small repairs, rather than inoperable during intrusive interventions, extensive replacement and new construction. In archaeological sites, *Preservation* can consist of creating or maintaining a stable environment for the character-defining elements to extend their physical life.

Consider *Preservation* as the **primary treatment** when:

 (a) Materials, features and spaces of the historic place are essentially intact and convey the historic significance, without extensive repair or replacement;

- (b) Depiction during a particular period in its history is not appropriate; and,
- (c) Continuation or new use does not require extensive alterations or additions.

Preservation tends to be the most cautious of the conservation treatments and retains the most materials. It is therefore more appropriate when heritage values related to physical materials dominate. A plan for Preservation should be developed before work is undertaken.

The nine General Standards (see Chapter 3) and the General Guidelines (see Chapter 4) relate directly to *Preservation*. Since protecting, maintaining and stabilizing are at the core of all conservation projects, the General Standards and General Guidelines must be considered, and applied where appropriate, to any conservation project.

REHABILITATION

Rehabilitation involves the sensitive adaptation of an historic place or individual component for a continuing or compatible contemporary use, while protecting its heritage value. Rehabilitation can include

replacing missing historic features. The replacement may be an accurate replica of the missing feature or it may be a new design compatible with the style, era and character of the historic place. In the context of archaeological sites, *Rehabilitation* allows their compatible use through actions aimed at communicating and conveying their heritage value.

Consider *Rehabilitation* as the **primary treatment** when:

- (a) Repair or replacement of deteriorated features is necessary;
- (b) Alterations or additions to the historic place are planned for a new or continued use; and,
- (c) Depiction during a particular period in its history is not appropriate.

Rehabilitation can revitalize historical relationships and settings and is therefore more appropriate when heritage values related to the context of the historic place dominate. A plan for Rehabilitation should be developed before work begins.

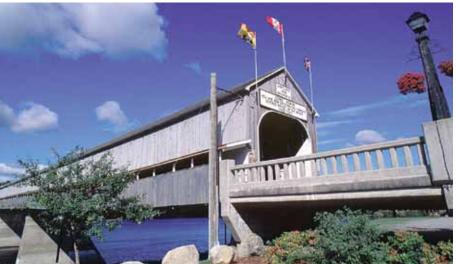
Three Additional Standards (10–11–12) relate to *Rehabilitation* and all three must be considered, and applied where appropriate, to a *Rehabilitation* project,

in addition to the nine General Standards (see chapter 3). Both the General Guidelines and the Additional Guidelines for Rehabilitation must also be considered, and applied where appropriate, to any *Rehabilitation* project (see chapter 4).

RESTORATION

Restoration involves accurately revealing, recovering or representing the state of an historic place or individual component as it appeared at a particular period in its history, while protecting its heritage value. Restoration may include removing non character-defining features from other periods in its history and recreating missing features from the restoration period. Restoration must be based on clear evidence and detailed knowledge of the earlier forms and materials being recovered. Restoration does not apply to archaeological sites because archaeology does not favour one period over another. The value lies partly in the information the sites contain. In a cultural landscape, the difference must be clearly understood between ecological restoration and restoration as a heritage conservation treatment. For ecological restoration,





The Hartland Covered Bridge, crossing the St. John River at Hartland, NB, is the world's longest covered bridge. It is significant for its structural qualities, contributions to transportation and as a symbol of the heritage of covered bridges in New Brunswick. The present bridge is a standard covered bridge structure composed of a Howe truss superstructure enclosed with vertical unpainted weatherboard siding. When the New Brunswick Department of Transportation recently *rehabilitated* the bridge by installing a fire suppression system, care was taken to ensure that this new system was barely visible in the upper structural system.

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consult the *Principles* and *Guidelines* for *Ecological Restoration* in *Canada's Protected Natural Areas* (Parks Canada and the Canadian Parks Council, 2008).

Consider *Restoration* as the **primary treatment** when:

- (a) An historic place's significance during a particular period in its history significantly outweighs the potential loss of existing, non character-defining materials, features and spaces from other periods;
- (b) Substantial physical and documentary or oral evidence exists to accurately carry out the work; and,
- (c) Contemporary additions or alterations and are not planned.

Restoration is most appropriate when strong associative or symbolic values have been obscured and can be revealed through removals, repairs and replacements based on historical evidence.

Before the work begins, the restoration period must be selected and justified and a plan for Restoration developed. The use of traditional methods and techniques should be encouraged, where possible, in a restoration project.

Restoration is rarely used today as the primary treatment for an entire historic place, but rather as a secondary treatment for specific character-defining elements. If changes to an historic place have acquired value over time, then *Preservation* or a combination of *Preservation* and *Rehabilitation* would be more appropriate.

In addition to the nine General Standards, two Additional Standards (13–14) relate to *Restoration*. These eleven standards must be considered, and applied where appropriate, to a *Restoration* project (see chapter 3). The General Guidelines and Additional Guidelines for Restoration must be considered, and applied where appropriate, to any *Restoration* project (see chapter 4).

KEY DEFINITIONS

Conservation: all actions or processes that are aimed at safeguarding the character-defining elements of an historic place so as to retain its heritage value and extend its physical life. This may involve *Preservation*, *Rehabilitation*, *Restoration*, or a combination of these actions or processes.

Preservation: the action or process of protecting, maintaining, and/or stabilizing the existing materials, form, and integrity of an *historic place*, or of an individual component, while protecting its *heritage value*.

Rehabilitation: the action or process of making possible a continuing or compatible contemporary use of an *historic place*, or an individual component, while protecting its *heritage value*.

Restoration: the action or process of accurately revealing, recovering or representing the state of an *historic place*, or of an individual component, as it appeared at a particular period in its history, while protecting its *heritage value*.



Chiefswood, birthplace of famed poetess, E. Pauline Johnson, is in Ohsweken, ON, in the Six Nations of the Grand River Territory. It was built between 1853–1856 by her father, Mohawk Chief George H. M. Johnson, a leading figure of the Six Nations. Located on a knoll overlooking the Grand River, the Italianate-style house, set back from the county highway, represents the Johnson family's interpretation of a rural Picturesque estate.

The meadow and summer kitchen, two of the site's character-defining elements, were removed in the 1960s and replaced with a manicured lawn. On the basis of both documentary and physical evidence, the summer kitchen was rebuilt and the meadow *restored* using native plant species.

THE STANDARDS FOR THE CONSERVATION OF HISTORIC PLACES IN CANADA

3

THE STANDARDS FOR THE CONSERVATION OF HISTORIC PLACES IN CANADA

The Standards for the Conservation of Historic Places in Canada promote responsible *conservation* practices to help protect Canada's historic places. They provide a philosophical approach to conservation work. While neither technical nor case-specific, they offer a framework for making essential decisions about which *character-defining elements* of an *historic place* should be preserved and which ones can be altered while protecting *heritage value*.

These Standards are, in fact, principles that express the collective wisdom that has accumulated in heritage conservation practice. They are rooted in practical and theoretical arguments that evolved as the field of conservation developed over the years. Working from these basic principles gives consistency and an ethical foundation to the decisions that must be made when conserving an historic place. The Standards are to be broadly applied throughout the conservation process and read as a whole, because they are interconnected and mutually reinforcing.

Conservation is a case-by-case pursuit, based on an understanding of the specific values of an historic place. While the applicability of each standard is unique to each case or *intervention*, nevertheless, there is a consistency in applying the standards to different types of places. Chapter 4, which forms the bulk of this document, provides detailed guidelines for four categories of historic places and materials.

Because the standards are basic principles to be applied using a reasoned process unique to each historic place, it is important to fully understand their meaning. This chapter explains the meaning of each standard and gives examples for their application. Because many of the standards describe multiple principles, it is important to consider every sentence in a standard. The individual principles associated with each standard are separated into part (a), (b), etc. The explanations that follow further define each separate principle.

The first nine standards relate to *Preservation*, which is at the core of all conservation projects. As such, these general standards must be applied to all conservation projects regardless of treatment type. Three additional standards are specific to *Rehabilitation* projects—Standards 10, 11 and 12—and two additional standards are provided for Restoration—Standards 13 and 14.

REPAIRING OR REPLACING?

Standards 8, 10 and 13 are related standards; each one describes the importance of repairing before replacing for each of the three treatment types based on the condition of the character-defining elements and the type of evidence available.

- Standard 8, in the context of *Preservation*, where the condition allows more for repair than replacement, assumes that material evidence is available to use as a basis when part of a character-defining element needs to be replaced;
- Standard 10, in the context of *Rehabilitation*, permits compatible, distinguishable new elements to be inserted when replacing elements too deteriorated to repair;
- Standard 13, in the context of *Restoration*, requires that replacement elements be based on evidence from the restoration period.

THE STANDARDS

The Standards are not presented in a hierarchical order. All standards for any given type of treatment must be considered, and applied where appropriate, to any conservation project.

General Standards for Preservation, Rehabilitation and Restoration

- 1. Conserve the *heritage value* of an *historic place*. Do not remove, replace or substantially alter its intact or repairable *character-defining elements*. Do not move a part of an historic place if its current location is a character-defining element.
- **2.** Conserve changes to an *historic place* that, over time, have become *character-defining elements* in their own right.
- **3.** Conserve *heritage value* by adopting an approach calling for *minimal intervention*.
- **4.** Recognize each *historic place* as a physical record of its time, place and use. Do not create a false sense of historical development by adding elements from other historic places or other properties, or by combining features of the same property that never coexisted.
- **5.** Find a use for an *historic place* that requires minimal or no change to its *character-defining elements*.
- **6.** Protect and, if necessary, stabilize an *historic place* until any subsequent *intervention* is undertaken. Protect and preserve archaeological resources in place. Where there is potential for disturbing archaeological resources, take mitigation measures to limit damage and loss of information.
- 7. Evaluate the existing condition of *character-defining elements* to determine the appropriate *intervention* needed. Use the gentlest means possible for any intervention. Respect *heritage value* when undertaking an intervention.
- **8.** Maintain *character-defining elements* on an ongoing basis. Repair character-defining elements by reinforcing their materials using recognized conservation methods. Replace in kind any extensively deteriorated or missing parts of character-defining elements, where there are surviving *prototypes*.
- **9.** Make any *intervention* needed to preserve *character-defining elements* physically and visually compatible with the *historic place* and identifiable on close inspection. Document any intervention for future reference.

Additional Standards Relating to Rehabilitation

- **10.** Repair rather than replace *character-defining elements*. Where character-defining elements are too severely deteriorated to repair, and where sufficient physical evidence exists, replace them with new elements that match the forms, materials and detailing of sound versions of the same elements. Where there is insufficient physical evidence, make the form, material and detailing of the new elements compatible with the character of the *historic place*.
- **11.** Conserve the *heritage value* and *character-defining elements* when creating any new additions to an *historic place* or any related new construction. Make the new work physically and visually compatible with, subordinate to and distinguishable from the historic place.
- **12.** Create any new additions or related new construction so that the essential form and integrity of an *historic place* will not be impaired if the new work is removed in the future.

Additional Standards Relating to Restoration

- **13.** Repair rather than replace *character-defining elements* from the *restoration* period. Where character-defining elements are too severely deteriorated to repair and where sufficient physical evidence exists, replace them with new elements that match the forms, materials and detailing of sound versions of the same elements.
- **14.** Replace missing features from the *restoration* period with new features whose forms, materials and detailing are based on sufficient physical, documentary and/or oral evidence.

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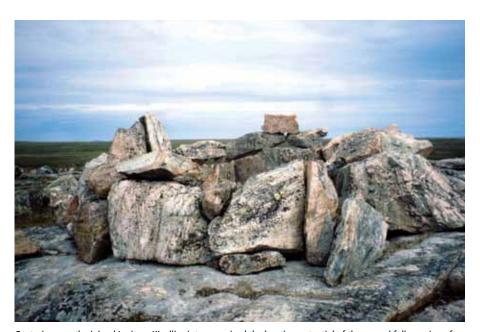
The character-defining interior features and finishes, such as the birch floors, window frames and views of the city at Habitat 67 in Montreal, have been carefully maintained, repaired and retained.

(a) Conserve the *heritage value* of an *historic place*. (b) Do not remove, replace or substantially alter its intact or repairable *character-defining elements*. (c) Do not move a part of an historic place if its current location is a character-defining element.

Part (a) states that the overarching objective of heritage conservation is to conserve heritage value. If an historic place has been formally recognized, the designating authority will likely have prepared a document outlining the place's values, such as a Statement of Significance. These values are embodied in character-defining elements.

Part (b) outlines how to conserve heritage value by minimizing changes to character-defining elements. Identifying character-defining elements helps guide where necessary interventions should and should not take place.

Part (c) addresses the wholeness of a place and reinforces that spatial relationships can be character-defining. In a garden, for example, moving a central feature to another location affects the heritage value of the entire landscape. In an archaeological site, location may be critical to understanding other elements that are now missing. In an engineering work, machinery moved from its original position can lose part of its meaning, thus diminishing its heritage value.



Centuries ago, the inland Inuit, or Kivallirmiut, recognized the hunting potential of the annual fall crossing of massive herds of caribou and began establishing seasonal camps along the Kazan River. Today Fall Caribou Crossing NHSC in Nunavut, is noted not only for its archaeological remains and former importance to the Kivallirmiut, but also for its natural landscape, continued use as a hunting area and the vitality of the oral history and traditions of the people who know it best. Moving any of these stones would impair heritage value.

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Conserve changes to an *historic place* that, over time, have become *character-defining elements* in their own right.

It is natural and necessary for places to evolve, reflecting changes in the community and culture of that they are a part. Places may be modified for reasons of taste, for the changing nature of their use, or to adapt to evolving conditions and technologies. Changes that mark significant changes, or that are considered expressions of their time, may be deemed to have a value in their own right.

Factories and other industrial works are constantly adapted. Retaining these adaptations may be important in telling the story of changing technology or the growth of a particular industry. Commercial and residential interiors were often changed with new ownership or passing trends. For example, a 1950s cafeteria in a 1910 office building may have its own distinct value as part of the evolution of that historic place.

A fine old storefront that has been modernized may have lost its heritage value. However, some changes may have acquired value, such as an art-deco stainless steel over-cladding or a marquee added to a popular urban theatre. Not every change to an historic place has heritage value, but those that do should be identified in a Statement of Significance. For historic places that were formally recognized some time ago, the process of determining if there is heritage value associated with later changes is an important step in the conservation process.



Over the years, several landscape architects and architects have made specific contributions to the evolving functions of Vancouver's Stanley Park. These include the play areas, totem groupings and aquarium that are now integral to the park's heritage value.



The lean-to is a character-defining element that shows the evolution of the Addison Sod House in Saskatchewan from a rustic sod dwelling to a comfortable home. Removing the later changes to restore the house to an earlier period would not be appropriate because it would remove elements that have heritage value.



When the windows of Lefurgey House in Summerside, PEI were damaged in a fire, instead of replacing the entire windows, only the broken glass was replaced. The replacement glass, salvaged from a nearby house that was replacing its windows, had similar properties and wavy appearance.

Conserve heritage value by adopting an approach calling for minimal intervention.

Minimal intervention in the context of heritage conservation means doing enough, but only enough to meet realistic objectives while protecting heritage values.

Minimal does not mean, doing little or nothing, or the least possible. In fact, enough intervention to arrest and correct deterioration, meet codes, or introduce new services, can be quite extensive. Determining minimal intervention is a matter of rigorous assessment, options analysis and creativity to identify the intervention that balances technical and programmatic requirements with protecting heritage value.

The application of Standard 3 varies depending on the nature of the character-defining element. In a landscape where value resides in living things that mature and die, substantial replanting may be necessary. In the case of an historic bridge that is unable to support current traffic loads, minimal intervention might well mean significant interventions to assure public safety.

For archaeological sites, minimal intervention calls for striking a balance between gaining knowledge from investigations and preserving the resources *in situ*. A certain level of intervention is often necessary to sufficiently understand the heritage value of the archaeological site and to determine the best preservation approach. This can be achieved by selecting the most appropriate and effective research methodology for a specific project such as targeting only necessary excavations and using non-intrusive means of investigation, when appropriate.

Minimal intervention has different meanings for *Preservation*, *Rehabilitation* and *Restoration*. In the context of Preservation, it means undertaking sufficient maintenance or repairs to ensure the longevity of the place while protecting heritage value. In the context of *Rehabilitation*, it might mean limiting the proposed new use, addition or changes. In a *Restoration*, minimal intervention is a delicate balance between removals and recreations to represent the historic place's condition at a specific time in its history.



The extensive damage caused by Hurricane Juan to the Halifax Public Gardens required substantial replanting. The large scope of work is still considered a minimal intervention because any less work would have negatively affected the heritage value of the place.

4

(a) Recognize each *historic place* as a physical record of its time, place and use. (b) Do not create a false sense of historical development by adding elements from other historic places or other properties or by combining features of the same property that never coexisted.

Part (a) of this standard requires us to respect the historic place and to conserve, as best we can, the physical evidence that conveys the significance of the historic place, including its contribution to a specific context and to the social history associated with its uses.

Part (b) discourages the creation of additions that falsify the story of a place. There is always a high risk of loss of authenticity when adding elements from other places or eras.

The materials removed from historic places are often salvaged and reused. Careful consideration must be given to how and where this is done. For example, using a salvaged lamppost from an historic landscape with identifiable characteristics at another site does not conform to the standard. On the other hand, using recycled bricks of the same age and appearance, or reusing identical windows within a building are appropriate from both conservation and *sustainability* standpoints. Where it is deemed critical to the honesty of the work, such additions can be rendered distinguishable in a discreet way.



The Old Strathcona Provincial Historic Area in Edmonton is a diverse historic district. The individuality of each building and evidence of the era of its construction has been maintained. Earlier simply constructed wood buildings stand alongside later more sophisticated masonry buildings and modern infill structures.





The original plans for the Margaret Marin Residence in Edmonton indicate a decorative upper balcony that was never built. During recent renovations, it was decided not to construct this balcony because it would have conveyed a false sense of historical development.

5



Despite changing requirements in education, the Lunenburg Academy in Nova Scotia remains in its original building and setting. The Academy was designed using green space, natural lighting and ventilation in a way that is still valid for school use today.

Find a use for an *historic place* that requires minimal or no change to its *character-defining elements*.

Standard 5 advocates maintaining the use of the place or finding a new viable use that has little impact on its character-defining elements. It is important to find the right function for an historic place to ensure a long-term, stable context for conserving heritage value.

If the current use is a character-defining element, maintaining this use is in accordance with the standard, as long as growth or technological change does not become destructive to its character-defining elements. If maintaining the original use leads to the removal or significant alteration of character-defining elements, the owners and users may need to consider a compatible new use for the historic place.

Finding a new use depends on an analysis of heritage value and physical compatibility with the historic place and its likeliness to provide a lasting, new life for the historic place. Using an old jail as a youth hostel may initially seem like an unusual concept, but it illustrates resourceful, clear-sighted functional analysis as the generator of good reuse: both jails and hostels provide a lot of small rooms for sleeping.

Old buildings are often considered as venues for museums or galleries, but if strict interior environmental conditions are required for that function, complex and potentially destructive interventions may be needed. New uses that require substantial alteration of character-defining elements do not conform to the standard.

In the case of archaeological sites, the intention is seldom to use the archaeological site itself, but rather the space that contains it. It is therefore important that a new use requires minimal intervention and does not alter the character-defining elements that are often submerged or buried underground.



After serving the community for many years as a primary school, the Charlotte Street School in Fredericton now has a new community use as the Charlotte Street Arts Centre. This use required little change to the building's layout and character. Classrooms were maintained to serve as open art studios, dance and music studios and an art gallery. The existing wide corridors and staircases, as well as the classrooms and other spaces, fit the new needs well.



This Dawson City building, originally built to be the temporary location for the government telegraph office, was rehabilitated into housing units.

6

(a) Protect and, if necessary, stabilize an *historic place* until any subsequent *intervention* is undertaken. (b) Protect and preserve archaeological resources in place. Where there is potential for disturbing archaeological resources, take mitigation measures to limit damage and loss of information.

While Standard 5 reinforces the need for an appropriate and sustainable use, part a) of Standard 6 recognizes that there may be a period of vacancy in the life of any historic place, such as a period of inaction at a former industrial site or farm.

Mothballing, the temporary closure of an historic place with measures to protect it from vandalism and weather, is a process that requires planning and continual monitoring. For a landscape, mothballing might include taking measures to diminish the risk of insect infestation or plant disease. Archaeological sites can be particularly vulnerable because the resources are often not visible.

Part b) acknowledges a responsibility to protect archaeological resources, but also reinforces the message that they must be protected and preserved *in situ*. This is a highly regulated aspect of conservation: one must identify and engage the authority having jurisdiction. The information required to best preserve and protect the site is gained from a variety of archaeological interventions. A strategy to recover the information using the most appropriate and effective methods needs to be developed in an effort to strike a balance between gaining knowledge from investigations and preserving the resources *in situ*.



Nearby archaeological resources were protected when stabilizing the Prince of Wales Fort in Manitoba. Strategically placed archaeological investigations on the surface of the ramparts established the extent of artifacts, including their depth below the surface.



These buildings, along with others at St.Luke's Anglican Rectory and Church in the Yukon, were temporarily stabilized using a variety of measures including adding sandwich bracing, cable bracing, heavy frames, roll roofing, and covering door and window openings in order to keep out snow and rain. Stabilization allows the structures to be adequately researched and their eventual restoration to be planned.

7



Ground-penetrating radar was used at McPherson House in Fort Simpson, NT; this guided archaeological excavations limiting the impact on the site.

(a) Evaluate the existing condition of character-defining elements to determine the appropriate intervention needed. (b) Use the gentlest means possible for any intervention. Respect heritage value when undertaking an intervention.

Part (a) of Standard 7 refers to a comprehensive examination and assessment of the physical place. Determining if an intervention is needed, and what an appropriate intervention might be, requires an understanding of the physical condition and behaviour of the character-defining elements and the historic place as a whole. The cause and extent of any decay should be based on evidence from a site investigation.

If the condition evaluation reveals a weakness that threatens the historic place's long-term survival, the standard requires assessments and options analysis to determine the appropriate course of action. This standard, in combination with Standard 3, usually leads to intervening only where the existing condition is actively causing further deterioration or weakening the asset.

Part (b) addresses the course of action once it is clear that an intervention is needed. The gentlest means to achieve a reasonable level of conservation should be selected. This includes the technique or methodology itself and the extent of the intervention being considered.

Investigations themselves are forms of intervention and as such should follow a minimal intervention approach. Investigations should begin with observation and non-invasive probes followed by careful sampling and physical openings or selective disassembly if required. The objective is to obtain enough evidence without unnecessarily disturbing the historic place.



A condition assessment and evaluation undertaken before an intervention at Belvedere Cemetery in St.John's Ecclesiastical District, would reveal that the well-aged and weathered patina found on the grave markers is not damaging. It is in fact a character-defining element of this historic place and should be preserved.

8

(a) Maintain *character-defining elements* on an ongoing basis. (b) Repair character-defining elements by reinforcing their materials using recognized *conservation* methods. (c) Replace *in kind* any extensively deteriorated or missing parts of character-defining elements, where there are surviving *prototypes*.

This standard introduces the basic hierarchy of interventions. Maintain first, then repair rather than replace the deteriorated parts of character-defining elements. If the replacement of a part is the only option, it should be done *in kind*. This approach is closely tied to *minimal intervention* (Standard 3).

Part (a) of this standard promotes the ongoing maintenance of an historic place, an essential but often undervalued aspect of conservation. Rigorous maintenance reduces long-term costs as well as the frequency of major interventions.

Part (b) emphasizes the use of recognized conservation methods when carrying out repairs. Past experiences in conservation offer many cases where the application of unproven new materials or techniques resulted in more damage than good. Techniques and materials must have proven track records and be based on research, analysis and review.

Part (c) introduces the concept of replacement *in kind*. In kind is defined as: with the same form, material and detailing as seen in the existing elements. If the character-defining element is a wood shingle, the standard states that it must be replaced with a wood shingle, and not an asphalt shingle.

Replacement *in kind* may sometimes be difficult, and substitute materials may be necessary when the original materials are damaging to character-defining elements or hazardous to public health. Some mid-20th century materials are no longer made or cannot be manufactured in small batches. In a place where the heritage value depends on a material that is no longer available, the ongoing loss of the material will eventually lead to a difficult choice: accepting breakage or replacing the entire material or assembly with one that is physically and visually compatible with the original.



Wrecks at Red Bay NHSC, NL, such as this Basque Period wreck, are reburied using sand and tarp to ensure their long-term preservation. Their condition is periodically assessed through monitoring.



When restoring decorative plaster in the Walker Theatre in Winnipeg, moulds were made of existing plaster elements. The deteriorated plaster was then patched and repaired using the moulds to match the original.



A condition assessment of the exterior walls and frame of this Storehouse at Fort Langley, BC found extensive deterioration of some timbers, which required replacement in kind. The dimensions, hewn finish and species of wood used in the repairs matched those replaced. The photograph shows part of one storehouse wall after the repairs were completed, but before the new timbers were whitewashed.



The new pieces of stone on the Wellington Wall at the Parliament Grounds in Ottawa are clearly visible on close inspection due to a different tooling technique.

(a) Make any *intervention* needed to preserve *character-defining elements* physically and visually compatible with the *historic place* and identifiable on close inspection. (b) Document any intervention for future reference.

Part (a) of this standard speaks to balancing the need for an *intervention* to be appropriate in physical and visual terms and subtly distinguishable. Compatibility can allow for some variation in the finish or patina, which will serve as the distinguishing factor. Generally, repair and replacement work only needs to be identifiable on close inspection. However, honesty requires that new work be clearly distinguishable from the old by subtle visual means or by date stamping in inconspicuous locations.

Part (b) emphasizes the requirement for documentation to help future decision makers better understand the historic place. It is important to keep good records of all conservation work, including *maintenance*, and to plan for easy retrieval of that data in the future.

While the main reason for making interventions identifiable is honesty, it is also a means of keeping a record of the place. The historic place itself is its own best document.



The grand residential estate at Parkwood in Oshawa is a cultural landscape that covers 4.8 hectares. Aerial photography was used to document the large-scale site during the conservation process.

10

- (a) Repair rather than replace character-defining elements.
- (b) Where character-defining elements are too severely deteriorated to repair, and where sufficient physical evidence exists, replace them with new elements that match the forms, materials and detailing of sound versions of the same elements. (c) Where there is insufficient physical evidence, make the form, material and detailing of the new elements compatible with the character of the *historic place*.

This standard advocates restraint during a *Rehabilitation* project, recognizing that the wholesale replacement of elements will inevitably have an impact on heritage value. *Rehabilitation* is meant to preserve and not diminish the heritage value of a place; a new use or a substantial reinvestment does not justify extensive replacement.

Part (a) discourages replacing elements that can be repaired. In a rehabilitation project, more latitude is available in choosing the techniques and methods of repair. Modifying a technically problematic detail may be required to ensure long-term performance. In archaeological sites, elements are rarely repaired or replaced. However, in some cases, this may be the most appropriate way to slow deterioration and prevent the loss of heritage value.

Part (b) encourages replacing elements with in-kind versions, when the original is too deteriorated to repair, but enough evidence is available to accurately reproduce the element in kind.

Part (c) addresses the case of historic places in a more advanced state of disrepair, or where significant elements or assemblies are missing. A rehabilitation project must conserve the heritage value of the place despite the insertion of a new element. Compatibility with the historic place is achievable through a range of approaches. The new element could be discreet and compatible in form, material and detailing, or contemporary in design, achieving compatibility through proportion, scale or massing.

Addressing significant deterioration is an implicit goal of this standard. If deterioration is not properly addressed, it can result in a loss of heritage value.



where insufficient historical evidence existed, a
Rehabilitation approach was taken. New perennial
beds were designed using adjacent layouts and
historical information from other parts of the garden
as inspiration. This approach resulted in compatible
new beds that completed the garden and
strengthened its overall heritage value.





The character-defining elements of Doukhobor Dugout House NHSC in Saskatchewan, such as the window frames, had suffered visible deterioration from exposure to the elements. A long-term repair solution was necessary to prevent further decay and to preserve the site's heritage value.

Following the reinforcement treatment of treating the logs with preservatives, collapsed character-defining elements were reassembled based on records from previous interventions and existing traces on the site.

11

(a) Conserve the *heritage value* and *character-defining elements* when creating any new additions to an *historic place* or any related new construction. (b) Make the new work physically and visually compatible with, subordinate to, and distinguishable from the historic place.

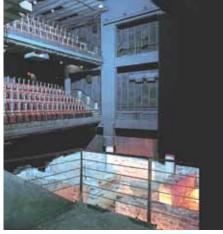
In a rehabilitation project, additions or new construction may be needed to assure the continued use of an historic place. Part (a) indicates that when this is the case, such additions or new construction must not obscure, radically change or have a negative impact on character-defining materials, forms, uses or spatial configurations.

Part (b) requires physical compatibility with the historic place. This includes using materials, assemblies and construction methods that are well suited to the existing materials. New materials and assemblies should also have compatible service lives or durability, so that *maintenance* and repair work can be undertaken concurrently. Not doing so can lead to prematurely replacing adjacent historic materials for the sake of efficiency.

Part (b) also requires that additions or new construction be *visually* compatible with, yet distinguishable from, the historic place. To accomplish this, an appropriate balance must be struck between mere imitation of the existing form and pointed contrast, thus complementing the historic place in a manner that respects its heritage value.

Part (b) also requires an addition to be subordinate to the historic place. This is best understood to mean that the addition must not detract from the historic place or impair its heritage value. Subordination is not a question of size; a small, ill-conceived addition could adversely affect an historic place more than a large, well-designed addition.





These two additions in Montreal show the range of possibilities for successful additions to historic places. Although the addition to Shaughnessy House by the Canadian Centre for Architecture has a larger footprint than the original building, it demonstrates a subtle approach, using compatible scale, proportions of openings, materials and details, which acknowledges the original building. Pointe-à-Callière Museum of Archaeology and History illustrates a contrasting contemporary approach where an archaeological site has been successfully integrated into a new design in ways that communicate the site's heritage value.

12

Create any new additions or related new construction so that the essential form and integrity of an *historic place* will not be impaired if the new work is removed in the future.

Reversible interventions are those that can be removed at a later date without damaging the character-defining elements of the historic place. This is particularly important if the intervention is related to a new use that may later change. For example, a temporary access ramp could be constructed in a manner that allows for easy dismantling without damaging an adjacent character-defining foundation wall or front garden. Reversible interventions are not destructive. A proposal to tear down a wall and store the stone so that it might someday be rebuilt is not a reversible intervention.

A sound addition can enhance the value of an historic place. An addition, in itself, can be intended to last, and should be designed to be physically compatible. Although a certain amount of irreversible change may be unavoidable, strategies to reduce the size and impact of the addition should be explored. This can be achieved, for example, by using existing window openings to insert a connecting door, or attaching an addition to an elevation that is not character defining.

Interventions to accommodate rapidly evolving technologies or short-lived objectives must be designed with particular attention to reversibility. If the new element is equipment that requires regular replacement, it is important to anticipate a large enough access for future upgrades.



Space to temporarily house the Library of Parliament in the former Bank of Nova Scotia Building on Sparks Street in Ottawa. The entire intervention was designed to be reversible.



The dome of Melville City Hall was originally an uninsulated, painted-metal covering that caused persistent condensation problems. Applying insulating polyurethane foam with aluminized coating was a cost-effective solution that was compatible with the historic metallic look of the dome. If a more elaborate solution is contemplated in the future, the polyurethane could be removed.

13



These cast iron columns were uncovered and restored when CentreBeam Place, in St. John, was rehabilitated.

(a) Repair rather than replace *character-defining elements* from the *restoration* period. (b) Where character-defining elements are too severely deteriorated to repair and where sufficient physical evidence exists, replace them with new elements that match the forms, materials and detailing of sound versions of the same elements.

Part (a) of Standard 13 emphasizes repairing deteriorated elements from the restoration period. The act of repairing a character-defining element supports the goal of authenticity.

Part (b) recognizes that elements may deteriorate beyond repair, but their deteriorated state, or the state of adjacent surviving elements, may still contain sufficient physical evidence to allow their accurate replacement. Replacing individual components is an ongoing activity where the loss of small parts, such as decorative finials on a fence post, is common. The value does not reside in a single one of these elements, but their continual loss can eventually compromise the heritage value of the whole.

A preservation or rehabilitation project may also include elements of restoration, such as work on an ornamental fountain in the centre of a formal garden. Any restoration interventions must be based on clear physical, documentary or oral evidence and detailed knowledge of the earlier forms and materials.



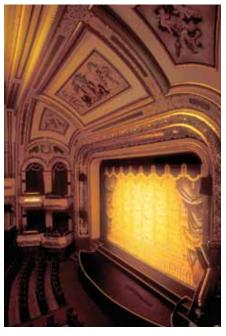
The rhythmic pattern created by the regular spacing of trees along the street is a character-defining element of the Avenue of Trees in Surrey, BC that can be used as evidence to restore the row if a gap develops.

14

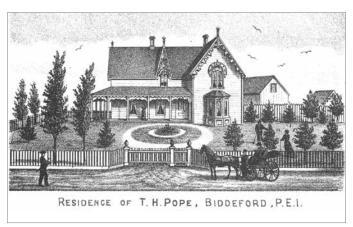
Replace missing features from the *restoration* period with new features whose forms, materials and detailing are based on sufficient physical, documentary and/or oral evidence.

This standard applies mainly to projects where *Restoration* is the primary treatment type and where the absence of character-defining elements from the restoration period has a negative impact on the heritage value of the historic place. Recreating large missing assemblies is challenging because of the extraordinary amount of evidence required to avoid conjecture. Where resources are limited, the urge to restore should be balanced with the practicality of replacing and later maintaining long-missing features.

The reconstruction of an entire historic place is not considered conservation and is not addressed in this document. However, the recreation of a missing built feature in a landscape or heritage district is best regarded as an addition to an historic place, and would be subject to Standards 11 and 12.



In the restoration of the Capitol Theatre in Moncton, photographic and physical evidence supported restoring the interior decorative frescoes in their original colours. Other elements, such as the marquee, were reproduced from documentary photos using new elements to match the forms, materials and detailing.





Based on documentary evidence, including an 1880 engraving, the original fenestration of the Bideford Parsonage Museum in P.E.I. was restored and roof finials replaced.

THE GUIDELINES FOR THE CONSERVATION OF HISTORIC PLACES IN CANADA









These examples illustrate the four categories of historic places. Clockwise, from top left: Bar U Ranch in Alberta is a cultural landscape; Saguenay-St. Lawrence Marine Park contains underwater archaeological sites; the Hartt Boot and Shoe Factory in Fredericton is an example of an historic building; and Dredge No. 4 in Dawson City is an engineering work.

4

THE GUIDELINES FOR THE CONSERVATION OF HISTORIC PLACES IN CANADA

Those caring for historic places must make specific decisions on how to conserve them, based on a thorough understanding of their heritage value and character-defining elements. The Guidelines provide direction on how to interpret and apply the Standards for the Conservation of Historic Places in Canada to selected aspects of the conservation of historic places. The Guidelines provide sound and practical guidance to those involved in conservation planning, bringing them one step closer to an intervention, yet stopping short of recommending specific methods or products.

The Guidelines should be consulted throughout the conservation decision-making process. All stakeholders in a conservation process—owners, managers and developers of historic places, conservation professionals and contractors, and regulatory authorities—will benefit from them. The Guidelines are not meant to give case-specific advice or address exceptions or rare examples. Ultimately, it is the responsibility of the owner and the conservation team to understand the particular case and make detailed conservation decisions for the specific historic place.

To cover any and every type of historic place, separate Guidelines are provided for four broad categories of historic places: Cultural Landscapes, Archaeological Sites, Buildings and Engineering Works. Any given historic place may be a mix of these four categories. A thorough understanding of the site will indicate what mix of guidelines could apply to a given project or maintenance activity. All relevant guidelines should be consulted. The introductions to the sections for each

category of historic place should be read first, followed by those guidelines relevant to the given work.

Because materials are common among the different categories of historic places, a fifth category, Guidelines for Materials, addresses the materials that may be part of each. For example, advice related to conserving the wooden shingles of a roof will be found in the Guidelines for Buildings under Roofs, and in the Guidelines for Materials under Wood and Wood Products.

APPLYING THE GUIDELINES

The Guidelines should be consulted only when the element to be intervened upon has been identified as a character-defining element in a Statement of Significance or equivalent document. The General Guidelines apply to all interventions, whether the primary treatment is Preservation, Rehabilitation or Restoration. There are additional guidelines for Rehabilitation and Restoration projects.

The Guidelines are presented in an ascending sequence of lesser to greater intervention—from **documenting**, to **maintaining**, **repairing**, and **replacing** character-defining elements. Because the expressed objective of the Standards is to conserve the heritage value of an historic place, projects should focus on the first activities in the sequence of Guidelines; that is, applying the standard of *minimal intervention* and resorting to the last activities in the sequence only when essential functional goals cannot otherwise be met.

The Guidelines use a **Recommended** and Not Recommended format. Approaches or techniques that are consistent with the Standards for the Conservation of Historic Places in Canada are listed in the Recommended column on the left. The Not Recommended column on the right identifies actions or approaches that do not conform to the Standards. In cases where a nonrecommended action does not enrich the understanding of the advice offered, the Not Recommended column remains blank. The guidelines are numbered for easy referencing. For example, the ninth guideline under 4.3.4, Exterior Walls, can

GENERAL GUIDELINES FOR PRESERVATION, REHABILITATION AND RESTORATION

be identified as guideline 4.3.4.9.

The Guidelines always begin with a recommendation on **understanding** the character-defining element and how it contributes to the heritage value of the historic place.

Next are recommendations on **documenting** the character-defining elements before beginning project work. An overall **assessment** of their physical condition, using methods that respect the principle of minimal intervention, should always begin at this level.

Recommendations are then presented on **protecting and maintaining** elements, with an emphasis on recognized conservation methods, and daily, seasonal and cyclical maintenance. Protection generally represents the least degree of intervention.

Then, recommendations are provided on **retaining** sound elements and elements that can be repaired, rather than removed or replaced.

Recommendations on **stabilizing** fragile and deteriorated elements follow. This typically involves interim structural reinforcement, weather protection or correcting unsafe conditions, as required, until any additional work is undertaken. A limited amount of repair and replacement may be acceptable at this point for extensively deteriorated or missing parts of an element, if the repair focuses on using limited reinforcement or well-tested consolidants, or if the replacement is done in kind, where there are surviving prototypes. See the info-box below on Replacing Character-Defining Elements. Note that in the context of specific historic places and associated characterdefining elements, the verb "repair" may not be suitable. For example, as part of the restoration of vegetation features of a cultural landscape, the verbs "re-establish", "reinstate" or "rejuvenate" may be more appropriate.

ADDITIONAL GUIDELINES FOR REHABILITATION

In each section of the Guidelines, additional guidelines are provided for work that relates to additions or alterations to accommodate an expanded program or a new use, and the application of current codes and standards to meet the requirements of health, safety, security, accessibility and sustainability.

Additions or Alterations to an Historic Place

The construction of an exterior addition in an historic place may seem essential for a proposed new use, but the Guidelines emphasize that such new additions should be avoided, if possible, and considered only after it is determined that those needs cannot be met on another site or by altering secondary, non character-defining interior spaces. An addition should be

designed so that the heritage value of the historic place is not impaired and its character-defining elements are not obscured, damaged or destroyed. The addition should be physically and visually compatible with, subordinate to, and distinguishable from the historic place as stated in Standard 11.

The guidelines on Additions or Alterations found under the Additional Guidelines for Rehabilitation Projects apply to additions that range in size from a new building in a heritage district, to a new wing or storey on an existing historic building, to a new element like an interior partition or handrail. While the same principles of minimal intervention, compatibility and reversibility apply regardless of size, the ultimate goal is to protect heritage value.

In a *Rehabilitation* project, some alterations to an historic place may be needed to assure its continued use. There is a need to find creative solutions that balance health, safety, security, accessibility, sustainability and other regulations, and the preservation of the character-defining elements of an historic place.

Health, Safety and Security

In undertaking work on historic places, consider the impact that compliance with current health and safety codes (public health, occupational health, life safety, fire safety, electrical, seismic, structural and building codes) and increased security requirements will have on an historic place's heritage value and character-defining elements. Special coordination with the proper code officials may be required. It is often necessary to look beyond the 'letter' of code requirements to their underlying objective; most modern codes allow for alternative approaches and reasonable variance to achieve compliance.

Some historic materials (for example, insulation, lead paint, etc.) contain toxic substances that are potentially hazardous to people. Careful investigation and analysis may determine that some form of abatement is required. All workers

involved in the encapsulation, repair or removal of known hazardous materials should be adequately trained and wear proper protective gear as required by applicable legislation. Finally, a maintenance protocol for historic places known to contain such materials should be developed to include proper warnings and precautions.

Increased concerns about security within or around buildings and public places can also lead to introducing new measures, such as equipment and barriers that should be carefully planned to reduce their impact on the heritage value of an historic place. Approaches based on the objectives of minimal intervention and compatibility should be developed for these requirements.

Accessibility

Providing people of all ages, interests and abilities with access to historic places is highly desirable and a frequently mandated social goal. Generally, the solutions that best balance accessibility needs with heritage value are those that enhance the use and appreciation of an historic place for everyone. Work should be carefully planned and undertaken so that impact on an historic place's heritage value and character-defining elements is minimized: the objective is to provide the highest level of access with the lowest level of impact. To determine the most appropriate solutions, accessibility and conservation specialists, and users, should be consulted early in the planning process.

Sustainability

The goals of environmental *sustainability* should be balanced with heritage conservation objectives when making decisions on sustainability-related interventions. Environmental assessment, which is a legislated requirement in many jurisdictions, identifies possible effects, intended or unintended, on both ecological and cultural resources. Understanding the past and current environmental characteristics and performance of an historic place is

required to identify appropriate solutions. Before adapting or retrofitting historic places to make them more sustainable, the first step should always be to identify and evaluate character-defining features to assess their inherent environmental potential. Any decision to proceed with resource-saving measures involving energy, water or materials should include a step where the environmental benefits of these measures is weighed against their impact on heritage value. Solutions should be found that take advantage of the inherent durability and adaptability of most historic places.

Modifications undertaken to comply with environmental assessment or to meet environmental objectives, such as protecting the nesting area of an endangered species, should not result in the damage or loss of an historic place's heritage value. To determine the most appropriate solutions to meet environmental objectives, experts and officials should be consulted early in the planning process. It may be possible to develop systems, methods, devices or technologies of equivalent or superior effectiveness to those prescribed by regulation to minimize the impact on character-defining elements.

ADDITIONAL GUIDELINES FOR RESTORATION

In each section of the Guidelines, additional guidelines are provided for work that relates to irreversible changes, including removing elements from periods other than the chosen restoration period and recreating missing features from the restoration period. The preservation and restoration of existing elements should be addressed before considering work of this kind.

In a *Restoration* project, the goal is to depict the appearance of an historic place or an individual component as it appeared at a particular period in its history (usually the most significant). Thus, specific guidance is included on **removing** or altering non character-defining features from

REPLACING CHARACTER-DEFINING ELEMENTS

Replacement of all or parts of character-defining elements should only be considered when repair is not possible, and if there is sufficient physical evidence to match the forms, materials and detailing of a sound version of the same element. Replacement may be required because an existing feature is so severely deteriorated or damaged that repair is not possible, or because a feature is missing entirely. In all cases where replacement is required, sound elements that may be part of a larger grouping should be preserved. For example, a few brackets in a cornice, a few windows in a factory or a few plantings in a flowerbed may be salvageable, even though the overall character-defining element is severely damaged.

It is particularly important to understand the distinction between replacement as part of rehabilitation or restoration, as described in Standards 10 and 13.

Replacement as Part of Rehabilitation

In a *Rehabilitation* project, replacing a character-defining feature that is beyond reasonable repair may be appropriate if its essential form and detailing are still evident. Replacing a feature that is missing, but known from physical, documentary and oral evidence, may be appropriate; however, accepting the loss and not intervening is another possibility. (Where an important feature is missing, its replacement is always recommended in these Guidelines as the preferred course of action.) The approach for replacement work will depend on the overall design approach and design intentions, and most particularly, on achieving a visual and functional balance between the new work and the historic place. In some cases, the preferred design approach will be replacement *in kind*; in other cases, substitute forms, materials or detailing may be appropriate. In both situations, the replacement should be visually and physically compatible with, and distinguishable from, the historic place. If the replacement is in kind, the work need only be distinguishable on close inspection.

Replacement as Part of Restoration

In a *Restoration* project, replacement, as a rule, should be done in kind. Recreating earlier forms, materials, textures, finishes, colours and detailing, and patterns and relationships, can help recover or represent an historic place as it appeared at a particular period in its history. Success is largely a question of accuracy. This requires scrupulous attention to the physical, documentary and oral evidence, and careful monitoring of the replication process. The replacement work is normally distinguishable only on close inspection or as part of the project documentation. If there is insufficient physical, documentary and oral evidence to establish a reasonable level of accuracy, then *Restoration* is probably not an appropriate treatment.

periods other than the restoration period. (Because this can result in considerable change to an historic place, *Restoration* should be undertaken only when the place's heritage value relates specifically to a single period in its history.) Before such materials, features, spaces, or finishes

from other periods are altered or removed, they should be well documented.

Additional guidance on **recreating missing features** from the chosen restoration period of an historic place is provided below in the discussion on replacement as part of a restoration project.

APPLYING THE GUIDE-LINES TO MONTMOREN-CY FALLS, A CULTURAL LANDSCAPE THAT IN-CLUDES BUILDINGS, EN-GINEERING WORKS AND ARCHAEOLOGICAL SITES

Designated a historic site in 1994, Montmorency Falls is a place of natural beauty that includes tourism and recreational buildings and built features. In addition to the river and 84 metre high waterfall, the site includes exceptional water and geomorphological features, and six known archaeological sites, as well as landscape elements, structures, buildings and vestiges of 17th century agricultural settlements, 18th century farmhouses, 19th century industry, and 19th and 20th century tourism activities. Framed by a partly wooded escarpment, the site is located on two levels formed by a deep crevasse: the plateau of the Montmorency River and the basin of the falls at the St. Lawrence River level. (Source: Site historique de la Chute-Montmorency, Canadian Register of Historic Places.)

Refer to Heritage Value and Character-defining Elements

According to the Quebec government's Statement of Significance (SOS) posted on the *Canadian Register of Historic Places*, "the heritage value of the Montmorency Falls historic site resides in its historic significance, which is linked to various human activities and the surrounding land." The site's character-defining elements include features that relate to its historic significance such as built elements that document the history of varied human activities, vestiges of industrial activities and archaeological sites and potential archaeological resources that remain buried.



The Montmorency Falls Historic Site is a natural site that includes the falls as well as archaeological sites, landscape elements, structures, buildings and vestiges of 17th century agricultural settlements.

"The site's heritage value also stems from its outstanding landscape." Characterdefining elements of its landscape include natural features located upstream or near Montmorency Falls, such as the Montmorency River with its wooded banks and the waterfall itself; water resurgences and geological formations visible at this location; park landscaping, lookout belvederes, stairways and many pathways; and views of the site itself and the surrounding panoramas of the St. Lawrence River, Île d'Orléans and Quebec City. Finally, "the site's heritage value also rests on its ethnological significance due to the diversity in cultural events that are evoked."

Conservation Treatments and Standards

A wide variety of conservation work is required for a complex historic place such as the Montmorency Falls Historic Site. This work would include *Preservation*, through maintenance or small repairs of character-defining elements, and Rehabilitation for more major repairs, upgrades or additions to address public use, codes and standards. The Restoration of deteriorated or missing character-defining elements is less common. Restoration is associated with interventions on features where the values are clearly related to a specific period in the past. Depending on the proposed intervention or activity, consult the General Standards (1 to 9) along with the related Additional Standards for Rehabilitation (10 to 12) or Additional Standards for Restoration (13 and 14).

Guidelines for Cultural Landscapes

As a site that has changed over time due to human activities and one that is largely valued today for its natural features, the Montmorency Falls Historic Site is an evolved cultural landscape. Protection and conservation of natural features, such as the hydrological and geomorphological systems and woods and ecosystems, must be balanced with the conservation and ongoing use of structures associated with past and surviving farming, industrial and tourism activities.

For example, for an intervention that might affect the landscape, such as the installation of elevated footpaths above and below the falls along the cliffs, the Guidelines for Visual Relationships, Landforms, Spatial Organization, Circulation, Ecological Features and Water Features should all be considered.

Guidelines for Archaeological Sites

The SoS for Montmorency Falls Historic Site refers to both known archaeological sites and potential archaeological resources that remain buried. Archaeological sites provide evidence of activities from pre-historic times, to early European settlement and industrial uses. Protecting and conserving archaeological sites must be carefully balanced with projects that address their interpretation or public use.

For example, for an intervention that might affect an archaeological site, such as the maintenance of an exposed industrial vestige by removal of vegetation, consult the guidelines for Archaeological Sites as well as the guidelines for Industrial Sites, and Sites in Cultural Landscapes.

Guidelines for Buildings

The SoS for the Montmorency Falls
Historic Site identifies multiple buildings
as features related to its historic significance including Manoir Montmorency
and its outbuildings, St. Mary's Anglican
Chapel, the guardhouse and Wolfe's
house. It also identifies the Vézina and
Claude-Gilbert-et-Claire-Gagnon family



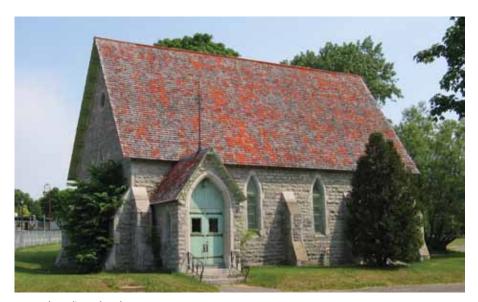
Both known archaeological sites and those that remain buried are mentioned in the Statement of Significance for the site.

homes as "monuments historiques cités" (recognized historic monuments). Protecting and conserving these buildings and their character-defining elements must be balanced with adaptation or upgrades for new uses.

For example, for an intervention that might affect a building, such as the rehabilitation (including an addition) and partial restoration of exterior and

interior elements of the Ste-Marie Chapel, the guidelines for Exterior Form, Interior Arrangement, Roofs, Exterior Walls, Windows, Doors and Storefronts, and Interior Features should all be considered.

In addition, the Guidelines for Materials and the related Guidelines for Cultural Landscapes that guide the treatment of the building setting should be consulted.



St. Mary's Anglican Chapel.

Guidelines for Engineering Works

The SoS for the Montmorency Falls Historic Site refers to engineering works at Montmorency Falls, including civil, industrial and military works. These works include the reconstructed 1759 British redoubt; the bridge spanning the Montmorency Falls; the piers supporting the 1856 bridge; and vestiges of industrial activities, including hydroelectric installations at Montmorency Falls and Marches-Naturelles Falls. Protecting and conserving these works and their character-defining elements must be balanced with adaptation or upgrades for new uses.

For example, for an intervention that might affect an engineering work, such as the stabilization and repair of the piers supporting the bridge over the falls, the guidelines for Constructed Elements and Functional Arrangement should be considered.

As well, the Guidelines for Buildings, the Guidelines for Materials and the related Guidelines for Cultural Landscapes that guide the treatment of the setting should be consulted.

Guidelines for Materials

While specific materials are not identified in the SoS, protecting and conserving the materials found in the site's various buildings, built features and constructed elements, including groups of buildings, engineering works and park structures, are essential for conserving these structures and the overall site. Conserving materials that are part of characterdefining elements may be necessary in the ongoing maintenance, or in larger conservation projects that address major repairs. Both the general guidelines that apply to all materials and the guidelines that apply to the specific materials of each character-defining element should be consulted.

For example, for an intervention that might affect the materials of a character-defining element, such as the repair and partial replacement of a "tôle à la canadienne" metal roof, the guidelines for All Materials and Metals should be considered, in addition to the appropriate guidelines for Buildings, in this case, Roofs.

As this example illustrates, there is often a strong overlap between the five sections of the guidelines. The guidelines should therefore be used in an integrated manner that balances the conservation objectives of a variety of resource types of historic places with their specific heritage values and character-defining elements. The appropriate guidelines to follow should be determined following an analysis of how the character-defining elements can best be protected in the context of a specific conservation intervention.



The bridge over the falls.



Remains of hydroelectric installations.



Elevated footpaths along the cliffs.

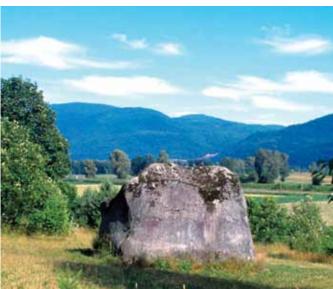
4.1

GUIDELINES FOR CULTURAL LANDSCAPES, INCLUDING HERITAGE DISTRICTS









Cultural landscapes are divided into three categories and also include heritage districts. Clockwise, from top left: Confederation Centre of the Arts in Charlottetown is an example of a designed landscape; the Victoria Settlement in Alberta illustrates an organically evolved landscape; Xá:ytem (Hatzic Rock) in British Columbia is an associative landscape; and the Winnipeg Exchange District is an urban heritage district.

4.1

GUIDELINES FOR CULTURAL LANDSCAPES, INCLUDING HERITAGE DISTRICTS

From its dense urban areas in the South to the wide open expanses in the North, the Canadian landscape exhibits countless contrasts and subtleties. Natural forces and climatic conditions have combined to form landscapes that are uniquely different from one region to another. Across this land, and across the centuries, the peoples of Canada have continually shaped these landscapes, which today bear witness to their individual histories, traditions and lifestyles.

For the purposes of these guidelines, a *cultural landscape* is defined as any geographical area that has been modified, influenced or given special cultural meaning by people, and that has been formally recognized for its heritage value. Cultural landscapes are often dynamic, living entities that continually change because of natural and human-influenced social, economic and cultural processes.

While the resulting forms may sometimes be simple and other times complex, there is a common language and approach developed for the conservation of cultural landscapes. For example, a widely accepted framework developed by UNESCO places cultural landscapes into three categories: designed; organically evolved (vernacular); and associative (UNESCO, Operational Guidelines for the Implementation of the World Heritage Convention, 2008, Annex 3).

Cultural landscapes vary dramatically in size and character—from heritage districts, to prehistoric rock art sites, and to designed landscapes, such as parks and gardens. Indeed, cultural landscapes can be as old as ancient land and water routes, or as recent as a mid-20th-century parkway system.



Before undertaking project work affecting character-defining elements, a survey of their characteristics, conditions and interrelationships should be prepared—such as the interrelationship between built features, water, vegetation and viewscapes at Hatley Park near Victoria.



Regular, ongoing maintenance helps extend the life of character-defining elements, and is an essential part of the conservation program. Every year dedicated volunteers spend thousands of hours caring for and preserving the historic garden at Maplelawn and Gardens NHSC in Ottawa.

HERITAGE DISTRICTS

A heritage district is a cultural landscape. The Canadian Register of Historic Places (CRHP) defines a heritage district as "a place comprising a group of buildings, structures, landscapes and/or archaeological sites and their spatial relationships where built forms are often the major defining features and where the collective identity has heritage value for a community, province, territory or the nation." Heritage districts can be urban or rural. Most heritage districts are governed by municipal by-laws that are complemented by guidelines to protect their heritage value.

Different Canadian jurisdictions use different terms to identify heritage districts, including: "historic district", "heritage precinct", "heritage conservation area", and "secteur patrimonial" and "arrondissement historique" (French). Each jurisdiction provides its own definition of what constitutes this type of historic place.

APPLYING THE GUIDELINES

The Guidelines for Cultural Landscapes are divided into 11 subsections: evidence of land use: evidence of traditional practices; land patterns; spatial organization; visual relationships; circulation; ecological features; vegetation; landforms; water features; and built features. These guidelines pertain to the elements of a cultural landscape or to the spatial or visual relationships between them. The elements may have been introduced or transformed by people or may be natural with a recognized heritage value. Because these elements are usually interrelated, users should refer to other relevant guidelines when conserving a cultural landscape, to ensure that all characterdefining elements are protected, and the heritage value of the historic place preserved.

All treatment types apply to cultural landscapes. However, restoration as a primary treatment usually applies only to designed cultural landscapes or organically evolved, relict landscapes for which the heritage value relates to a specific period in time. Restoration as a 'secondary' treatment can also apply to specific character-defining elements in an organically evolved, continuing landscape or in an associative landscape (See UNESCO categories of *cultural landscapes* in the Glossary).

Because cultural landscapes can also contain buildings, engineering works and archeological resources, reference should be made to those guidelines when appropriate. Also refer to the Guidelines for Materials, which encompass traditional as well as modern construction and finishing materials.

THE IMPORTANCE OF SETTING IN THE SIGNIFICANCE OF CULTURAL LANDSCAPES

The setting often contributes to the significance of a cultural landscape and may help explain its origins and subsequent development and evolution. The International Council on Monuments and Sites (ICOMOS) defines the setting of a heritage structure, site or area as "the immediate and extended environment that is part of, or contributes to, its significance and distinctive character" (ICOMOS, Xi'an Declaration on the Conservation of the Setting of Heritage Structures, Sites and Areas, 22 November 2005, p. 2).

In a cultural landscape, the setting often corresponds to the visible boundaries (whether natural or human-made) that encompass the site. In most cases, the setting goes beyond the boundaries of the historic place and understandably, interventions within the broader setting, such as the addition of a high-rise building in the sight line of a heritage district, can affect its heritage value. A good strategy for the preservation of the setting of an historic place is to ensure that adjacent property owners are aware of its heritage value and how interventions on their property can affect that value.

4.1.1 EVIDENCE OF LAND USE

These guidelines provide direction when the evidence of a land use has been identified as a character-defining element of an historic place. They apply specifically to the features that express or support a past or continuing land use when these features have been identified in a *Statement of Significance*.

In the context of these guidelines, land use refers to the human use of the natural environment. It includes activities that significantly modify aspects of the natural environment into a built environment, such as fields, pastures and settlements, but also includes land uses that have a lighter impact, such as hunting and trapping, maple syrup harvesting, or fishing.

Land use can evolve over time. When a required change in land use demands changes to the physical form of the landscape, it is important to carefully assess the viability of the proposed changes to avoid consecutive land use changes that might gradually erode the heritage value of the historic place. For example, changing from an industrial use to a residential use in a heritage district may require changing the landscape character or increasing the built density of the historic place.

These guidelines provide general recommendations for the conservation of the features of a cultural landscape that express or support a past or continuing land use. While other guidelines focus on specific evidence of land use, such as built features or circulation, these guidelines address land use as a general consideration. Other relevant guidelines, such as Land Patterns or Evidence of Traditional Practices, should be consulted when appropriate.



Buxton Settlement in Chatham, ON, survives today as a distinct cultural landscape that continues to function as a rural agricultural community while preserving tangible reminders of its historic past. Tree lines and hedgerows are character-defining elements that help define the historic agricultural land use. Preserving the evidence of land use includes maintaining the tree lines and hedgerows and replacing those that are extensively deteriorated.



The huge and uncluttered lawn of the Parliament Hill Grounds in Ottawa is an outstanding landscape feature that expresses the symbolic importance of Parliament Hill. It continues to be used for many nationally significant events and ceremonies, including the annual celebration of Canada Day.

| | Recommended | Not Recommended |
|---|---|---|
| 1 | Understanding land use and how it contributes to the heritage value of the cultural landscape. | |
| 2 | Understanding the environmental, economic and social contexts that support past or continuing land uses. This can include climate and ecological processes, available workforce and markets, and consultation with practitioners and community dwellers. | |
| 3 | Documenting the evidence of past or continuing land uses and any evolution in land use before beginning project work. | Undertaking interventions that will have an impact on the evidence of past or continuing land uses, without first understanding and documenting the values that contribute to their meaning. |
| 4 | Assessing the overall condition of the feature that supports a land use early in the planning process so that the scope of work is based on current conditions. | |
| 5 | Protecting and maintaining a feature that supports a land use by adopting non-destructive maintenance methods in daily, seasonal and cyclical tasks to extend the life expectancy. | Allowing the features that support a land use to be altered or lost by incompatible development or neglect. |
| 6 | Repairing deteriorated parts of a feature that supports a land use, using recognized conservation methods. | Replacing a feature that supports a land use when that feature can be repaired. |
| 7 | Replacing in kind extensively deteriorated or missing parts of a feature that support a land use where there are surviving prototypes. | Replacing an entire feature that supports a land use, when limited replacement of deteriorated and missing parts is appropriate. |
| 8 | Documenting all interventions that affect the land use and ensuring that this documentation will be available to those responsible for future interventions. | |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended |
|----|---|---|
| 9 | Repairing an extensively deteriorated or missing feature that supports a past or continuing land use by using non-destructive methods and materials, such as regenerating a deteriorated pasture at a designated farm site and reintroducing grazing animals to maintain the meadow. | Replacing an entire feature that supports a past or continuing land use, when repair or limited replacement of deteriorated or missing parts is possible. |
| 10 | Replacing in kind an entire feature that supports a past or continuing land use when that feature is too deteriorated to repair, such as replanting a clear-cut woodlot with the same tree species that was removed. | Replacing an irreparable feature with a new feature that does not support the past or continuing land use. |
| 11 | Replacing a missing historic feature by designing a new built or landscape feature that is compatible with the land use of the cultural landscape, and is based on physical, documentary or oral evidence. | Creating a false historical appearance because the new feature is incompatible, or based on insufficient physical, documentary or oral evidence. |

ADDITIONS OR ALTERATIONS TO A CULTURAL LANDSCAPE

| 12 | Designing a new feature when required by a new use that is |
|----|---|
| | compatible with the past or continuing land use. For example, |
| | building a visitor access road along the margin of a field and |
| | woodlot in an historic farm site, so that both can continue to |
| | function. |

Adding a new feature that alters or obscures a continuing land use, such as locating a visitor parking lot in a character-defining farmyard.

Introducing a new feature that is incompatible in function with the past or continuing land use.

ADDITIONAL GUIDELINES FOR RESTORATION PROJECTS

| | Recommended | Not Recommended |
|----|--|--|
| 13 | Repairing a deteriorated feature that supports the land use from the restoration period using a minimal intervention approach. | Replacing an entire feature that supports the land use from the restoration period, when repair is possible. |
| 14 | Replacing in kind an entire feature from the restoration period that is too deteriorated to repair, using the same configuration and design details. The new work should be well documented to guide future research and treatment. | Removing an irreparable feature from the restoration period and not replacing it, or replacing it with an inappropriate new feature. |

REMOVING EXISTING FEATURES FROM OTHER PERIODS

Removing or altering non character-defining features that support the land use from periods other than the chosen restoration period.

Failing to remove non character-defining features from another period that confuse the depiction of the chosen restoration period.

RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD

Recreating a missing feature that supports the land use from the restoration period, based on physical, documentary and oral evidence.

Installing a feature that was part of the original plan, but was never actually built, or constructing a feature thought to have existed during the restoration period, but for which there is insufficient documentation.

4.1.2 EVIDENCE OF TRADITIONAL PRACTICES

These guidelines provide direction when the evidence of a traditional practice has been identified as a character-defining element of an historic place. They apply specifically to the features that express or support a past or continuing traditional practice when these features have been identified in a *Statement of Significance*.

Traditional practices are based on the close observation and understanding of a local landscape by a cultural community who has a long association with that place. These practices include the beliefs, wisdom, activities, traditions and skills derived from extended observations of the land and its creatures, weather, seasonality and other cycles, and spiritual associations.

Traditional practices are passed down to generations and provide a sense of continuity for the individuals in the cultural community. The length of association with a place may vary among peoples and different cultural groups may value the same cultural landscape. When planning interventions that could affect the cultural landscape, it is important to balance these interests and ensure that the capacity to express the traditional practices of each community is respected.

Any historic place may have been influenced by traditional practices that evolve over time; for example, stone masonry traditions were transferred and adapted through apprenticeship systems from the Middle Ages to the present day. Traditional practices may be the strongest influence in determining heritage value, even if evidence of any type of construction or human-generated change appears insignificant. The natural landscape may reflect traditional knowledge through beliefs, oral traditions and practices known only to the cultural community.



Located south of Rankin Inlet, NU, Marble Island has a long history of diverse use. Inuit first came to the island as seasonal hunters, followed by European explorers and then by Scottish and American whalers. Today, traces of each group, such as stone tent rings, graves and kayak remnants, can be found among the summer vegetation. Understanding the users' traditional practices and how they have contributed to the heritage value of this cultural landscape is essential to good preservation practice.

Material features or landscape patterns or forms that result from traditional practices may be identified as character-defining elements in a cultural landscape. In Aboriginal cultural landscapes, the extent to which such character-defining elements can be identified will depend on how much information the communities are willing and able to share.

These guidelines provide general recommendations for the conservation of the features of a cultural landscape that express or support past or continuing traditional practices. Other relevant guidelines, such as Evidence of Land Use or Land Patterns, should be consulted when appropriate.





Victoria's Chinese cemetery lies near the rocky shore of Harling Point. Here simple markers are found among wildflowers in a setting selected according to the ancient concept of feng shui. Descendants of families buried in this cemetery still visit the site to burn incense, leave offerings of food and artificial paper money following traditional practices. All Preservation activities affecting character-defining elements on this site should only be done after consulting the cultural community.



Preservation of the totems at Nan Sdins, Gwaii Haanas includes their stabilization, while continuing to allow their gradual deterioration. The values associated with the totems include their eventual return to the earth.

| | Recommended | Not Recommended |
|---|---|--|
| 1 | Understanding traditional practices and how they contribute to the heritage value of the cultural landscape. | |
| 2 | Understanding the local environmental context, including climate, prevailing winds, underlying topography and ecological processes integral to traditional practices. | |
| 3 | Documenting aspects of traditional practices prior to beginning project work, including consulting with the cultural community on the ways that traditional practices have changed over time. | Documenting only material features of the cultural landscape, and neglecting to document the traditional practices associated with them. |
| 4 | Assessing the overall condition of the features that support traditional practices early in the planning process, so that the scope of work is based on current conditions. | |
| 5 | Protecting and maintaining the features that support traditional practices by using non-destructive methods in daily, seasonal and cyclical tasks in keeping with those practices. | Allowing the features that support traditional practices to be altered or lost through incompatible development or neglect. |
| 6 | Repairing or rejuvenating deteriorated parts of features that support traditional practices using recognized conservation methods. Where possible, conservation work should be done according to traditional practices. | Replacing features that support traditional practices when those features can be repaired or rejuvenated. |
| 7 | Replacing in kind extensively deteriorated or missing parts of features that support traditional practices where there are surviving prototypes. The new work should match the old in form, location, orientation, materials, detailing and craftsmanship. | Replacing an entire feature that supports traditional practices, when limited replacement of deteriorated and missing parts is possible. |
| 8 | Documenting all interventions that affect the features that support traditional practices, and ensuring that this documentation is available to those responsible for future interventions. | |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended |
|---|---|--|
| 9 | Repairing or rejuvenating extensively deteriorated or missing features that support traditional practices within the cultural landscape, by using non-destructive methods and materials. For example, using only native plant species significant to the cultural community, when rejuvenating vegetation or ecological features important to traditional practices. | Replacing an entire feature that supports traditional practices when repair or rejuvenation is possible. |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended |
|----|---|--|
| 10 | Replacing in kind an entire feature that supports traditional practices when that feature is too deteriorated to repair or rejuvenate, such as replanting a clear-cut forest with the type and mix of trees removed. | Replacing an irreparable feature with a new feature that does not support the past or continuing traditional practice. |

ADDITIONS OR ALTERATIONS TO A CULTURAL LANDSCAPE

Designing a new feature when required by a new use that does not obscure, damage or destroy other features also important to traditional practices.

Adding a new feature that detracts from, damages, or destroys features that support traditional practices.

Introducing a new feature that is incompatible with the past or continuing traditional practice.

ADDITIONAL GUIDELINES FOR RESTORATION PROJECTS

| | Recommended | Not Recommended |
|----|--|--|
| 12 | Repairing deteriorated features that support traditional practices from the restoration period using a minimal intervention approach. Where possible, repair activities should be done according to traditional practices. | Replacing an entire feature that supports traditional practices from the restoration period when repair is possible. |
| 13 | Replacing in kind an entire feature from the restoration period that is too deteriorated to repair or rejuvenate, using the same configuration and design details. The new work should be well documented to guide future research and treatment. | Removing an irreparable feature from the restoration period and not replacing it, or replacing it with an inappropriate new feature. |

REMOVING EXISTING FEATURES FROM OTHER PERIODS

Removing or altering non character-defining features from periods other than the chosen restoration period that obscure the historic features that support traditional practices within the cultural landscape.

Failing to remove non character-defining features from another period that confuse the understanding of traditional practices during the chosen restoration period.

RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD

Recreating a missing feature that supports traditional practices from the restoration period, based on physical, documentary and oral evidence.

Installing a feature that could have been important to traditional practices, but was never implemented, or introducing a feature thought to have existed during the restoration period, but for which there is insufficient documentation.

4.1.3 LAND PATTERNS

These guidelines provide direction when land patterns have been identified as character-defining elements of an historic place. Land pattern refers to the overall arrangement and interrelationship of the larger-scale aspects of a cultural land-scape, whether natural or human-made.

Land patterns help us understand how naturally occurring elements, such as forests, meadows, rivers, lakes, hills or valleys, fit together and fit with human-made elements such as farm fields, pastures, significant built features and major circulation systems.

Historic aerial photography and maps are important tools for describing land patterns and their changes over time. As well, consultation among communities, Aboriginal groups and ecosystem specialists can help us understand the traditional practices and natural processes that may have shaped land patterns.

Because land patterns refer to the mutual influences and interactions between nature and humans and the interrelationships of large-scale elements, they can be important character-defining elements of a cultural landscape. Land patterns are important for cultural landscapes regardless of whether they are relatively unchanged from their natural state, or highly manipulated through human activity or natural events.

These guidelines provide general recommendations for the conservation of the land patterns of a cultural land-scape. Other relevant guidelines, such as Evidence of Land Use or Evidence of Traditional Practices, should be consulted when appropriate.



The overall arrangement of landscape may best be appreciated from an aerial perspective. The land patterns created by the interrelationship of larger landscape components, such as the topography, cultivated fields and human settlements of Neubergthal in Manitoba are often more obvious from the air.

| | Recommended | Not Recommended |
|---|---|--|
| 1 | Understanding the land patterns and how they contribute to the heritage value of the cultural landscape. | |
| 2 | Understanding the local environmental context, including climate, prevailing winds, geology, underlying topography and ecological processes. | |
| 3 | Documenting the overall pattern of the landscape: the size, configuration, proportion and relationship of its larger components, such as forests, fields or subdivisions, and its evolution and condition before beginning project work. This can include identifying the values that contribute to the meaning of land patterns, such as associations from Aboriginal oral traditions, or the expression of cultural traditions that originated from other countries. | Undertaking interventions that will affect land patterns without first documenting and understanding their characteristics, relationships, evolution, conditions, intangible values and environmental context. |
| 4 | Assessing the overall condition of the land patterns early in the planning process so that the scope of work is based on current conditions. | |
| 5 | Protecting and maintaining features that define land patterns by using non-destructive methods in daily, seasonal and cyclical tasks. This could include limiting the impact of ecological processes, such as erosion, and monitoring sensitive areas. | Allowing land patterns to be altered or lost by incompatible development or neglect. |
| 6 | Retaining sound land patterns or deteriorated land patterns that can be repaired or rejuvenated. | |
| 7 | Repairing or rejuvenating deteriorated parts of a feature of the land pattern, using recognized conservation methods. Repair may also include the limited replacement in kind of those extensively deteriorated or missing parts of land pattern elements. Repairs should be physically and visually compatible. | Replacing a feature of the land pattern when that feature can be repaired or rejuvenated. |
| 8 | Replacing in kind extensively deteriorated or missing parts of land patterns where there are surviving prototypes. | Replacing an entire feature of the land patterns when limited replacement of deteriorated and missing parts is possible. |
| 9 | Documenting all interventions that affect the land pattern, and ensuring that this documentation will be available to those responsible for future interventions. | |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended |
|----|---|---|
| 10 | Repairing or rejuvenating an extensively deteriorated or missing feature that defines a land pattern, by using non-destructive methods and materials, such as regenerating a deteriorated meadow. | Replacing an entire feature that defines a land pattern when repair or limited replacement of deteriorated or missing parts is possible. |
| 11 | Replacing in kind an entire feature that defines a land pattern when that feature is too deteriorated to repair, such as replanting a clear-cut woodlot. The replacement feature should be as similar as possible to the original, both visually and functionally. | Replacing an irreperable feature with a new feature that does not respect the land pattern. |
| 12 | Replacing a missing historic feature by designing a new feature that is compatible with the land patterns of the cultural landscape, and is based on physical, documentary and oral evidence. | Creating a false historical appearance because the new feature is incompatible with the land pattern, or based on insufficient physical and documentary evidence. |

ADDITIONS OR ALTERATIONS TO A CULTURAL LANDSCAPE

| 13 | Designing a new feature when required by a new use that does | Introducing a new feature that is incompatible in size, |
|----|--|---|
| | not obscure, damage or destroy character-defining land patterns, such as locating a new road along the edge of a forest. | scale or design with the land pattern. |

ADDITIONAL GUIDELINES FOR RESTORATION PROJECTS

| | Recommended | Not Recommended |
|----|--|--|
| 14 | Repairing or rejuvenating a declining feature that defines a land pattern from the restoration period using a minimal intervention approach. | Replacing an entire feature that defines a land pattern from the restoration period, when repair or rejuvenation is possible. |
| 15 | Replacing in kind an entire feature that defines a land pattern from the restoration period that is too deteriorated to repair, using the same configuration and design details. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Removing an irreparable feature that defines a land pattern from the restoration period and not replacing it, or replacing it with an inappropriate new feature. |

REMOVING EXISTING FEATURES FROM OTHER PERIODS

Removing or altering non character-defining features from periods other than the chosen restoration period, which intrude on the land patterns.

Failing to remove non character-defining features from another period that confuse the depiction of the land patterns during the chosen restoration period.

RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD

17 Recreating a missing feature important to the land patterns that existed during the restoration period, based on physical, documentary and oral evidence.

Installing a feature that was part of the original land pattern, but was never actually built, or constructing a feature of the land pattern that was thought to have existed during the restoration period, but for which there is insufficient documentation.

4.1.4 SPATIAL ORGANIZATION

These guidelines provide direction when spatial organization has been identified as a character-defining element of an historic place. Spatial organization refers here to the arrangement of spaces in a cultural landscape.

Landscape features, whether natural or human-made, can define the volume of an outdoor space. In small landscapes, the vertical planes of an outdoor space may be formed by vegetation, such as hedges, garden beds or forest margins, or by the exterior walls of buildings, earthen ramparts, fences or stone walls. The ground plane may be made of natural materials, such as earth, sand or grass; or manufactured materials, such as pavers, asphalt or gravel. The overhead plane can be provided by the tree canopy, but can also be defined by built features such as pergolas.

The position of natural and built elements, and how they are visually and physically connected, are also important when describing spatial organization, especially as it relates to the intended user experience. The functional relationships between the spaces are also important; for example, building living quarters on a ranch in relation to barns and roads are critical to the efficiency of its operation.

In urban heritage districts, land use, buildings, streets and topography often define or influence spatial organization. The buildings' siting, the open spaces between them and the circulation corridors, are often identified as character-defining elements in urban heritage districts. In natural environments, the spatial organization of the features of the landscape can have spiritual significance.

Because buildings and their landscapes were often designed together, it is important to understand and respect their relationships. Architects and landscape architects often worked together to design sites as a whole, making the exterior spaces an integral part, or extension of the interior spaces, and vice versa.

These guidelines provide general recommendations for spatial organization in a cultural landscape. Other relevant guidelines, such as Visual Relationships and Circulation, should be consulted when appropriate. When spatial organization is part of an engineering work, refer to Functional Arrangement in the Guidelines for Engineering Works; for buildings, refer to Exterior Form or Interior Arrangement.



The character-defining spatial organization of Motherwell Homestead in Saskatchewan was conserved when the landscape was restored. The orientation, alignment, size, configuration and interrelationships of its component features, including the formal tennis lawn and ornamental garden (foreground), the household vegetable garden (beside the implement shed) and the grain fields beyond, were carefully preserved.



Ministers Island is a 2km² island in Passamaquoddy Bay near the town of St. Andrews, NB. This cultural landscape includes the entire island that encompasses a shell midden archaeological site, the home of Loyalist and Anglican minister Samuel Andrews and the summer estate of Sir William Cornelius Van Horne. The island's spatial organization as a grand estate with a core residential area, formal gardens, recreational spaces, agricultural spaces and forest is a character-defining element of the site.



The Bonar Law House is a 9 hectare property along the north side of the Richibucto River in the Village of Rexton, NB. This complex contains a simple 19th century wood farm house facing the river and a barn and wagon shed. Board fencing connects the buildings to form an enclosed courtyard. New community facilities are being implemented to increase community use while maintaining the site's original spatial organization.

| | Recommended | Not Recommended |
|---|--|---|
| 1 | Understanding the spatial organization and how it contributes to the heritage value of the cultural landscape. | |
| 2 | Understanding the function and form of designed landscapes, and the planning principles behind the spatial organization of the cultural landscape. | |
| 3 | Documenting the spatial organization of the cultural landscape, including the orientation, alignment, size, configuration and interrelationships of its component features; the relationship of features to the overall landscape; and its evolution and condition before beginning project work. | Undertaking interventions that affect the spatial organization without first documenting and understanding its characteristics, relationships, evolution, conditions and intangible values. |
| 4 | Assessing the overall condition of the spatial organization early in the planning process, so that the scope of work is based on current conditions. | |
| 5 | Protecting and maintaining the features that define the spatial organization by using non-destructive methods in daily, seasonal and cyclical tasks. | Allowing the spatial organization to be altered by incompatible development or neglect. |
| 6 | Retaining sound or deteriorated features of the spatial organization that can be repaired or rejuvenated. | |
| 7 | Repairing or rejuvenating deteriorated parts of a feature of the spatial organization, using recognized conservation methods. Repair may also include the limited replacement in kind of those extensively deteriorated or missing parts of the spatial organization. | Replacing a feature of the spatial organization when repair or limited replacement of deteriorated or missing parts is possible. |
| 8 | Replacing in kind extensively deteriorated or missing parts of the spatial organization where there are surviving prototypes. | Replacing an entire feature of the spatial organization when limited replacement of deteriorated and missing parts is possible. |
| 9 | Documenting all interventions that affect the spatial organization, and ensuring that this documentation will be available to those responsible for future interventions. | |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended |
|----|--|--|
| 10 | Repairing or rejuvenating extensively deteriorated features that define the spatial organization, by using non-destructive methods and materials. | Replacing an entire feature that defines the spatial organization when repair or limited replacement of deteriorated or missing parts is possible. |
| 11 | Replacing in kind an entire feature of the spatial organization that is too deteriorated to repair. The replacement feature should be as similar as possible to the original, both visually and functionally. | Replacing an irreperable feature with a new feature that does not respect the landscape's spatial organization. |
| 12 | Replacing missing historic features by designing new features that are compatible with the spatial organization of the cultural landscape, and are based on physical, documentary and oral evidence. | Creating a false historical appearance because the new feature is incompatible, or based on insufficient physical, documentary and oral evidence. |

ADDITIONS OR ALTERATIONS TO A CULTURAL LANDSCAPE

| 13 | Designing a new feature when required by a new use that is compatible with the character-defining spatial organization. | Adding a new feature that alters or obscures the spatial organization, such as constructing a farmhouse addition on an area that was traditionally used as a kitchen garden. |
|----|--|--|
| | | Introducing a new feature that is incompatible in size, scale or design with the spatial organization. |

ADDITIONAL GUIDELINES FOR RESTORATION PROJECTS

| | Recommended | Not Recommended |
|----|--|--|
| 14 | Repairing or rejuvenating declining features from the restoration period that define the spatial organization using a minimal intervention approach. | Replacing an entire feature that defines the spatial organization from the restoration period when repair or rejuvenation is possible. |
| 15 | Replacing in kind an entire feature from the restoration period that is too deteriorated to repair, using the same configuration and design details. The new work should be well documented to guide future research and treatment. | Removing an irreparable feature from the restoration period and not replacing it, or replacing it with an inappropriate new feature. |

REMOVING EXISTING FEATURES FROM OTHER PERIODS

| 16 | Removing or altering non character-defining features from periods other than the chosen restoration period. | Failing to remove non character-defining features from another period that confuse the depiction of the spatial organization during the restoration period. |
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| | personal diameter crossin restriction person | organization during the restoration period. |

RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD

| | tion period, but for which |
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|--|----------------------------|

4.1.5 VISUAL RELATIONSHIPS

These guidelines provide direction when visual relationships have been identified as a character-defining element of an historic place. They pertain to the visual relationships between an observer and a landscape or landscape feature (a viewscape) or between the relative dimensions of landscape features (scale).



Small unit pavers provide appropriate texture and give a pedestrian scale to Dalhousie Square which is part of a larger plan to revitalize the east end of the Old Montreal historic district. The new paving patterns of the square combine a range of materials, forms and scales to evoke the former location of the 18th century fortification walls and country road, as well as the 19th century train lines of the adjacent former Canadian Pacific train station.



The Saskatchewan Legislative Building and Grounds balance the formal and the picturesque by using informal spaces, organized plantings and promenades, and strategically placed statues and monuments. Visual Relationships are also important character-defining elements of the site: the viewscape across Wascana Lake establishes a connection with downtown Regina and contributes to the site's heritage value.



The Bar U Ranch NHSC visitor centre was built beyond the immediate view of the historic ranch complex, which preserves the historic viewscapes.

A viewscape can include scenes, panoramas, vistas, visual axes and sight lines. In designed landscapes, a viewscape may have been established following the rules of pictorial composition: elements are located in the foreground, middle ground and background. A viewscape may also be the chief organizing feature when a succession of focal points is introduced to draw the pedestrian onward through a landscape.

The scale of a cultural landscape can produce emotional responses in people. Large landscapes either intimidate or inspire us, while small landscapes tend to make us feel comfortable. The texture of a given surface can also affect the perception of scale. For example, a street or courtyard covered in cobblestones or brick seems smaller than the same area covered in asphalt, a much smoother surface.

The visual relationships between elements of natural or designed landscapes, or heritage districts, can influence the user experience. For example, a tall building in a low-rise heritage district may be perceived as out of scale.

The addition of green technologies to a cultural landscape, such as wind turbines or solar panels, may affect its heritage value. While recognizing the importance of renewable energy sources, it is important to consider the visual impact these technologies may have on the cultural landscape. Visual impact assessments need to be integrated at an early stage in project planning so that potential impacts on the heritage value of the cultural landscape are clearly understood.

These guidelines provide general recommendations for the conservation of the visual relationships in a cultural landscape. Other relevant guidelines, such as Built Features and Vegetation, should be consulted when appropriate.

| | Recommended | Not Recommended |
|---|--|---|
| 1 | Understanding the visual relationships and how they contribute to the heritage value of the cultural landscape. | Undertaking interventions without understanding their impact on the visual relationships in the cultural landscape; for example, removing vegetation that was intended to frame an important view in the historic place. |
| 2 | Understanding designed landscapes, and the planning principles behind the visual relationships in the cultural landscape. | |
| 3 | Understanding the evolution of visual relationships. This could include using historic photographs or artwork to understand how the visual relationships may have changed or been lost over time. | |
| 4 | Documenting the visual relationships in the cultural landscape, including viewscapes and their foreground, middle ground and background; landmarks, edges and skyline; prospects, both to and from the historic place; and condition, before beginning project work. | Undertaking interventions that affect the visual relationships without completing a survey of characteristics and conditions. |
| 5 | Assessing the overall condition of the visual relationships early in the planning process so that the scope of work is based on current conditions. | |
| 6 | Protecting and maintaining the features that define the visual relationships by using non-destructive methods in daily, seasonal and cyclical tasks, such as pruning, to retain sight lines. This could also include maintaining the size and massing of vegetation and built features that contribute to the overall scale of the historic place. | Allowing visual relationships to be altered by incompatible development or neglect. Using maintenance methods that alter or obscure the visual relationships in the cultural landscape, such as removing planting that reduces the perceived size of a parking lot to make winter snow removal easier. |
| 7 | Retaining sound features that define the visual relationships in the cultural landscape, or deteriorated features that can be repaired or rejuvenated. | |
| 8 | Repairing or rejuvenating deteriorated parts of features that define the visual relationships using recognized conservation methods. Repair may also include the limited replacement in kind of those extensively deteriorated or missing parts of features. Repairs should match the existing work as closely as possible, both physically and visually. | Replacing a feature that defines the visual relationships when that feature can be repaired or rejuvenated. Using a substitute material for the replacement part that neither conveys the same appearance as the surviving parts of the feature, nor is physically and visually compatible. |

| | Recommended | Not Recommended |
|----|---|--|
| 9 | Replacing in kind extensively deteriorated parts of features that define the visual relationships where there are surviving prototypes. The new work should match the old in form and detailing. | Replacing an entire feature that defines the visual relationships when limited replacement of deteriorated or missing parts is possible. |
| 10 | Documenting all interventions that affect the visual relationships and ensuring that this documentation is available to those responsible for future interventions. | |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended |
|----|--|--|
| 11 | Rehabilitating the visual relationships, if an evaluation of their overall condition determines that more than preservation is required. | |
| 12 | Repairing or rejuvenating features that define the visual relationships, by using non-destructive methods and materials, such as regenerating vegetation that frames an important view. | Failing to perform necessary work, resulting in the loss of character-defining visual relationships. Replacing a feature that defines the visual relationships when repair is possible. |
| 13 | Replacing in kind an entire feature that is too deteriorated to repair. | Replacing an irreperable feature with a new feature that does not respect the visual relationships in the cultural landscape. |
| 14 | Replacing missing historic features by designing new features that are compatible with the visual relationships in the cultural landscape, based on physical and documentary evidence. | Introducing new features that are incompatible in size, scale, material, style and colour. Creating a false historical appearance because the new feature is based on insufficient physical and documentary evidence. |

ADDITIONS OR ALTERATIONS TO A CULTURAL LANDSCAPE

| 15 | Designing a new feature when required by a new use that | Introducing a new feature that alters or obscures the |
|----|--|--|
| | respects the historic visual relationships in the cultural landscape. This can include matching established proportions and densities, such as maintaining the overall ratio of open space to building mass in an urban heritage district when designing an infill building. | visual relationships in the cultural landscape, such as constructing a new building as a focal point, when a character-defining vista was traditionally terminated by the sky. |

ADDITIONAL GUIDELINES FOR RESTORATION PROJECTS

| | Recommended | Not Recommended |
|----|---|--|
| 16 | Repairing or rejuvenating a deteriorated or declining feature that defines the visual relationships from the restoration period using a minimal intervention approach. | Replacing an entire feature that defines the visual relationships from the restoration period when repair or rejuvenation is possible. |
| | | Using a substitute material for a replacement part that neither conveys the same appearance of the surviving features from the restoration period, nor is physically or visually compatible. |
| 17 | Replacing in kind an entire feature that defines the visual relationships from the restoration period when that feature is too deteriorated to repair, using the same configuration and design details. The new work should be well documented to guide future research and treatment. | Removing an irreparable feature from the restoration period and not replacing it, or replacing it with a new feature that does not respect the visual relationships in the cultural landscape. |

REMOVING EXISTING FEATURES FROM OTHER PERIODS

| 18 | Removing or altering non character-defining features from periods other than the chosen restoration period. | Failing to remove non character-defining features from another period that confuse the visual relationships of the chosen restoration period. |
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| | | the chosen restoration period. |

RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD

| 19 | Recreating a missing feature important to the visual relationships that existed during the restoration period, based on physical, documentary and oral evidence. | Introducing a feature that was part of the original design, but was never actually built, or a feature that was thought to have existed during the restoration period, but for which there is insufficient documentation. |
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4.1.6 CIRCULATION

These guidelines provide direction when a circulation system or feature has been identified as a character-defining element of an historic place. Circulation refers to individual elements that facilitate or direct movement and travel, such as human or animal paths, traditional trails, roads, parkways, highways, railways, canals and portages. The linkages of such elements create circulation systems.

Various aspects of circulation can be character-defining. For example, in an urban context, historical circulation needs and subsequent patterns typically determined the alignment of streets. The water levels needed to maintain water-borne traffic are also important character-defining elements of a canal.

When describing a circulation feature or system, important characteristics may include: alignment; width; finished grade or gradients; surface materials; edge treatment; infrastructure and relationships with neighbouring features.

These guidelines provide general recommendations for the conservation of the circulation systems or features in a cultural landscape. Other relevant guidelines, such as Land Patterns and Spatial Organization, should be consulted when appropriate.



Circulation systems largely define the character of the Sault Ste. Marie Canal NHSC where a historic canal, paths, roadways, parking lots and railways converge in a very small area. Protecting and maintaining this landscape requires carefully managing the site's circulation infrastructure.



The Carré Royal in Sorel-Tracy, QC was first used for military exercises in 1780. In 1785, a military engineer drew up site plans in the shape of the Union Jack. In 1868, it was opened to the public as an urban park, which continues to this day. Its original layout of walkways, configured to match the original cross patterns of the Union Jack flag, is in full evidence. This is a fine example where a circulation pattern is considered an important character-defining element of a cultural landscape.



Alterations or new construction designed to meet requirements, such as accessibility, need to be carefully considered to respect the character-defining elements of a historic place. Accessibility requirements at Province House in Charlottetown required careful landscape assessment and rehabilitation in order to respect the original approach to the building. Here, the change in grade was limited to the building's middle section to preserve the view of the base course and sections of the original steps.

| | Recommended | Not Recommended |
|----|--|--|
| 1 | Understanding the heritage value of the circulation patterns and systems, and how they contribute to the heritage value of the cultural landscape. | |
| 2 | Understanding the evolution of circulation systems, including using aerial photographs to understand a transportation corridor's change from a two-lane road to a six-lane highway, or using archaeological methods and historical maps to locate pathways and roads not obvious from surface investigation. It may also include researching oral traditions and written documents to understand the heritage values that may be associated with circulation systems. | Undertaking project work without understanding the evolution of the circulation systems, such as changing road alignments and widths. |
| 3 | Documenting the characteristics of circulation systems, such as location, alignment, surface treatment, edge, grade, materials, infrastructure and condition before beginning project work. | Undertaking interventions that affect character-defining circulation systems, without preparing a survey of their characteristics and condition. |
| 4 | Assessing the overall condition of circulation systems early in the planning process, so that the scope of work is based on current conditions. | |
| 5 | Protecting and maintaining circulation systems by using non-destructive methods in daily, seasonal and cyclical tasks, including seasonal clearing of trails, or using rubberized blade edges on snow plows to prevent damaging stone curbs. | Using materials such as salts and chemicals that can accelerate the deterioration of surfaces. |
| 6 | Retaining sound circulation systems or deteriorated circulation systems that can be repaired. | |
| 7 | Stabilizing a deteriorated circulation system by using structural reinforcement and weather protection, or correcting unsafe conditions, as required, until repair work is undertaken. | |
| 8 | Repairing a deteriorated circulation system by patching, consolidating, or otherwise reinforcing, using recognized conservation methods. Repair may also include the limited replacement in kind of those extensively deteriorated or missing parts of the circulation systems. | Removing a deteriorated circulation system that could be stabilized or repaired. |
| 9 | Replacing in kind extensively deteriorated parts of the circulation system where there are surviving prototypes. The new work should match the old in form and detailing. | Replacing an entire feature, such as a stone curb, when limited replacement of deteriorated and missing parts is possible. |
| 10 | Documenting all interventions that affect the circulation system, and ensuring that this documentation is available to those responsible for future interventions. | |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended |
|----|--|---|
| 11 | Repairing extensively deteriorated circulation features by using non-destructive methods and materials. | Replacing or altering features and materials of a circulation system when repair is possible. |
| 12 | Replacing a deteriorated circulation feature by using the physical evidence of its form, detailing and alignment to reproduce it. If using the same kind of material is not technically, economically or environmentally feasible, then a compatible substitute material may be considered; for example, replacing the decayed timber edge in kind along an historic trail. The replacement feature should be as similar as possible to the original, both visually and functionally. | Replacing an irreperable feature with a new feature that does not convey the same visual appearance. |
| 13 | Replacing a missing historic feature by designing a new feature compatible with the circulation of the cultural landscape, based on physical and documentary evidence. | Creating a false historical appearance because the new feature is incompatible, or based on insufficient physical and documentary evidence. |

ADDITIONS OR ALTERATIONS TO A CULTURAL LANDSCAPE

| 14 | Designing and installing a new circulation feature, when required by a new use, that is compatible with the heritage value of the historic place, including controlling and limiting new access points and intersections along an historic road. | Installing a new circulation feature in a way that detracts from the historic circulation pattern; for example, creating a new bike path when an existing path can accommodate the new use. |
|----|---|---|
| | | Introducing a new circulation feature that is visually incompatible in terms of scale, alignment, surface treatment, width, edge treatment, grade, materials or infrastructure. |

ACCESSIBILITY CONSIDERATIONS

| 15 | Complying with accessibility requirements in a manner that conserves character-defining circulation systems or features. | Damaging character-defining circulation systems or features while making modifications to comply with accessibility requirements. |
|----|---|---|
|----|---|---|

ADDITIONAL GUIDELINES FOR RESTORATION PROJECTS

| | Recommended | Not Recommended |
|----|--|--|
| 16 | Repairing a deteriorated circulation feature from the restoration period using a minimal intervention approach. | Replacing an entire circulation feature from the restoration period when repair is possible. |
| 17 | Replacing in kind an entire circulation feature from the restoration period that is too deteriorated to repair, using the same configuration and design details. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Removing an irreparable circulation feature from the restoration period that is beyond repair and not replacing it, or replacing it with an inappropriate new feature. |

REMOVING EXISTING FEATURES FROM OTHER PERIODS

| 18 | Removing or altering non character-defining circulation features from periods other than the chosen restoration period. | Failing to remove non character-defining circulation features from another period that confuse the depiction |
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| | reduces non-periods outer than the chosen restoration period. | of the circulation system during the restoration period. |

RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD

| 19 | Recreating a missing circulation feature that existed during the restoration period, based on physical, documentary and oral evidence, such as duplicating paving patterns based on surviving prototypes. | Installing a circulation feature that was part of the original design, but was never actually built, or constructing a new circulation feature thought to have existed during the restoration period, but for which there is insufficient documentation. |
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4.1.7 ECOLOGICAL FEATURES

These guidelines provide direction when an ecological feature has been identified as a character-defining element of an historic place. In the context of these guidelines, an ecological feature is a natural element, such as a marsh, a pond or a stand of trees, which can be part of a larger ecosystem. While ecosystems at an historic place should be evaluated and managed for their natural values by ecologists and other natural resource specialists, these guidelines apply only to the features of those ecosystems determined to have heritage value.



The Melanson Settlement in Annapolis, NS reflects Acadian family communities that settled along the Dauphin (now Annapolis) River, and a form of agriculture unique in North America. One of the site's character-defining elements is the nearness of this settlement to salt marshes that embody natural and ecological values. Documenting and understanding the structure, function and dynamics of this ecological feature is an important step before working on the site.

Ecological features vary in size but are typically studied at the scale of a pond or stand of trees. Character-defining ecological features are also found in urban areas. When using these guidelines, it is important to work with natural resource conservation and environmental assessment specialists, and where appropriate, with aboriginal groups and other partners and stakeholders to ensure that diverse knowledge and information are used to conserve the natural structure, function and dynamics of the entire ecosystem.

The potential for adverse environmental impacts (e.g., introduction or re-introduction of invasive species) must also be considered, regardless of whether it is required by environmental assessment or related legislation. The pan-Canadian approach to ecological restoration described in the "Principles and Guidelines for Ecological Restoration in Canada's Protected Natural Areas" (Parks Canada and the Canadian Parks Council, 2008) provides additional guidance on integrating consideration of natural and cultural heritage values in conservation planning and intervention. This document is particularly relevant when rehabilitation or restoration is the selected approach.

Ecological features are character-defining elements of many Aboriginal cultural landscapes where traditional practices have been sustained for centuries. In addition, ecological features associated with an historic place can extend far beyond its established boundaries.

These guidelines provide general recommendations for the conservation of ecological features in a cultural landscape. Other relevant guidelines, such as Vegetation and Water Features, should be consulted when appropriate.

| | Recommended | Not Recommended |
|---|---|---|
| 1 | Understanding the ecological features and how they contribute to the natural and cultural heritage value of the cultural landscape. | |
| 2 | Understanding the natural structure, function and dynamics of the ecological feature and of the ecosystem of which it is part. | |
| 3 | Documenting the characteristics and condition of the ecological feature and its relationship with the ecosystem of which it is a part, before beginning project work. Documentation should combine the best available scientific and traditional knowledge. | Undertaking interventions that affect a character-defining ecological feature without first documenting and understanding its characteristics, relationships, evolution and condition. |
| 4 | Assessing the overall condition of the ecological feature early in the planning process, so that the scope of work is based on an understanding of current conditions and predicted changes. | |
| 5 | Protecting and maintaining the ecological feature by using non-destructive methods in daily, seasonal and cyclical tasks. | Allowing ecological features to degrade by incompatible development or neglect. Using maintenance methods that damage or destroy an ecological feature. |
| 6 | Retaining intact ecological features and degraded ecological features that can be returned to good ecological condition. | Replacing degraded ecological features that could be returned to good ecological condition; for example, clear cutting a declining forest stand to create a parking lot or meadow. |
| 7 | Repairing degraded ecological features or parts of ecological features using recognized methods and trained personnel; for example, using a certified arborist to heal a mature tree. The work should be physically and visually compatible with the cultural and natural heritage values of the cultural landscape. | Removing ecological features or parts of ecological features that could be conserved, or using untested methods and untrained personnel, thus causing further damage to fragile features and relationships. |
| 8 | Replacing extensively degraded or missing ecological features or parts of ecological features based on physical and documentary evidence; for example, replanting a documented shrub species lost through erosion, with the same native species from a local source. | Replacing an entire ecological feature, such as a stand of trees, when limited replacement of deteriorated and missing parts (e.g., one or a few trees) is possible. |
| 9 | Documenting all interventions that affect the ecological feature, and ensuring that the documentation is available to those responsible for future interventions. | |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended |
|----|--|--|
| 10 | Repairing or rejuvenating extensively deteriorated ecological features by using non-destructive methods and materials, such as planting native species to facilitate the regeneration of a deteriorated meadow. | Failing to perform necessary work, including removing invasive species, resulting in the loss of ecological features and their components. |
| 11 | Replacing in kind an entire ecological feature that is too deteriorated to repair, such as replanting a clear-cut stand of trees with locally obtained saplings, and in similar density. | |

ADDITIONS OR ALTERATIONS TO A CULTURAL LANDSCAPE

12 Introducing a new element, when required by a new use, that does not have a negative impact on the heritage value and condition of the ecological feature.

ADDITIONAL GUIDELINES FOR RESTORATION PROJECTS

| | Recommended | Not Recommended |
|----|--|--|
| 13 | Restoring an ecological feature if an evaluation of its overall condition determines that more than preservation is required; i.e., if an intervention on the ecological feature is necessary to sustain it into the future. For example, removing invasive tree species from a character-defining escarpment and replanting it with a mix of plant material corresponding to the natural conditions of the escarpment. This work should be based on physical and documentary evidence. | Restoring an ecological feature to an historic condition that is no longer sustainable given current physical and ecological conditions, including climate. |
| 14 | Repairing or rejuvenating a declining ecological feature that contributes to the sustainability of the cultural landscape, by using non-destructive methods. | Replacing an entire ecological feature when repair or rejuvenation is possible, or using destructive repair or rejuvenation methods, causing further damage to the ecological feature. |
| 15 | Replacing in kind an entire ecological feature that contributes to the sustainability of the cultural landscape when that feature is too deteriorated to repair or rejuvenate. The new work should be well documented to guide future research and treatment. | Removing an ecological feature that is beyond repair and not replacing it, or replacing it with an inappropriate ecological feature. |

4.1.8 **VEGETATION**



Honeywood Nursery in Saskatchewan was established and operated by Dr. A. J. (Bert) Porter, a self-taught, award-winning horticulturalist who developed many fruits and ornamental plants capable of thriving on the Prairies. The property's planting beds, orchards and examples of various plant varieties are character-defining elements that illustrate Mr. Porter's contributions to the development of Saskatchewan's horticulture.

These guidelines provide direction when vegetation has been identified as a character-defining element of an historic place. For direction on how to treat vegetation as part of a natural system that is a character-defining element, also refer to the Guideline on Ecological Features.

Vegetation refers to trees, shrubs, herbaceous plants, grasses, vines, aquatic and wetland plants, and other living plant material. Vegetation may include individual plants, such as a sentinel (single specimen) tree in a pasture, or specimen trees in a garden; designed groupings, such as hedges, allées and perennial borders; and groupings used to control sun and wind patterns. Vegetation can also refer to planted crops, re-forested hillsides and naturally occurring plant communities.

Vegetation may have historical associations as well as functional and aesthetic qualities. As well, vegetation may have historical and scientific value, which can contribute to maintaining the biodiversity of native, horticultural or agricultural varieties. Vegetation in a cultural landscape can also represent the genetic repository of species once present, but now largely disappeared.

Vegetation is often the most dynamic and memorable feature in a cultural landscape. In addition to the continuous cycle of growth and decay, there will be variations in form, colour and canopy across the seasons. In describing vegetation as a character-defining element, the following concepts should be considered: growth habit, including juvenile or mature form; leaf and bloom; colour and texture; bark; bloom periods; fruit; fragrance; and context. Vegetation also contributes to other character-defining elements, such as land patterns, visual relationships and spatial organization.

These guidelines provide general recommendations for the conservation of vegetation in a cultural landscape. Other relevant guidelines, such as Ecological Features and Spatial Organization, should be consulted when appropriate.



A large site in Calgary's inner city that evolved during the early 20th century, this naturalistic rock garden is significant for its association with the noted horticulturalist William Reader and as a botanical laboratory to study the receptivity of Alberta's soils to a variety of plant species. The extensive arrangements of local rocks and plantings, many of which had become overgrown, were meticulously restored using careful plant analysis and by referring to William Reader's own detailed documentation.



The Trappist Monastery Ruins recall a complex of religious architecture unique to Manitoba and the early Frenchspeaking Métis community. Damaged by fire in 1983, the stabilized ruins, and the grounds featuring mature trees, expanses of lawn and open fields, now form the Trappist Monastery Provincial Heritage Park. Protecting and maintaining the vegetation is essential to preserving the site's historical values.

| | Recommended | Not Recommended |
|---|--|--|
| 1 | Understanding vegetation and how it contributes to the heritage value of the cultural landscape. | |
| 2 | Understanding the evolution of a landscape's vegetation over time, using archival resources, such as plans and photographs or, when appropriate, archaeological analysis or minimally destructive techniques. This could include using resistivity testing to determine the age of a tree, or understanding the heritage value of a vegetation feature, such as the oak as a symbol of fortitude. | Undertaking interventions, such as indiscriminately clearing a woodland understorey without understanding its impact on historic vegetation. |
| 3 | Understanding the roles of people, animals and insects in producing and maintaining the existing vegetation. | |
| 4 | Documenting the extent and condition of vegetative cover in forests, woodlands, meadows, planted and fallow fields, and the genus, species, calibre, height, colour, form and texture of significant, individual tree specimens, before beginning project work. | Undertaking interventions that affect character-defining vegetation, without preparing a survey of existing plant material and its condition. |
| 5 | Assessing the overall condition of the vegetation early in the planning process so that the scope of work is based on current conditions. | |
| 6 | Protecting and maintaining the vegetation by using non-destructive methods and daily, seasonal and cyclical tasks, including pruning or establishing colonies of beneficial insects that protect fruit trees from pests. | Failing to perform preventive maintenance on character-defining vegetation. |
| 7 | Using maintenance practices that respect the habit, form, colour, texture, bloom, fruit, fragrance, scale and context of the vegetation. | Using maintenance practices and techniques that fail to recognize the individual plant materials' uniqueness. Examples include poorly timed pruning or application of insecticide, which may alter fruit production. |
| 8 | Using traditional horticultural and agricultural maintenance practices when those techniques are critical to maintaining the vegetation's character, such as manually removing dead flowers to ensure continuous bloom. | |
| 9 | Retaining and perpetuating vegetation by preserving seed collections and stock cuttings to preserve the genetic pool. | Failing to propagate vegetation from original stock cuttings, when few or no known sources for replacement are available. |

GENERAL GUIDELINES FOR PRESERVATION, REHABILITATION AND RESTORATION

| | Recommended | Not Recommended |
|----|---|---|
| 10 | Securing and protecting deteriorated vegetation by structural reinforcement, or correcting unsafe conditions, as required, until additional work is undertaken; for example, using steel cables to support large branches. | Failing to secure and protect deteriorated vegetation, thus putting it at risk of further deterioration. |
| 11 | Replacing in kind extensively deteriorated or missing parts of vegetation where there are surviving prototypes. The new plantings should match the old in species, colour and texture. | Removing deteriorated vegetation that could be stabilized and conserved, or using untested techniques and untrained personnel, thus causing further damage to fragile elements. Introducing or re-introducing a species or variety that is known or suspected to be invasive. Replacing entire vegetation when limited replacement of deteriorated and missing parts is appropriate. Using replacement material that does not match the historic vegetation. |
| 12 | Documenting all interventions that affect the vegetation, and ensuring that this documentation is available to those responsible for future interventions. | |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended |
|----|--|---|
| 13 | Rejuvenating historic vegetation by corrective pruning, deeproot fertilizing, aerating the soil, renewing seasonal plantings, and/or grafting onto historic root stock. | Replacing vegetation when rejuvenation is possible, including removing a deformed or damaged plant when corrective pruning could be successfully employed. |
| 14 | Replacing a deteriorated or declining vegetation feature with a new feature, based on the physical evidence of its composition, form and habit. If using the same kind of material is not technically, economically or environmentally feasible, then a compatible substitute material may be considered. For example, a diseased sentinel tree in a meadow may be replaced with a disease-resistant tree of similar type, form, shape and scale. | Replacing a deteriorated feature with a new feature that does not convey the same appearance, such as replacing a large, declining canopy tree with a dwarf flowering tree. |
| 15 | Replacing missing historic features by installing a new vegetation feature. It may be a new feature that is compatible with the habit, form, colour, texture, bloom, fruit, fragrance, scale and context of the historic vegetation; for example, replacing a lost vineyard with hardier stock similar to the historic plant material. | Creating a false historical appearance because the replacement vegetation is based on insufficient physical, documentary and oral evidence. |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended |
|--|-------------|-----------------|
|--|-------------|-----------------|

ADDITIONS OR ALTERATIONS TO A CULTURAL LANDSCAPE

Introducing new vegetation, when required by a new use, to ensure that the heritage value of the cultural landscape is preserved, including planting a hedge to screen new construction.

Placing a new feature where it may cause damage or is incompatible with the character of the historic vegetation; for example, erecting a new building or structure that adversely affects the root systems of historic vegetation.

Locating a new vegetation feature that detracts from, or alters the historic vegetation; for example, introducing exotic species in a landscape historically comprised of only indigenous plants.

Introducing a new vegetation feature that is incompatible in terms of its habit, form, colour, texture, bloom, fruit, fragrance, scale or context.

ADDITIONAL GUIDELINES FOR RESTORATION PROJECTS

| | Recommended | Not Recommended |
|----|---|---|
| 17 | Rejuvenating declining vegetation from the restoration period by corrective pruning, deep-root fertilizing, aerating the soil, renewing seasonal plantings, and/or grafting onto historic stock. | Replacing vegetation from the restoration period when rejuvenation is possible, or using destructive repair methods, thus causing further damage to fragile plant material. |
| 18 | Replacing in kind a declining vegetation feature from the restoration period that is too deteriorated to repair, using the physical evidence as a model to reproduce the feature. The new work should be well documented to guide future research and treatment. | Removing a deteriorated vegetation feature from the restoration period and not replacing it, or replacing it with a new feature that does not convey the same appearance. |

REMOVING EXISTING FEATURES FROM OTHER PERIODS

Removing or altering non character-defining vegetation from periods other than the chosen restoration period, such as removing later foundation planting or aggressive exotic species.

19

Failing to remove non character-defining vegetation from another period that confuses the depiction of the chosen restoration period.

RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD

Recreating a missing vegetation feature that existed during the restoration period, based on physical, documentary and oral evidence. For example, replanting crop types based on pollen analysis.

Planting vegetation that was part of the original design, but was never installed, or installing vegetation thought to have existed during the restoration period, but for which there is insufficient documentation.

4.1.9 LANDFORMS

These guidelines provide direction when a landform has been identified as a character-defining element of an historic place. Landform refers to the shape of the Earth's surface at a particular place.

Some naturally occurring landforms include mountains, hills, canyons, valleys and plains. Human-made landforms include terraces, embankments, *ramparts*, *berms*, ditches and *swales*. When describing a particular landform, whether natural or built, it is important to consider shape, slope, dimensions and geological material, such as sand and silt.

Naturally occurring landforms may have been significant factors in determining the location and development of a cultural landscape; for example, choosing to build a fortress on high land for military advantages.

Throughout history, human beings have used landforms as landmarks and manipulated natural topography for functional and aesthetic reasons: *swales* remove water from building foundations; ditches keep roads dry; *berms* provide wind shelter or hide undesirable views; *ramparts* and *glacis* provide unobstructed surveillance; and paired embankments frame views.

These guidelines provide general recommendations for the conservation of the landforms of a cultural landscape. Other relevant guidelines, such as Evidence of Land Use and Circulation, should be consulted when appropriate.



Landforms can be natural, such as hills and plains, or they can be human-engineered. Dramatic examples of human-engineered landforms are the early 20th century tailing fields in the Yukon's Klondike Gold Fields. These views help define and interpret Dredge #4 NHSC.



The Frank Slide is the site of a catastrophic landslide in spring 1903 that destroyed part of the town of Frank, Alberta. One of the largest landslides in Canadian history, it is historically significant for its impact on the area's mining communities. It is geologically interesting for the information it yields on the dynamics of large-scale rock slides. Barren of vegetation and devoid of buildings, the boulderstrewn debris field extending across the valley floor is a character-defining landform that is maintained due to a moratorium on development.

GENERAL GUIDELINES FOR PRESERVATION, REHABILITATION AND RESTORATION

| | Recommended | Not Recommended |
|---|--|---|
| 1 | Understanding landforms and how they contribute to the heritage value of the cultural landscape. | |
| 2 | Understanding the evolution of landforms over time, using archival resources, such as plans and aerial photographs. This can also include archaeological analysis or oral history to understand the landforms and any cultural values associated with them. | Undertaking interventions without understanding its impact on historic landforms. |
| 3 | Documenting the geological material, elevation, slope, shape, orientation, contour, condition and function of landforms before beginning project work. | Undertaking project work that will affect landforms without documenting the existing topographic variation, condition and function. |
| 4 | Assessing the overall condition of landforms early in the planning process so that the scope of work will be based on current conditions. | |
| 5 | Protecting and maintaining landforms by using non-destructive methods in daily, seasonal and cyclical tasks. This may include mowing vegetative cover to reveal the landform. | Allowing landforms to be altered by incompatible development or neglect. |
| 6 | Retaining sound landforms or deteriorated landforms that can be repaired or reinstated. | |
| 7 | Repairing or reinstating a deteriorated feature of the landform, using recognized conservation methods. Repair may also include the limited replacement in kind of those extensively deteriorated or missing parts of landforms. Repairs should match the existing work as closely as possible, both physically and visually. | Replacing landforms that can be repaired or reinstated. |
| 8 | Replacing in kind extensively deteriorated or missing parts of the landform where there are surviving prototypes. The new work should match the old in form and detailing. | Replacing an entire feature of the landform when limited replacement of deteriorated or missing parts is possible. |
| 9 | Documenting all interventions that affect the landform, and ensuring that this documentation will be available to those responsible for future interventions. | |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended |
|----|--|---|
| 10 | Repairing or reinstating an extensively deteriorated or missing landform. This could include re-excavating a silted swale through appropriate re-grading, or re-establishing an eroding agricultural terrace. | Modifying the shape, slope, elevation or contour of a landform when repair is possible. |
| 11 | Replacing in kind an entire feature of a landform, using the physical evidence of its form and composition. | Replacing an irreparable feature with a new feature that does not convey the same visual appearance, for example, changing stepped terracing to a graded slope. |
| 12 | Replacing missing historic features by designing new features that are compatible with the landforms of the cultural landscape, based on physical, documentary and oral evidence. | Creating a false historical appearance because the new feature is based on insufficient physical, documentary or oral evidence. |

ADDITIONS OR ALTERATIONS TO A CULTURAL LANDSCAPE

| 13 | Designing a new feature when required by a new use that is compatible with the character-defining landform. | Introducing a new feature where it may alter the character-defining landform. This could include failing to provide proper drainage for a new feature, resulting in the decline or loss of an historic landform. |
|----|--|--|
| | | the decline of loss of all historic fandionn. |

ACCESSIBILITY CONSIDERATIONS

Respecting the landform when locating new accessibilityrelated features. For example, introducing a gently sloped
walkway instead of a constructed ramp with handrails.

ADDITIONAL GUIDELINES FOR RESTORATION PROJECTS

| | Recommended | Not Recommended |
|----|---|---|
| 15 | Repairing or reinstating a declining landform feature from the restoration period using a minimal intervention approach. | Replacing an entire landform feature from the restoration period when repair or reinstatement is possible. |
| 16 | Replacing in kind an entire landform feature from the restoration period that is too deteriorated to repair, using the same configuration and design details. The new work should be well documented to guide future research and treatment. | Removing a deteriorated landform feature from the restoration period and not replacing it, or replacing it with an inappropriate new feature. |

REMOVING EXISTING FEATURES FROM OTHER PERIODS

| 17 | Removing or altering non character-defining landform features from periods other than the chosen restoration period. | Failing to remove non character-defining features from another period that confuse the depiction of the chosen |
|----|---|--|
| | | restoration period. |

RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD

| 18 | Recreating a missing landform feature from the restoration period, based on physical, documentary and oral evidence; for example, recreating a trench and fortification from the restoration period based on stratigraphic research. | Introducing a feature that was part of the original plan but that never actually existed, or a feature that was thought to have existed during the restoration period, but for which there is insufficient documentation. |
|----|---|--|
|----|---|--|

4.1.10 WATER FEATURES

These guidelines provide guidance when a water feature is identified as a character-defining element of an historic place. Water features can include constructed elements, such as canals, ponds, reflecting pools and fountains as well as natural elements, such as lakes, rivers and streams. Their role may be functional or aesthetic, or a combination of both.

Water features may be part of the natural hydrology of the historic place, or fed artificially from a separate, dedicated water source. When assessing a constructed water feature, the water supply, drainage and mechanical system required for its functioning should be identified. Additionally, shape, dimensions, materials, water level and quality, flow rate, reflectivity and associated plant and animal life should be listed as important characteristics.

These guidelines provide general recommendations for the conservation of water features in a cultural landscape. For direction on conserving natural water features that are part of a larger ecosystem, refer to the Guidelines for Ecological Features. For recommendations on specific materials that make up constructed water features, refer to the Guidelines for Materials. Other relevant guidelines, such as Built Features and Vegetation, should be consulted when appropriate.



Beaver Lake is a constructed pond that has become a central feature in Montreal's Mount Royal Park, within the natural and historic district of Mount Royal. Its intense use throughout the seasons puts great pressure on its condition. Protecting and maintaining water features includes daily, seasonal and cyclical tasks. Maintaining a constructed water feature's mechanical, plumbing and electrical systems is essential to ensure the appropriate depth and quality of water.



GENERAL GUIDELINES FOR PRESERVATION, REHABILITATION AND RESTORATION

| | Recommended | Not Recommended |
|----|--|--|
| 1 | Understanding the water feature and how it contributes to the heritage value of the cultural landscape. | |
| 2 | Understanding the evolution of water features over time and their role in the overall hydrology of the landscape. This includes using archaeological techniques to determine the changing path of a watercourse, using infrared aerial photographs to map hydrological patterns. | Undertaking interventions without understanding the evolution of water features. |
| 3 | Documenting water features before beginning project work. Documentation should include shape, edge and bottom condition and materials; water level, sound and reflective qualities; associated plant and animal life; water quality; natural erosion and flooding; and overall condition. | Undertaking interventions that affect the water features and associated hydrology, without undertaking a survey of their character and condition. |
| 4 | Assessing the overall condition of water features early in the planning process, so that the scope of work is based on current conditions. | |
| 5 | Protecting and maintaining water features by using non-destructive methods in daily, seasonal and cyclical tasks, such as cleaning leaf litter or mineral deposits out of drainage inlets or outlets. | Allowing water features to be altered by incompatible development, maintenance methods or neglect. |
| 6 | Retaining sound or deteriorated water features that can be repaired or rejuvenated. | |
| 7 | Stabilizing deteriorated water features by using structural reinforcement, weather protection, or correcting unsafe conditions, as required, until repair work is undertaken. | |
| 8 | Repairing deteriorated water features using recognized conservation methods. Repair may also include the limited replacement in kind of extensively deteriorated or missing parts of water features. Repairs should match the existing work as closely as possible, both physically and visually. | Removing deteriorated water features that could be stabilized or repaired. |
| 9 | Maintaining a built water feature's mechanical, plumbing and electrical systems to ensure appropriate depth of water or direction of flow, including maintaining the timing and sequencing mechanisms for irrigation systems. | Allowing mechanical systems to fall into a state of disrepair, resulting in degradation of the water feature. For example, allowing algae to develop because a pool's aeration system is not maintained. |
| 10 | Replacing in kind extensively deteriorated or missing parts of water features where there are surviving prototypes. The new work should match the old in form and detailing. | Replacing an entire water feature when limited replacement of deteriorated and missing parts is possible |

GENERAL GUIDELINES FOR PRESERVATION, REHABILITATION AND RESTORATION

| | Recommended | Not Recommended |
|----|---|-----------------|
| 11 | Testing interventions to establish appropriate replacement materials, quality of workmanship and methodology. This includes reviewing samples, testing products, methods or assemblies, or creating a mock-up. | |
| 12 | Documenting all interventions that affect the water features, and ensuring that the documentation is available to those responsible for future interventions. | |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended |
|----|---|--|
| 13 | Repairing extensively deteriorated water features by reinforcing materials or improving mechanical systems. For example, patching a crack in a pond liner, or repairing a failed pump mechanism. | Replacing or removing water features or systems when repair is possible. |
| 14 | Replacing in kind a deteriorated water feature by using the existing physical evidence of its form, depth and detailing, to reproduce it. If using the same kind of material is not technically or environmentally feasible, then a compatible substitute material may be considered; for example, replacing a lead pond liner with a plastic one. The replacement feature should be as similar as possible to the original, both visually and functionally. | Replacing a water feature with a new feature that does not convey the same appearance, including, replacing a single orifice nozzle with a spray nozzle, changing an historic fountain's appearance from a single stream of water to a mist-like stream. |
| 15 | Replacing missing historic features by designing new features compatible with the water features of the cultural landscape, based on physical, documentary and oral evidence. For example, a lost irrigation feature may be replaced by using materials that convey the same appearance. | Introducing new features that are incompatible in size, scale, material, style and colour, such as replacing a natural pond with a manufactured pool. Creating a false historical appearance because the replaced features are based on insufficient physical, documentary and oral evidence. |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| Recommended | Not Recommended |
|-------------|-----------------|
| | |

ADDITIONS OR ALTERATIONS TO A CULTURAL LANDSCAPE

Designing and installing a new water feature, when required, by a new use in a way that preserves the cultural landscape's heritage value. For example, locating a new retention basin in a secondary or non-character-defining space. Placing a new water feature where it may cause damage or is incompatible with the heritage value of the cultural landscape, such as, locating a Baroque fountain within a Picturesque-style garden.

HEALTH AND SAFETY CONSIDERATIONS

17 Complying with the health and safety requirements, in a manner that minimizes the impact on heritage value.

Damaging or destroying features while making modifications to comply with health and safety requirements.

ADDITIONAL GUIDELINES FOR RESTORATION PROJECTS

| | Recommended | Not Recommended |
|----|--|---|
| 18 | Repairing deteriorated water features from the restoration period by reinforcing the materials that comprise those features. Repairs include the limited replacement in kind of those extensively deteriorated or missing parts of features, when there are surviving prototypes. | Replacing an entire water feature from the restoration period, when repair or limited replacement of deteriorated or missing parts is appropriate, or using destructive repair methods that damage the water feature. |
| 19 | Replacing an entire water feature from the restoration period that is too deteriorated to repair, using the same configuration and design details. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Removing a deteriorated water feature from the restoration period and not replacing it, or replacing it with an inappropriate new feature. |

REMOVING EXISTING FEATURES FROM OTHER PERIODS

Removing or altering non character-defining water features from periods other than the chosen restoration period, such as a later retention pond that is no longer needed.

Failing to remove non character-defining water features from another period that confuses the depiction of the chosen restoration period.

RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD

Recreating a missing water feature that existed during the restoration period, based on physical, documentary and oral evidence. An example could include recasting a fountain from its original mould.

Creating a water feature that was part of the original design, but was never actually built, or constructing a water feature thought to have existed during the restoration period, but for which there is insufficient documentation.

4.1.11 BUILT FEATURES

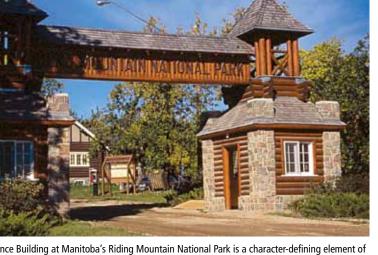
These guidelines provide direction when the built features of a cultural landscape have been identified as character-defining elements of an historic place. Built features can include archaeological remains; residential, commercial and institutional buildings; structures, such as dams or bridges; and caribou fences. A building may play a role as a character-defining element in a cultural landscape, in

addition to having its own heritage value. Smaller features, such as gazebos, fences, free-standing walls and *statuary*, as well as site furnishings, such as benches, light standards and drinking fountains, are also built features. Built features may also include culturally significant objects or constructed symbols, such as *inukshuks*, crosses and medicine wheels.

Modern cultural landscapes, such as campuses and plazas, were planned and designed as a cohesive whole. Adding new features to satisfy regulatory requirements, such as ramps, guardrails and bollards, could affect their heritage value. Additions to recent cultural landscapes should be undertaken with the utmost respect and care, and complement the heritage value of the historic place.

Interpretive panels and directional signs are often added to historic places. If appropriate, these interventions should be integrated into the landscape in a manner that does not impair its heritage value.

These guidelines provide general recommendations for built features in a cultural landscape. When the built feature is an archaeological site, a building, or part of an engineering work, refer to the specific guidelines for those categories of historic places. For recommendations on specific materials that make up built features, refer to the Guidelines for Materials. Other relevant guidelines, such as Water Features and Spatial Organization, should be consulted when appropriate.



The East Gate Entrance Building at Manitoba's Riding Mountain National Park is a character-defining element of this cultural landscape that needs to be protected.



Key elements that define the modern heritage character of the former Ottawa City Hall include the ornamentation of the building's exterior with publicly commissioned art work. Exterior elements that contribute to the heritage value of a place should be part of a cyclical maintenance program to the same level as the building itself.



The original weathered sandstone gravemarker for John Parot's Grave is one of the oldest in Newfoundland and Labrador. It was replaced with a wooden replica made by a local resident, while the original was taken away for conservation.



The character-defining elements of Habitat 67 in Montreal include modern urban concrete furniture. These built features of the landscape complement and reinforce the building's forms, materials and colour.

GENERAL GUIDELINES FOR PRESERVATION, REHABILITATION AND RESTORATION

| | Recommended | Not Recommended |
|----|--|---|
| 1 | Understanding the built features and how they contribute to the heritage value of the cultural landscape. | |
| 2 | Understanding the evolution of built features over time. Examples could include, using historic aerial photographs to understand the relationship of windmills, silos and water troughs in a ranch compound, or the placement of cairns on a jump site. | Undertaking project work without understanding the evolution of built features. |
| 3 | Documenting the function, condition, materials and surroundings of built features and the relationship of those features to each other and to the historic place, before beginning project work. | Undertaking interventions that affect the built features without conducting a survey of conditions, materials, surroundings and interrelationships. |
| 4 | Assessing the overall condition of built features early in the planning process so that the scope of work is based on current conditions. | |
| 5 | Protecting and maintaining the built features by using non-destructive methods in daily, cyclical and seasonal tasks. This may include limited rust or paint removal and reapplication of protective coating systems in kind. | Using maintenance practices and materials that are abrasive or unproven; for example, using potentially damaging cleaning methods, such as grit blasting on wood, brick or soft stone, or using harsh chemicals on masonry or metals. |
| 6 | Retaining sound built features or deteriorated built features that can be repaired. | |
| 7 | Stabilizing a deteriorated built feature by using structural reinforcement, weather protection, or correcting unsafe conditions, as required, until repair work is undertaken. | |
| 8 | Repairing a deteriorated built feature by using recognized conservation methods. Repair may also include the limited replacement in kind of those extensively deteriorated or missing parts of built features. | Removing a deteriorated built feature that could be stabilized or repaired. |
| 9 | Replacing in kind extensively deteriorated parts of built features where there are surviving prototypes. The new work should match the old in form and detailing. | Replacing an entire built feature when limited replacement of deteriorated and missing parts is possible. |
| 10 | Testing proposed interventions to establish appropriate replacement materials, quality of workmanship and methodology. This may include reviewing samples, testing products, methods or assemblies, or creating a mock-up. | |
| 11 | Documenting all interventions that affect the built features, and ensuring that this documentation is available to those responsible for future interventions. | |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended |
|----|--|---|
| 12 | Repairing extensively deteriorated built features by using non-destructive methods and materials. | Replacing an entire built feature when repair or limited replacement of deteriorated or missing parts is possible. |
| 13 | Replacing in kind an entire built feature by using the physical evidence of its form, material and detailing to reproduce it. If using the same kind of material is not technically, economically or environmentally feasible, then a compatible substitute material may be considered; for example, replacing redwood decking with cedar, a less endangered species. The replacement feature should be as similar as possible to the original, both visually and functionally. | Replacing an irreparable built feature with a new feature that does not convey the same visual appearance. |
| 14 | Replacing missing historic features by designing new built features that are compatible with the cultural landscape and based on physical, documentary and oral evidence. | Creating a false historical appearance because the new built feature is incompatible, or based on insufficient physical and documentary evidence. |

ADDITIONS OR ALTERATIONS TO A CULTURAL LANDSCAPE

Designing a new built feature, when required by a new use, to be compatible with the heritage value of the cultural landscape. For example, erecting a new farm outbuilding, using traditional form and materials, or installing signs and lighting compatible with the cultural landscape.

Locating a new built feature in a manner that undermines the heritage value of the cultural landscape. Introducing a new built feature, such as an interpretive panel, that is visually incompatible with the cultural landscape.

HEALTH AND SAFETY CONSIDERATIONS

Complying with the health and safety requirements, in a manner that minimizes impact on the character-defining elements of the cultural landscape.

ACCESSIBILITY CONSIDERATIONS

17 Finding solutions to meet accessibility requirements that are compatible with the built feature. For example, introducing a gently sloped walkway instead of a constructed ramp with handrails in a manner that does not detract from the built feature.

ADDITIONAL GUIDELINES FOR RESTORATION PROJECTS

| | Recommended | Not Recommended |
|---|--|--|
| 18 | Repairing deteriorated built features from the restoration period by reinforcing the materials and assemblies that comprise those features. Repairs will also generally include the limited replacement—preferably in kind—of those extensively deteriorated or missing parts of features when there are surviving prototypes. The new work should be unobtrusively dated to guide future research and treatment. | Replacing an entire built feature from the restoration period when repair or limited replacement of deteriorated or missing parts is possible, or using destructive repair methods, causing further damage to fragile historic material. |
| 19 | Replacing in kind an entire built feature from the restoration period that is too deteriorated to repair, using the same configuration and design details. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Removing a deteriorated built feature from the restoration period and not replacing it, or replacing it with an inappropriate new feature. |
| REM | OVING EXISTING FEATURES FROM OTHER PERIODS | |
| 20 | Removing or altering non character-defining built features from periods other than the chosen restoration period. | Failing to remove non character-defining built features from another period that confuse the depiction of the chosen restoration period. |
| RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD | | ON PERIOD |

| 21 | Recreating a missing built feature that existed during the restoration period, based on physical, documentary and oral evidence, such as duplicating a corn crib from an existing <i>prototype</i> . | Installing a built feature that was part of the original design, but was never actually built, or constructing a built feature that was thought to have existed during the restoration period, but for which there is insufficient documentation. |
|----|---|---|
|----|---|---|

4.2

GUIDELINES FOR ARCHAEOLOGICAL SITES



Archaeological sites fall under several categories and settings. Clockwise, from top left: the excavations at the Mansion House at Ferryland in Newfoundland and Labrador are an example of historical archaeology; Fathom Five National Marine Park in Ontario illustrates underwater archaeology; Writing-on-Stone Provincial Park in Alberta contains specimens of rock art; and Sirmilik National Park in Nunavut is a pre-contact site.

4.2

GUIDELINES FOR ARCHAEOLOGICAL SITES

Archaeological sites are places or areas where tangible evidence of past human activity is located *in situ* on, below or above ground, or on lands under water. In the context of historic places, Archaeological sites fall under two categories, and these guidelines apply to both. They are:

- Archaeological sites that are historic places because they have been formally recognized by an authority as having heritage value;
- 2. Archaeological sites that are part of an historic place, such as a building, engineering work, cultural landscape or heritage district, and that contribute as *character-defining elements* to that historic place's *heritage value*.

An archaeological site is characterized by its environment including stratified deposits with physical traces of the site's formation that help determine its age and interpret its complexity. A site can also include one, or a combination of, the following character-defining elements:

- Features, such as postholes, hearths, stone tool manufacture areas, industrial staging areas, cairns and rock art, and natural features that have cultural significance;
- Structures, such as remains of stone walls, industrial machinery, fish weirs, tent rings and wharves, which can be below or above-ground, or underwater;



Because their character-defining elements are often submerged or underground, a large number of archaeological sites are not accessible. Communicating their heritage value is a challenge. Exposed remains, such as at the ones at Champs-de-Mars, Montreal not only add to our knowledge of past times and people, but they can also enrich our environment.

- Archaeological objects, such
 as artifacts, soil and botanical
 samples, animal remains, pollen,
 or any specimen associated with
 the site that provides information
 on its characteristics, function and
 significance;
- Physical places with evidence of human activity identified through local knowledge or oral tradition;
- Spatial relationships between the features, structures, objects and physical places identified above.

These elements embody the heritage value of the archaeological site. *Character-defining elements* may include elements of aesthetic, historic, scientific, cultural, social or spiritual importance, and intangible qualities and uses. A site's heritage value may lie as much in the information contained in the elements as in their evocative force, as vestiges of past histories.

Federal, provincial and territorial authorities maintain extensive inventories of archaeological sites that often include information on location, type of resources, state of conservation and time period. However, only a fraction of known archaeological sites are formally recognized in Canada. When such information is available in the inventories, it should be taken into account before conducting an intervention that may affect archaeological resources.

In principle, archaeological sites should be preserved *in situ* by limiting negative impacts on the site's physical integrity. However, in situations where preservation is threatened, a controlled archaeological investigation should be undertaken, using the highest recording standards to document the site's physical features. This would include situations where:

- Natural impacts threaten the site;
- Assessment demonstrates that unavoidable conflicts with a proposed project could jeopardize the site's heritage value;
- An archaeological research project is planned to enhance the site's heritage value by contributing to knowledge about the site or historic place.

ARCHAEOLOGICAL SITES AND THE NATURAL ENVIRONMENT

The maintenance of archaeological sites relies on periodic evaluations, and focuses on the archaeological site and its natural environment.

Monitoring environmental conditions can help preserve archaeological sites and maintain the balance between the site and its environment.



The physical integrity of this excavated archaeological site at Fort Battleford, Saskatchewan, was temporarily protected from accidental disturbance by covering the ground with plastic sheets and erecting a small barrier fence. As required by law, the archaeological intervention was authorized and a permit was obtained before excavation began.

Any intervention or maintenance activity on historic places should endeavour to safeguard archaeological sites based on their contribution to the historic place's heritage value. An intervention planned on an archaeological site or area containing an archaeological site should involve an archaeologist and, where appropriate, other field scientists, conservators, architects, engineers, Elders and other knowledge keepers.

Before a conservation intervention takes place, essential steps must be taken to implement an appropriate conservation strategy. This would include, understanding the historic place's heritage value and character-defining elements; thoroughly planning the proposed intervention; and identifying an appropriate use of the place. Additionally, most jurisdictions require that archaeological impact assessments be performed before any project is undertaken.

When carrying out interventions at an historic place, new archaeological resources may be discovered that directly relate to the historic place's heritage value. In this situation, impact assessments should be carried out to evaluate the significance of a newly discovered resource, and how this will impact on the historic place's heritage value.

Because most archaeological investigations in Canada are performed as impact assessments, these guidelines are useful in guiding the evaluation, planning and mitigation measures required at historic places. The principle of minimal intervention should always guide any actions affecting archaeological sites.

Archaeology and the Law

All provinces and territories have legislation that protects, to varying degrees, the physical evidence connected to archaeological sites. Generally, this legislation provides for:

- Protecting and managing archaeological sites and resources;
- Issuing permits to qualified archaeologists for archaeological investigations;
- Carrying out archaeological impact assessments prior to development, or activities that may have an impact on the site;
- Identifying repositories for the archaeological objects collected;
- Discussing plans with affected groups;
- Issuing stop work orders when accidental discoveries are made, and/or human remains are discovered.

There is no federal legislation specific to archaeological sites on federal lands. The Canadian Environmental Assessment Act is the main, relevant federal legislation. The Act covers the impacts of development projects on the environment and on cultural and archaeological resources. Under the Canada Shipping Act, 2001 (CSA 2001), all recovered material of wrecks (ships and aircrafts) must be reported directly to the regional Receiver of Wreck, an officer of Transport Canada. Any person who recovers material from a wreck during an activity, such as fishing or diving, or during an archaeological excavation, has to comply with the CSA 2001. The federal government also has various policies and departmental directives that support archaeological assessment and mitigation, when projects could potentially disturb archaeological resources on federal land.

In some parts of Canada, Aboriginal land claim agreements address issues such as archaeological site protection, ownership and access rights, consultation, permit and reporting requirements and conservation planning.

ACCIDENTAL DISCOVERIES

Where archaeological resources are inadvertently discovered, the appropriate archaeological authorities should be contacted and an archaeologist assigned to evaluate the site. A clear understanding of the value of the archaeological site is crucial to determining the appropriate course of action.

In the case of human remains, all activities should be halted and the police authorities or coroner must be contacted. If the police authorities determine that the remains are not the subject of a police or coroner's investigation, then the appropriate archaeological authorities in the jurisdiction should be contacted.

EVALUATING AN ARCHAEOLOGICAL SITE

Archaeological sites should not be impaired prior to evaluation. As with other types of heritage places, an archaeological site must be evaluated before an intervention, and its heritage value and character-defining elements identified. However, given the nature of archaeology, interventions often uncover new data, in which case, the heritage value of new finds will need to be evaluated. As such, an archaeological site may be subject to re-evaluation as new information is gathered.

Cemeteries, Burial Grounds and Other Culturally Sensitive Places

Culturally sensitive places are defined here as officially recognized places that have been given special meaning by a group or a community. Those places can include burial grounds, above-ground burials, abandoned cemeteries and other sites that may have cultural or spiritual value to a community.

Each province or territory has its own heritage/archaeology/cemetery statutes that relate to burial sites and human remains. In addition, some settled land claims agreements set out obligations related to burial sites and human remains.

It is best practice to inform, and in some cases mandatory to consult, the local and/or culturally affiliated Aboriginal and non-Aboriginal communities before visiting or intervening on a culturally sensitive place, or before removing human remains and funerary objects considered archaeological.

APPLYING THE GUIDELINES

The Guidelines for Archaeological Sites contain guidelines that apply to Archaeological Sites, regardless of setting, and guidelines related to archaeological sites in seven settings, including: the urban environment; industrial sites; sites in cultural landscapes; sites in protected natural areas; sites underwater; rock art and culturally modified trees; and culturally sensitive places. When conserving any archaeological site, first refer to the guidelines for Archaeological Sites and then to the subsequent guidelines related to the setting in which the archaeological site is located, if applicable.

These guidelines cover two conservation treatments:

- Preservation, which applies to all projects involving archaeological sites:
- Rehabilitation, which covers
 interventions to sites that will be
 made accessible and visible, and
 interventions to sites that will be
 incorporated into a contemporary
 project in an historic place.

An intervention an archeological site will focus on *Preservation* first, but may also include *Rehabilitation*. *Restoration*, on the other hand, is never applied to the conservation of archeological sites.

These guidelines should not be used in isolation. As there may be heritage value in the relationships between archaeological sites and cultural landscapes, buildings or engineering works, those guidelines should also be consulted, and applied where appropriate, before undertaking an intervention.

UNDERSTANDING AND ARCHAEOLOGY

Archaeological resources differ from extant resources because their character-defining elements are often hidden or unknown. Depending on the information on hand, understanding and documenting the heritage value of an historic place before carrying out an intervention may require archaeological research, in addition to documentary research and local knowledge. Such endeavours must be grounded in the principle of minimal intervention. Archaeological investigation includes surveying, testing and excavation. Throughout the process, all work is documented. Documenting an archaeological site involves the recording of information gained through a variety of methods, including, but not limited to: written documents, such as field notes generated by fieldwork; photographic documents, such as rectified photographs; and non-photographic documents, such as maps and plans drawn from results of surveys.



This tent ring overlooking an unnamed lake in Tuktut Nogait National Park, Northwest Territories, is part of a larger site that includes several large tent rings and hunting blinds. Moving any of the stones forming the tent ring would cause a loss of heritage value.

4.2.1 ARCHAEOLOGICAL SITES

These guidelines provide direction for the conservation of archaeological sites when formally recognized as an historic place, or part of an historic place.

At archaeological sites, remnants of the past may be deeply buried, leaving no indication of their existence, or they may be partially or completely submerged in a lake, river, or sea (for example, a shipwreck). They can also rest above ground, or on the surface of the ground, such as the remains of a dugout house.



At the Colony of Avalon site in Ferryland, Newfoundland, its heritage value lies as much in character-defining elements, such as the in-situ archaeological remnants of early 17th century plantation life, as in the continued public use of the traditional fishing premises.

Archaeological excavations are conducted to better understand the occupation of the site by the Beothuks, seasonal European fishermen and settlers such as David Kirke.

Preservation

Preservation may involve documenting, stabilizing, sheltering, capping or reburying the site. This may be the primary treatment when:

- The historic place's materials, features and spaces are essentially intact, thus conveying the heritage value without extensive repair or replacement;
- When the historic place's materials, features and spaces could be disturbed by natural or humaninduced activities, resulting in the loss of heritage value.

A *Preservation* plan should be developed before the works begin.

Rehabilitation

Rehabilitation involves actions to present and convey the heritage value of an archaeological site. These actions may include reassembly; integration; ground markings; pathways or trails; and structures, such as interpretive constructs.

Reassembly refers to putting back together existing but dismembered parts, based on research, and performed as part of the site's *Rehabilitation*. Minimal repairs and replacement of deteriorated features should only be considered when the original material cannot be retained. These interventions should be identifiable.

Integration can involve incorporating the archaeological site's heritage value and character-defining elements in a project, such as the archaeological remains of a stone wall into a new construction. The project should be designed so that the site's heritage value is neither affected nor its character-defining elements obscured, damaged or destroyed. Integration may be considered when the archaeological site's heritage value has been considered in a project that protects it; or when the archaeological site is a character-defining element of an historic place that contributes to the heritage value of that historic place; or when the archaeological site acquires a contemporary function while retaining its heritage value.

Ground markings, such as stones or vegetation, are often used to identify the presence of an archaeological site when it is not visible. Markings should be kept to a minimum to avoid cluttering the site. Alternative methods, such as self-guided tour maps and escorted walking tours, should also be considered as a means to provide information.

Pathways or trails may be required to provide access to and between archaeological sites. The new pathway can either follow an historic access route, provided that the archaeological resources are not impaired, or be situated in a non character-defining area of the site.

Structures, such as shelters and *interpretive constructs*, should avoid disturbing surviving archaeological evidence. In addition, *interpretive constructs*, such as plaques or panels, should take into account evidence from all available sources to communicate the site's *heritage value*, and be clearly identifiable.



Identifying the presence of archaeological features by using ground markings is an excellent way to communicate the heritage value of a site. The location and size of the northwest tower of the second Habitation de Champlain, uncovered at Place-Royale in the arrondissement historique de Québec, has been highlighted with ground markings without affecting the site's character-defining elements.

When considering a new use for an archaeological site, the use should be determined from the planning phase after a clear understanding of the site's heritage value has been obtained through archaeological investigations and other research. If the use of an historic place is part of its heritage value, then that use should be retained. This is particularly relevant for spiritual places and places of memory that have a strong archaeological dimension.

Rehabilitation may be considered as the primary treatment when the archaeological site's features, structures and objects have been stabilized, and there is an opportunity to allow access and convey its heritage value. A plan for Rehabilitation should be developed before work is undertaken. When planning a Rehabilitation project on archaeological sites, also consult the Guidelines for Materials.

| | Recommended | Not Recommended |
|---|---|---|
| 1 | Understanding the character-defining elements of the archaeological site and how they contribute to its heritage value. | |
| 2 | Understanding the archaeological site through documentary research, local knowledge and archaeological investigations. | |
| 3 | Documenting the historic place and surroundings before beginning project work, or in anticipation of future projects, particularly where the terrain will be altered, to determine the presence of archaeological sites and the potential impact on them from the project work. | Proceeding with an intervention without properly documenting the historic place to determine the potential presence of an archaeological site. |
| 4 | Documenting the archaeological site to determine the natural and human impacts that could affect it. | |
| 5 | Documenting , protecting and maintaining the archaeological site's heritage value and character-defining elements, by reaching a reasonable balance between the objectives of archaeological research and their preservation <i>in situ</i> . Choices should be periodically reassessed during the investigation. | Carrying out archaeological investigations without periodically weighing the benefits of pursuing the excavation against those of ceasing the work. |
| 6 | Protecting an archaeological site from disturbances by planning and undertaking the necessary archaeological investigation and mitigation work. The work should involve qualified individuals and be undertaken only when there is potential for disturbance. | Allowing unqualified personnel to perform archaeological mitigation work and data recovery, resulting in the loss of important archaeological data or material. |
| 7 | Protecting and maintaining the physical integrity of an archaeological site, including soil, stratigraphy and spatial distribution of artifacts, from natural and human-induced deterioration by identifying, evaluating, minimizing and monitoring the disturbance to the archaeological site and its setting. | Disturbing the context of an archaeological site, thus compromising its physical integrity and associated scientific and research information. |
| 8 | Protecting and maintaining the physical integrity of character-defining elements, including archaeological objects and records that relate to the site, from natural and human-induced deterioration, during and after excavations. This could include appropriate installations, such as fences, caps, shelters or infill, or proper long-term storage for objects and records. | Introducing a use, activity, feature or equipment into areas where it disturbs or damages the archaeological site. |
| 9 | Protecting and maintaining an archaeological site by striking a balance with the objectives of conserving its natural environment. | Damaging an archaeological site as a consequence of efforts to preserve, rehabilitate, or restore a natural environment. |

| | Recommended | Not Recommended |
|----|--|---|
| 10 | Protecting and maintaining the environment of an archaeological site, for example, by preventing water penetration and maintaining proper drainage in dry environments, and preventing dehydration of waterlogged character-defining elements in wet environments. | |
| 11 | Stabilizing deteriorated, collapsed or deformed features and structures through appropriate and reversible methods, such as structural consolidation, shelters, capping, or infill. | |
| 12 | Assessing the factors that will affect protective and stabilizing installations, such as shelters or caps. For capping, factors could include soil composition, level of humidity, terrain, presence or absence of vegetation, compression strength and permeability. For shelters, factors could include the geological structure that supports the site, the nature of the materials and environmental and human-induced stressors. | |
| 13 | Designing protective and stabilizing structures, such as caps, shelters or fences in a manner that does not disturb or affect character-defining elements. | Designing protective and stabilizing structures that disturb or affect character-defining elements, such as resting a fencepost on the remains of a stone wall, |
| 14 | Protecting character-defining elements when installing protective and stabilizing structures. This includes activities associated with setting up the structures, such as the placement of soil and mineral layers and the circulation of heavy machinery. | Using materials to mark the location of a site without assessing their physical properties and their effect on resources. |
| 15 | Marking the location of the site and the limits of the excavated area with a reversible protective layer such as a geotextile membrane. | Using materials that can be confused with the site's cultural layers. |
| 16 | Infilling or backfilling the archaeological site, when appropriate, to stabilize the <i>in situ</i> remains and the stratigraphic profiles, using excess excavation sediments or new fill. This will provide a proper preservation environment that balances appropriate levels of humidity, soil acidity, compaction and protection from roots. | Infilling or backfilling the archaeological site in ways that negatively impact on the character-defining elements. |
| 17 | Removing fragile objects, features or structures with surrounding soil from environments that prove difficult to control, such as a wet environment or permafrost. | |
| 18 | Stabilizing the archaeological object, feature or structure before its removal. | |

| | Recommended | Not Recommended |
|----|---|--|
| 19 | Documenting the state of conservation of the archaeological object, feature or structure at the time of its removal. | |
| 20 | Preserving the archaeological object once removed from its discovered location. The work should be performed by qualified individuals. | |
| 21 | Retaining sound wooden and masonry elements, earthworks or deteriorated elements that can be repaired. | |
| 22 | Cleaning objects, features and structures, using recognized preservation methods, when necessary, to halt deterioration. | |
| 23 | Carrying out surface cleaning tests to determine the gentlest method possible and the appropriate level of cleanliness. The test should be observed over a sufficient period of time to determine its immediate and long-term effects. | |
| 24 | Developing a maintenance strategy that considers both existing vegetation and new appropriate vegetation. Monitoring the effects of vegetation on the character-defining elements. | Allowing for vegetation to grow, or removing vegetation without considering the potential effects on the <i>in situ</i> resource, and failing to monitor the effects of changes in vegetation. |
| 25 | Monitoring the effectiveness of protective and stabilizing structures regularly to assess whether they are achieving expected preservation results. | |
| 26 | Documenting interventions that affect the archaeological site, and ensuring that the documentation is readily available to those responsible for future work. | |

ADDITIONAL GUIDELINES FOR REHABILITATION

| | Recommended | Not Recommended |
|----|--|---|
| 27 | Preserving and revealing the character-defining elements to convey the site's heritage value. This should be based on sound and up-to-date research. | |
| 28 | Repairing deteriorated, collapsed, deformed, or incorrectly placed components of features and structures through minimal intervention. This could include resetting, reassembling, retying and jointing, using original building methods and materials whenever possible. | Repairing deteriorated, collapsed, deformed or incorrectly placed components of features and structures, using incompatible contemporary building methods and materials. This could include such approaches as dismantling and <i>in situ</i> reconstruction, or reassembling without proper documentation. |
| 29 | Repairing and stabilizing deteriorated wooden or masonry elements with structural reinforcement and weather protection, or correcting unsafe conditions, as required, until any additional work is undertaken. Repairs should be physically and visually compatible with the heritage value of the archaeological site. | Proceeding with physically and visually incompatible temporary repairs and stabilizing work. |
| 30 | Balancing the need to preserve the site's heritage value and character-defining elements with the desire to allow public access for educational purposes. | Allowing access while compromising heritage value and character-defining elements. |
| 31 | Exhibiting archaeological sites only when the proposed project maintains the site's heritage value. | Exhibiting archaeological sites, i.e., exposing character defining elements, when such actions impair heritage value. |

REASSEMBLY

| 32 | Reassembling components of character-defining elements, using the least intrusive method when the information about their original location and materials, degree of deterioration and human-induced and natural pressures have been recorded and assessed. Reassembly should only be performed if it contributes to the heritage value of the archaeological site and does not impact on its character-defining elements, either directly or indirectly. | Considering the reassembly of components of the site's character-defining elements, without adequately assessing and recording the site's original location and materials, its degree of deterioration, and human-induced and natural pressures. |
|----|--|--|
| 33 | Replacing missing components by designing new components that are compatible with the character-defining elements of the archaeological site, based on physical, documentary or oral evidence. The new work should be well documented, distinguishable, and unobtrusively dated to guide future research and treatment. | Replacing missing elements in a manner that confuses the authenticity of the site's character-defining elements. |

ADDITIONAL GUIDELINES FOR REHABILITATION

| | Recommended | Not Recommended | |
|------|---|---|--|
| INTE | INTEGRATION | | |
| 34 | Integrating an archaeological resource into a landscape, building or structure in a manner that communicates its heritage value and preserves its character-defining elements. | Integrating an archaeological resource into a landscape, building or structure in a manner that affects its heritage value and character-defining elements, such as creating a design where a structural load is supported by the archaeological remains. | |
| 35 | Preserving archaeological resources through appropriate maintenance of the new landscape, building or structure. | | |
| GRO | OUND MARKINGS | | |
| 36 | Ground marking in areas where the archaeological site was found, surveyed, recorded and preserved <i>in situ</i> . Ground marking should only be considered when there is no risk of negatively affecting the site's heritage value and character-defining elements. | | |
| 37 | Protecting archaeological resources by using a design and materials that do not affect the physical integrity of the character-defining elements, such as installing surface stones to delineate the perimeter of a buried foundation wall. The materials should be compatible with the setting, texture, colour and shape of the site. | Selecting a design or materials that are incompatible with the site's heritage value. | |
| PAT | HWAYS OR TRAILS | | |
| 38 | Introducing new pathways or trails in a manner that does not affect the physical integrity of the character-defining elements, such as locating them in areas of the site free of archaeological resources. New pathways or trails should not follow the course of historic circulation routes unless this can be achieved without damaging character-defining elements. | Introducing new pathways or trails directly on top of former historic routes. | |
| 39 | Selecting new materials that are compatible with those used in existing circulation patterns, with the setting, and with the site's heritage value. | | |
| 40 | Designing pathways or trails that allow access to the character-defining elements, while protecting the archaeological site. If a new access point is required, it should be distinguishable and have minimal impact on the site's heritage value. | | |
| 41 | Providing safe and secure access to the archaeological site while protecting heritage value. | Compromising the heritage value of an archaeological site in an attempt to allow safe and secure access. | |

ADDITIONAL GUIDELINES FOR REHABILITATION

| | Recommended | Not Recommended |
|-----|---|---|
| STR | UCTURES | |
| 42 | Installing a shelter that respects the heritage value of the archaeological site and its setting, where appropriate. | Installing a shelter that obscures the site or the understanding of its heritage value. |
| 43 | Designing and building structures, such as shelters, buildings or <i>interpretive constructs</i> , that neither affect the physical integrity of the character-defining elements, nor the historic place's heritage value. | |
| 44 | Selecting materials and forms in designing structures that are physically and visually compatible with the site and setting. | Selecting materials and forms that are incompatible with the historic place's heritage value and character-defining elements. |
| 45 | Designing interpretive constructs, speculative components and access points in a manner that clearly distinguishes what is historic and what is new. | Creating interpretive constructs and speculative components that could be confused with the site's character-defining elements, thus creating a false sense of history. |
| 46 | Maintaining structures from decay to protect the historic place's character-defining elements. | |

4.2.2 SITES IN URBAN ENVIRONMENTS

These guidelines provide direction when an archaeological site is located in an urban environment and contributes to its heritage value. Urban environments refer to settlements, such as villages, towns and cities that have been densely populated over an extensive period. They potentially provide a large concentration and complexity of archaeological sites, including historic period structures and features, such as burials, buildings and remains of public works, and Aboriginal sites.

Urban sites potentially provide a large concentration and complexity of archaeological sites. A witness of market, civic, commercial and residential uses for over two centuries, the Market Square Heritage Conservation District in Kingston ON, contains significant archaeological resources. Archaeological investigations have revealed a series of surfaces from different time periods. Qualified personnel expose a cobblestone surface as daily market activities continue beyond the fence.





Conserving archaeological sites in urban environments, such as the St-Louis Forts and Château National Historic Site of Canada in Québec City beside the heavily visited Château Frontenac and Dufferin Terrace, faces numerous challenges such as pollution, new constructions, upgrades for public works and intensive traffic.

Conserving archaeological sites in urban environments includes two perspectives: the challenges of preserving archaeological sites in densely populated areas, or archaeology in the city; and the study of the evolution of the settlement itself, or archaeology of the city. Both perspectives are essential in preserving the relationship between individual sites and the settlement as a whole. Maps and historical accounts can help us understand this evolution, but certain elements of the evolution can be missing from these sources, such as an Aboriginal presence. Archaeological surveys are a key resource in providing this missing information. The intent is to focus on preserving components whose significance contributes to an understanding of the whole.

Urban environments are rapidly changing, which may lead to the disappearance of past functions and uses. Having to deal with numerous stakeholders and uses, such as private owners, intensive traffic, pollution, new construction, upgrades to public works, and pressures for private development or public activities can also be a challenge. The proximity of archaeological sites to public services makes them more accessible to the local community, while also making them vulnerable to damage.

These guidelines should be used in conjunction with section 4.2.1, Archaeological Sites. When conducting work on archaeological sites in an urban environment, also consult the Guidelines for Cultural Landscapes, including Heritage Districts.

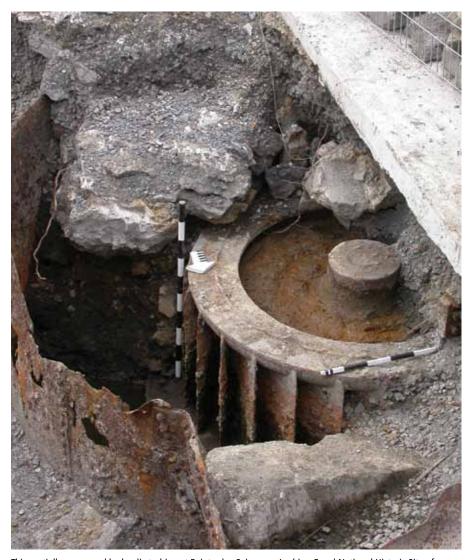
| | Recommended | Not Recommended |
|---|---|--|
| 1 | Understanding the urban environment of the archaeological site before any intervention is undertaken. | |
| 2 | Documenting archaeological sites, including determining their individual significance in the settlement history of an urban environment. | Documenting archaeological sites individually, without considering the evolution of the urban environment to which it belongs. |
| 3 | Preserving archaeological sites in urban environments in situ, through minimal interventions, such as stabilization and consolidation. | Preserving archaeological sites in urban environments <i>in situ</i> , without adequately protecting the site from the potentially harmful effects of contemporary uses. |
| 4 | Documenting the site thoroughly when contemporary uses could threaten archaeological resources. | |
| 5 | Preserving links with nearby features and settlement patterns to better understand the heritage value of the archaeological site. | Preserving the archaeological site in isolation or destroying significant elements of the settlement pattern resulting in the loss of the understanding of the settlement's evolution. |
| 6 | Protecting the character-defining elements from excess traffic by limiting access to and around the archaeological site. | Allowing access to and around the archaeological site without adequately protecting the character-defining elements. |
| 7 | Maintaining and preserving archaeological sites by controlling vegetation, cleaning traces of pollution, and removing graffiti from character-defining elements using recognized conservation methods. | Failing to take actions to adequately maintain the site and preserve the character-defining elements. |

ADDITIONAL GUIDELINES FOR REHABILITATION

| | Recommended | Not Recommended |
|----|--|---|
| 8 | Revealing the presence of archaeological sites in urban environments with ground markings, interpretive constructs, or other appropriate methods. | |
| 9 | Creating a buffer area around the site to enhance visitor experience. The buffer area should help to communicate the site's heritage value and not detract from it. | |
| 10 | Integrating archaeological sites in the urban environment while preserving their heritage value, including finding uses or activities that complement the heritage value of the site. | Allowing uses or activities that undermine the heritage value of the archaeological site. |

4.2.3 INDUSTRIAL SITES

These guidelines provide direction when an archaeological site is associated with, or is a part of an industrial site, and contributes to its heritage value.



This partially uncovered hydraulic turbine at Pointe-des-Seigneurs, Lachine Canal National Historic Site of Canada in Montreal was installed and used by the Caledonian Iron Works Co. in the late 19th century. Conserving archaeological remains of industrial components *in situ*, such as this turbine, contributes to our understanding of industrial processes and helps illustrate a site's functional arrangement.

In a comprehensive approach, industrial archaeology deals with all the components that contribute to understanding and communicating the knowledge and values associated with an industrial site. Industrial archaeological sites contain physical elements organized in a system constructed and used for industrial activities. The purpose of these sites often resides in their design, or in the concept behind their functions, reflecting an industrial process that is inherent in the interrelations of the site's material remains. As such, industrial archaeology aims to conduct a systematic study of structures and archaeological objects to better understand the industrial past. The process of industrial archaeology is usually part of a co-ordinated multidisciplinary approach.

Conserving an industrial site involves not only preserving physical remains, but also recognizing the site's development phases by studying the physical remains and how they evoke the human activities that took place at the site. Appreciating physical industrial remains is based on understanding the knowledge, values and messages they convey. A successful rehabilitation helps to understand the connection between a conserved physical record and the site, and to appreciate the interdependence of the site's character-defining elements. The chain of production, brand image, various technologies and social trends underlying this cultural heritage, are often studied. As well, physical and visual connections can communicate the interrelations between the industry, communication networks and adjacent human communities.

These guidelines should be used in conjunction with section 4.2.1, Archaeological Sites. When conducting work on an industrial archaeological site, it is important to also consult the Guidelines for Cultural Landscapes, the Guidelines for Buildings and the Guidelines for Engineering Works.

| | Recommended | Not Recommended |
|---|--|---|
| 1 | Understanding the industrial environment of the archaeological site before any intervention is undertaken. | |
| 2 | Documenting and protecting character-defining archaeological remains <i>in situ</i> , such as industrial components, where possible, to illustrate the functional arrangement of the industrial site. | Removing, damaging or destroying industrial components and storing them in a location that impairs their heritage value. Failing to prepare an adequate inventory of the industrial components. |
| 3 | Researching and documenting industrial processes and operations contributing to the knowledge of the site, including oral history accounts of former workers, where appropriate. | Failing to undertake adequate research to document various aspects of operations. |
| 4 | Preserving documentary and corporate written records associated with the industrial site and making them accessible for future research. | |
| 5 | Protecting and maintaining the remains of industrial machinery <i>in situ</i> to preserve their heritage value. | Moving the remains of industrial machinery thus affecting their heritage value. |
| 6 | Carrying out archaeological work to collect data before the archaeological site is disrupted by soil decontamination operations. | Failing to consider the archaeological work when planning decontamination operations, thus running the risk of losing information in last-minute salvage operations. |

ADDITIONAL GUIDELINES FOR REHABILITATION

| | Recommended | Not Recommended |
|----|--|--|
| 7 | Respecting the symbolic and associative value of the character defining elements of the site when developing the rehabilitation concept. | |
| 8 | Ensuring consistent comprehension of the various components of the industrial site by drawing from its constructed elements, industrial components and objects, and their functional arrangement. | |
| 9 | Preserving the remains of industrial structures and components in situ to retain their functional arrangement. | Removing or relocating the remains of industrial structures and components that contribute to the site's heritage value. |
| 10 | Integrating a new structure into an existing industrial archaeological site in a manner that respects its heritage value and character-defining elements. | |
| 11 | Maintaining , re-establishing or illustrating the functional arrangement of the industrial archaeological site when new structures are added. | |

4.2.4 SITES IN CULTURAL LANDSCAPES



The heritage value of the Fortress of Louisbourg NHSC in Nova Scotia resides in a number of character-defining elements, including preserved elements of an 18th Century cultural landscape and a number of known and unknown archaeological resources. Several of these archaeological resources, in particular those situated along the coastline, are at risk due to the storm surges hitting the site in the past years.

These guidelines provide direction when an archaeological site is located in a cultural landscape and contributes to its heritage value. In this document, a cultural landscape is defined as any geographical area that has been modified, influenced or given special cultural meaning by people. Cultural landscapes are often dynamic, living entities, continually changing because of natural and human-influenced social, economic and cultural processes. Archaeological sites in cultural landscapes can be components of Aboriginal landscapes, city parks, or rural areas. Those landscapes may include gardens, hunting and fishing sites, bison jumps, medicine wheels, cairns and Aboriginal sites that have a spiritual dimension.

An appropriate conservation approach should consider the relationship between dispersed archaeological sites and between the sites and their environment. Factors, such as the visual impacts of interventions, must be considered

to preserve the cultural landscape. In addition, these can be living sites where local communities still carry out activities. Archaeological sites located in cultural landscapes can be identified by traditional archaeological techniques. The evolution of these sites can also be documented through oral history of local communities or groups; written records, such as censuses; and visual records, such as aerial photographs and historic artwork.

Archaeological sites in cultural landscapes can be vulnerable to natural erosion, animal grazing and burrowing, and land alteration. Human factors, such as plowing, infrastructure development and recreational activities, can also affect an archaeological site in a cultural landscape.

These guidelines should be used in conjunction with section 4.2.1, Archaeological Sites. When conducting work on archaeological sites in cultural landscapes, also consult the Guidelines for Cultural Landscapes.



Kejimkujik National Historic Site of Canada in Nova Scotia has been designated as a Mi'kmaq cultural landscape. Archaeological remains of fishing and sites such as fish weirs, are part of the cultural landscape. Stone alignments set across a stream, with baskets and wooden traps, helped the Mi'kmaq harvest seasonal runs of fish on the Mersey River. The stone vestiges of weirs, as well as their position in the cultural landscape, must be preserved.

| | Recommended | Not Recommended |
|----|--|---|
| 1 | Understanding the cultural landscape in which the archaeological site is located before any intervention is undertaken. | |
| 2 | Documenting , protecting and maintaining the patterns of archaeological sites located in a cultural landscape where their multiplicity constitutes a character-defining element. | Documenting sites individually, without documenting their pattern on the cultural landscape. |
| 3 | Preserving archaeological sites <i>in situ</i> ; for example, when numerous sites form a network, such as military sites on a defensive line. | Preserving a sample of <i>in situ</i> resources without considering the relationship between the selected sites, thus affecting the heritage value. |
| 4 | Preserving representative samples <i>in situ</i> as well as their spatial relationships. | |
| 5 | Protecting and maintaining past links connecting archaeological sites, such as roads, trails, paths and visual relationships. | Damaging or altering former links connecting archaeological sites. |
| 6 | Protecting and maintaining the environmental conditions in which the archaeological site has been preserved. | Altering environmental conditions that could result in damage to the archaeological site. |
| 7 | Protecting character-defining elements from the impacts of agricultural activities, by selecting sensitive agricultural practices, such as lifting the plowshare or cultivator; avoiding identified areas; managing grazing by livestock; and assessing appropriate stock levels. | Selecting agricultural practices without considering their potential effects on the site's character-defining elements. |
| 8 | Stabilizing archaeological sites by maintaining appropriate vegetation. The potential impact of the planting material on the character-defining elements should be evaluated. | Failing to maintain vegetation, or using inappropriate vegetation, resulting in a deterioration of the archaeological site and loss of information. |
| 9 | Protecting and maintaining character-defining natural features and environments, such as cliffs, hills, shores and viewscapes. | Damaging character-defining natural features and environments; for example, remodelling or reshaping the landscape, or installing structures that negatively impact on the site and the viewscapes. |
| 10 | Protecting and maintaining archaeological sites by developing a vegetation management strategy, including opening up the landscape by thinning or removing trees from the archaeological site, without compromising its heritage value. | Altering the landscape, without previously developing a vegetation management strategy based on the archaeological site's heritage value. |

4.2.5 SITES IN PROTECTED NATURAL AREAS

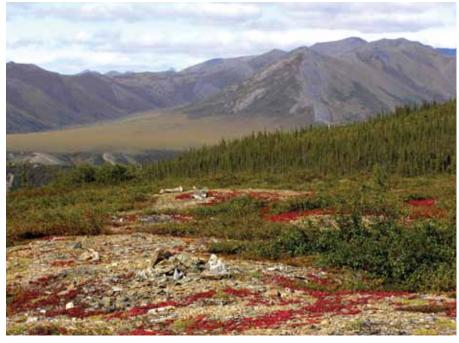
These guidelines provide direction when an archaeological site is located in a protected natural area—such as a national or provincial park, conservation area or wetland—and contributes to its heritage value. Large areas of historical significance, such as rural heritage districts, can also include protected natural areas or ecosystems that contribute to the historic place's heritage value.

Ecological restoration programs can be an opportunity to maintain or enhance the preservation of archaeological sites. They can also be destructive if archaeological investigations are not conducted. When engaging in the ecological preservation or restoration of a protected natural area, it is important to understand the area's evolution and human settlement to preserve the archaeological site and the environmental conditions that allowed its preservation.

These guidelines should be used in conjunction with section 4.2.1, Archaeological Sites. For additional information, consult the guidelines for Ecological Features (4.1.7) and the "Principles and Guidelines for Ecological Restoration in Canada's Protected Natural Areas" (Parks Canada and the Canadian Parks Council, 2008).



Non-intrusive activities, such as surveying this wreck in the Saguenay-St. Lawrence National Marine Park in Quebec, help preserve both the site's characterdefining elements and the area's ecosystem.

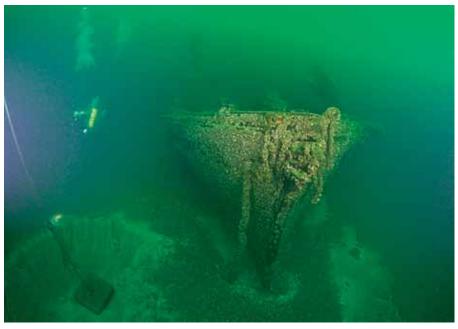


Archaeological sites in natural protected areas, such as these remains of a caribou fence near Firth River, in Ivvavik National Park, Yukon, contribute to our understanding of the evolution and the human settlement of these areas.

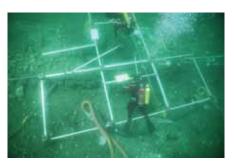
| | Recommended | Not Recommended |
|---|---|---|
| 1 | Understanding the protected natural area where the archaeological site is located, before any intervention is undertaken. | |
| 2 | Understanding the heritage value of archeological sites in a protected natural area, including understanding the effects of human settlement on the environment. | Failing to understand the effects of human settlement on the environment of a protected natural area. |
| 3 | Preserving the heritage value and character-defining elements of an archaeological site <i>in situ</i> without compromising the ecological integrity of the protected natural area. | Destroying archaeological sites to preserve the ecological integrity of the protected natural area. |
| 4 | Protecting and preserving the heritage value and character-defining elements of an archaeological site when developing and implementing ecological restoration strategies. | |
| 5 | Protecting and maintaining the environmental conditions that preserve the archaeological site. | Altering the environmental conditions without considering their role in preserving the archaeological site. |
| 6 | Stabilizing an archaeological site with the appropriate use of vegetation to preserve both its heritage value and character-defining elements, and the area's ecosystem. The potential impact of the planting material on the character-defining elements should be evaluated. | Planting vegetation that would negatively affect the preservation of archaeological sites. |
| 7 | Protecting and maintaining an archaeological site by developing and implementing a vegetation management strategy that preserves both its heritage value and character-defining elements, and the area's ecosystem. | Developing and implementing a vegetation management strategy that negatively affects the heritage value and character-defining elements of the archaeological site, or the ecosystem of the protected natural area. |
| 8 | Protecting and maintaining the character-defining natural features and environment of an archaeological site, such as cliffs, hills, shores and viewscapes. | Altering landscape features to maintain the ecosystem, without considering the effects on the heritage value of the archaeological site. |

4.2.6 SITES UNDERWATER

These guidelines provide direction when an archaeological site is located underwater. Underwater archaeological sites can be submerged, or in intertidal or wetlands environments, and include sites as varied as shipwrecks and their debris fields, intertidal structures, such as fishing weirs or canoe runs, harbour works, wharves and submerged landscapes. They also include archaeological sites on land inundated by reservoirs or rises in sea level.



Installing permanent boat mooring systems away from the archaeological site's structures and features is an excellent way to prevent visitors from mooring and anchoring their boats on a site's structure, which could damage the character-defining elements.



Interventions, such as this archaeological excavation of a Basque period wreck at Red Bay National Historic Site of Canada, Newfoundland and Labrador, are documented in many ways such as field notes, drawings, photographs, as well as videos.

Although found in diverse environments, these sites are usually partially or wholly submerged in water, whether by the sea, lakes, rivers, marshes or bogs. They can be subjected to cyclical wet-dry exposure due to tides or other water level fluctuations. Found on a range of substrates, from rock to soft sediments, sites underwater can be completely uncovered, buried, or periodically revealed due to sediment movement caused by waves and currents. Some sites are reached easily, while others are found in deeper water far from shore and accessible only by diving or other underwater investigation methods. Like terrestrial sites, they host a range of plant and animal life.

Natural environmental factors affect a site's condition. Underwater sites usually settle into equilibrium with their environment, which can foster slow rates of decay and promote good site preservation for hundreds, or even thousands of years. Underwater sites, particularly those buried by sediment, are particularly rich in organic material, which creates a significant conservation and preservation challenge. All underwater archaeological sites can be damaged, not only by complex and dynamic natural forces, but also by human activities, such as construction, dredging, commercial fishing and some forms of recreational diving and anchoring, as well as vandalism and looting. Sites, such as shipwrecks, can retain a high level of structural integrity similar to a heritage building on land. In some cases, it is possible to mitigate naturally induced deterioration. Non-intrusive approaches that promote in situ conservation, minimal intervention and non-intrusive study and appreciation are recommended.

These guidelines should be used in conjunction with section 4.2.1, Archaeological Sites.

GENERAL GUIDELINES FOR PRESERVATION AND REHABILITATION

| | Recommended | Not Recommended |
|---|--|---|
| 1 | Understanding the underwater site and its environment before any intervention is undertaken, including factors such as water depth, temperature, salinity, currents and biological activity. | Conducting an intervention without understanding the underwater site and its environment. |
| 2 | Preserving the underwater archaeological resources in situ. | |
| 3 | Removing artifacts under exceptional circumstances and only after thorough documentation and surveying have been carried out. | |
| 4 | Protecting underwater sites from human impacts, such as marine construction, dredging, log salvage, shoreline development, anchoring and unauthorized artifact removal. | Failing to protect underwater archaeological sites from damaging human impacts and unauthorized activities. |
| 5 | Creating protected zones, where appropriate, to control and monitor human access and activities. | |
| 6 | Maintaining and stabilizing environmental conditions to preserve character-defining elements, where possible and practicable. | Modifying the environmental conditions that contribute to preserving the site's character-defining elements. |
| 7 | Protecting underwater resources by installing specialized protective and stabilizing systems; for example, structural reinforcement, replenishing sand, ballasted tarps, sandbagging, sacrificial anodes and sediment traps, only after measures are taken to document and maintain the integrity of the character-defining elements. | Installing specialized protective and stabilizing measures without prior documenting. |
| 8 | Monitoring and maintaining underwater protective and stabilizing interventions. | Stabilizing underwater sites using methods that damage their character-defining elements, or failing to monitor and maintain underwater protective and stabilizing interventions. |
| 9 | Removing flora and fauna only when necessary to protect or record underwater resources. | Removing flora, such as kelp, or fauna, such as mussels, from the underwater resources, resulting in the loss of heritage value. |

ADDITIONAL GUIDELINES FOR REHABILITATION

| | Recommended | Not Recommended | |
|------|---|--|--|
| PATI | PATHWAYS OR TRAILS | | |
| 10 | Preserving and exhibiting the site's heritage value through low-impact diving practices using pre-planned trail and signage systems. | Allowing visitors to access sites with no instruction, code of practice, preventive signage, or trail system to help protect the site's integrity. | |
| 11 | Protecting submerged archaeological sites from visiting divers and charter boats, by installing permanent boat mooring systems independent of the site's structures or features. | Attaching boat moorings directly to a site's structure and anchoring into a site to provide access to visiting divers. | |
| 12 | Monitoring visitor impact on underwater archaeological sites. | | |

4.2.7 ROCK ART AND CULTURALLYMODIFIED TREES

These guidelines provide direction when an archaeological site includes or consists of rock art, or *culturally-modified trees* (CMTs) that contribute to its heritage value. Rock art and CMTs are more susceptible to environmental and human impacts than most types of archaeological sites because they are often more

exposed and visible. They usually have a strong association with their natural surroundings and may be associated with a local community.

These guidelines should be used in conjunction with section 4.2.1, Archaeological Sites.



Rock art, such as this 1847 grave marker at the spiritual site of Merrymakedge Cemetery at Kejimkujik National Historic Site of Canada in Nova Scotia, should be preserved *in situ*.



It is recommended to document culturally modified trees, such as these ancient adze marks made by Haida ancestors, at Bag Harbour, Gwaii Haanas, using non-intrusive methods such as photography and drawings.

GENERAL GUIDELINES FOR PRESERVATION AND REHABILITATION

| | Recommended | Not Recommended |
|----|--|--|
| 1 | Understanding the heritage value of rock art and culturally-modified trees before any intervention is undertaken. | |
| 2 | Documenting rock art and culturally-modified trees using non-intrusive methods, such as photography and drawing. | Enhancing faint engravings and paintings by wetting paintings and chalking engravings to better record the rock art. This can destroy evidence and make analysis and dating difficult. |
| 3 | Preserving and stabilizing rock art and culturally modified trees <i>in situ</i> . | Highlighting, repainting or regrooving faded rock art or adding new images for aesthetic purposes, thus compromising heritage value. |
| 4 | Removing non character-defining graffiti from rock art, as needed, to preserve the site's heritage value, only after recording graffiti and character-defining motifs, and documenting removal. | Removing graffiti to an extent that affects the heritage value. |
| 5 | Avoiding over-cleaning and infilling the damaged spaces within the character-defining motifs. If the character-defining motifs of rock art are badly damaged and infill is necessary, it should be done by qualified individuals, and distinguishable as an addition. | |
| 6 | Protecting rock art from animals, wind, sunlight, water, natural growths, such as algae and fungi, and dust. In all cases, a proper assessment should be undertaken to understand the materials and natural forces before work begins. | Proceeding with preservation methods against animals, wind, sunlight, water, natural growths, and dust without assessing their impact on the rock art's heritage value. |
| 7 | Monitoring the stability of the rock surface, salt and moisture distribution, and levels of air pollution so that appropriate measures are taken to protect the rock art. | Proceeding with preservation methods without first monitoring the stability of the rock surface, salt and moisture distribution, and levels of air pollution. |
| 8 | Protecting and maintaining the surroundings of culturally-modified trees and archaeological rock art sites by regular maintenance and cleaning by specialized personnel, as required. | Failing to maintain and clean the surroundings of rock art sites and culturally-modified trees. |
| 9 | Protecting and preserving culturally-modified trees <i>in situ</i> . | Removing dead culturally-modified trees or relocating culturally-modified trees when their preservation <i>in situ</i> is possible. |
| 10 | Protecting and maintaining culturally-modified trees by monitoring environmental impacts, such as insects, fungi and water. | Failing to protect and maintain the surroundings of culturally-modified trees, resulting in loss of information and inappropriate environmental conditions. |
| 11 | Protecting culturally-modified trees by identifying them, using non-intrusive and non-permanent methods. | Identifying culturally-modified trees, using intrusive methods that leave visible, permanent traces. Altering culturally-modified trees; for example, by regrooving graffiti. |

ADDITIONAL GUIDELINES FOR REHABILITATION

| | Recommended | Not Recommended |
|----|---|--|
| 12 | Removing recently deposited dust on rock art for preservation and rehabilitation purposes. | Removing surface accretions to make rock art more visible or attractive, when the surface accretions may contain valuable information. |
| 13 | Limiting access to rock art sites and culturally-modified trees through guided tours and visitor quotas, to control deterioration from visitor contact. | |
| 14 | Protecting rock art sites and culturally-modified trees by installing barriers that allow visual contact. These barriers should be discreet and removable, and not be supported by the character-defining elements. | Protecting rock art and culturally-modified trees with an installation supported by the character-defining elements that is physically and visually incompatible with the site and its surroundings, and cannot be removed without damaging, in part or in whole, the archaeological site. |
| 15 | Providing effective and simple installations for remote sites to indicate their importance, such as a visitor registry that explains the site's heritage value and provides a place for visitors to record comments and impressions. | |
| 16 | Protecting rock art sites and culturally-modified trees by installing removable structures, pathways, trails and boardwalks to allow access and viewing. They should be designed to avoid trampling the site, stirring up dust particles, scratching the rock surface, and damaging vegetation and rock features | Installing structures, pathways, trails and boardwalks, where installation or removal could affect the character-defining elements. |

4.2.8 CULTURALLY-SENSITIVE PLACES

These guidelines provide direction when an archaeological site is considered to be, or is located in, a culturally-sensitive place. This document defines culturally-sensitive places as formally recognized places that have been given special meaning by a group or a community. These places include burial grounds, above-ground burials, and abandoned cemeteries, Aboriginal spiritual places, such as medicine wheels and effigies, and other sites that may have spiritual value for a community.

Culturally-sensitive places deserve a separate section in these guidelines because their *heritage value* most often resides in their cultural, social and spiritual significance. The heritage value of culturally sensitive places is not always proportional to the extent or state of their physical remains. Therefore, great sensitivity is required so that conservation strategies preserve the associated values of these places, even when there is little tangible evidence on or in the ground. These types of archaeological sites can be found in many contexts, in urban as well as natural environments.

If human remains are discovered, all activities must stop, and the proper authorities must be contacted. Any action on human remains should only be performed according to provincial and territorial legislation and be supported by the affiliated community.

These guidelines should be used in conjunction with section 4.2.1, Archaeological Sites.



Planning archaeological investigations should be done, when appropriate, in consultation with local Elders or other knowledge keepers.



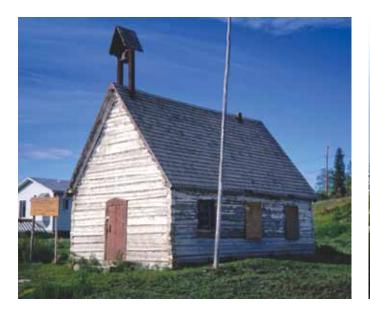
Preserving relationships with a site, such as this traditional gathering held at Arvia'juaq and Qikiqtaarjuk National Historic Site in Nunuvut can contribute to the site's heritage value. Access to sites should be balanced with the need to preserve their character-defining elements.

GENERAL GUIDELINES FOR PRESERVATION AND REHABILITATION

| | Recommended | Not Recommended |
|---|--|--|
| 1 | Understanding the potentially sensitive nature of an archaeological site and its environment, for a group or community, before any intervention is undertaken. | |
| 2 | Protecting and preserving the landscape and its natural features that directly contribute to the site's heritage value. | |
| 3 | Recording without disturbance the elements that contribute to the heritage value in consultation with the affiliated community. | Recording the elements that contribute to the heritage value, using methods that disregard the sensitive nature of the sites. |
| 4 | Stabilizing the character-defining elements, using methods that do not affect the site's heritage value. | |
| 5 | Working with interested parties, particularly the affiliated community, to define acceptable activities at a culturally sensitive place. | Allowing activities in culturally sensitive places, without notifying interested parties, resulting in negative impacts on the heritage value. |
| 6 | Preserving the heritage value of a site by enabling a continued relationship between cultural groups and culturally-sensitive places, when this relationship contributes to the heritage value of the site. This includes access and use for rituals, ceremonies and traditional gatherings, while ensuring measures to protect heritage value are in place. The need to preserve the community's relationship with the place should be balanced with the need to preserve the character-defining elements. | |
| 7 | Protecting the archaeological context of burials to preserve associated information. | |
| 8 | Removing , when appropriate, human remains with associated funerary objects and surrounding soil, with the support of the affiliated community and after documenting their position. | Removing human remains without the support of the affiliated community, and without including information about context and location, such as soil, position, funerary objects, etc. |

4.3

GUIDELINES FOR BUILDINGS









The historic buildings illustrated on this page are clockwise, from top left: the old Anglican Church in Tulita, Northwest Territories; a stone farmhouse at Minister's Island in New Brunswick; the Bloedel Conservatory in Vancouver; and Union Station in Toronto.

4.3

GUIDELINES FOR BUILDINGS

Buildings illustrate the evolution of Canadian architecture in terms of their form and setting and their assemblies, systems and materials. Buildings can express cultural, regional, local or individual uses, or construction practices, and embody meanings that evolve over time.

The broad range of buildings that are considered historic varies from modest to monumental, ancient to recent, and private to public. Buildings in a heritage district, or in a complex of buildings, may not be formally recognized individually, but may be recognized as contributing to the larger historic place. There is no typical historic building. Each is valued for its own reasons and faces its own challenges.

Buildings can represent identifiable expressions of one or more of the many different cultural, religious or interest groups that make up Canada's multicultural population. They can also be designated because they demonstrate an appropriate and/or innovative response to their climate and setting. Often the heritage value of a building, or group of buildings, illustrates a specific phase, or various phases, in the development of a particular building type, style or aesthetic. Some buildings are historic places because of their association with a particular person, event, theme or achievement.

These guidelines provide general recommendations appropriate to all types of buildings. However, because buildings can also be part of cultural landscapes, engineering works and archaeological sites, those guidelines should be consulted when appropriate. Also refer to the Guidelines for Materials that include traditional as well as modern building and finishing materials.



A building's setting can be as important to its interpretation and understanding of a historic place as is the structure itself. A train station moved away from its tracks is clearly out of context. A lighthouse is equally connected to its setting. The character-defining elements of the Head Harbour Light Station in New Brunswick includes all of the 3,000 square metres of the rocky outcropping and two nearby rocks as well as the five buildings on the site.

BALANCING CONSERVATION PRINCIPLES AND SUSTAINABILITY OBJECTIVES

Both heritage conservation and sustainability aim to conserve. In the case of heritage buildings, this includes considering the inherent performance and durability of their character-defining assemblies, systems and materials, and the minimal interventions required to achieve the most effective sustainability improvements. For example, it may be possible to improve the energy efficiency of an historic building by insulating the attic and basement rather than removing or concealing character-defining brick or plaster to insulate the walls.

APPLYING THE GUIDELINES

The Guidelines for Buildings are divided into three main groups: Form, Assemblies and Systems. Traditional construction methods, and the complex assemblies and systems found in recent heritage buildings, are both addressed.

Form

Most interventions to an historic building—including interventions to its architectural assemblies, engineered systems and materials—have some impact on its overall appearance. This impact is particularly apparent when constructing additions or making modifications to the building form. Two sets of guidelines are provided to address the impact of additions and alterations on form: Exterior Form and Interior Arrangement.

Assemblies

Many building interventions involve preserving or modifying one or more architectural assemblies. In these guidelines, architectural assemblies are seen as complex elements composed of distinct parts and materials that work together to help the building fulfill its purpose. Assemblies also define a building's architectural expression. Five sets of guidelines address architectural assemblies: Roofs; Exterior Walls; Windows, Doors and Storefronts; Entrances, Porches and Balconies; and Interior Features.



Ongoing maintenance is the simplest, most effective and least glamorous method to ensure the lasting conservation of buildings. The Hôpital general de Québec built between 1671 and 1692, is a model example of the result of centuries of appropriate ongoing maintenance.

Systems

Building interventions often involve adding, removing, replacing or modifying engineered systems. For the purposes of these guidelines, engineered systems are composed of connected elements that work together to ensure that an historic place is capable of fulfilling its design or modified purpose, and/or providing a safe and comfortable environment. Two sets of guidelines pertain to systems: Structural Systems, and Mechanical and Electrical Systems.

INHERENT VICE

Inherent vice is an old concern with a new significance with respect to recent heritage. It can include faulty assemblies or details, such as binding together galvanic materials, but also experimental materials that are unable to perform their intended function over the long term. The overarching requirement is to conserve the heritage value of an historic place. Defective details or inappropriate material choices should not be duplicated when improvements are possible without significantly affecting the place's value.

4.3.1 EXTERIOR FORM

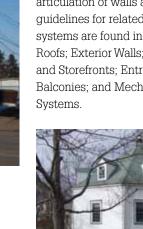
These guidelines provide direction when a building's exterior form is identified as a character-defining element of an historic place. They also give direction on how to minimize the impact of alterations and additions on the building's exterior due to a change in use or regulations.

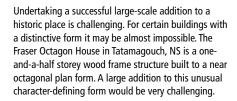
Exterior form refers to a building's orientation, scale, massing, composition, proportions, colour and texture. A building's exterior form is also related to its surroundings, which includes spatial relationships with adjacent buildings, plazas or natural features, views, climatic considerations and circulation for vehicles and pedestrians.

The exterior form usually expresses ideas on how to locate and plan a building. The location, massing, aesthetics, style, plan form, roof shape and position of entrances may have responded to orientation, topography or functional requirements. The interrelationships of site and setting with broader environmental considerations are addressed in more detail in the Guidelines for Cultural Landscapes.

Typical interventions that are addressed here include large and small additions, including both building expansions and smaller interventions, such as stairway, elevator or mechanical equipment enclosures. Exterior form often has a strong relationship with the Interior Arrangement of a building, thus the impact on Interior Arrangement should be considered when making changes to the exterior form.

These guidelines offer practical advice for conserving character-defining elements, such as the size, number, form, proportion and position of openings, or the form and articulation of walls and roofs. Specific guidelines for related assemblies or systems are found in the Guidelines for Roofs; Exterior Walls; Windows, Doors and Storefronts; Entrances, Porches and Balconies; and Mechanical and Electrical Systems.







St. Jean Baptiste Church and Rectory are situated on a single, large town lot on Main Street in Morinville, AB. The church steeple is clearly visible on the landscape and helps convey the Catholic Church's role in the settlement of the district.



A compatible addition to the rear of the Yukon Sawmill Co. Office provides space for services. If necessary, it could be removed without affecting the building's historic fabric. One window opening and the surrounding wall framing were altered to provide space for a connecting door.

THE RELATIONSHIP BETWEEN EXTERIOR FORM AND SETTING

In heritage districts and modern campus-like landscapes, the exterior form of buildings often plays an important role in defining plazas, open spaces and streetscapes. Prior to making any changes to the exterior form of a building, it is important to understand how the proposed changes affect the setting of the historic place. The definition of setting and its interrelationship with the broader environment are addressed in more detail in the Introduction to the Guidelines for Cultural Landscapes.





A new rear addition to the Strathcona Public Library in Edmonton respects the primary value on the site—the historic library—while expanding the floor space to better serve the neighbourhood in the future. The addition is a successful example of meeting requirements for a new addition to be subordinate, distinguishable and compatible.

GENERAL GUIDELINES FOR PRESERVATION, REHABILITATION AND RESTORATION

| | Recommended | Not Recommended |
|---|--|---|
| 1 | Understanding the exterior form and how it contributes to the heritage value of the historic building. | |
| 2 | Understanding the design principles used by the original designer or builder, and any changes made to the exterior form over time. | |
| 3 | Documenting the building's exterior form before undertaking an intervention, including the form and massing, and viewscapes, sunlight and natural ventilation patterns. | Undertaking an intervention that affects the building's exterior form without first documenting building, site and setting relationships. |
| 4 | Assessing the condition of the building's exterior form early in the planning process so that the scope of work is based on current conditions. | |
| 5 | Protecting and maintaining elements of the building's exterior form through cyclical or seasonal maintenance work. | |
| 6 | Retaining the exterior form by maintaining proportions, colour and massing, and the spatial relationships with adjacent buildings. | |
| 7 | Stabilizing deteriorated elements of the exterior form by using structural reinforcement and weather protection, or correcting unsafe conditions, as required, until repair work is undertaken. | Removing deteriorated elements that could be stabilized or repaired. |
| 8 | Protecting adjacent character-defining elements from accidental damage or exposure to damaging materials during maintenance or repair work. | |
| 9 | Documenting all interventions that affect the exterior form, and ensuring that the documentation is available to those responsible for future interventions. | |

| | Recommended | Not Recommended |
|----|---|-----------------|
| 10 | Reinstating the exterior form by recreating missing, or revealing obscured parts to re-establish character-defining proportions and massing. | |

| | Recommended | Not Recommended | |
|-----|--|--|--|
| ADI | ADDITIONS OR ALTERATIONS TO THE EXTERIOR FORM | | |
| 11 | Accommodating new functions and services in non-character-defining interior spaces as an alternative to constructing a new addition. | Constructing a new addition when the proposed functions and services could be accommodated by altering existing, non-character-defining interior spaces. | |
| 12 | Selecting a new use that suits the existing building form. | Selecting a use that dramatically alters the exterior form; for example, demolishing the building structure and retaining only the street façade(s). | |
| 13 | Selecting the location for a new addition that ensures that the heritage value of the place is maintained. | Constructing a new addition that obscures, damages or destroys character-defining features of the historic building, such as relocating the main entrance. | |
| 14 | Designing a new addition in a manner that draws a clear distinction between what is historic and what is new. | Duplicating the exact form, material, style and detailing of the original building in a way that makes the distinction between old and new unclear. | |
| 15 | Designing an addition that is compatible in terms of materials and massing with the exterior form of the historic building and its setting. | Designing a new addition that has a negative impact on the heritage value of the historic building. | |
| HEA | ALTH, SAFETY AND SECURITY CONSIDERATIONS | | |
| 16 | Adding new features to meet health, safety or security requirements, such as an exterior stairway or a security vestibule in a manner that respects the exterior form and minimizes impact on heritage value. | Constructing a new addition to accommodate code- required stairs or elevators on a highly visible, character- defining elevation, or in a location that obscures, damages or destroys character-defining elements. | |
| 17 | Working with code specialists to determine the most appropriate solution to health, safety and security requirements with the least impact on the character-defining elements and overall heritage value of the historic building. | Making changes to the exterior form without first exploring equivalent health, safety and security systems, methods or devices that may be less damaging to the character-defining elements and overall heritage value of the historic building. | |
| ACC | ESSIBILITY CONSIDERATIONS | | |
| 18 | Finding solutions to meet accessibility requirements that are compatible with the exterior form of the historic building. For example, introducing a gently sloped walkway instead of a constructed ramp with handrails in front of an historic building. | Radically altering the building's exterior form to comply with accessibility requirements. Relocating primary entrances when undertaking interventions to accommodate accessibility-related features. | |
| 19 | Working with accessibility and conservation specialists and users to determine the most appropriate solution to accessibility issues with the least impact on the character-defining elements and overall heritage value of the historic building. | Altering character-defining elements, without consulting the appropriate specialists and users. | |

| | Recommended | Not Recommended |
|-----|---|---|
| SUS | TAINABILITY CONSIDERATIONS | |
| 20 | Adding new features to meet sustainability requirements, such as solar panels or a green roof, in a manner that respects the exterior form and minimizes impact on character-defining elements. | Adding a new feature to meet sustainability requirements in a location that obscures, damages or destroys character-defining elements. |
| 21 | Working with sustainability and conservation specialists to determine the most appropriate solution to sustainability requirements with the least impact on the character-defining elements and overall heritage value of the historic building. | Making changes to the exterior form, without first exploring alternative sustainability solutions that may be less damaging to the character-defining elements and overall heritage value of the historic building. |
| 22 | Complying with energy efficiency objectives in a manner that minimizes impact on the character-defining elements and overall heritage value of the historic building. | Damaging or destroying character-defining elements or undermining their heritage value, while making modifications to comply with energy efficiency objectives. |
| 23 | Accommodating functions requiring a controlled environment, such as artefact storage or exhibits in an addition, while using the historic building for functions that benefit from existing natural ventilation and/or daylight. | Introducing new mechanical systems based on airtight building envelope design in buildings that were designed to use natural ventilation. |

ADDITIONAL GUIDELINES FOR RESTORATION PROJECTS

| | Recommended | Not Recommended |
|---|---|---|
| 24 | Reinstating the building's exterior form from the restoration period, based on documentary and physical evidence. | |
| REIV | OVING EXISTING FEATURES FROM OTHER PERIODS | |
| 25 | Removing a non character-defining feature of the building's exterior form, such as an addition built after the restoration period. | Failing to remove a non character-defining feature of the building's exterior form that confuses the depiction of the building's chosen restoration period. Removing a feature from a later period that serves an important function in the building's ongoing use, such as a fire escape. |
| RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD | | |

RECREATING IVIISSING FEATURES FROM THE RESTORATION PERIOD

Recreating missing features of the exterior form that existed during the restoration period, based on physical or documentary evidence; for example, duplicating a dormer or restoring a carport that was later enclosed.

Constructing a feature of the exterior form that was part of the building's original design but was never actually built, or a feature thought to have existed during the restoration period but for which there is insufficient documentation.

4.3.2 INTERIOR ARRANGEMENT

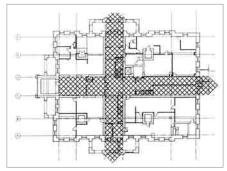
These guidelines provide direction when a building's interior arrangement is identified as a character-defining element of an historic place. They also give direction on how to minimize the impact on heritage value of additions or alterations to the building's interior due to a change in use or regulations.



The interior arrangement and planning principles employed in a building are often character defining. When considering adaptive reuse, it is important to select a new use that is compatible with the existing interior arrangement such as converting one wing of this convent (Monastère-des Augustines-de-l'Hôtel-Dieu-de-Québec) into temporary accommodations for the parents of sick children in the hospital.



Having served a number of different denominations over the years, the Free Meeting House in Moncton was restored to its earliest, 1821 interior configuration by following floor marks and other physical and documented evidence. Missing features from the selected restoration period were replaced.



Changing or reorganizing the way one moves through a building, such as the Calgary City Hall, shown here, can greatly affect heritage character. The procession through a series of spaces, or the inter-relationship between certain rooms, may be character defining. This should be considered when providing space for security desks or when free entry into certain parts of a building must be prevented. Every attempt should be made to continue the original flow of movement.

Interior arrangement refers to the overall organization or layout of a building's interior spaces, including the configuration and relationship of rooms and circulation spaces. These guidelines also apply to the elements that define the quality of the interior spaces and arrangement, such as interior walls, ceilings and floors. Interior arrangement also relates to the relationship between a building's interior design and use, and its exterior form.

Interior arrangement includes the functional relationships between spaces, such as the connection between a kitchen and dining room. It also includes circulation patterns and layout of rooms, including their proportions and scale, and planning associated with a style or period, such as the open plan and modular proportions of a modernist office tower interior.

Some non character-defining interior features may be replaced without altering the interior arrangement. For example, a theatre may still retain its original spatial arrangement, including balconies and stage openings, even if the furnishings and finishes are replaced. More recent interior interventions may also acquire value.

Typical interventions in an interior arrangement include adaptations to meet contemporary regulations, such as redesigning a lobby to meet security requirements, providing universal accessibility, or adding fire separations and exits. The interior arrangement often has a strong relationship with the building's exterior form, thus the impact on the exterior form should be considered when making any changes to the interior arrangement. The deterioration or loss of interior features can affect the overall heritage value of an historic building.

These guidelines provide general recommendations appropriate to all types of interior arrangements. For recommendations on specific architectural assemblies of interiors, refer to Interior Features. When spatial relationships are part of an engineering work, refer also to Functional Arrangement in the Guidelines for Engineering Works.

GENERAL GUIDELINES FOR PRESERVATION, REHABILITATION AND RESTORATION

| | Recommended | Not Recommended |
|---|---|--|
| 1 | Understanding the interior arrangement and how it contributes to the heritage value of the historic building. | |
| 2 | Understanding the planning principles used by the original designer or builder, and any changes made to the interior arrangement over time. | |
| 3 | Documenting the interior arrangement, including the form and relationship between circulation patterns and interior spaces, and the condition, interrelationships and evolution of the elements that define the arrangement, before undertaking an intervention. | Undertaking an intervention that affects the interior arrangement, without first documenting the existing arrangement. |
| 4 | Assessing the integrity of the interior arrangement early in the planning process so that the scope of work is based on current conditions. | |
| 5 | Protecting and maintaining elements of the building's interior arrangement through cyclical or seasonal maintenance work. | |
| 6 | Retaining the interior arrangement by maintaining historic circulation patterns and spatial relationships. | Altering the interior arrangement by modifying or obscuring circulation patterns and spatial relationships. |
| 7 | Protecting adjacent character-defining elements from accidental damage, or exposure to damaging materials during maintenance or repair work. | |
| 8 | Documenting all interventions that affect the interior arrangement, and ensuring the documentation is available to those responsible for future interventions. | |

| | Recommended | Not Recommended |
|----|---|--|
| 9 | Re-establishing the interior arrangement by reinstating missing or obscured parts of the arrangement, such as removing a drop ceiling to reveal the proportions of a character-defining space. | |
| 10 | Designing interior spaces and circulation that are compatible with the interior arrangement of the historic building. | Altering or destroying character-defining interior spaces by inserting floors, lowering ceilings, or adding or removing walls. Relocating an element related to circulation patterns, such as a staircase or main entrance, thereby altering the interrelationship between interior spaces and exterior form. |

ADDITIONS OR ALTERATIONS TO THE INTERIOR ARRANGEMENT

| 11 | Accommodating service functions, such as bathrooms, mechanical equipment and office machines required by the building's new use in non-character-defining spaces, such as previously undeveloped attics or storage spaces. | |
|----|---|--|
| 12 | Designing a new, compatible interior addition in a manner that draws a clear distinction between what is historic and what is new. | Duplicating the exact form, material, style and detailing of interior features, in a manner that makes the distinction between old and new unclear. |
| 13 | Installing permanent partitions in secondary spaces, and making use of demountable partitions, when subdivision of a character-defining space is required to accommodate a new use. | Installing permanent partitions that damage or obscure character-defining spaces. |
| 14 | Adding a new floor in a manner that minimizes the impact on character-defining interior spaces, features and finishes. | Inserting or removing floors in a manner that radically changes the interior space, or obscures, alters or destroys the decorative detailing or windows of the building. |

HEALTH, SAFETY AND SECURITY CONSIDERATIONS

| HEALTH, SAFETY AND SECURITY CONSIDERATIONS | | |
|--|---|---|
| 15 | Adding new features to meet health, safety or security requirements, such as a fire separation in a lobby or an interior stairway, in a manner that respects the interior arrangement and minimizes impact on heritage value. | Constructing a new feature to meet health, safety and security requirements in a location that obscures, damages or destroys character-defining elements. |
| 16 | Working with code specialists to determine the most appropriate solution to health, safety and security requirements with the least impact on the character-defining elements and overall heritage value of the historic building. | Making changes to the interior arrangement without first exploring equivalent health, safety and security systems, methods or devices that may be less damaging to the character-defining elements and overall heritage value of the historic building. |
| 17 | Placing new functional or code-required stairways or security screening functions in the building's secondary and service areas. | Radically changing, damaging or destroying character- defining spaces, features or finishes when adding new functional or code-required features. |
| 18 | Complying with requirements, such as seismic standards, in a way that minimizes impact on the interior arrangement. | Damaging or destroying character-defining aspects of the interior arrangement when adding seismic reinforcement. |

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| | Recommended | Not Recommended |
|-------------------------------|---|--|
| ACC | ESSIBILITY CONSIDERATIONS | |
| 19 | Respecting the interior arrangement of the building when locating new accessibility-related features, such as ramps and lifts. | Radically altering the building's interior arrangement or circulation patterns to comply with accessibility requirements. |
| 20 | Working with accessibility and conservation specialists and users to determine the most appropriate solution to accessibility issues with the least impact on the character-defining elements and overall heritage value of the historic building. | Altering character-defining elements, without consulting the appropriate specialists and users. |
| 21 | Locating public functions strategically to limit changes to the building. For example, providing new functions for the public on the ground floor or in areas already served by exits. | Relocating primary entrances or stairways when undertaking intervention to accommodate accessibility-related features. |
| SUSTAINABILITY CONSIDERATIONS | | |
| 22 | Adding new features to meet sustainability requirements, in a manner that respects the interior arrangement and minimizes impact on character-defining elements. | Adding a new feature to meet sustainability requirements in a location that obscures, damages or destroys character-defining elements. |
| 23 | Working with sustainability and conservation specialists to determine the most appropriate solution to sustainability requirements with the least impact on the character-defining elements and overall heritage value of the historic building. | Making changes to the interior arrangement, without first exploring alternative sustainability solutions that may be less damaging to the character-defining elements and overall heritage value of the historic building. |
| 24 | Retaining or reinstating character-defining aspects of the interior arrangement which contribute to the historic building's inherent sustainability, such as natural daylight and ventilation. | Destroying character-defining interior arrangements to introduce daylight or ventilation into a space where it never existed. |
| 25 | Accommodating equipment designed to increase energy efficiency in secondary, non character-defining spaces, such as service areas. | |

| | Recommended | Not Recommended |
|----|--|-----------------|
| 26 | Reinstating the interior arrangement from the restoration period by reintroducing the layout, circulation patterns and spatial relationships, based on physical and documentary evidence. | |

REMOVING EXISTING FEATURES FROM OTHER PERIODS

| 27 | Removing a non character-defining feature of the building's interior arrangement, such as a wall added to subdivide a character-defining room. | Failing to remove a non character-defining feature of the building's interior arrangement that confuses the depiction of the building's chosen restoration period. |
|----|---|--|
| | | Removing a feature from a later period that serves an important function in the building's ongoing use, such as an accessible washroom or exit stairway. |

RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD

| 28 | Recreating a missing feature of the interior arrangement that existed during the restoration period, based on physical or documentary evidence. | Constructing a feature of the interior arrangement that was part of the building's original design but was never actually built, or a feature thought to have existed during the restoration period but for which there is insufficient documentation. |
|----|--|--|
|----|--|--|

4.3.3 ROOFS

These guidelines provide direction when a roof or roof element is identified as a character-defining element of an historic place. Roof assemblies include both visible elements, such as cupolas, turrets, cresting, chimneys, gutters, weathervanes, gables, eaves, parapets, dormers, soffits and fascias, and components, such as the cladding, substructure, insulation, vapour controls, flashing and ventilation, that are critical in providing a weatherproof enclosure for the building.

As the most exposed architectural assembly, the roof is vital in protecting the rest of the building from the weather. A deteriorated roof can cause catastrophic damage to interiors and to the building structure. The roof is also an important architectural feature that contributes to a building's form and aesthetics. The profile and details of a flat roof may also be character-defining despite its more understated appearance compared to a large hip or gable roof.



The steep copper roof of the Fort Garry Hotel in Winnipeg is defined by a multitude of small shed- and hip-roofed dormers, highly elaborate stone dormer facades at the corners, a wealth of pinnacles and large ornate chimneys.



The Rehabilitation of the Truro Post Office, in Truro, NS included restoring its distinctive slate roof. In Rehabilitation, the replacement of missing historic features with a replica based on physical and documentary evidence, as in this project, is acceptable, as is a new design that is compatible with the heritage value of the historic place.



When restoring the former post office in Dawson, YK, the metal roofing surface, which was too deteriorated to repair, was replaced in kind. Physical evidence from the restoration period was used as a model to reproduce the characteristic standing seam detail.



In order to accommodate new condominium units in the upper floor of this building on Queen Street in Charlottetown, new dormers were added. In Rehabilitation, the design of new elements should be compatible with the heritage value of the historic place.

Given the constant exposure to the environment, roofing materials do not last indefinitely. While some materials, such as copper sheeting and slate shingles, can last for many decades if properly designed and maintained, other materials, such as wood and asphalt shingles and membrane roofing, need to be replaced more frequently. The need for regular replacement makes roofs vulnerable to changes that may affect their heritage value. Careful attention must be given to the detailing, pitch, exposure, material and shape when replacing a roof. Preserving durable roofing materials will prolong the building's service life, sometimes by decades.

These guidelines provide general recommendations appropriate to all types and shapes of roofs. For recommendations on form and structural issues related to roofs, refer to Exterior Form and Structural Systems, respectively. For specific materials that make up roofs, refer to the Guidelines for Materials.



A surviving pressed metal shingle was used as a prototype for manufacturing replacement shingles when restoring the main house at the Motherwell Homestead near Abernathy, SK. In Restoration, repairs or replacements of extensively deteriorated or missing parts of features are done in kind, and are based on physical, documentary and oral evidence.



It is important to consider the expected life span of all elements that make up a roof assembly when repairing or replacing a roof such as this one on St.Dunstan's Basilica in Prince Edward Island. Roofing materials, such as copper and slate, need to be matched with flashings of a similar life span.

GENERAL GUIDELINES FOR PRESERVATION, REHABILITATION AND RESTORATION

| | Recommended | Not Recommended |
|----|--|---|
| 1 | Understanding the roof and how it contributes to the heritage value of the historic building. | |
| 2 | Understanding the properties and characteristics of the roof as well as changes and previous maintenance practices. | Failing to consider the impact of previous changes and maintenance practices on the roof. |
| 3 | Documenting the form, materials and condition of roof assemblies before undertaking an intervention, including the roof's pitch, shape, decorative and functional elements, and materials, and its size, colour and patterning. | Undertaking an intervention that affects character- defining roofs and roof elements, without first documenting their existing character and condition. |
| 4 | Assessing the condition of the roof assembly and materials early in the planning process so that the scope of work is based on current conditions. | |
| 5 | Determining the cause of a roof's distress, damage or deterioration through investigation, monitoring and minimally invasive or non-destructive testing techniques. | |
| 6 | Protecting and maintaining a roof by cleaning and maintaining the gutters, downspouts and flat roof drains, and replacing deteriorated flashing in kind. Roof sheathing should also be checked for proper venting to prevent moisture condensation and water penetration, and to ensure that materials are free from insect infestation. | Failing to maintain roofs on a cyclical basis. Failing to replace deteriorated flashing, or to clean and properly maintain gutters and downspouts and flat roof drains so that water and debris collect and damage roof fasteners, sheathing and the underlying structure. |
| 7 | Retaining sound or deteriorated roof assemblies that can be repaired. | Stripping the roof of sound or repairable character- defining materials, such as slate, clay tile, wood and architectural metal. |
| 8 | Stabilizing deteriorated roofs by structural reinforcement, weather protection or correcting unsafe conditions, as required, until repair work is undertaken. | Removing deteriorated roof elements that could be stabilized or repaired. |
| 9 | Repairing parts of roofs by patching, piecing-in, consolidating, or otherwise reinforcing, using recognized conservation methods. Repair may also include the limited replacement in kind, or with a compatible substitute material, of extensively deteriorated or missing parts of the roof. Repairs should match the existing work as closely as possible, both physically and visually. | |
| 10 | Protecting adjacent character-defining elements from accidental damage or exposure to damaging materials during maintenance or repair work. | |

GENERAL GUIDELINES FOR PRESERVATION, REHABILITATION AND RESTORATION

| | Recommended | Not Recommended |
|----|---|--|
| 11 | Replacing in kind extensively deteriorated or missing parts of roof assemblies where there are surviving prototypes. | Replacing an entire roof element, such as a dormer, when limited replacement of deteriorated and missing parts is possible. Using a substitute material for the replacement part that neither conveys the same appearance as the surviving parts of the roof element, nor is physically or visually compatible. |
| 12 | Testing proposed interventions to establish appropriate replacement materials, quality of workmanship and methodology. This can include reviewing samples, testing products, methods or assemblies, or creating a mock-up. Testing should be carried out under the same conditions as the proposed intervention. | |
| 13 | Documenting all interventions that affect the building's roof, and ensuring that the documentation is available to those responsible for future interventions | |

| | Recommended | Not Recommended |
|----|--|--|
| 14 | Repairing a roof assembly, including its functional and decorative elements, by using a minimal intervention approach. Such repairs might include the limited replacement in kind, or replacement with an appropriate substitute material, of irreparable or missing elements, based on documentary or physical evidence. | Replacing an entire roof element, such as a cupola, dormer or lightning rod, when the repair of materials and limited replacement of deteriorated or missing elements is feasible. Failing to reuse intact roofing materials when only the roofing structure or sheathing needs replacement. |
| 15 | Improving the detailing of roof elements, following recognized conservation methods, to correct faulty details. For example, adjusting the slope of a cornice to prevent ponding, or introducing a new drip edge at the eave to better direct water runoff away from a masonry wall. Such improvements should be physically and visually compatible. | |
| 16 | Replacing in kind an entire element of the roof that is too deteriorated to repair—if the overall form and detailing are still evident—using the physical evidence as a model to reproduce the element. This can include a large section of roofing, a dormer, or a chimney. If using the same kind of material is not technically or economically feasible, then a compatible substitute material may be considered. | Removing a roof element that is irreparable, such as a chimney or dormer, and not replacing it, or replacing it with a new element that does not convey the same appearance or serve the same function. Replacing deteriorated roof elements and materials that are no longer available with physically or visually incompatible substitutes. |
| 17 | Replacing missing historic features by designing and constructing a new roof feature, based on physical and documentary evidence, or one that is compatible in size, scale, material, style or colour. | Creating a false historical appearance because the replicated feature is incompatible or based on insufficient physical and documentary evidence. |

| | Recommended | Not Recommended |
|---|--|---|
| ADDITIONS OR ALTERATIONS TO ROOFS AND ROOF ELEMENTS | | |
| 18 | Modifying or replacing a roof or roof element, to accommodate an expanded program, a new use, or applicable codes and regulations, in a manner that respects the building's heritage value. | Constructing an addition that requires removing a character-defining roof. Changing the configuration of a roof by adding new elements, such as dormer windows, vents or skylights, in a manner that negatively affects its heritage value. |
| 19 | Selecting appropriate rooftop mechanical and service equipment and associated piping and cabling, such as air-conditioning components, transformers or solar collectors, and installing the equipment as inconspicuously as possible, while respecting the building's heritage value and character-defining elements. | Selecting inappropriate rooftop mechanical or service equipment, or installing such equipment in a manner that compromises the building's heritage value and character-defining elements. Adding significant loads to a roof without assessing the impact on the building's structure. |
| 20 | Designing and constructing additions to roofs, such as access stairs, elevator or mechanical equipment housing, decks and terraces, and dormers and skylights that are inconspicuous from the public right of way and do not damage or obscure character-defining elements. | Designing and constructing a roof addition that compromises the building's character-defining roof elements, its structural integrity, or its overall appearance. Constructing a rooftop addition that blocks natural light patterns or important views. |
| HEA | LITH, SAFETY AND SECURITY CONSIDERATIONS | |
| 21 | Complying with health and safety requirements, by providing lightning protection, or snow and ice guards, or roof anchors in a manner that conserves the roof's heritage value and minimizes impact on its character-defining elements. | Damaging or destroying character-defining elements while making modifications to comply with health and safety requirements. |
| 22 | Working with code specialists to determine the most appropriate solution to health, safety and security requirements with the least impact on the character-defining elements and overall heritage value of the historic building. | Making changes to character-defining roofs, without first exploring equivalent systems, methods or devices that may be less damaging to the character-defining elements and heritage value of the historic building. |
| 23 | Removing or encapsulating hazardous materials, such as asbestos insulation, using the least-invasive abatement methods possible, and only after thorough testing has been conducted. | |
| 24 | Protecting roofs against loss or damage by identifying and assessing the specific fire risks, and by implementing an appropriate fire-protection strategy that addresses those risks. | Covering flammable character-defining elements with fire-resistant sheathing or coatings that alter their appearance. Replacing wood roof elements with alternate materials, without carefully considering other options for reducing fire spread. Failing to take proper fire protection precautions when using a technique that could endanger the building, such as applying membranes on wood roofs using heat. |

| | Recommended | Not Recommended |
|-----|--|---|
| SUS | TAINABILITY CONSIDERATIONS | |
| 25 | Complying with energy efficiency objectives in upgrades to the roof assembly in a manner that respects the building's character-defining elements, and considers the energy efficiency of the building envelope and systems as a whole. | Damaging or destroying character-defining elements while making modifications to comply with energy efficiency requirements. |
| 26 | Working with energy efficiency and sustainability specialists to determine the most appropriate solution to energy efficiency and sustainability requirements with the least impact on the character-defining elements and overall heritage value of the historic building. | Making changes to the roof assembly, without first exploring alternative sustainability solutions that may be less damaging to the character-defining elements and overall heritage value of the historic building. |
| 27 | Exercising caution and foreseeing the potential effects of insulating the roof on the building envelope to avoid damaging changes, such as displacing the <i>dew point</i> and creating <i>thermal bridges</i> , or increasing the snow load. | Installing insulation without anticipating its potential impact on the building envelope. Inserting thermal insulation in roof assemblies, without providing appropriate vapour barriers or ventilation. |
| 28 | Installing thermal insulation in non-character-defining roof spaces, such as attics, without adversely affecting the building envelope. | Installing insulation in habitable attic spaces without considering its effect on character-defining interior features such as mouldings. |
| 29 | Ensuring that structural, drainage and access requirements to improve the roof's energy efficiency can be met without damaging character-defining elements. | |
| 30 | Assessing the addition of vegetated roof systems (green roofs) or storm water cisterns to flat-roof assemblies, and their impact on the building's heritage value and structural integrity, before work begins. | Adding a vegetated or reflective membrane roof system that might compromise the building's heritage value or its structural integrity. |

| | Recommended | Not Recommended |
|----|---|--|
| 31 | Repairing a roof assembly from the restoration period by reinforcing its materials. | Replacing an entire roof feature from the restoration period, such as a cupola or dormer, when the repair of materials and limited replacement of deteriorated or missing parts is possible. |
| 32 | Replacing in kind an entire roof feature from the restoration period that is too deteriorated to repair, using the physical evidence as a model to reproduce the feature. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Removing an irreparable roof feature from the restoration period and not replacing it, or replacing it with an inappropriate new roof feature. Reinstating a roof detail that is damaging to character-defining elements. |

REMOVING EXISTING FEATURES FROM OTHER PERIODS

| 33 | Removing or altering a non character-defining roof or roof element, such as a later dormer or asphalt roofing, dating from a period other than the restoration period. | Failing to remove a non character-defining roof or roof element from another period that confuses the depiction of the building's chosen restoration period. |
|----|---|---|
| 34 | Retaining alterations to roof assemblies that address problems with the original design if those alterations do not have a negative impact on the building's heritage value. | Removing a roof element from a later period that serves an important function in the building's ongoing use, such as a skylight for natural daylight, or a vent for natural ventilation. |

RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD

| 35 | Recreating a missing roof element that existed during the restoration period, based on physical or documentary evidence; for example, reinstating a dormer or cupola. | Constructing a roof element that was part of the building's original design, but never actually built, or constructing a feature thought to have existed during the restoration period, but for which there is insufficient documentation. |
|----|--|--|
|----|--|--|

4.3.4 EXTERIOR WALLS

These guidelines provide direction when exterior walls and their elements are identified as character-defining elements of an historic place. Exterior walls include foundation walls, structural masonry or log walls, and wood, concrete or steel framing with an exterior cladding, such as curtain-wall systems. The guidelines also provide direction on how to minimize the negative impact of additions or alterations on exterior walls.

Exterior walls perform many functions, including those of structure, weatherproofing, thermal protection, daylight control and ventilation. Traditional load-bearing walls, such as log or masonry walls, perform all of these functions in a single composition. Later, the development of frame-based structural systems led to the separation of these functions. In modern buildings, components, such as cladding, air barriers and insulation, are combined to create a complex exterior wall assembly. These components act both independently and as a whole; consequently, there may be specific conservation issues associated with the materials concealed in the core or cavity of the assembly.



Because they are largely below the surface, foundations are often dismissed as not contributing to a building's heritage character. However, it is important to remember that heritage value is not only found in what can be seen. Construction methods, materials and techniques can all be character defining, as is the case for the Grange Alexander-Salomon-Wallbridge in Quebec.

Log, stone and concrete foundations are visually and functionally very different. The decision to repair, replace in kind or rehabilitate a foundation should be determined by both the condition of the foundation and its compatibility with the heritage values of the place.



A modern building envelope includes multiple materials, such as a concrete structure, metal curtain wall mullions and glazed panels. Each of these materials ages differently and reacts in its own way to stresses, heat and cold. For a face-sealed curtain wall like this one, it is important to select sealants that make the assembly weathertight and that are compatible with all the materials with which they come into contact. Sealant materials generally have a shorter service life than adjacent materials and will eventually fail due to exposure to weather, stress and age. Regularly replacing appropriate sealants is an important part of building maintenance.

When frame-based cladding and curtain walls were developed, air and vapour barriers were introduced, as well as mechanical heating, ventilating and air conditioning (HVAC) systems that changed the thermal and moisture conditions in the walls. Changes to existing HVAC systems, or introducing mechanical systems in buildings where the walls were designed without insulation or air barriers, often led to the deterioration of exterior wall assemblies. It is, therefore, important to understand how the exterior wall relates to the building systems.

Curtain wall systems present a range of new conservation challenges, because they were the result of an era of experimentation in structures and materials, and predate higher standards for energy efficiency. Their conservation should be examined on a case-by-case basis, taking into account the heritage value of the design and the actual conditions and causes of deterioration, while planning for extended or improved performance.

These guidelines provide general recommendations appropriate to all types of exterior walls. For recommendations on associated issues related to walls, refer to the individual guidelines for Exterior Form; Windows, Doors and Storefronts; and Structural Systems. For specific materials that make up exterior walls, refer to the Guidelines for Materials.







New signs (top right) should be compatible with the building in terms of size, scale, material, style and colour. They should also not obscure, damage or destroy character-defining elements. In some cases, as Mel's Tea Room in Sackville, NB (left), signs added later become character-defining elements in their own right. Character defining signage should also be maintained despite a change in use, such as this painted sign for the Hartt Boot and She Factory in Fredericton (bottom right), which has been converted into apartments.



Responding to the dangers of arctic exploration and the loss of the Franklin Expedition, Kellett's Storehouse in Nunuvut was built in 1853 for sailors in distress. Constructed from local stone, it was filled with enough provisions to maintain a large group for several months. Conserving building remains or above-ground archaeological resources pose unique challenges. In this case, the walls and foundations were stabilized and an insulated floor was installed allowing remaining soil layers and associated artifacts to be left in place while being protected from theft and further exposure to the elements.



The impact of adding insulation to an exterior wall assembly that was not historically insulated should be carefully considered, including by measurement of the current performance of the wall and energy modelling the performance of different approaches. Adding insulation on the exterior or interior of solid masonry or log walls may impact on heritage character and lead to deterioration of the wall, if not based on a through understanding of the wall's physical characteristics and context, including its exposure to air, water and vapour pressures. Any changes to an exterior wall should be based on the building envelope science for the type of historic assembly.

GENERAL GUIDELINES FOR PRESERVATION, REHABILITATION AND RESTORATION

| | Recommended | Not Recommended |
|----|---|--|
| 1 | Understanding the exterior walls and how they contribute to the heritage value of the historic building. | |
| 2 | Understanding the properties and characteristics of the exterior walls as well as changes and previous maintenance practices. | Failing to consider the impact of previous changes to the exterior wall assembly, such as the addition of insulation and vapour barriers, or new heating or cooling systems. |
| 3 | Documenting the composition, form, materials, details, dimensions and condition of exterior wall assemblies before undertaking an intervention. This includes geometry, scale, proportions, openings, form and supporting frames or structures. | Undertaking an intervention that affects exterior wall assemblies without first documenting their existing character and condition. |
| 4 | Assessing the condition of wall assemblies and their materials early in the planning process so that the scope of work is based on current conditions. | |
| 5 | Determining the cause of distress, damage or deterioration of exterior walls through investigation, monitoring and minimally invasive or non-destructive testing techniques. | |
| 6 | Protecting and maintaining exterior walls by cleaning and repairing damaged materials, and checking exterior wall assemblies for moisture penetration and insect infestation, taking corrective action, as necessary and as soon as possible. | Failing to maintain exterior walls on a cyclical basis. Failing to correct causes of deterioration of the exterior wall assembly, such as failed sealants. |
| 7 | Retaining sound or deteriorated exterior wall assemblies that can be repaired. | |
| 8 | Stabilizing deteriorated exterior walls by using structural reinforcement, weather protection, or correcting unsafe conditions, as required, until repair work is undertaken. | Removing deteriorated exterior wall elements that could be stabilized or repaired. |
| 9 | Repairing parts of exterior walls by patching, piecing-in, consolidating, or otherwise reinforcing, using recognized conservation methods. Repair may also include the limited replacement in kind, or with a compatible substitute material, of extensively deteriorated or missing parts of the exterior wall assembly. Repairs should match the existing work as closely as possible, both physically and visually. | |
| 10 | Protecting adjacent character-defining elements from accidental damage or exposure to damaging materials during maintenance or repair work. | |

GENERAL GUIDELINES FOR PRESERVATION, REHABILITATION AND RESTORATION

| | Recommended | Not Recommended |
|----|---|---|
| 11 | Replacing in kind extensively deteriorated or missing parts of exterior wall assemblies where there are surviving prototypes. | Replacing an entire exterior wall assembly when only limited replacement of deteriorated and missing parts is possible. Using a substitute material for the replacement part that neither conveys the same appearance as the surviving parts of the element, nor is physically or visually compatible. |
| 12 | Testing proposed interventions to establish appropriate replacement materials, quality of workmanship and methodology. This can include reviewing samples, testing products, methods or assemblies, or creating a mock-up. Testing should be carried out under the same conditions as the proposed intervention. | |
| 13 | Documenting all interventions that affect the exterior walls, and ensuring that the documentation is available to those responsible for future interventions. | |

| | Recommended | Not Recommended |
|----|---|---|
| 14 | Repairing an exterior wall assembly, including its functional and decorative elements, by using a minimal intervention approach. Such repairs might include the limited replacement in kind, or replacement using an appropriate substitute material of irreparable or missing elements, based on documentary or physical evidence. Repairs might also include dismantling and rebuilding a masonry or wood wall, if an evaluation of its overall condition determines that more than limited repair or replacement in kind is required. | Over-cladding a deteriorated or poorly insulated exterior wall with a new material or assembly, without considering the impact on heritage value or the condition of underlying materials. Replacing an entire exterior wall assembly when the repair and limited replacement of deteriorated or missing elements is feasible. Failing to reuse intact cladding when only the internal parts of the wall assembly need replacement. |
| 15 | Improving the drying ability of exterior wall assemblies through suitable heating and/or ventilation measures. | Damaging the masonry of an exterior wall by drilling drainage holes into the masonry units or into the joints, with a drill bit wider than the mortar joints. Introducing a vapour barrier in an exterior wall that was constructed to be permeable or breathable. |

| | Recommended | Not Recommended |
|-----|---|---|
| 16 | Accommodating the thermal expansion and contraction of masonry, concrete and curtain wall assemblies, by introducing expansion or control joints, and incorporating those joints into existing crack patterns, where feasible, to minimize impact on character-defining elements. | Filling moving cracks or expansion joints in exterior wall assemblies with materials that inhibit or prevent thermal expansion and contraction. |
| 17 | Replacing in kind an irreparable exterior wall assembly, based on documentary and physical evidence. If using the same kind of material is not environmentally sound, or technically or economically feasible, then a compatible substitute material may be considered. | Removing an irreparable exterior wall assembly, such as a cornice or <i>brise-soleil</i> , and not replacing it, or replacing it with a new element that does not convey the same appearance or serve the same function. Replacing deteriorated elements and materials in curtain wall assemblies that are no longer available, with physically and visually incompatible substitutes. |
| 18 | Replacing missing historic features by designing and constructing a new portion of the exterior wall assembly, based on physical and documentary evidence, or one that is compatible in size, scale, material, style and colour. | Creating a false historical appearance, because the replicated feature is incompatible or based on insufficient physical and documentary evidence. |
| ADD | DITIONS OR ALTERATIONS TO EXTERIOR WALLS | |
| 19 | Modifying exterior walls to accommodate an expanded program, a new use, or applicable codes and regulations, in a manner that respects the building's heritage value. | |
| 20 | Designing a new addition in a manner that preserves the character-defining exterior walls of the historic building. | Constructing an addition that requires the removal of character-defining exterior walls. |
| HEA | LTH, SAFETY AND SECURITY CONSIDERATIONS | |
| 21 | Complying with health, safety and security requirements in a manner that conserves the heritage value of the exterior wall assembly and minimizes impact on its character-defining elements. | Damaging or destroying elements while making modifications to comply with health, safety or security requirements. |
| 22 | Working with code specialists to determine the most appropriate solution to health, safety and security requirements with the least impact on the character-defining elements and overall heritage value of the historic building. | Making changes to exterior walls, without first exploring equivalent systems, methods or devices that may be less damaging to character-defining elements and the heritage value of the historic building. |
| 23 | Removing or encapsulating toxic materials, using the least-invasive abatement methods possible, and only after thorough testing has been conducted. | |
| 24 | Protecting exterior walls against loss or damage by identifying and assessing specific risks, and by implementing an appropriate fire-protection and blast protection strategy that addresses those risks. | Covering flammable character-defining walls with fire-resistant sheathing or coatings that alter their appearance. |

| | Recommended | Not Recommended |
|-----|---|--|
| SUS | TAINABILITY CONSIDERATIONS | |
| 25 | Complying with energy efficiency objectives in upgrades to exterior wall assemblies in a manner that respects the building's character-defining elements, and considers the energy efficiency of the building envelope and systems as a whole. | Changing the composition or materials of the exterior wall assembly in a manner that compromises the building's character-defining elements and the durability of its materials. Replacing single pane glazing with sealed thermal units, without considering the impact on interrelated elements, such as curtain wall connections. |
| 26 | Assessing the potential impacts of adding insulation to the building envelope, such as displacing the <i>dew point</i> and creating <i>thermal bridges</i> . | Inserting thermal insulation in exterior wall cavities, in attics, and in unheated cellars and crawl spaces, that might adversely affect the building's envelope and character-defining elements. Installing insulation on the inside of exterior walls without considering the effect on character-defining interior mouldings or detailing. |
| 27 | Working with energy efficiency specialists to determine the most appropriate solution to energy efficiency requirements with the least impact on the character-defining elements and overall heritage value of the historic building. | Making changes to the exterior walls, without first exploring alternative energy efficiency solutions that may be less damaging to the character-defining elements and overall heritage value of the historic building. |

| | Recommended | Not Recommended |
|----|--|---|
| 28 | Repairing an exterior wall assembly from the restoration period by reinforcing its materials; for example, using heavier gauge metal to reinforce a mullion in a curtain wall. | Replacing an entire exterior wall assembly from the restoration period when the repair of materials and limited replacement of deteriorated or missing parts is possible. |
| 29 | Replacing in kind an entire exterior wall assembly from the restoration period that is too deteriorated to repair, using the physical evidence as a model to reproduce the assembly. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Removing an irreparable exterior wall assembly from the restoration period and not replacing it, or replacing it with an inappropriate exterior wall assembly. Reinstating an exterior wall detail that is damaging to adjacent character-defining elements. |

REMOVING EXISTING FEATURES FROM OTHER PERIODS

| 30 | Removing or altering a non character-defining exterior wall assembly or element from a period other than the restoration period. | Failing to remove a non character-defining exterior wall assembly or element from another period that confuses the depiction of the building's chosen restoration period. |
|----|---|---|
| 31 | Retaining alterations to exterior wall assemblies that address problems with the original design, if those alterations do not have a negative impact on the building's heritage value. | Removing an exterior wall assembly or element from a later period that serves an important function in the building's ongoing use. |

RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD

| Recreating a missing exterior wall assembly from the restoration period, based on physical or documentary evidence. Constructing an exterior wall assembly that was par of the building's original design, but was never actubuilt, or constructing a feature thought to have exist during the restoration period, but for which there is insufficient documentation. |
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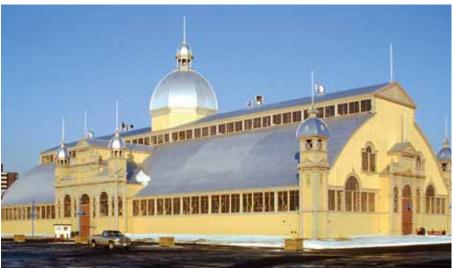
4.3.5 WINDOWS, DOORS AND STOREFRONTS

These guidelines provide direction when windows, doors or storefronts are identified as *character-defining elements* of an historic place. They also give direction on how to minimize the impact of introducing a new element, or changing existing non-character-defining windows, doors and storefronts in an historic building.



The character-defining form and features of the Byrnes Block storefronts in Gastown, Vancouver, including their large plate-glass display windows with multipane transom windows above and recessed central doorways, have been retained through Preservation.





The windows of the Aberdeen Pavilion in Ottawa, a building that is valued as an example of a large-scale exhibition structure from the 19th century, include monitor windows at the top of the curved roof structure to provide daylight to the wide open space from above. Preservation of the character-defining wood windows involved scraping, sanding, re-puttying and repainting. While some replacement in kind was undertaken, almost all the original windows were retained, including the glass. Wholesale replacement of window units is not an appropriate Preservation treatment.



Doors are often targets for replacement because of security, energy efficiency or fire separation needs. Often it is possible to meet all these needs while retaining a historic door. Adding weather stripping can contribute greatly to a door's efficiency. Modern locks and locking mechanisms can often be installed with little damage. The fire rating of a solid wood door may meet certain code requirements.

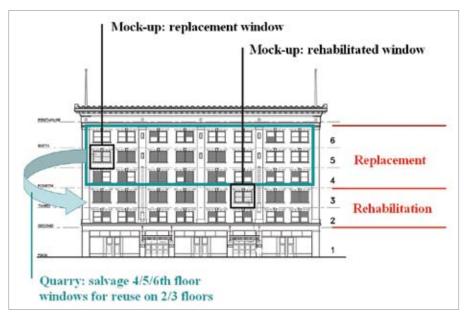
Windows and doors range from traditional wood and steel assemblies to modern sealed units, skylights, conservatories and revolving doors. They also come with a wide range of functional and decorative components, including frames, sashes, muntins, stained glass, glazing, hardware, sills, hoodmoulds, panelled or decorated jambs and mouldings, and interior and exterior shutters.

Windows, doors and storefronts are among the most conspicuous of any building's features. They punctuate the façade or, in the case of curtain wall construction, are integral to the exterior wall assembly. In addition to their function—providing light, views, fresh air and access to the building—their arrangement and design is fundamental to the building's appearance and heritage value. Each window, door or storefront is, in itself, a complex assembly whose function and operation must be considered as part of its conservation.

Windows and doors are vulnerable to wear and tear, changing tastes and functional requirements. The ongoing need for maintenance and upgrades can, however, motivate interventions that can have a negative impact on their heritage value. Often, windows and doors are replaced with newer units that have a much shorter service life, in the name of energy efficiency.

Storefronts often provide display space and are susceptible to rapidly changing commercial requirements. They are included in this section along with their functional and decorative features, such as windows, doors, transoms, cornices, corner posts, awnings, signs and lighting.

These guidelines provide general recommendations for windows, doors and storefronts. For recommendations on related issues, refer to the individual guidelines for Exterior Form and Mechanical and Electrical Systems. For materials that make up these assemblies, refer to the Guidelines for Materials.



While rehabilitating the Lougheed Building in Calgary, the windows in the best condition were repaired and consolidated on the lower levels where they were most visible from the street. New windows based on the existing were specially constructed for the upper levels. The location and reuse of the windows was carefully and clearly documented both for construction purposes and for future reference.





The Leopold Roy House in Saint-Quentin NB is a good example of a window, door and storefront restoration. Based on photographic and physical evidence, the original finishes and designs were uncovered and repaired or replaced in kind.



These large windows on King Street in St.John were originally slated for removal and replacement as part of the CentreBeam Place rehabilitation project. Instead, a condition revealed that the original windows could be retained and repaired, with the addition of interior storm to meet energy efficiency requirements.

| | Recommended | Not Recommended |
|----|--|--|
| 1 | Understanding windows, doors and storefronts and how they contribute to the heritage value of the historic building. | |
| 2 | Understanding the properties, operation and characteristics of the windows, doors and storefronts as well as changes and previous maintenance practices. | Failing to consider the impact of previous changes and maintenance practices, such as sealed windows or the removal of awnings or sunshades. |
| 3 | Documenting the form, materials and condition of windows, doors and storefronts, and their elements, before undertaking an intervention. This includes the configuration, style, method of operation and materials. | Undertaking an intervention that affects windows, doors and storefronts without first documenting their existing character and condition. |
| 4 | Assessing the condition of windows, doors and storefronts, including hardware, early in the planning process so that the scope of work is based on current conditions. | |
| 5 | Determining the cause of distress, damage, or deterioration of windows, doors and storefronts through investigation, monitoring, and minimally invasive or non-destructive testing techniques. | |
| 6 | Protecting and maintaining windows, doors and storefronts by using appropriate surface treatments, such as cleaning, rust removal, limited paint removal, and reapplying protective coating systems in kind. | Failing to adequately maintain windows, doors and storefronts on a regular basis. |
| 7 | Making windows, doors and storefronts weather tight and energy efficient by re-puttying and replacing or installing weatherstripping, adjusting hardware, and sealing openings and joints. | |
| 8 | Retaining sound and repairable windows, doors and storefronts, including their functional and decorative elements, such as hardware, signs and awnings. | Removing or replacing windows, doors and storefronts that can be repaired. Peeling paint, broken glass, stuck sashes, loose hinges or high air infiltration are not, in themselves, indications that these assemblies are beyond repair. |
| 9 | Stabilizing deteriorated windows, doors and storefronts by using structural reinforcement, and weather protection, or correcting unsafe conditions, as required, until repair work is undertaken. | Adding protective glazing or exterior storms to stained glass elements, without the involvement of a specialist conservator. |
| 10 | Repairing parts of windows, doors, or storefronts, by patching, piecing-in, consolidating, or otherwise reinforcing, using recognized conservation methods. Repair may also include the limited replacement in kind, or with a compatible substitute material, of those extensively deteriorated or missing parts of windows, doors and storefronts. Repairs should match the existing work as closely as possible, both physically and visually. | |

| | Recommended | Not Recommended |
|----|---|--|
| 11 | Protecting adjacent character-defining elements from accidental damage, or exposure to damaging materials during maintenance or repair work. | |
| 12 | Replacing in kind extensively deteriorated or missing parts of windows, doors and storefronts, where there are surviving prototypes. | Replacing an entire functional or decorative element, such as a shutter with a broken louver, or a door with a missing hinge, when only limited replacement of deteriorated or missing part is possible. Using a substitute material for the replacement part that neither conveys the same appearance as the surviving parts of the element, nor is physically or visually compatible. |
| 13 | Testing proposed interventions to establish appropriate replacement materials, quality of workmanship and methodology. This can include reviewing samples, testing products, methods or assemblies, or creating a mock-up. Testing should be carried out under the same conditions as the proposed intervention. | |
| 14 | Documenting all interventions that affect the building's windows, doors and storefronts, and ensuring that the documentation is available to those responsible for future interventions. | |

| | Recommended | Not Recommended |
|----|--|---|
| 15 | Repairing windows, doors and storefronts by using a minimal intervention approach. Such repairs might include the limited replacement in kind, or replacement with an appropriate substitute material, of irreparable or missing elements, based on documentary or physical evidence. | Replacing an entire window, door or storefront when the repair of materials and limited replacement of deteriorated or missing elements is feasible. Failing to reuse serviceable hardware, such as sash lifts and sash locks, hinges and doorknobs. |
| 16 | Replacing in kind irreparable windows, doors or storefronts based on physical and documentary evidence. If using the same materials and design details is not technically or economically feasible, then compatible substitute materials or details may be considered. | Removing an irreparable window, door or storefront and not replacing it, or replacing it with a new one that does not convey the same appearance or serve the same function. Stripping storefronts of character-defining materials or covering over those materials. |
| 17 | Replacing missing historic features by designing and installing new windows, doors and storefronts based on physical and documentary evidence, or one that is compatible in size, scale, material, style and colour. | Creating a false historical appearance because the new window, door or storefront is incompatible, or based on insufficient physical and documentary evidence. |

| | Recommended | Not Recommended |
|-----|--|---|
| 18 | Designing and constructing a new window, door or storefront when it is completely missing, with a new design that is compatible with the style, era and character of the historic place, or a replica based on documentary evidence. | Changing the number, location, size, or configuration of windows, doors and storefronts, by cutting new openings, blocking in existing openings, or installing replacement units that do not fit the opening. |
| 19 | Using signs, awnings, canopies or marquees of a scale and design that is compatible with the historic building. | Introducing a new design that is incompatible in size, scale, material, style or colour. |
| ADI | DITIONS OR ALTERATIONS TO WINDOWS, DOORS A | ND STOREFRONTS |
| 20 | Designing and installing new windows, doors or storefronts required by a new use on non-character-defining elevations in a manner that is compatible with the building's style, era and character. | Installing new windows, doors or storefronts that are incompatible with the building's style, era and character, or that obscure, damage or destroy character-defining elements. |
| 21 | Providing a setback in the design of drop ceilings, when required, to allow for full height window openings. | Inserting new floors or drop ceilings that cut across windows openings, changing the interior and exterior appearance of the building, and reducing access to daylight. |
| HEA | ALTH, SAFETY AND SECURITY CONSIDERATIONS | |
| 22 | Complying with health, safety and security requirements in a manner that conserves the heritage value of the windows, doors and storefronts and minimizes impact on its character-defining elements. | Damaging or destroying elements while making modifications to comply with health, safety and security requirements. |
| 23 | Working with code specialists to determine the most appropriate solution to health, safety and security requirements with the least impact on the character-defining elements and overall heritage value of the historic building. | Making changes to windows, doors or storefronts without first exploring equivalent health, safety and security systems, methods or devices that may be less damaging to the character-defining elements of the historic building. |
| 24 | Removing or encapsulating hazardous materials, such as lead-based paint, using the least-invasive abatement methods possible, and only after thorough testing has been conducted. | |
| 25 | Protecting windows, doors or storefronts against loss or damage by identifying and assessing specific risks, and by implementing an appropriate fire protection strategy that addresses those risks. For example, replacing a character-defining wood door with a compatible fire-rated door, only after carefully considering other options. | Implementing a generic fire-protection strategy, or one that does not appropriately address the specific fire risks of the historic building. Covering flammable, character-defining elements with fire-resistant sheathing or coatings that alter their appearance. |

| | Recommended | Not Recommended |
|-----|---|---|
| ACC | ESSIBILITY CONSIDERATIONS | |
| 26 | Complying with accessibility requirements in a manner that conserves, where possible, character-defining doors and storefronts, including their decorative and operating hardware. This can include using an automatic door opener instead of providing the required manoeuvring space for wheelchairs at doors. | Installing new hardware that damages character-defining doors and mouldings without considering alternate means of meeting accessibility requirements |
| 27 | Working with accessibility and conservation specialists and users to determine the most appropriate solution to accessibility issues with the least impact on the character-defining elements and overall heritage value of the historic building. | Altering character-defining windows, doors and storefronts without consulting the appropriate specialists and users. |
| SUS | TAINABILITY CONSIDERATIONS | |
| 28 | Complying with energy efficiency objectives in upgrades to character-defining doors, windows and storefronts by installing weather-stripping, storm windows, interior shades and, if historically appropriate, blinds and awnings. The energy efficiency of the building envelope and systems as a whole should be considered. | Replacing character-defining, multi-paned sashes with new thermal sashes with false <i>muntins</i> . |
| 29 | Working with specialists to determine the most appropriate solution to energy efficiency requirements with the least impact on the character-defining elements and overall heritage value of the historic building. | Making changes to windows, doors or storefronts without first exploring alternative energy efficiency solutions that may be less damaging to the character-defining elements and overall heritage value of the historic building. |
| 30 | Maintaining the building's inherent energy-conserving features in good operating condition, such as operable windows or louvered blinds for natural ventilation. | Replacing repairable windows with new ones, without evaluating the performance and remaining service life of the existing windows. |
| 31 | Installing interior storm windows where original windows are character-defining and exterior storms are inappropriate. | |

| | Recommended | Not Recommended |
|----|--|--|
| 32 | Repairing windows, doors and storefronts from the restoration period, using a minimal intervention approach, such as patching, splicing, consolidating, or otherwise reinforcing their materials and improving weather protection. | Replacing an entire window, door or storefront from the restoration period, when the repair of materials and limited replacement of deteriorated or missing parts is possible. |
| 33 | Replacing in kind an entire window, door or storefront from the restoration period that is too deteriorated to repair, using the physical evidence as a model to reproduce the assembly. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Removing an irreparable window, door or storefront and not replacing it, or replacing it with an inappropriate window, door or storefront. Reinstating a window, door or storefront detail that is damaging to character-defining elements. |

REMOVING EXISTING FEATURES FROM OTHER PERIODS

| 34 | Removing or altering non character-defining windows, doors or storefronts, or their associated functional or decorative elements, from a period other than the restoration period. | Failing to remove a non character-defining window, door or storefront from another period that confuses the depiction of the building's chosen restoration period. |
|----|---|--|
| 35 | Retaining alterations to windows, doors or storefronts that address problems with the original design, if those alterations do not have a negative impact the building's heritage value. | Removing a window, door or storefront from a later period that serves an important function in the building's ongoing use, such as an emergency exit door. |

RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD

| 36 | Recreating a missing window, door or storefront from the restoration period, based on physical or documentary evidence. | Installing a window, door or storefront that was part of the building's original design, but was never actually built, or constructing a feature thought to have existed during the restoration period, but for which there is insufficient documentation. |
|----|---|--|
| 37 | Recreating missing signage, awnings or canopies where sufficient physical or documentary evidence exists, and the building's current use allows. | Installing signs, awnings, canopies or marquees, for which there is insufficient physical or documentary evidence. |

4.3.6 ENTRANCES, PORCHES AND BALCONIES

These guidelines provide direction when entrances, porches and balconies are identified as a *character-defining element* of an historic place. Lobbies, vestibules, stairs, canopies, verandas, overhangs, *widow's walks* and *pergolas*, and their decorative and functional elements, such as pilasters, entablatures, fire escapes, lights and balustrades are also included, as well as features that allow access to the building by car, such as a drive-through, ramp, canopy or carport.

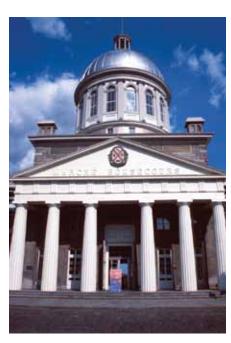
Entrances, porches and balconies contribute to a building's aesthetic and retain heat, block sun, or provide natural ventilation. Because entrances, porches and balconies are exposed to the elements, they require regular maintenance. Modifications may also be needed due to new functional requirements, code compliance, or accessibility. The addition of a new ramp or security clearance area are common interventions that may affect the layout and functional configuration of both the interior and exterior of an entranceway.







In Rehabilitation, deteriorated features should be repaired, whenever possible, and replaced when the severity of the damage makes it necessary. The stone steps of this house entrance were cracked. Appropriate work included repairing the stone steps and walls and installing a compatible metal handrail to meet building code requirements.



Porches, such as this portico on the old Bonsecours Market in Montreal (built 1844–1847) with its striking Greek Doric cast iron columns, can play a significant role in defining a building's character. Maximizing the retention of character-defining elements, including the portico, was the primary conservation objective when the building was rehabilitated into a municipal offices, exhibition spaces and restaurants.

The guidelines address these types of projects and provide general recommendations appropriate to all types of entrances, porches and balconies. For recommendations on associated issues, refer to the individual guidelines for Interior Arrangement; Roofs; Doors, Windows and Storefronts; Exterior Walls; and Structural Systems. For recommendations on specific materials that make up entrances, porches and balconies, refer to the Guidelines for Materials.



The curved, ornate metal canopy extending over the sidewalk at the Maltese Cross Building in Winnipeg's Exchange District clearly marks one of the buildings main entrances. Not using this entrance or establishing a new primary entrance in a different location would be inappropriate.





In Restoration, reinstating the historic paint colours from the restoration period should be based on physical or documentary evidence such as on-site paint analysis and colour photographs.



Adding a ramp to meet accessibility requirements should be designed to be compatible with a building's character. This new ramp at Province House in Charlottetown was discretely integrated into one side of an existing entrance porch.

| | Recommended | Not Recommended |
|----|--|---|
| 1 | Understanding entrances, porches or balconies and how they contribute to the heritage value of the historic building. | |
| 2 | Understanding the functions, properties and characteristics of entrances, porches and balconies, as well as changes and previous maintenance practices. | Failing to consider the impact of previous changes and maintenance practices, such as the removal of an awning or porch. |
| 3 | Documenting the form, materials and condition of entrances, porches and balconies before undertaking an intervention. | Undertaking an intervention that affects entrances, porches and balconies without first documenting their existing character and condition. |
| 4 | Assessing the condition of entrances, porches and balconies early in the planning process so that the scope of work is based on current conditions. | |
| 5 | Determining the cause of distress, damage or deterioration of entrances, porches and balconies through investigation, monitoring and minimally invasive or non-destructive testing techniques. | |
| 6 | Protecting and maintaining entrances, porches and balconies, by using appropriate surface treatments, such as cleaning, rust removal, limited paint removal, and reapplying protective coating systems in kind. | Failing to maintain paint and coatings, to replace damaged flashings, and to prevent the growth of plants and access by animals. |
| 7 | Retaining sound or repairable entrances, porches and balconies and their functional and decorative elements. | Removing sound or repairable elements, such as decorative woodwork, wrought iron detailing, or terra cotta tile. |
| 8 | Stabilizing deteriorated entrances, porches and balconies by structural reinforcement and weather protection, or correcting unsafe conditions, as required, until repair work is undertaken. | Removing deteriorated entrances, porches or balconies that could be stabilized or repaired. |
| 9 | Repairing parts of entrances, porches or balconies by patching, piecing-in, consolidating, or otherwise reinforcing, using recognized conservation methods. Repair might also include the limited replacement in kind, or with a compatible substitute material, of those extensively deteriorated or missing parts of entrances, porches and balconies. Repairs should match the existing work as closely as possible, both physically and visually. | |
| 10 | Protecting adjacent character-defining elements from accidental damage or exposure to damaging materials during maintenance or repair work. | |

| | Recommended | Not Recommended |
|----|--|---|
| 11 | Replacing in kind extensively deteriorated or missing parts of entrances, porches or balconies where there are surviving prototypes. | Replacing an entire functional or decorative element when limited replacement of deteriorated and missing parts is possible. Using a substitute material for the replacement part that neither conveys the same appearance as the surviving element, nor is physically or visually compatible. |
| 12 | Testing proposed interventions to establish appropriate replacement materials, quality of workmanship and methodology. This can include, reviewing samples, testing products, methods or assemblies, or creating a mock-up. Testing should be carried out under the same conditions as the proposed intervention. | |
| 13 | Documenting all interventions that affect the building's entrances, porches and balconies, and ensuring the documentation is available to those responsible for future interventions. | |

| | Recommended | Not Recommended |
|----|---|--|
| 14 | Repairing an entrance, porch or balcony by using a minimal intervention approach. Such repairs might include the limited replacement in kind, or replacement with an appropriate substitute material, of irreparable or missing elements, based on documentary or physical evidence. | Replacing an entire entrance, porch or balcony when the repair of materials and limited replacement of deteriorated or missing elements is feasible. |
| 15 | Replacing in kind an irreparable entrance, porch or balcony based on physical and documentary evidence. If using the same materials and design details is not technically or economically feasible, then compatible substitute materials or details may be considered. | Removing an irreparable entrance, porch or balcony and not replacing it, or replacing it with a new one that does not convey the same appearance or serve the same function. |
| 16 | Replacing missing historic features by designing and constructing a new entrance, porch or balcony, based on physical and documentary evidence, or one that is compatible in size, scale, material, style or colour. | Creating a false historical appearance because the new entrance, porch or balcony is incompatible, or based on insufficient physical and documentary evidence. |

| | Recommended | Not Recommended | |
|-----|---|--|--|
| ADD | ADDITIONS OR ALTERATIONS TO ENTRANCES, PORCHES AND BALCONIES | | |
| 17 | Modifying , replacing or designing a new entrance, porch or balcony required by a new use or applicable codes and regulations, in a manner that is compatible with the building's style, era and character. | Altering a secondary entrance to give it the appearance of a main entrance. Enclosing a porch or balcony in a manner that has a negative impact on the building's heritage value. Removing character-defining entrances, porches or balconies that are no longer needed for the new use. Constructing an addition that requires the loss of a character-defining entrance, porch, or balcony. | |
| HEA | LTH, SAFETY AND SECURITY CONSIDERATIONS | | |
| 18 | Adding new features to meet health, safety and security requirements, such as a new handrail, in a manner that conserves the heritage value of the entrance, porch or balcony and minimizes impact on its character-defining elements. | Damaging or destroying an entrance, porch or balcony while making modifications to comply with health, safety and security requirements. | |
| 19 | Working with code specialists to determine the most appropriate solution to health, safety and security requirements with the least impact on the character-defining elements and overall heritage value of the historic building. | Making changes to entrances, porches or balconies without first exploring equivalent systems, methods or devices that may be less damaging to the character-defining elements of the historic building. | |
| 20 | Exploring all options for modifications to existing entrances, porches and balconies to meet code and regulation requirements, prior to considering removal or replacement. | Removing an entrance, porch or balcony that does not comply with codes or regulations, and not replacing it with a compatible new assembly. | |
| 21 | Removing or encapsulating hazardous materials, using the least-invasive abatement methods possible, and only after thorough testing has been conducted. | | |
| 22 | Protecting entrances, porches or balconies against loss or damage by identifying and assessing specific risks, and by implementing an appropriate fire-protection strategy that addresses those specific risks. | Covering flammable, character-defining elements with fire-resistant sheathing or coatings that alter their appearance. | |

| | Recommended | Not Recommended |
|-----|---|--|
| ACC | ESSIBILITY CONSIDERATIONS | |
| 23 | Respecting the location of existing entrances, and porches when providing new accessibility-related features, such as ramps and lifts. For example, providing new functions for the public on the ground floor, or in areas already served by exits. | Relocating a main entrance when undertaking interventions to accommodate accessibility-related features. |
| 24 | Exploring all options for modifications to existing entrances, porches and balconies to meet accessibility requirements prior to considering removal or replacement. | Removing an entrance, porch or balcony that does not meet accessibility requirements, and not replacing it with a compatible new assembly. |
| 25 | Working with accessibility and conservation specialists and users to determine the most appropriate solution to accessibility issues with the least impact on the character-defining elements and overall heritage value of the historic building. | Altering character-defining entrances, porches and balconies without consulting the appropriate specialists and users. |
| SUS | TAINABILITY CONSIDERATIONS | |
| 26 | Complying with energy efficiency objectives by maintaining inherent energy conserving features, such as overhangs, awnings and vestibules while preserving heritage value. | Removing character-defining vestibules, porches and balconies that contribute to the inherent energy efficiency of the historic building. |
| 27 | Working with specialists to determine the most appropriate solution to energy efficiency requirements with the least impact on the character-defining elements and overall heritage value of the historic building. | Making changes to entrances, porches and balconies without first exploring alternative energy efficiency solutions that may be less damaging to the character-defining elements and overall heritage value of the historic building. |

| | Recommended | Not Recommended |
|----|--|--|
| 28 | Repairing entrances, porches and balconies from the restoration using a minimal intervention approach, such as patching, splicing, consolidating or otherwise reinforcing its materials and improving weather protection. | Replacing an entire entrance, porch or balcony from the restoration period when the repair of materials and limited replacement of deteriorated or missing parts is possible. |
| 29 | Reinstating an open porch or balcony that was enclosed. | |
| 30 | Replacing in kind an entire entrance, porch or balcony from the restoration period that is too deteriorated to repair, using the physical evidence as a model to reproduce the assembly. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Removing an irreparable entrance, porch or balcony from the restoration period and not replacing it, or replacing it with an inappropriate entrance, porch or balcony. Reinstating an entrance, porch or balcony detail that is damaging to character-defining elements. |

REMOVING EXISTING FEATURES FROM OTHER PERIODS

| 31 | Removing or altering a non character-defining entrance, porch or balcony from a period other than the restoration period. | Failing to remove a non character-defining entrance, porch or balcony from another period that confuses the depiction of the building's chosen restoration period. |
|----|--|--|
| 32 | Retaining alterations to entrances, porches or balconies that address problems with the original design, if those alterations do not have a negative impact on the building's heritage value. | Removing alterations to an entrance, porch or balcony that serve an important function in the building's ongoing use, such as a ramp or handrail. |

RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD

| 33 | Recreating a missing entrance, porch or balcony, or one of its features, from the restoration period, based on physical or documentary evidence; for example, duplicating a fanlight or porch column. | Constructing an entrance, porch or balcony that was part of the building's original design but was never actually built, or a feature thought to have existed during the restoration period but for which there is insufficient documentation. |
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4.3.7 INTERIOR FEATURES

These guidelines provide direction when a building's interior features are identified as *character-defining elements* of an historic place. They also give direction on how to preserve those features through maintenance and repair, or when a change in use or regulations dictates the need for alterations or additions.

Interior features can include elements such as interior walls, floors and ceilings. mouldings, staircases, fireplace mantels, faucets, sinks, built-in cabinets, light fixtures, hardware, radiators, mail chutes, telephone booths and elevators. Because their heritage value resides not only in their physical characteristics, but also in their location in the historic building, it is important to protect them from removal. This is particularly true of doors, banisters, church pews, fireplace mantels, sinks and light fixtures, which are often replaced instead of being upgraded. Reuse in their original location not only protects their heritage value, but is also a more sustainable approach to conserving these artefacts.



Artwork, including sculpture and murals may contribute to the character of an interior. The murals in the Saskatchewan Legislature Building required the expertise of art conservators for their repair and cleaning undertaken for the Saskatchewan Centennial.



When adding any new features to meet functional requirements, adjacent character-defining elements should be conserved. A new glass wall in the Dominion Public Building in Halifax was carefully designed to complement the quality of the lobby's materials and finishes, and installed to avoid damaging the adjacent character-defining plasterwork and stone wainscoting.

These guidelines provide general recommendations appropriate to all types of interior features. For recommendations on associated issues related to interior features, refer to Interior Arrangement. For recommendations on specific materials that make up interior features, refer to the Guidelines for Materials.



Functional elements, such as radiators and decorative grilles, can contribute to the overall heritage character of a place. Opportunities to retain these features when upgrading or replacing mechanical systems should be explored. This heating grate is one of many that were retained and repaired for use with a new heating plant when the Dawson City Telegraph office was rehabilitated into housing.



These large light fixtures in the main hall of the Jasper train station were rewired and adapted to accept compact fluorescent bulbs in order to meet sustainability and current health and safety concerns. Light fixtures of any scale can be similarly rehabilitated rather than being replaced.



Historic guards and handrails often do not conform to current codes and safety regulations. Modifying historic balustrades in a compatible way to meet these requirements is recommended over replacement. The balustrade at the National Archives and Library in Ottawa underwent a sensitive rehabilitation to meet current requirements for spacing between balusters.

| | Recommended | Not Recommended |
|----|--|--|
| 1 | Understanding interior features and how they contribute to the heritage value of the historic building. | |
| 2 | Understanding the properties and characteristics of interior features as well as changes and previous maintenance practices; for example, investigating the reconfiguration of a staircase or removal of a reception counter, or testing the loading capacity of a period elevator. | Failing to consider the impact of previous changes and maintenance practices on the interior features. |
| 3 | Documenting the form, materials and condition of interior features before undertaking an intervention. | Undertaking an intervention that affects interior features without first documenting their character and condition. |
| 4 | Assessing the condition of interior features early in the planning process so that the scope of work is based on current conditions. | |
| 5 | Determining the cause of distress, damage or deterioration of interior features through investigation, monitoring and minimally invasive or non-destructive testing techniques. | |
| 6 | Protecting and maintaining interior features through appropriate repairs to their functional parts and by using appropriate surface treatments, such as cleaning, rust removal, limited paint removal and reapplying protective coating systems in kind. | Failing to maintain interior features on a regular basis. |
| 7 | Using proven cleaning methods. More aggressive cleaning should be considered only after other gentler methods have proven to be ineffective. | Changing the texture and patina of interior features and finishes through the use of abrasive methods to remove paint or finishes. |
| 8 | Using paint or coating systems of appropriate colour and texture. | |
| 9 | Preserving the method of operation of interior features that contribute to the heritage value of the historic place. For example, continuing to use a fireplace. | Altering or eliminating the method of operation of interior features that contributes to the heritage value of the historic building. |
| 10 | Retaining sound and repairable interior features. | Removing character-defining interior features, such as light fixtures, radiators and wood work. Applying paint, plaster or other finishes to surfaces that have historically been unfinished. Removing paint, plaster or other finishes from historically finished surfaces, such as removing plaster to expose a brick wall, or stripping paint from doors and trim work. |
| 11 | Stabilizing deteriorated interior features by structural reinforcement, or correcting unsafe conditions, as required, until repair work is undertaken. | Removing deteriorated interior features that could be stabilized or repaired. |

| | Recommended | Not Recommended |
|----|--|---|
| 12 | Repairing parts of interior features by patching, piecing-in, consolidating or otherwise reinforcing, using recognized conservation methods. Repair may also include the limited replacement in kind, or with a compatible substitute material, of those extensively deteriorated or missing parts of interior features. Repairs should match the existing work as closely as possible, both physically and visually. | |
| 13 | Protecting adjacent character-defining elements from accidental damage or exposure to damaging materials during maintenance or repair work. | Failing to protect interior features against damage, theft or vandalism during construction. |
| 14 | Replacing in kind extensively deteriorated or missing parts of interior features where there are surviving prototypes. | Replacing an entire interior feature when only limited replacement of deteriorated and missing parts is possible. Using a substitute material for the replacement part that neither conveys the same appearance as the surviving interior feature, nor is physically or visually compatible. |
| 15 | Testing proposed interventions to establish appropriate replacement materials, quality of workmanship and methodology. This can include reviewing samples, testing products, methods or assemblies, or creating a mock-up. Testing should be carried out under the same conditions as the proposed intervention. | |
| 16 | Documenting all interventions that affect the building's interior features, and ensuring that the documentation is available to those responsible for future interventions. | |

| | Recommended | Not Recommended |
|----|---|---|
| 17 | Repairing interior features by using a minimal intervention approach. Such repairs might include the limited replacement in kind, or replacement with an appropriate substitute material, of irreparable or missing elements, based on physical or documentary evidence. | Replacing an entire interior feature, such as a staircase, paneled wall, parquet floor or cornice, when the repair of materials and limited replacement of deteriorated or missing parts is feasible. |
| 18 | Replacing in kind an irreparable interior feature based on physical and documentary evidence. Examples include wainscoting, a pressed-metal ceiling or interior stairs. If using the same material and design details is not technically or economically feasible, then compatible substitute material or details may be considered. | Removing an element that is irreparable and not replacing it, or replacing it with a new feature that does not convey the same appearance or serve the same function. |

| | Recommended | Not Recommended |
|-----|---|--|
| 19 | Replacing missing historic features by designing and installing a new interior feature, based on physical and documentary evidence, or one that is compatible in size, scale, material, style or colour. | Creating a false historical appearance because the new interior feature is incompatible or based on insufficient physical and documentary evidence. |
| 20 | Operating and using a functioning interior feature that is important to the heritage value of the historic building, such as rewiring a character-defining light fixture according to the appropriate safety codes. | Ceasing use of or altering a functioning interior feature that is important in defining the heritage value of the historic building. |
| ADE | DITIONS OR ALTERATIONS TO INTERIOR FEATURES | |
| 21 | Designing , locating and installing new interior features, such as stairways, cabinetwork or fireplaces, in a manner that respects the building's heritage value. | Introducing a new interior feature that is incompatible in size, scale, material, style or colour with the existing features. |
| HEA | LITH, SAFETY AND SECURITY CONSIDERATIONS | |
| 22 | Upgrading interior features to meet health, safety and security requirements, in a manner that preserves the existing feature and minimizes impact on its heritage value. | Damaging or destroying interior features while making modifications to comply with health, safety and security requirements. |
| 23 | Working with code specialists to determine the most appropriate solution to health, safety and security requirements with the least impact on the character-defining elements and overall heritage value of the historic building. | Making changes to interior features, without first exploring equivalent systems, methods or devices that may be less damaging to the character-defining elements of the historic building. |
| 24 | Exploring all options for modifications to existing interior features to meet functional requirements prior to considering removal or replacement. | Removing an interior feature, such as a security desk, without investigating options to meet current requirements. |
| 25 | Removing or encapsulating hazardous materials, such as friable asbestos insulation, using the least-invasive abatement methods possible, and only after thorough testing has been conducted. | Neglecting to maintain and repair the cladding protecting encapsulated asbestos insulation. |
| 26 | Installing sensitively designed fire-suppression systems that retain character-defining elements and respect heritage value. | Covering flammable character-defining elements with fire-resistant sheathing or coatings that alter their appearance. |

| | Recommended | Not Recommended |
|-----|---|--|
| ACC | ESSIBILITY CONSIDERATIONS | |
| 27 | Finding solutions to meet accessibility requirements that minimize impact on interior features, such as locating public functions strategically to limit changes to the interior. | |
| 28 | Working with accessibility and conservation specialists and users to determine the most appropriate solution to accessibility issues with the least impact on the character-defining elements and overall heritage value of the historic building. | Altering character-defining interior features, without consulting the appropriate specialists and users. |
| 29 | Respecting the location of existing staircases when providing new accessibility-related features, such as ramps and lifts. | Locating accessibility-related features in secondary or service areas, when making compatible modifications to primary vertical circulation areas is possible. |
| 30 | Exploring all options for modifications to existing interior features, prior to considering removal or replacement. | |
| SUS | TAINABILITY CONSIDERATIONS | |
| 31 | Complying with energy efficiency objectives by maintaining energy-conserving interior features, such as interior shutters, transoms and vestibules. | Failing to incorporate interior features, such as ventilation grilles or radiator covers, as part of upgrades to heating and ventilation systems. |
| 32 | Complying with energy-efficiency objectives by upgrading rather than replacing character-defining light fixtures. | |
| 33 | Working with specialists to determine the most appropriate solution to energy efficiency requirements with the least impact on the character-defining elements and overall heritage value of the historic building. | Making changes to interior features, without first exploring alternative energy efficiency solutions that may be less damaging to the character-defining elements and overall heritage value of the historic building. |

| | Recommended | Not Recommended |
|----|---|--|
| 34 | Repairing interior features from the restoration period by using a minimal intervention approach such as patching, splicing, consolidating or otherwise reinforcing its materials. | Replacing an entire interior feature from the restoration period, such as a staircase, when the repair of materials and limited replacement of deteriorated or missing parts is possible. |
| 35 | Replacing in kind an entire interior feature from the restoration period that is too deteriorated to repair, using the physical evidence as a model for reproduction. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Removing an irreparable interior feature from the restoration period and not replacing it, or replacing it with an inappropriate interior feature. Reinstating a detail of an interior feature that is damaging to character-defining elements. |

REMOVING EXISTING FEATURES FROM OTHER PERIODS

| 36 | Removing or altering a non character-defining interior feature from a period other than the restoration period. | Failing to remove a non character-defining interior feature from another period that confuses the depiction of the building's chosen restoration period. |
|----|---|--|
| 37 | Retaining alterations to interior features that address problems with the original design if those alterations do not have a negative impact on the building's heritage value. | Removing an interior feature that serves an important function in the building's ongoing use, such as a security desk or accessible washroom. |

RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD

| 38 | Recreating a missing interior feature from the restoration period, based on physical or documentary evidence; for example, duplicating a marble mantel or staircase. | Constructing an interior feature that was part of the building's original design but never actually built, or a feature thought to have existed during the restoration period but for which there is insufficient documentation. |
|----|---|--|
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4.3.8 STRUCTURAL SYSTEMS

These guidelines provide direction when a structural system is identified as a *character-defining element* of an historic place. They also provide direction on maintaining, repairing and replacing structural components or systems.



In Preservation, visible structural systems that are important in defining a building's overall character should not be removed or obscured. When evaluating the physical condition of the structural system (using minimally destructive techniques) indicates that repairs of deteriorated parts are required, they should match the old in form and detailing and have adequate strength.



Analyzing structural systems built using traditional materials and assemblies can be challenging. These historic materials and assemblies often have variable properties, and can include flaws or deterioration that have developed over time. Testing can give some insight into these properties. However, extrapolating findings from localized tests to describe the strength and stiffness of a larger structural assembly is not always straightforward. Thus, any analysis should account for the variability of the materials and assemblies, and should be repeated using different assumptions to arrive at a range of results predicting how the assembly will behave.

Structural systems are the deliberate assembly of distinct components that ensure a structure or building will stand up. A structural system must meet life safety requirements (i.e., it should not collapse) and serviceability requirements for the architectural elements and finishes attached to it (i.e., it should not bend or deform excessively). Structural systems are typically composed of two distinct components: the substructure or foundation; and the superstructure above. Structural systems can take many forms, such as post and beam, arches, domes, trusses or frames, and use many different materials, such as stone, brick, steel, wood or concrete.

The regulations to which building structures must perform have evolved considerably over time. Building codes first appeared in Canada in the 1940s, and now include requirements to resist loads such as earthquakes, that were never considered in earlier times. Modern codes also no longer address materials and construction techniques that were used to build many historic building structures. Despite these changes, early structural systems, when properly interconnected and maintained in good condition, can be made to work effectively. The challenge of conserving the structures often lies in confirming whether they can achieve the level of performance expected from today's building codes. The services of a professional engineer are mandatory whenever a structural system is investigated, analysed or modified. Knowledge of structural behaviour and period materials and technology are essential to the investigation and analysis of an historic structure.

These guidelines provide general recommendations appropriate for all types of structural systems. Because structural systems can also form the wall assembly, such as in load-bearing masonry or log structures, it may be difficult to perform work on a structural system without adversely affecting character-defining architectural components and assemblies.

When intervening on an historic building's structure, refer to the related Guidelines for Buildings. For recommendations on specific materials that make up structural systems, refer to the Guidelines for Materials. When undertaking any excavation work, consult the Guidelines for Archaeological Sites. Structural systems are also present in many engineering works, therefore, the Guidelines for Engineering Works should be referred to when conserving those types of historic places.



It is important to adapt interim stabilization interventions to the anticipated lifespan of the intervention and make it as reversible as possible. Temporary steel cross bracing supports an exterior wall at St. Peter's Dynevor Anglican Church Rectory in Selkirk MB.



When a building's structure has performed satisfactorily for many years, and has had no recent change in use, its structure is likely satisfactory for wind and gravity loads. The National Building Code of Canada, Commentary L, describes applying this logic when evaluating and upgrading an existing building. This logic, however, cannot be applied when there is significant deterioration, a change in use is planned or seismic strength is in question. Under these circumstances, a detailed engineering investigation and analysis is necessary to verify the structure's performance.

The McLeod Building, an early terra-cotta high-rise in Edmonton, was rehabilitated from office space to condominiums with no need for alterations to the structural system.

| | Recommended | Not Recommended |
|---|--|--|
| 1 | Understanding the structural system and how it contributes to the heritage value of the historic place. | |
| 2 | Understanding the techniques and materials used in the construction of the structural system, any subsequent alterations and their effects, and the loads it was subjected to over its history. | |
| 3 | Documenting the form, materials, function and condition of structural systems before undertaking an intervention. | Undertaking an intervention that affects structural systems, without first documenting their existing character and condition. |
| 4 | Assessing the condition of structural systems, including the foundations, early in the planning process so that the scope of work is based on current conditions. | Carrying out a level of conservation work that exceeds what is required, or taking action based on assumptions or rules of thumb. |
| 5 | Determining the physical condition of structural systems or their components, and the cause of distress, damage or deterioration through investigation, analysis, monitoring and minimally invasive or non-destructive testing techniques. | Using highly destructive probing or sampling techniques that damage or destroy structural systems or their components. Failing to identify, evaluate and treat the causes of distress, damage or deterioration of structural systems or their components. Carrying out a repair that does not treat or address the cause of the problem. |
| 6 | Verifying the theoretical characteristics of structural systems by testing them in place to determine their actual characteristics, provided the appropriate precautions are taken to avoid their failure or destruction. | Reinforcing or replacing structural systems or their components that are theoretically overloaded, without validating the analysis through an accurate comparison with their actual, observed performance. |
| 7 | Taking into account the past performance and load history of structural systems or their components when determining their present or future capacity. | |
| 8 | Reviewing the requirements of codes and regulations for structural performance, and involving experts and code officials early in the process to investigate systems, methods or devices that minimize the impact on character-defining elements. | Forcing generic or conventional code solutions on an historic place, without thoroughly assessing their effect on character-defining elements and rigorously investigating alternatives with the authority. |
| 9 | Determining the appropriate performance requirements that must be applied in assessing the condition and performance of an historic structural system. | |

| | Recommended | Not Recommended |
|----|---|--|
| 10 | Protecting and maintaining structural systems by maintaining the building envelope—roof to foundation—including roofing, flashings, gutters and downspouts, wall components of masonry, concrete, wood and metals; ensuring positive drainage away from foundations; and ensuring that structural members are free of fungal decay and insect infestation. | Failing to adequately maintain structural systems and their components on a cyclical basis, causing the materials to deteriorate. |
| 11 | Imposing limits on the acceptable use of structures based on their actual characteristics and capacities, to protect them from damage; balancing present and anticipated usage demands with heritage value; and avoiding, where possible, any use that would damage or destroy the structural system. | |
| 12 | Retaining sound structural systems or deteriorated structural systems that can be repaired. | Replacing or rebuilding structural systems that can be repaired. Relocating structural components when their location is part of their heritage value. |
| 13 | Stabilizing deteriorated structural systems by structural reinforcement, weather protection or correcting unsafe conditions, as required, until repair work is undertaken. | Removing deteriorated structural systems that could be stabilized or repaired. Leaving known structural problems untreated. |
| 14 | Repairing deteriorated structural systems and their components in a manner that is physically and visually compatible with the historic building or structure. | Replacing an entire structural system or component when repair or limited replacement of deteriorated or missing parts is possible. |
| 15 | Protecting adjacent character-defining elements from accidental damage or exposure to damaging materials during maintenance or repair work. | |
| 16 | Accommodating the thermal expansion and contraction of structural systems by introducing expansion or control joints, and incorporating such joints into existing crack patterns of masonry and concrete structures where possible. | Filling moving cracks or expansion joints with materials that inhibit or prevent the thermal expansion and contraction of the structural system. |
| 17 | Replacing in kind extensively deteriorated or missing parts of structural systems where there are surviving prototypes. The new work should match the old as closely as possible in form, materials and detailing, and have adequate strength. | Replacing an entire structural system or component when limited replacement of deteriorated and missing parts is possible. Altering a structural system by adding new structural members that alter the load-carrying system of the original structure. |

| | Recommended | Not Recommended |
|----|---|-----------------|
| 18 | Testing proposed interventions to establish appropriate replacement materials, quality of workmanship and methodology. This can include reviewing samples, testing products, methods or assemblies, or creating a mock-up. Testing should be carried out under the same conditions as the proposed intervention. | |
| 19 | Documenting all interventions that affect structural systems, and ensuring the documentation is available to those responsible for future interventions. | |

GENERAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended |
|----|---|--|
| 20 | Repairing structural systems by augmenting or upgrading individual components, such as <i>sistering joists</i> with new wood to improve structural efficiency. Repairs might include the limited replacement in kind, or replacement with an appropriate substitute material, of irreparable or missing elements, based on documentary or physical evidence. Repairs might also include dismantling and rebuilding a masonry or timber structure, if an evaluation of its overall condition determines that more than limited repair or replacement in kind is required. | Upgrading a structural system in a manner that alters the character-defining exterior of an historic building, or damages character defining interior features or spaces. Replacing a structural member or component when it could be augmented and retained. |
| 21 | Repairing deteriorated structural systems or their components, using new technologies where the original technology has been found to accelerate deterioration. The new technology should be chosen based on its compatibility with the historic element, its reliability and its visual impact on the character-defining elements and structural system as a whole. | Repairing deteriorated structural systems or their components, using new technologies to improve durability when the original technology performs adequately. Reinforcing structural systems or their components, without verifying the effectiveness or the level of benefit achieved by the reinforcement work. |
| 22 | Replacing in kind an irreparable structural system or component based on physical and documentary evidence. | |
| 23 | Replacing missing historic features by designing and installing a new structural system or component based on physical and documentary evidence, or one that is compatible in size, scale, material, style and colour. | Creating a false historical appearance because the new structural system or component is incompatible, or based on insufficient physical and documentary evidence. |

GENERAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended | |
|-----|--|---|--|
| ADE | ADDITIONS OR ALTERATIONS TO STRUCTURAL SYSTEMS | | |
| 24 | Designing the structural system of a new addition or altering an existing structure in a manner that is compatible with the building's structural system and respects its heritage value. | Radically changing character-defining interior spaces, or damaging or destroying interior features or finishes, while attempting to correct structural deficiencies in preparation for a new use. | |
| 25 | Limiting new excavations adjacent to foundations to avoid undermining the stability of the structural system or adjacent structures. | | |
| HEA | LTH, SAFETY AND SECURITY CONSIDERATIONS | | |
| 26 | Complying with health, safety and security requirements, such as seismic upgrades or blast protection, in a manner that conserves the structural system and minimizes impact on its heritage value. | Damaging or destroying character-defining elements, while making modifications to comply with health, safety and security requirements. | |
| 27 | Working with code specialists to determine the most appropriate solution to health, safety and security requirements with the least impact on the character-defining elements and overall heritage value of the historic place. | Making changes to structural systems without first exploring equivalent systems, methods or devices that may be less damaging to the character-defining elements of the historic place. | |
| 28 | Removing or encapsulating hazardous materials, using the least-invasive abatement methods possible, and only after thorough testing has been conducted. | | |
| 29 | Protecting structural systems against loss or damage by identifying and assessing specific risks, and by implementing an appropriate fire-protection strategy that addresses those specific risks. | Covering flammable, character-defining structural components with fire-resistant sheathing or coatings that alter their appearance. | |
| 30 | Applying fire retardant materials that do not damage or obscure character-defining structural systems. For example, applying fire-retardant, <i>intumescent paint</i> to an exposed column to further protect its steel. | | |
| SUS | TAINABILITY CONSIDERATIONS | | |
| 31 | Working with specialists to determine the most appropriate solution to energy efficiency and sustainability requirements with the least impact on the character-defining elements and overall heritage value of the historic place. | Making changes to character-defining structural systems, including foundations, without first exploring alternative sustainability solutions that may be less damaging to the character-defining elements and overall heritage value of the historic place. | |

| | Recommended | Not Recommended |
|----|---|--|
| 32 | Repairing the structural system from the restoration period by stabilizing, reinforcing or otherwise upgrading individual components in a manner that is consistent with the restoration period. | Replacing an entire structural system or its component from the restoration period when the repair or limited replacement of deteriorated or missing components is possible. |
| 33 | Replacing in kind an entire structural system or component from the restoration period that is too deteriorated to repair, using the physical evidence as a model to reproduce the system or component. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Removing an irreparable structural system or component from the restoration period and not replacing it, or replacing it with an inappropriate new system or component. |

REMOVING EXISTING FEATURES FROM OTHER PERIODS

| 34 | Retaining alterations to structural systems that address | Removing alterations to structural systems or |
|----|---|--|
| | problems with the original design, if those alterations do not | components that serve an important function in |
| | have a negative impact on the building's heritage value. | the building's ongoing use. |
| | | |

RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD

| 35 | Recreating a missing structural component from the restoration period, based on physical or documentary evidence. | Installing a structural system or component that was part of the building's original design but never actually built, or constructing a structural system or component thought to have existed during the restoration period but for which there is insufficient documentation. |
|----|--|---|
|----|--|---|

4.3.9 MECHANICAL AND ELECTRICAL SYSTEMS

These guidelines provide direction when a mechanical or electrical system is identified as a *character-defining element* of an historic place. They also give information on how to minimize the impact of introducing a new, or changing an existing non-character-defining mechanical or electrical system. Conserving these systems can be a challenge because their construction and operation are governed by stringent safety codes and regulations, and because historic installations and materials may no longer meet code requirements.

Mechanical systems (heat, ventilation, air conditioning and refrigeration) control a building's interior environment. They also include systems that provide necessary services, such as septic systems, potable water supply and fire suppression. The most visible components of mechanical systems include interior features such as radiators, vents, fans, grilles and plumbing fixtures.



In modern buildings, reinforced concrete is often left exposed or simply painted in order to display a distinctive structural form, such as this waffle slab ceiling in the Victoria City Hall Annex. Inserting new wiring or services into such spaces can be challenging. Discreetly using conduit is recommended rather than installing false ceilings or walls that cover the historic structure.





When upgrading the mechanical system at the George Brown House in Toronto, the design solution integrated original heating and ventilation systems, such as operable windows and the existing hot water radiator system, with technological interventions to provide increased levels of controlled cooling and heating. The original boiler was restored and incorporated into a modern hot water radiator system, and the interior finishes were retained by strategically locating drop ceilings and reusing historic fireplace flues and 'warm' and 'foul' air shafts.





During the rehabilitation of the Gooderham & Worts Distillery district in Toronto much of the original alcohol production equipment was retained in place, this included distribution piping that traveled throughout the large site, within and between buildings.

A cyclone blower and related ductwork on the 5th floor of the granary was also retained. Some of the lengths of duct were adjusted to accommodate a new concrete floor and other lengths were removed where they blocked access or were a hazard.

Contemporary building design typically uses an active approach to controlling the building environment with fans, blowers, boilers, furnaces, ducts and plenums. In some cases, the systems are deliberately exposed as an aesthetic display or an architectural expression of the component's functionality. More traditional building designs, however, often used passive techniques that were integrated into the building's design. These passive designs can include character-defining elements such as high ceilings, open corridors and transoms that facilitate air circulation. operable windows and shutters, and canopies and plantings that provide shade and act as windbreaks.

Electrical systems include power and communication systems such as electric lighting, intercoms, doorbells, telephones, buzzers, alarm systems and detectors. The proliferation of equipment such as computers, telephones and lighting can place extreme demands on electrical systems necessitating their upgrade or replacement. While the conservation of electrical and communications systems often focuses on fixtures, other aspects should also be considered, such as sounds made by alarms, bells or buzzers, and lighting design, including light levels and colour, and relationships to sources of natural light.

These guidelines provide general recommendations for mechanical and electrical systems. For recommendations on the conservation of mechanical and electrical fixtures, refer to Interior Features. For recommendations on architectural features and assemblies related to passive mechanical and lighting systems, refer to Windows, Doors and Storefronts; Exterior Walls; Exterior Form; and Interior Arrangement. Mechanical systems can also form an important part of an engineering work; the Guidelines for Engineering Works should be referred to when conserving those types of historic places.

| | Recommended | Not Recommended |
|----|---|---|
| 1 | Understanding the mechanical or electrical system and how it contributes to the heritage value of the historic building. | |
| 2 | Understanding the construction history, theory and design behind the mechanical or electrical system, and its relationship with the building's site and climate. | |
| 3 | Documenting the form, materials, function and condition of mechanical and electrical systems before undertaking an intervention. | Undertaking an intervention that affects a mechanical or electrical system without first documenting its components, layout, materials, operation and condition. |
| 4 | Assessing the condition of mechanical and electrical systems and their components early in the planning process so that the scope of work is based on current conditions. | |
| 5 | Determining the physical condition of mechanical and electrical systems or their components, and the cause of distress, damage or deterioration through investigation, analysis, monitoring and minimally invasive or non-destructive testing techniques. | Using highly destructive probing or sampling techniques that damage or destroy mechanical and electrical systems or their components. Failing to identify, evaluate and treat the causes of distress, damage or deterioration of mechanical and electrical systems, or their components. Carrying out a repair that does not treat or address the cause of the problem. |
| 6 | Testing mechanical and electrical systems or their components to determine their actual characteristics provided the appropriate precautions are taken to avoid their failure or destruction. | |
| 7 | Protecting and maintaining mechanical or electrical systems and their components through cyclical cleaning and other appropriate measures. | |
| 8 | Preserving abandoned systems that are character-defining, such as wire bell pull systems, speaking tubes and mail drops. | |
| 9 | Preserving the method of operation of mechanical and electrical systems that contribute to the heritage value of the historic place. For example, maintaining a passive ventilation system in a building, rather than switching to forced air ventilation. | Altering or eliminating the method of operation of mechanical and electrical systems that contributes to the heritage value of the historic building. |
| 10 | Retaining sound mechanical and electrical systems or deteriorated systems that can be repaired. | Replacing or removing mechanical and electrical systems or their components that can be repaired. |

| | Recommended | Not Recommended |
|----|---|--|
| 11 | Repairing deteriorated mechanical or electrical systems and their components in a manner that is physically and visually compatible with the historic place. | Replacing an entire mechanical or electrical system or component, when repair or limited replacement of deteriorated or missing parts is possible. |
| 12 | Protecting adjacent character-defining elements from accidental damage or exposure to damaging materials during maintenance or repair work. | |
| 13 | Replacing in kind extensively deteriorated or missing parts of mechanical or electrical systems where there are surviving prototypes. The new work should match the old as closely as possible in form, materials and detailing and have adequate capacity. | |
| 14 | Operating and using functioning mechanical and electrical systems that are important in defining the heritage value of the historic place, according to the appropriate safety codes. | Ceasing to use or altering a functioning mechanical or electrical system that is important in defining the heritage value of the historic place. |
| 15 | Testing proposed interventions to establish appropriate replacement materials, quality of workmanship and methodology. This can include reviewing samples, testing products, methods or assemblies, or creating a mock-up. Testing should be carried out under the same conditions as the proposed intervention. | |
| 16 | Documenting all interventions that affect the building's mechanical and electrical systems, and ensuring that the documentation is available to those responsible for future interventions. | |

| | Recommended | Not Recommended |
|----|--|---|
| 17 | Repairing mechanical and electrical systems that contribute to the heritage value of the historic place. Such repairs might include the limited replacement in kind, or replacement with an appropriate substitute material, of irreparable or missing components, based on documentary or physical evidence. | Replacing a mechanical or electrical system or component that could be upgraded and retained. |
| 18 | Repairing deteriorated mechanical and electrical systems or their components, using new technologies when the original technology has been found to accelerate deterioration. The new technology should be chosen based on its compatibility with the historic element, its reliability, and its visual impact on the character-defining elements and mechanical or electrical system as a whole. | Repairing deteriorated character-defining mechanical and electrical systems or their components, using new technologies to improve durability when the original technology performs adequately. |

| | Recommended | Not Recommended |
|----|---|--|
| 19 | Replacing in kind those portions or components of mechanical and electrical systems that are either extensively deteriorated or missing, when there are surviving prototypes. | Installing a visible replacement element that does not convey the same appearance. |
| 20 | Replacing missing historic features by designing and installing new mechanical or electrical systems or components, based on physical and documentary evidence, or one that is compatible in size, scale, material, style or colour. | Creating a false historical appearance because the new mechanical or electrical system or component is incompatible, or based on insufficient physical and documentary evidence. |

ADDITIONS OR ALTERATIONS TO MECHANICAL AND ELECTRICAL SYSTEMS

| 21 | Using planned additions to provide space for new functions requiring controlled ambient conditions, such as exhibition or storage spaces in a museum, while using the historic building for functions that can be accommodated by the existing systems. | Introducing functions that require a controlled environment in buildings that were designed for natural light or ventilation. Locating additions where they block existing windows or skylights that provide natural ventilation and daylight. |
|----|---|---|
| 22 | Installing a new mechanical or electrical system, if required by the new use, while ensuring the least alteration possible to the building's interior arrangement and exterior form, and the least damage to the character-defining elements of the historic building. | Concealing systems in walls or ceilings causing the removal of character-defining elements. |
| 23 | Placing new mechanical or electrical systems in existing, non-character-defining spaces, rather than constructing a new addition. | Installing a drop ceiling to hide mechanical equipment when it alters the proportions of character-defining interior spaces. |
| 24 | Installing new heating/air conditioning units in a manner that does not damage or obscure character-defining elements and generate excessive moisture. | Installing heating/air conditioning units in window frames rather than improving the efficiency and operation of the existing mechanical system. |
| 25 | Installing individual heating/air conditioning units in window frames, if necessary, so that sashes and frames are protected. Consider window installations only when all other viable heating/cooling systems would result in significant damage to character-defining materials. | Radically changing the appearance of the historic building, or damaging or destroying windows by installing heating/air conditioning units in character-defining windows. |
| 26 | Installing the vertical runs of ducts, pipes and cables in non-character-defining spaces, such as closets, service rooms and wall cavities. | Installing vertical runs of ducts, pipes and cables in places where they will damage, radically alter, or obscure character-defining elements. |

| | Recommended | Not Recommended | | | |
|-------------------------------|--|--|--|--|--|
| HEA | HEALTH, SAFETY AND SECURITY CONSIDERATIONS | | | | |
| 27 | Removing or encapsulating hazardous materials using the least-invasive abatement methods possible, and only after thorough testing has been conducted. | Neglecting to maintain and repair the cladding protecting encapsulated asbestos insulation. | | | |
| 28 | Working with code specialists to determine the most appropriate solution to health, safety and security requirements with the least impact on the character-defining elements and overall heritage value of the historic place. | Making changes to mechanical and electrical systems without first exploring equivalent systems, methods or devices that may be less damaging to the character-defining elements of the historic place. | | | |
| SUSTAINABILITY CONSIDERATIONS | | | | | |
| 29 | Reinstating , where possible, character-defining natural ventilation and daylight, such as operable transom windows and atrium skylights. | Introducing airtight mechanical systems and artificial lighting in buildings that were designed for natural daylight and ventilation. | | | |
| 30 | Ensuring that the introduction of new types of mechanical and electrical systems, such as solar, geothermal or heat-exchange systems, will have minimal impact on the character-defining elements of the historic building. | | | | |
| 31 | Working with specialists to determine the most appropriate solution to energy efficiency requirements with the least impact on the character-defining elements and overall heritage value of the historic place. | Making changes to character-defining mechanical and electrical systems, without first exploring alternative energy efficiency solutions that may be less damaging to the character-defining elements and overall heritage value of the historic place. | | | |

| | Recommended | Not Recommended |
|----|---|---|
| 32 | Repairing mechanical and electrical systems by stabilizing, reinforcing, or otherwise upgrading individual components in a manner that is consistent with the restoration period. | Replacing an entire mechanical or electrical system from the restoration period when the repair or limited replacement of deteriorated or missing components is possible. |
| 33 | Replacing in kind an entire mechanical or electrical system or component from the restoration period that is too deteriorated to repair, using the physical evidence as a model to reproduce the system or component. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Removing an irreparable mechanical or electrical system or component and not replacing it, or replacing it with an inappropriate new system or component. |

REMOVING EXISTING FEATURES FROM OTHER PERIODS

| 34 | Removing or altering non character-defining mechanical and electrical systems from a period other than the restoration period. | Failing to remove visible, non character-defining components of mechanical or electrical systems from another period that confuse the depiction of the building's chosen restoration period. |
|----|---|--|
| 35 | Retaining alterations to mechanical or electrical systems that address problems with the original design, if those alterations do not have a negative impact on the building's heritage value. | Removing alterations to mechanical or electrical systems or components that serves an important function in the building's ongoing use. |

RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD

| 36 | Recreating a missing mechanical or electrical system or component from the restoration period, based on physical or documentary evidence. | Installing a mechanical or electrical system or component that was part of the building's original design but never actually built, or a system or component thought to have existed during the restoration period but for which there is insufficient documentation. |
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4.4

GUIDELINES FOR ENGINEERING WORKS, INCLUDING CIVIL, INDUSTRIAL AND MILITARY WORKS









Engineering Works fall under three categories. Clockwise, from top left: Fort Rodd Hill in BC is an example of a military work; the grain elevator in Hepburn, Saskatchewan is an industrial work, and the SS Klondike in Whitehorse and the Quebec Bridge illustrate civil engineering works.

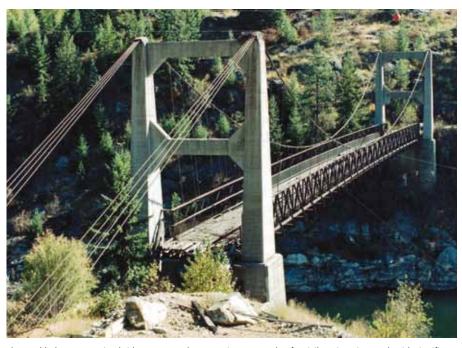
4.4

GUIDELINES FOR ENGINEERING WORKS, INCLUDING CIVIL, INDUSTRIAL AND MILITARY WORKS

Engineering works, including civil, industrial and military works, are constructions built or sites transformed for purposes other than habitation; they exist primarily to produce goods or provide services for the benefit of human needs. Major engineering works have stimulated and facilitated development across Canada—significant innovations made in resource extraction, industry, transportation, and communications have contributed towards developing new, or adapting existing technologies to suit Canada's climate and geography.

Civil works can include constructions associated with:

- Transportation of humans or goods by land, rail, water or air, such as historic roads and routes, bridges, tunnels, highways, ships, lighthouses, and railways, canals, airports, harbours, subways and their associated supporting infrastructure;
- Energy-generation and transmission facilities and infrastructure, such as hydroelectric dams, powerhouses, power-generating stations and transmission towers and systems;
- Communications facilities and infrastructure, such as telephone, microwave, radio and television networks and systems; and,
- Water supply, flood control and irrigation facilities and infrastructure, such as waterworks, pump houses, sewer networks and water treatment plants, dams, canals, floodways and aqueducts.



The Doukhobor Suspension bridge, near Castlegar, BC, is an example of a civil engineering work with significant cultural symbolic value. Erected by members of the Doukhobor community, its construction represents a major achievement for a pioneer community and demonstrates the considerable capabilities of a people acting communally.

Industrial works can include constructions associated with:

- Manufacturing or industry, such as mills, factories and warehouses;
- Resource exploitation facilities and infrastructure, such as mines, quarries, oil wells and drilling sites, collieries, dredges, concentrators, laboratories and refineries; and,
- Agriculture and food processing facilities and infrastructure, such as farms, ranches, packing houses, grain elevators, breweries and canneries.

Military works can include defencerelated constructions associated with:

- Fortifications or military ships;
- Naval, army and air bases, or missile ranges; and,
- Unique constructions, such as the DEW line or the Diefenbunker.

The heritage value of engineering works may be historical, technological, social, scientific or architectural. Some works may also have considerable aesthetic value due to the quality of their architecture, design or planning. Often, there is also heritage value in the relationship between an engineering work and adjoining or nearby archaeological sites, cultural landscapes or buildings.



The Percival Windmill, restored in 1995, is valued for its association with Saskatchewan's rural water system. Because of the semi-arid climate and general lack of standing water in the south of the province, windmills gave many early residents access to underground water during the settlement period. Windmills were particularly important prior to the 1950s when widespread rural electrification enabled electric pumps to become regular farm features.

Engineering works should not be viewed as being exclusively the work of professional engineers. Achievements in *empirical engineering*, inventions and innovations made by lay-persons, and achievements associated with *artisanal technologies* can also be considered engineering works.



The Brooks Aqueduct, in Newell County, AB, is a significant civil engineering work from the development of irrigation in Alberta, and a significant example of the role the Canadian Pacific Railway (CPR) played in settling the region. It is one of the largest aqueducts of its kind in the world. An integral part of a larger irrigation system, it brought water to over 50,000 hectares of land that was susceptible to drought. The system allowed the CPR to open the area to agricultural settlement and supplied water to area farmers from 1914 to 1979.

Finding sustainable uses for engineering works is a significant challenge because their condition can range from archaeological resources to fully functioning installations. The continued use of an industrial or military work can seldom be accommodated when its original function has become redundant or obsolete. The engineering work may also have been abandoned for a long time, or the new planned use may have significantly different requirements for human comfort and safety than was required when it was originally built.

Civil works, such as bridges, dams and canals, present a different challenge.

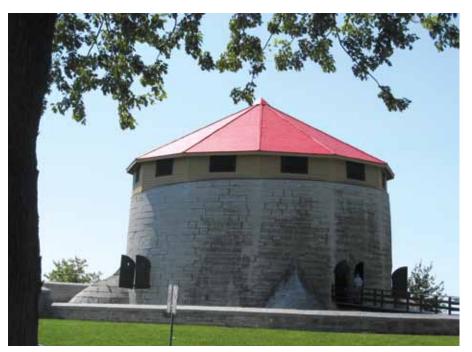
These works often remain fully functional and so must meet stringent contemporary safety codes that did not exist at the time of their construction. Their continued use is contingent on meeting these standards, often necessitating significant rehabilitation.

Engineering works can also be challenging to conserve because of possible site contamination issues, or because of the considerable evolution they may have undergone during their operating life, resulting in multiple constructions from varying eras that may or may not have heritage value.

APPLYING THE GUIDELINES

The Guidelines for Engineering Works are presented in two main groups:
Constructed Elements and Functional
Arrangement. This grouping is designed to help the reader to understand how these concepts apply to the engineering work, and how they interact. The user should always refer to both subsections when conserving an engineering work to ensure that the physical features (Constructed Elements) and their spatial configuration (Functional Arrangement) are protected.

These guidelines provide general recommendations appropriate to all types of engineering works. Because many engineering works incorporate buildings, contain archaeological resources (i.e. industrial archaeology), and are located within cultural landscapes, reference should be made to those guidelines when appropriate. Also consult the Guidelines for Materials that contain traditional as well as modern construction and finishing materials, and the guidelines for Structural Systems under Buildings when appropriate.



Murney Tower, in Kingston, ON, is a martello tower that forms part of the defence system built for Kingston Harbour during the Oregon Crisis of 1845–1846. It is a squat round tower with four hive-like caponiers at its base and a conical roof and is surrounded by a dry ditch. Murney Tower is valued for its excellent portrayal of the martello tower military structure, its built and landscaped forms, and also its strategic setting and defensive inter-relationship with other parts of the Kingston Fortifications.



The Lachine Canal, in Montréal, is a 14.5 kilometre-long canal that runs from the old port of Montréal to Lake Saint-Louis. It contains a significant number of civil engineering and industrial works. Opened to shipping in 1825, it was closed in 1970 after the St. Lawrence Seaway was built. The Lachine Canal was the forerunner of the early 19th century transportation revolution in Canada and played an important role in the industrial development of Montréal. The canal corridor was also one of the main manufacturing production centres in Canada until the Second World War. The LaSalle Coke crane located on the banks of the canal and formerly used for unloading coal, is a prominent engineering work of the Canal.

4.4.1 CONSTRUCTED ELEMENTS

These guidelines provide direction when the constructed elements of an engineering work are identified as *characterdefining elements* of an historic place.

Constructed elements are the distinct constructions that were built, erected or fabricated for the operation or use of the engineering work. Constructed elements can also be associated with the evolution of the work or with the transformation of the landscape resulting from the creation or operation of the work, which can include remnants, such as ore tailings from mining or dredging operations.

The types of constructions that can be considered constructed elements are extremely varied, including, for example:

- Structures that housed a warehouse, mill, factory, refinery, cannery or hydro-generating station;
- Landforms such as earth embankments and retaining walls of a dry ditch at a fort;
- Bridge superstructures;
- Tunnels, rock cuts and fills for a railway or highway right-of-way;
- Locks, dams and weirs of a canal system:
- Industrial machinery at a factory, or operational equipment inside a refinery, such as piping and steam tunnels:
- Ships such as paddle steamers or dredges; and,
- Ancillary equipment such as liquid or gas storage tanks, ore bins, cranes, derricks, chutes, conveyors or smokestacks at a factory.

Constructed elements offer a physical record of the work; its purpose, operation and evolution; the engineering innovation and design it embodies; and its impact on the environment. Their form, scale, massing, materials and construction type can all have heritage value, because they illustrate the purpose, operation and use of the work. Constructed elements help to illustrate and demonstrate the process, operation or activity that is, or once occurred, in the work. The condition of the constructed elements (including patina, graffiti and signs of wear) and the remnants or by-products from their operation (such as debris), can also hold value by demonstrating the evolution and function of the work in its environment.



The deteriorated heavy timber bow gantry frame of Dredge No. 4, in Dawson City, YK, was dismantled and replaced in kind with a new frame, built from new timbers sized to match the original timbers and reusing all original metal brackets and fixtures. The bow gantry, which supports the digging ladder, is a significant constructed element in the dredge's operational design.

These guidelines focus on stationary constructed elements; that is, character-defining machinery and ancillary equipment that are fixed in place.

Movable equipment and artifacts are not covered under these guidelines, although they are often indispensable in helping to explain, interpret and illustrate the distinct stages of processes that once occurred in the works.

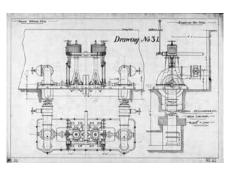
These guidelines provide general recommendations for constructed elements of an engineering work. When the constructed element is a building or part of a building, a built feature in a cultural landscape or an archaeological resource, also refer to the corresponding guidelines when appropriate. For recommendations on specific materials that make up constructed elements, refer to the Guidelines for Materials.



Completed in 1904, the tall wood frame Clearwater Canadian Pacific Railway Water Tower in Manitoba is an excellent example of an intact railway water tower. Twelve thick timbers are set on concrete bases and are strengthened with cross-braces that support the cedar-lined water tank, which occupies the top half of the structure. The water tower retains many of the original pipes, valves and controls used in filling and using the tank. When ceasing operation at a work such as this, the character defining pipes, valves and controls should continue to be subjected to regular maintenance to prevent their deterioration.



The Eagle Creek Cement Bridge in Saskatchewan is a good example of the nearly 90 reinforced concrete bowstring bridges that were constructed during the 1920s and 1930s as part of a comprehensive road building program in southern Saskatchewan. The graceful bowstring arches of these bridges, which blended functional engineering technology with aesthetically pleasing design, are character-defining elements. Repair or replacement of any parts of the bowstring arches should carefully designed for compatibility, matching the original form, materials and detailing of the arches.



Fully understanding the complexity and behaviour of a constructed element, such as pumps at the Kingston Dry Dock and Pumphouse can include determining its original design, purpose, operating theory, construction, operation, evolution over time, structural behaviour, structural performance over time including load history, performance under environmental loads, current condition and the deterioration mechanisms of its construction and materials.



Before beginning project work, the form, materials and condition of engineering works should be documented. Heritage recording of the Powerscourt Covered Bridge, National Historic Site of Canada in Powerscourt, QC, the only surviving bridge that uses the McCallum inflexible arch construction, included detailed measurements and a photographic record.

| | Recommended | Not Recommended |
|----|---|--|
| 1 | Understanding the constructed element and how it contributes to the heritage value of the engineering work. | |
| 2 | Understanding the construction history, theory, functional basis and design behind the constructed element. | |
| 3 | Documenting the form, materials and condition of the constructed element before undertaking an intervention. | Undertaking an intervention that affects a constructed element without first documenting its existing character and condition. |
| 4 | Documenting the operation and maintenance of constructed elements in sufficient detail to fully understand their operational characteristics. This can include obtaining an oral history of operation procedures, recording the machinery in operation or preserving records associated with the engineering work, and making these available for future research. | |
| 5 | Assessing the overall condition of constructed elements early in the planning process so that the scope of work is based on current conditions. | Carrying out a level of intervention that exceeds what is required, or taking action based on assumptions or rules of thumb. |
| 6 | Determining the appropriate level of investigation and analysis required to understand the overall condition of constructed elements, and analyzing the constructed elements in sufficient detail to fully understand their complexity and behaviour. | |
| 7 | Determining the physical condition of constructed elements or their components, including the causes of distress, damage or deterioration through investigation, analysis, monitoring and minimally invasive or non-destructive testing techniques. | Using highly destructive probing or sampling techniques that damage or destroy constructed elements or their components. Carrying out a repair that does not treat or address the cause of the problem. |
| 8 | Testing constructed elements or their components in place to determine their characteristics, provided the appropriate precautions are taken to avoid their failure or destruction. | |
| 9 | Taking into account the past performance and load history of constructed elements or their components when determining their present or future capacity. | |
| 10 | Protecting constructed elements through appropriate and regular maintenance. | Failing to adequately maintain constructed elements on a cyclical basis, causing their components to deteriorate. |

| | Recommended | Not Recommended |
|----|--|--|
| 11 | Protecting evidence of the evolution process or operation of constructed elements that contribute to the heritage value of the engineering work, including protecting patinas, soiling or debris, wear patterns and graffiti, resulting from the operation of the work or its associated machinery. For example, cleaning machinery just enough to reduce deterioration and danger to the public, rather than attempting to clean it to a "like new" condition. | |
| 12 | Preserving the method of operation of an engineering work or its constructed elements that are important in defining the overall heritage value of the historic place. For example, continuing to hand-operate a canal lock gate mechanism, rather than switching to a motor. | |
| 13 | Imposing limits on the acceptable use of constructed elements, based on their actual characteristics and capacities to protect them from damage. There is a need to balance present and anticipated usage demands with heritage value, and to avoid, if possible, any use that would damage or destroy the constructed elements. | Subjecting constructed elements to uses that could overload existing systems, such as installing equipment or systems that undermine the heritage value of the engineering work. |
| 14 | Balancing the need to alter constructed elements to meet current safety codes and standards (to allow continued use) with the need to preserve the heritage value of the work's functionality and operation. | |
| 15 | Retaining sound constructed elements or deteriorated constructed elements of engineering works that can be repaired. | Replacing or rebuilding constructed elements that can be repaired. |
| 16 | Stabilizing deteriorated constructed elements on an interim basis by structural reinforcement, weather protection, or correcting unsafe conditions, as required, until any additional work is undertaken. | Neglecting to treat known conditions that threaten the constructed elements of engineering works. |
| 17 | Adapting interim stabilization interventions to the anticipated lifespan of the constructed element, so that they remain as reversible as possible. | |
| 18 | Repairing deteriorated parts of constructed elements in a manner that is physically and visually compatible with the engineering work. | Failing to undertake necessary repairs, resulting in the loss of constructed elements. Replacing an entire constructed element when repair or limited replacement of deteriorated or missing parts is possible. |

| | Recommended | Not Recommended |
|----|--|--|
| 19 | Protecting adjacent character-defining elements and components of constructed elements from accidental damage or exposure to damaging materials during maintenance or repair work. | |
| 20 | Replacing in kind extensively deteriorated or missing parts of constructed elements using physical and documentary evidence as a model for reproduction. The new work should match the old as closely as possible in form, materials and detailing, and have adequate strength. | Replacing an entire constructed element when limited replacement of deteriorated and missing parts is possible. |
| 21 | Testing proposed interventions to establish appropriate replacement materials, quality of workmanship and methodology. This can include reviewing samples, testing products, methods or assemblies, or creating a mock-up. Testing should be carried out under the same conditions as the proposed intervention. | |
| 22 | Operating and using a functioning engineering work or its constructed elements appropriately and according to applicable codes, to preserve the functional purpose of the work that is important in defining the overall heritage value of the historic place. For example, maintaining a canal route open to navigation, or reinforcing a highway bridge so that it can remain in service. | Ceasing to use or altering the functional purpose of a functioning work, or its constructed elements, that is important in defining the overall heritage value of the historic place. Operating and using a functioning engineering work without providing appropriate and timely maintenance, or without appropriate safety equipment, guards or training. |
| 23 | Documenting all interventions that affect constructed elements, and ensuring that this documentation will be available to those responsible for future interventions. | |

| | Recommended | Not Recommended |
|----|--|---|
| 24 | Repairing constructed elements or their components using recognized conservation methods. Repairs might include the limited replacement <i>in kind</i> , or replacement with an appropriate substitute material, of irreparable or missing components, based on physical or documentary evidence. | Failing to undertake necessary repairs, resulting in the loss of constructed elements. Replacing or demolishing an entire constructed element, when repair and limited replacement of deteriorated or missing parts is possible. |
| 25 | Proof-testing repairs to reinforce constructed elements or their components in place, to confirm their actual rather than theoretical performance, provided the appropriate precautions are taken to avoid their failure or destruction. | Reinforcing constructed elements or their components, without verifying the effectiveness or the level of benefit achieved by the reinforcement work. |

| | Recommended | Not Recommended |
|----|--|---|
| 26 | Replacing in kind an entire constructed element that is too deteriorated to repair, using physical and documentary evidence as a model for reproduction. The new work should match the old as closely as possible in form, materials and detailing, and have adequate strength. | Replacing a constructed element with one that does not follow the same engineering concept as the original. For example, replacing a character-defining mass masonry retaining wall with a reinforced concrete retaining wall faced with stone. |
| 27 | Replacing missing historic features by designing and installing a new constructed element based on physical or documentary evidence, or one that is compatible in size, scale, material, style or colour. | Creating a false historical appearance by replacing a constructed element with one that is based on insufficient physical and documentary evidence. |

ADDITIONS OR ALTERATIONS TO CONSTRUCTED ELEMENTS

| 28 | Designing additions for a new use in a manner that is compatible with the constructed element and respects the heritage value of the engineering work. | Introducing additions to constructed elements that are incompatible with the character of the engineering or that alter the historic relationships of the work. | |
|----|---|---|--|
| 29 | Building an addition to a constructed element that retains as many of the historic materials as possible, and ensures that the constructed elements are not obscured, damaged or destroyed, or the heritage value undermined. | | |
| 30 | Designing a new addition to a constructed element in a manner that draws a clear distinction between what is historic and what is new. | Duplicating the exact form, material, style and detailing of the original constructed element so that the new work appears to be part of the historic place. | |
| 31 | Considering the design of an attached exterior addition in terms of its relationship to the engineering work. The design for the new work may be contemporary or refer to design motifs from the historic place. In either case, it should be compatible in terms of massing, materials and colour, yet be distinguishable from the historic place. | Designing and building new additions that negatively affect the heritage value of the engineering work, including its design, materials, workmanship, location or setting. | |
| 32 | Placing a new addition on a non-character-defining elevation and limiting its size and scale in relation to the engineering work. | Designing a new addition that obscures, damages or destroys constructed elements, or undermines the heritage value of the engineering work. | |
| 33 | Undertaking soil mechanics studies and limiting new excavations adjacent to constructed elements to avoid undermining the structural stability of the engineering work or adjacent historic structures. Archaeological investigations should be undertaken before any excavation to avoid damaging potential archaeological resources. Refer to the Guidelines for Archaeological Sites for additional recommendations on excavation work. | Carrying out excavations or re-grading that could cause constructed elements or adjacent historic structures to settle, shift or fail, or that could damage archaeological resources. | |

| | Recommended | Not Recommended |
|----|---|--|
| 34 | Correcting the structural deficiencies of constructed elements when preparing for a new use in a manner that preserves their character-defining elements and the overall heritage value of the engineering work. | |
| 35 | Designing and installing new mechanical or electrical systems or equipment when required for the new or continued use, in a manner that minimizes adverse effects on the constructed elements. | |
| 36 | Adding a new structural system to a constructed element when required for the new or continued use, in a manner that does not obscure, damage or destroy character-defining elements. | |
| 37 | Creating a habitable space when required for the new use, in a manner that assures that character-defining elements will be preserved. | |
| 38 | Removing non character-defining constructed elements when required by the new use. | Removing, relocating and displaying non character- defining constructed elements in a new location, creating a false impression of the engineering work. |

| | Recommended | Not Recommended |
|-----|---|--|
| HEA | LTH, SAFETY AND SECURITY CONSIDERATIONS | |
| 39 | Adding new features to meet health, safety or security requirements, in a manner that conserves the constructed elements and minimizes impact on the heritage value of the engineering work. | |
| 40 | Working with code specialists to determine the most appropriate solution to health, safety and security requirements with the least impact on the character-defining elements and overall heritage value of the engineering work. | Making changes to constructed elements, without first exploring equivalent systems, methods or devices that may be less damaging to the character-defining elements of the engineering work. |
| 41 | Protecting constructed elements against loss or damage by identifying and assessing specific risks, and by implementing an appropriate fire protection strategy that addresses those specific risks. | Implementing a generic fire protection strategy or one that does not appropriately address the specific fire risks of the engineering work. |
| 42 | Installing sensitively designed fire-suppression systems, such as sprinklers, that retain the character-defining elements and respect the heritage value of the engineering work. | Installing fire-suppression systems in a manner that damages or destroys character-defining elements. |
| 43 | Applying fire retardant or protective materials that do not damage or obscure constructed elements. For example, applying fire-retardant, <i>intumescent paint</i> to a deck to further protect its steel. | Covering flammable, character-defining constructed elements or their components with fire-resistant sheathing or coatings that alter their appearance. |
| 44 | Removing hazardous materials from engineering works, their constructed elements or their components, only after thorough testing has been conducted and less-invasive abatement methods have been shown to be inadequate. Where applicable, archaeological work to collect data should be carried out before the site is disrupted by soil decontamination operations. | |

| | Recommended | Not Recommended |
|-----|--|--|
| ACC | ESSIBILITY CONSIDERATIONS | |
| 45 | Introducing a new feature to meet accessibility requirements in a manner that conserves the constructed element and respects the overall heritage value of the engineering work. | |
| 46 | Working with accessibility and conservation specialists and users to determine the most appropriate solution to accessibility issues with the least impact on the character-defining elements and overall heritage value of the engineering work. | Altering character-defining constructed elements without consulting the appropriate specialists and users. |
| SUS | TAINABILITY CONSIDERATIONS | |
| 47 | Complying with energy-efficiency objectives in upgrades to the constructed elements in a manner that respects the engineering work's character-defining elements. | Damaging or destroying constructed elements and undermining the heritage value of the engineering work while making modifications to comply with energy-efficiency objectives. |
| 48 | Working with specialists to determine the most appropriate solution to energy efficiency requirements with the least impact on the character-defining elements and overall heritage value of the engineering work. | Making changes to constructed elements, without first exploring alternative energy efficiency solutions that may be less damaging to the character-defining elements and overall heritage value of the engineering work. |
| CEA | SING OPERATION OF AN ENGINEERING WORK | |
| 49 | Following appropriate <i>mothballing</i> procedures when ceasing operation of an engineering work so as to maintain the potential for future operation of the work or its constructed elements, including installing appropriate safety shut-offs, and carrying out regular maintenance on the shut-down mechanisms to prevent their deterioration. | |

| | Recommended | Not Recommended |
|----|---|--|
| 50 | Repairing constructed elements from the restoration period using a minimal intervention approach, such as patching, splicing, consolidating or otherwise reinforcing its materials and improving weather protection. | Replacing an entire constructed element from the restoration period when the repair of materials and limited replacement of deteriorated or missing parts is possible. |
| 51 | Replacing in kind an entire constructed element from the restoration period that is too deteriorated to repair using the physical evidence as a model to reproduce the element. The replacement should have the same form, appearance and material properties as the replaced element, and have adequate strength or load-bearing capabilities. The new work should be unobtrusively dated to guide future research and treatment. | Removing an irreparable constructed element from the restoration period and not replacing it, or replacing it with an inappropriate new element. |

REMOVING EXISTING FEATURES FROM OTHER PERIODS

Removing or altering a non character-defining constructed element or component from a period other than the restoration period.

Failing to remove a non character-defining constructed element or component from another period that confuses the depiction of the engineering work's chosen restoration period.

Removing a feature from a later period that serves an important function in the engineering work's ongoing use, such as an emergency exit door, or signage associated with a new use.

RECREATING MISSING FEATURES FROM THE RESTORATION PERIOD

Recreating a missing constructed element from the restoration period, based on physical or documentary evidence.

Installing a constructed element that was part of the engineering work's original design but was never actually built, or a constructed element that was thought to have existed during the restoration period but for which there is insufficient documentation.

RESTORING OPERATION TO AN ENGINEERING WORK

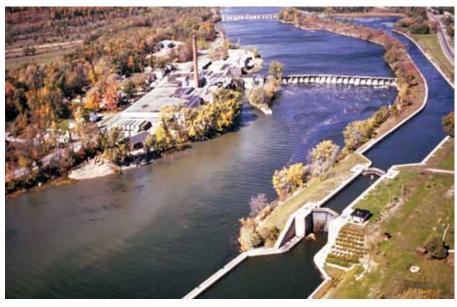
Restoring operation to an engineering work that is important in defining its heritage value.

Keeping an engineering work in a non-operational state when the operation of the work is important in defining its heritage value.

4.4.2 FUNCTIONAL ARRANGEMENT

These guidelines provide direction when the functional arrangement of an engineering work is identified as a characterdefining element of an historic place.

Functional arrangement, in the context of these guidelines, is the interrelationship of the constructed elements of the engineering work. Essentially, it is the layout of the work.



Large-scale Functional Arrangement: The Trent–Severn Waterway is an example of large-scale Functional Arrangement at a civil engineering work. The nearly 400 kilometre-long natural and human-made waterway crosses central Ontario linking Georgian Bay to the Bay of Quinte. The waterway's character-defining elements include many Functional Arrangement elements such as: the route of the waterway; the unity and completeness of the waterway, its engineering structures and buildings that support it, and the special cultural landscapes it has generated; the disposition and relationship of the waterway's Constructed Elements to their surroundings; and the legibility of the cultural landscapes and patterns between and among the Constructed Elements.

THE RELATIONSHIP BETWEEN AN ENGINEERING WORK AND ITS SETTING

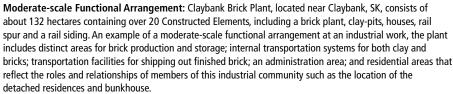
There is often a strong connection between the functional arrangement of an engineering work and its setting. The setting explains the location of a civil, industrial or military work. Prior to making any changes to the functional arrangement of an engineering work, it is important to understand how the proposed changes will affect its relationship with the setting, and the heritage value of the engineering work. The definition of setting and its relationship with the broader environment are addressed in more detail in the Introduction to the Guidelines for Cultural Landscapes.

On a large scale, functional arrangement can include a landscape that envelops and extends beyond the engineering work, such as the right-of-way of a railway passing through a mountain range, or a canal route that connects lakes and rivers across great distances. On a more moderate scale, functional arrangement can be limited to the site of the engineering work, such as the grouping of different buildings and equipment that supports a manufacturing or refining process. On a small scale, functional arrangement can be limited to what is internal to a single constructed element of the engineering work, such as the layout of a building that was determined by the process housed in that building.

The functional arrangement of the work can often be as important and valuable an aspect of the engineering work as the design of its constructed elements. For example, the routing of the Rideau Canal and the locations and interrelationships of its dams, weirs, lockstations and blockhouses are all character-defining elements of that historic place. The functional arrangement is often directly related to the human and engineering struggle encountered in imposing the work on the environment, to the distinct stages of the manufacturing or reduction process carried out at the work and to the patterns of circulation and activity involved in operating the work.

These guidelines provide general recommendations for the functional arrangement of an engineering work. When the engineering work is part of a cultural landscape, also refer to Spatial Relationships in the Guidelines for Cultural Landscapes.



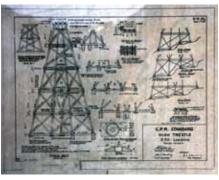




Small-scale Functional Arrangement: The interior of the Britannia Mines Concentrator, in Britannia Beach, BC, is an example of a small-scale Functional Arrangement at an industrial work. The concentrator processed copper ore for one of Canada's largest mining operations in the 1920s and 1930s. The concentrator used innovative technologies and took advantage of gravity to move the ore downwards through the building at each stage. The functional layout of the building's interior, and particularly the definition and respective locations of special-purpose areas, is a character-defining element.



The *Diefenbunker* is valued for the comprehensive physical evidence it presents confirming Canada's determination to survive and function as a nation during a nuclear attack. The Functional Arrangement of the Diefenbunker, including the relative placement of the surrounding buildings associated with its operations (the guard house and related shelter, the underground garage, the fibreglass tuning hut, the underground communications vault), is a character-defining element. Any new functions or services at the site should be located in a manner that does not obscure or alter this arrangement.







The routing of the Kettle Valley Railway through the Myra Canyon in British Columbia used a network of trestles, tunnels, rock cuts and fills. Constructed in 1915 as part of a secondary main line route that operated across southern British Columbia, the construction and positioning of the trestles greatly reduced the amount of rock excavation required to route the railway through the canyon. In 2003, a forest fire destroyed 12 of the 16 wooden trestles and damaged two steel structures in the canyon. The wooden trestles were rebuilt based on original construction specifications.

| | Recommended | Not Recommended |
|---|---|--|
| 1 | Understanding the functional arrangement and how it contributes to the heritage value of the engineering work. | |
| 2 | Understanding the construction history, theory, and functional basis and design behind the functional arrangement. | |
| 3 | Documenting the functional arrangement, including the circulation patterns and process sequence, and the orientation, alignment, size, juxtaposition and interrelationships of the constructed elements that define their organization, evolution and condition, before undertaking an intervention. | Undertaking an intervention that will affect the functional arrangement without first documenting the existing arrangement. |
| 4 | Assessing the physical integrity of the functional arrangement early in the planning process so that the scope of work is based on current conditions. | |
| 5 | Protecting the functional arrangement by securing and maintaining the circulation patterns and process sequence, and the orientation, alignment, size, juxtaposition and interrelationships of the constructed elements. | Allowing the functional arrangement to be altered by incompatible development or neglect. |
| 6 | Retaining the functional arrangement by maintaining the circulation patterns and process sequence as well as the orientation, alignment, size, juxtaposition and interrelationships of the constructed elements. | Altering the functional arrangement by removing or relocating sound or repairable constructed elements that define the functional arrangement. |
| 7 | Retaining the functional arrangement by maintaining the relationship between the engineering work and its site, when this relationship is part of its heritage value. | Removing or relocating an engineering work when its location is character-defining, thus affecting the relationship between the work and its site. |
| 8 | Documenting all interventions that affect functional arrangement, and ensuring that this documentation is available to those responsible for future interventions. | |

| | Recommended | Not Recommended |
|----|---|--|
| 9 | Rehabilitating the functional arrangement by re-establishing the circulation patterns and process sequence, and the orientation, alignment, size, juxtaposition and interrelationships of the constructed elements, using physical and documentary evidence as a model for reproduction. | |
| 10 | Rehabilitating the functional arrangement by replacing missing constructed elements that define the arrangement. Designing and installing new constructed elements using physical and documentary evidence as a model for reproduction. | Allowing the functional arrangement to be obscured by failing to replace a missing constructed element that defines the arrangement. |

ADDITIONS OR ALTERATIONS TO THE FUNCTIONAL ARRANGEMENT

| 11 | Locating new functions and services in existing non-character-defining spaces, in a manner that does not obscure or alter the functional arrangement. | Radically changing the functional arrangement to adapt to a new use. |
|----|---|--|
| 12 | Introducing new circulation in a way that respects character-defining circulation patterns and process sequence, and the functional arrangement of the constructed elements. | |
| 13 | Removing the non character-defining constructed elements that do not contribute to the functional arrangement, when required by the new use. | Altering the functional arrangement to suit a new use by removing character-defining constructed elements. Relocating non character-defining constructed elements to a new location, in a manner that alters or impairs the functional arrangement, thus creating a false impression of the engineering work. |

HEALTH, SAFETY AND SECURITY CONSIDERATIONS

| 14 | Adding new features to meet health, safety and security requirements in a manner that conserves the functional arrangement of the engineering work and minimizes impact on its character-defining elements. | Damaging or destroying character-defining elements while making modifications to comply with health, safety and security requirements. |
|----|--|---|
| 15 | Working with code specialists to determine the most appropriate solution to health, safety and security requirements with the least impact on the character-defining elements and overall heritage value of the engineering work. | Making changes to the functional arrangement without first exploring equivalent systems, methods or devices that may be less damaging to the character-defining elements of the engineering work. |

| | Recommended | Not Recommended |
|-----|--|--|
| ACC | ESSIBILITY CONSIDERATIONS | |
| 16 | Introducing a new feature to meet accessibility requirements in a manner that conserves the functional arrangement and respects the overall heritage value of the engineering work. | |
| 17 | Working with accessibility and conservation specialists and users to determine the most appropriate solution to accessibility issues with the least impact on the character-defining elements and overall heritage value of the engineering work. | Altering character-defining elements without consulting the appropriate specialists and users. |
| CEA | SING OPERATION OF AN ENGINEERING WORK | |
| 18 | Following appropriate <i>mothballing</i> procedures when ceasing the operation of an engineering work so as to maintain the potential for future operation of the work. | |

| | Recommended | Not Recommended |
|----|---|---|
| 19 | Reinstating the functional arrangement from the restoration period by re-establishing the circulation patterns and process sequence, and the orientation, alignment, size, juxtaposition and interrelationships of the constructed elements that define the arrangement, using documentary and physical evidence as a model for reproduction. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Replacing a constructed element that defines the functional arrangement from the restoration period when repair is possible, or using destructive repair methods, thus causing further damage to fragile historic materials. |
| 20 | Replacing in kind entire constructed elements that define the functional arrangement from the restoration period that are too deteriorated to repair, using physical evidence as a model to reproduce the element. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Removing a constructed element from the restoration period that is beyond repair and not replacing it, or replacing it with a new constructed element that does not respect the functional arrangement of the engineering work. |

| | Recommended | Not Recommended |
|---|--|--|
| REIV | OVING EXISTING ARRANGEMENTS FROM OTHER P | ERIODS |
| 21 | Removing or altering a non character-defining functional arrangement from a period other than the restoration period. | Failing to remove a non character-defining functional arrangement from a period other than the restoration period that confuses the depiction of the engineering work's chosen restoration period. Removing a functional arrangement from a later period that serves an important function in the engineering work's ongoing use. |
| RECREATING MISSING ARRANGEMENTS FROM THE RESTORATION PERIOD | | |
| 22 | Recreating a missing functional arrangement from the restoration period, based on physical or documentary evidence. | Establishing a functional arrangement that was part of the original design, but was never actually built, or creating a functional arrangement that was thought to have existed during the restoration period, but for which there is insufficient documentation. |
| RES | TORING OPERATION TO AN ENGINEERING WORK | |
| 23 | Restoring operation to an engineering work that is important in defining its heritage value. | Keeping an engineering work in a non-operational state when the operation of the work is important in defining its heritage value. |

4.5

GUIDELINES FOR MATERIALS









The following section addresses many types of materials. Clockwise, from top left are examples of landscape materials, masonry, fabric, and glass and concrete.

4.5

GUIDELINES FOR MATERIALS

The guidelines apply to the materials that compose buildings, built features of cultural landscapes and constructed elements of engineering works. Because materials are often identified as character-defining, they contribute to the heritage value of historic places and should be conserved. The ongoing care of materials, including appropriate maintenance and repair, contributes to the integrity and lifespan of an historic place.

In-kind materials should be used whenever possible. Sourcing materials for repair and replacement can be challenging, especially if the materials are from an historic source that no longer exists, such as a quarry, an old-growth forest, or a manufacturing facility that has closed down. It may be possible to find salvaged materials from other buildings or, in some cases, find the needed materials elsewhere in the historic place to use for small repairs.

DURABILITY

Traditional building materials, such as masonry and wood, are inherently durable. Over time, they have demonstrated a significant capacity to withstand surface degradation without losing structural capacity, or frequent repairs as long as basic maintenance is carried out.

PATINA

There is a fine distinction between patina and decay. Patina is the natural aging of materials; an organic and superficial surface degradation that is usually not harmful to the material. It can also be caused by use and wear. Understanding patina and its heritage value in the context of an historic place is part of assessing the condition of materials. It may be important to conserve patina for reasons of appearance, such as moss growing on a mature tree or the changed colour of a building stone, or for natural protection, such as on metals, where corrosion may form a protective coating.

Substitute Materials

Substitute materials should be explored only after all other options for repair and replacement have been ruled out. They should be used only when the original materials or craftsmanship are no longer available, when the original materials are of poor quality or damage adjacent character-defining materials, or when specific regulations rule out using hazardous materials. Because there are so many unknowns about the long-term performance of substitute materials, their use should not be considered without a thorough investigation of their composition, compatibility, durability and installation. The importance of finding visually and physically compatible substitute materials cannot be overstated.

APPLYING THE GUIDELINES

The Guidelines for Materials contain guidelines that apply to all materials, and guidelines related to specific materials. When conserving any material, first refer to the guidelines for All Materials and then to the guidelines related to the specific material: Wood and Wood Products, Masonry, Concrete, Architectural and Structural Metals, Glass and Glass Products, or Plaster and Stucco. The Miscellaneous Materials subsection includes general guidance for the conservation of materials that do not fall into one of these categories.

The Guidelines for Materials should not be used in isolation, but in conjunction with the appropriate section for the related building assembly, built feature, or constructed element.

4.5.1 ALL MATERIALS

These guidelines provide direction when a material is identified as a character-defining element of an historic place. The material may have been identified specifically, or may be an integral part of a character-defining element. These guidelines provide direction on documentation, condition assessment, testing and maintenance activities, repair and replacement in kind that apply to all materials. For the investigation, analysis and modification of materials that are part of engineering works, the services of a professional engineer are required by code.

The Guidelines for All Materials do not provide complete guidance on materials conservation; they provide general advice common to all materials. As such, they should be referred to in conjunction with the following guidelines for specific materials:

4.5.2 Wood and Wood Products

4.5.3 Masonry

4.5.4 Concrete

4.5.5 Architectural and Structural Metals

4.5.6 Glass and Glass Products

4.5.7 Plaster and Stucco

4.5.8 Miscellaneous Materials.



Wood: An example of "limited replacement in kind" describes an appropriate scope of work in the Preservation treatment. Only the damaged corner of a stair's newel post at the Commissioner's Residence in Dawson City, has been replaced (it will be stained to match). Only repairing deteriorated parts meant that most of the character-defining elements were retained.



Masonry: In this rehabilitation project of the Rideau Canal, some of the original limestone blocks remained in good condition. Others, which were too deteriorated to repair, were replaced in kind with new limestone blocks.

| | Recommended | Not Recommended |
|---|---|--|
| 1 | Understanding the materials that comprise the historic place and how they contribute to its heritage value. | |
| 2 | Documenting all interventions that affect materials, and ensuring that the documentation is available to those responsible for future interventions. | |
| 3 | Determining the appropriate level of investigation required to understand the properties and overall condition of the material. | Failing to undertake an appropriate level of investigation and analysis before identifying the level of conservation work required. |
| 4 | Assessing materials fully to understand condition, evolution over time, deterioration and mechanical and chemical properties. This should be done early in the planning process so that the scope of work is based on current conditions. | Carrying out a level of conservation work that exceeds what is required, or taking action based on assumptions or rules of thumb. Failing to assess the impact of maintenance practices on materials. Failing to consider the relationship between materials and adjacent elements as a source of deterioration. |
| 5 | Testing and examining materials and coatings to determine their properties and causes of deterioration, damage or distress, through investigation, monitoring and minimally invasive or non-destructive testing techniques. | Using highly destructive probing or sampling techniques that damage or destroy materials. Undertaking work without understanding the mechanical and chemical properties of the material. Carrying out a repair that does not treat or address the cause of the problem. |
| 6 | Testing proposed interventions to establish appropriate replacement materials, quality of workmanship and methodology. This can include reviewing samples, testing products, methods or assemblies, or creating a mock-up. Testing should be carried out under the same conditions as the proposed intervention. | |
| 7 | Maintaining materials on a regular basis, as described in the relevant material subsection. | Failing to adequately maintain materials, or carrying out maintenance on an ad-hoc basis. |
| 8 | Carrying out regular monitoring and inspections of materials to proactively determine the type and frequency of maintenance required. | |
| 9 | Developing a maintenance plan, where appropriate, that includes schedules for monitoring and inspection. | |

| | Recommended | Not Recommended |
|----|---|--|
| 10 | Updating and adapting maintenance activities, as conditions and knowledge about the materials and maintenance products and methods evolve. | |
| 11 | Cleaning materials only when necessary, to remove heavy soiling or graffiti. The cleaning method should be as gentle as possible to obtain satisfactory results. | |
| 12 | Carrying out cleaning tests, after it has been determined that a specific cleaning method is appropriate. | |
| 13 | Protecting adjacent materials from accidental damage during maintenance or repair work. | Allowing character-defining elements to be exposed to accidental damage by nearby work. |
| 14 | Repairing or replacing materials to match the original as closely as possible, both visually and physically. | Using inappropriate or untested materials or consolidants, or using untrained personnel for repair work. |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| | | Recommended | Not Recommended |
|---|----|---|---|
| 1 | 15 | Replacing character-defining materials with compatible substitute materials, when the original is found to accelerate deterioration and only after thorough analysis and monitoring confirms that the material or construction detail is problematic. Substitute materials should be as durable as the overall assembly to maintain its expected service life. | Using new materials and new technologies that do not have a proven track record. Replacing deteriorated character-defining elements using new materials or technologies to improve durability, when the original material performs adequately. |

| | Recommended | Not Recommended |
|----|---|--|
| 16 | Documenting materials dating from periods other than the restoration period before their alteration or removal. If possible, selected samples of these materials should be stored to facilitate future research. | Failing to document materials that are not from the restoration period before removing them. |

4.5.2 WOOD AND WOOD PRODUCTS

These guidelines provide direction when wood and wood products are identified as character-defining elements of an historic place. They also give direction on maintaining, repairing and replacing wood or wood products.

Wood and wood products refer to wood elements used in exterior or interior systems and assemblies. Wood elements include logs, sawn or hewn timbers, and milled or sculpted lumber. Wood products include plywood, glue-laminated timber, or composites, such as particleboard or wafer board. Both wood and wood products can be found in roofs, cladding, structure, windows and doors, interior finishes, carvings and fences.

An organic material, wood has a wide range of physical properties that vary significantly, depending on species, cut, grade and age. Wood is especially vulnerable to fire, moisture, ultraviolet radiation and insect infestation, thus protection from these threats is crucial to its conservation. This includes applying and maintaining suitable coatings and treatments, such as paints, stains, varnishes and preservatives.



It is important to identify the cause of any damage to a wooden building element before beginning a Preservation treatment. For the former machine shop of the North Pacific Cannery in Port Edward BC, exposure to marine conditions caused the exterior wood cladding to deteriorate.



Using minimally destructive testing methods can help evaluate the condition of wood without damaging it. Here a resistance measuring micro drill is being used to evaluate the condition of a log wall at Fort Walsh, NHSC in Saskatchewan. A drilling needle penetrates the wood at a constant speed and measures the resistance encountered to advance the drill bit. The resistance the wood offers indicates its condition: low resistance can indicate decay.

Repairing wood elements typically involves consolidating or replacing decayed or damaged wood, and correcting the conditions that caused the decay or damage. The use of traditional carpentry techniques in repairing architectural and structural wood elements is well established. However, repairing more recently introduced wood products, such as plywood and composites, may not be possible, due to the manufacturing process involved and their modular nature. In this case, replacement in kind may be more appropriate. The difficulty in locating a sustainable source for replacement in kind of old growth or exotic wood may result in the need to select an appropriate replacement material.

These guidelines provide general recommendations for wood and wood products and should be used in conjunction with 4.5.1, All Materials. Because wood can form part of the structure or envelope of a building or engineering work, also refer to the specific system or assembly in the Guidelines for Buildings.



Deteriorated logs at the John Walter Historic Site in Edmonton were replaced in kind with hewn logs that used the originals as templates to reproduce tooling marks on visible surfaces. On close inspection, this distinguishes the new materials if the logs are separated in the future.



Wood was often used in modern buildings as a finish to contrast with more industrial materials, or as part of an acoustical treatment on ceilings and walls. The wood ceiling and column claddings of the Beaver Lake Pavilion in Montreal were carefully preserved as part of the recent rehabilitation of the pavilion.



Preserving the wood doors of the Langevin Block in Ottawa included carefully dismantling the doors to permit the damaged and decayed wood to be repaired.

| | Recommended | Not Recommended |
|---|--|---|
| 1 | Understanding the properties and characteristics of wood and its finishes or coatings, such as its species, grade, strength and finish, or the chemical make-up of its coating. | |
| 2 | Documenting the location, dimension, species, finish and condition of wood before undertaking an intervention. | Undertaking an intervention that affects wood, without first documenting its existing characteristics and condition. |
| 3 | Protecting and maintaining wood by preventing water penetration; by maintaining proper drainage so that water or organic matter does not stand on flat, horizontal surfaces or accumulate in decorative features; and by preventing conditions that contribute to weathering and wear. | Failing to identify, evaluate and treat the causes of wood deterioration. |
| 4 | Creating conditions that are unfavourable to the growth of fungus, such as eliminating entry points for water; opening vents to allow drying out; removing piled earth resting against wood and plants that hinder air circulation; or applying a chemical preservative, using recognized conservation methods. | |
| 5 | Inspecting coatings to determine their condition and appropriateness, in terms of physical and visual compatibility with the material, assembly, or system. | |
| 6 | Retaining coatings that help protect the wood from moisture, ultraviolet light and wear. Removal should be considered only as part of an overall maintenance program that involves reapplying the protective coatings in kind. | Stripping paint or other coatings to reveal bare wood, thus exposing historically coated surfaces to moisture, ultraviolet light, accelerated weathering and mechanical wear. |
| 7 | Removing damaged, deteriorated, or thickly applied coatings to the next sound layer, using the safest and gentlest method possible, then recoating in kind. | Using destructive coating removal methods, such as propane or butane torches, sandblasting or water-blasting. These methods can irreversibly damage woodwork. |
| 8 | Using the gentlest means possible to remove paint or varnish when it is too deteriorated to recoat, or so thickly applied that it obscures details. | Using thermal devices improperly in a manner that scorches the woodwork. Failing to neutralize the wood thoroughly after using chemical strippers, thereby preventing the new coating from adhering. Allowing detachable wood elements to soak too long in a caustic solution, causing the wood grain to raise and the surface to roughen. Stripping historically coated wood surfaces to bare wood, then applying a clear varnish or stain. |

| | Recommended | Not Recommended |
|----|--|---|
| 9 | Applying compatible coatings following proper surface preparation, such as cleaning with tri-sodium phosphate. | Failing to follow the manufacturer's product and application instructions when applying coatings. |
| 10 | Ensuring that new coatings are physically and visually compatible with the surface to which they are applied in durability, chemical composition, colour and texture. | |
| 11 | Applying chemical preservatives to unpainted wood elements that are not exposed to view. | Using chemical preservatives, such as copper naphtanate, if these materials have not been used historically, and are known to change the appearance of wood elements. |
| 12 | Preventing the continued deterioration of wood by isolating it from the source of deterioration. For example, blocking windborne sand and grit with a windbreak, or installing wire mesh over floor joists in a crawlspace to thwart rodents. | Neglecting to treat known conditions that threaten wood, such as abrasion, animal gnawing, fungal decay, or insect infestation. |
| 13 | Treating active insect infestations by implementing an extermination program specific to that insect. | |
| 14 | Retaining all sound and repairable wood that contributes to the heritage value of the historic place. | Replacing wood that can be repaired, such as wood components from old growth timber that is inherently more durable. |
| 15 | Stabilizing deteriorated wood by structural reinforcement, weather protection, or correcting unsafe conditions, as required, until repair work is undertaken. | Removing deteriorated wood that can be stabilized or repaired. |
| 16 | Repairing wood by patching, piecing-in, consolidating, or otherwise reinforcing the wood, using recognized conservation methods. | Replacing an entire wood element, when repair and limited replacement of deteriorated or missing parts is appropriate. |
| 17 | Replacing in kind extensively deteriorated or missing parts of wood elements, based on documentary and physical evidence. | Using a substitute material for the replacement part that neither conveys the same appearance as the wood element, nor is physically or chemically compatible. |
| 18 | Replacing in kind the entire panel of an extensively deteriorated or missing modular wood product, such as plywood, on a unit-by-unit basis. | |

| | Recommended | Not Recommended |
|-----|---|---|
| 19 | Repairing wood elements by patching, piecing-in, consolidating or otherwise reinforcing the wood, using recognized conservation methods. Repair might include the limited replacement in kind, or replacement with compatible substitute material, of extensively deteriorated or missing wood, where there are surviving prototypes. Repairs might also include dismantling and rebuilding a timber structure or wood assembly, if an evaluation of its overall condition determines that more than limited repair or replacement in kind is required. | |
| 20 | Replacing in kind an irreparable wood element, based on documentary and physical evidence. | Removing an irreparable wood element and not replacing it, or replacing it with an inappropriate new element. |
| HEA | LTH, SAFETY AND SECURITY CONSIDERATIONS | |
| 21 | Removing or encapsulating hazardous materials, such as lead paint, using the least-invasive abatement methods, and only after adequate testing has been conducted. | |
| SUS | TAINABILITY CONSIDERATIONS | |
| 22 | Selecting replacement materials for character-defining old-growth, exotic, or otherwise unavailable wood, based on their physical and visual characteristics. | |

| | Recommended | Not Recommended |
|----|--|--|
| 23 | Repairing , stabilizing and securing fragile wood from the restoration period, using well-tested consolidants, when appropriate. Repairs should be physically and visually compatible and identifiable on close inspection for future research. | Removing wood from the restoration period that could be stabilized and conserved. Replacing an entire wood element from the restoration period when repair and limited replacement of deteriorated or missing parts is possible. Using a substitute material for the replacement that neither conveys the same appearance as the surviving wood, nor is physically or chemically compatible. |
| 24 | Replacing in kind a wood element from the restoration period that is too deteriorated to repair, based on documentary and physical evidence. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Removing an irreparable wood element from the restoration period and not replacing it, or replacing it with an inappropriate new element. |

4.5.3 MASONRY

These guidelines provide direction when masonry is identified as a character-defining element of an historic place. They also give direction on maintaining, repairing and replacing masonry elements.

Masonry refers to mortared or dry laid natural stone as well as brick, cast stone, terra cotta and concrete block. The aesthetic characteristics of the masonry, such as the finish dressing, texture and colour of the stone, brick or mortar, the coursing pattern, and the joint width and profile, along with the careful integration of decorative sculptural and functional elements, such as band courses, lintels, water tables, cornices, scuppers and carvings, all contribute to its heritage value and require careful consideration.

Masonry construction in Canada ranges from statues and simple stone pathways, to massive fortifications and modern brick veneers on high-rise buildings. In many early uses, masonry played a dual role, acting as both the structural system and the building envelope. When conserving these types of masonry, it is important to consider both of these roles.



Sandblasting was once a popular method of removing paint from brick; however, it also removed the brick's outer hardened "crust" causing the brick to deteriorate.



The harsh climate in many parts of Canada can seriously damage masonry elements. This wall has suffered irreversible damage from water penetrating the brick façade and freezing, causing the faces of many bricks to pop off. To avoid such damage, repair failed flashings, deteriorated mortar joints or other mechanical defects, but do not apply water-repellent coatings, which can trap moisture inside the masonry.



Preserving the exterior of the British Columbia Legislative Building (its rear façade shown here), including its masonry walls, steps, columns, pilasters, window surrounds, decorative details and cornices, began with documenting the material, form, jointing, tooling, bonding patterns, coatings, colour and conditions of these elements before beginning project work.



Masonry should be cleaned only when necessary to halt deterioration or remove heavy soiling. If surface cleaning is appropriate, test to select the gentlest cleaning method possible, and observe the result over time to determine the immediate and the long-term effects. Test cleaning the left portion of this brick and stone wall (using low pressure water and detergents, when there was no chance of freezing) created an acceptably clean wall.

A wide variety of stone has been used in historic places. Each type has different properties and behaviours that must be understood to ensure their proper conservation. Because stone is a natural material, it can possess inclusions of minerals or clay that can weaken it and reduce its durability. Poor-quality design and workmanship can aggravate these inherent weaknesses.

Brick is a solid or hollow masonry unit, typically made of clay, calcium-silicate, or concrete, and used for both cladding and structural work. Terra cotta is also made of clay mixed with sand. It is used for ornamental work, roof and floor tiles, interior partitions and as fire proofing for metal structures. Terra cotta is not a load-bearing material.

The preservation of masonry can best be ensured through appropriate and timely maintenance. Cleaning treatments for purely aesthetic purposes should be avoided because they can aggravate and accelerate deterioration.

These guidelines provide general recommendations for masonry and should be used in conjunction with 4.5.1, All Materials. Because masonry can form part of the structure or envelope of a building or engineering work, also refer to Structural Systems and to Exterior Walls in the Guidelines for Buildings.



One of the primary causes of deterioration of glazed architectural terra cotta, like that shown on the Confederation Life Building in Winnipeg is water. Water-related damage to the glazed units, mortar, metal anchors or masonry backfill can be repaired only after eliminating the sources of that water. In order to ensure that the actual root problem is being solved, investigation work would need to be completed prior to any repairs in order to identify that source.



Deteriorated slate pavers should be replaced in kind from the same source of the original material. If the original quarry is closed, a suitable match should be located and attention given to the stone's composition, strength and colour.



Tenby School in Lansdowne MB is a well-preserved and rare example of a village school built with concrete blocks, a material commonly used between 1890 and 1905 for homes and commercial buildings in southern Manitoba. The blocks were artfully formed on site by using three distinct moulds.



Using brick masonry in interiors is a long lasting, almost indestructible finish for public spaces. Brick walls and floors are character defining in many modern interiors such as the Joseph Shepard Building in Toronto. It is not recommended to apply paint or other coatings to masonry that has been historically unpainted or uncoated.



Many stone masonry monuments, such as the Brock Monument in Queenston, ON, are historic places. A monument does not face many of the challenges of historic buildings or engineering works. Its purpose and use are the same today as when it was built. A monument is expected to remain constant and unchanged despite time, deterioration and weathering. Continuous maintenance and repairs are required and interventions or major repairs must be carefully considered to evaluate their potential impact on each part of the monument.



Masonry used on the exterior of modern buildings is generally a cladding attached to a separate structure. Clips, anchors or shelf angles are used to attach the stone panels or brick masonry. The deterioration of these anchors is an area of potential deterioration and failure. Monitoring the condition of these anchors is a vital part of a maintenance plan, as their failure can lead to very significant damage.

| | Recommended | Not Recommended |
|---|---|--|
| 1 | Understanding the properties and characteristics of the masonry of the historic place. | |
| 2 | Documenting the form, materials and condition of masonry before undertaking an intervention. For example, identifying the particular characteristics and source of the type of stone or brick used, and the composition of the mortar. | Undertaking an intervention that affects masonry without first documenting its existing character and condition. |
| 3 | Protecting and maintaining masonry by preventing water penetration, and maintaining proper drainage so that water or organic matter does not stand on flat surfaces, or accumulate in decorative features. | Failing to identify, evaluate and treat the causes of masonry deterioration. Applying water-repellent coatings to stop moisture penetration when the problem could be solved by repairing failed flashings, deteriorated mortar joints, or other mechanical defects. |
| 4 | Applying appropriate surface treatments, such as breathable coatings, to masonry elements as a last resort, only if masonry repairs, alternative design solutions or flashings have failed to stop water penetration, and if a maintenance program is established for the coating. | |
| 5 | Sealing or coating areas of <i>spalled</i> or blistered glaze on terra cotta units, using appropriate paints or sealants that are physically and visually compatible with the masonry units. | |
| 6 | Cleaning masonry, only when necessary, to remove heavy soiling or graffiti. The cleaning method should be as gentle as possible to obtain satisfactory results. | Over-cleaning masonry surfaces to create a new appearance, thus introducing chemicals or moisture into the materials. Blasting brick or stone surfaces, using dry or wet grit sand or other abrasives that permanently erode the surface of the material and accelerate deterioration. Using a cleaning method that involves water or liquid chemical solutions when there is a possibility of freezing temperatures. Cleaning with chemical products that damage masonry or mortar, such as using acid on limestone or marble. Failing to rinse off and neutralize appropriate chemicals on masonry surfaces after cleaning. Applying high-pressure water cleaning methods that damage the masonry and mortar joints and adjacent materials. |

| | Recommended | Not Recommended |
|----|--|--|
| 7 | Carrying out masonry cleaning tests after it has been determined that a specific cleaning method is appropriate. | Cleaning masonry surfaces without sufficient time to determine long-term effectiveness and impacts. |
| 8 | Inspecting painted masonry surfaces to determine whether paint can successfully be removed without damaging the masonry, or if repainting is necessary. Testing in an inconspicuous area may be required. | |
| 9 | Removing damaged or deteriorated paint only to the next sound layer, using the gentlest method possible; for example, hand scraping before repainting. | Removing paint that is firmly adhering to masonry surfaces. Using methods of removing paint that are destructive to masonry, such as sandblasting, application of caustic solutions, or high-pressure water blasting. |
| 10 | Re-applying compatible paint or coatings, if necessary, that are physically compatible with the previous surface treatments and visually compatible with the surface to which they are applied. | Applying paint, coatings or stucco to masonry that has been historically unpainted or uncoated. Removing paint from historically painted masonry, unless it is damaging the underlying masonry. Removing stucco from masonry that was historically never exposed. |
| 11 | Retaining sound and repairable masonry that contributes to the heritage value of the historic place. | Replacing or rebuilding masonry that can be repaired. |
| 12 | Stabilizing deteriorated masonry by structural reinforcement and weather protection, or correcting unsafe conditions, as required, until repair work is undertaken. | |
| 13 | Repairing masonry by repointing the mortar joints where there is evidence of deterioration, such as disintegrating or cracked mortar, loose bricks, or damp walls. | Removing sound mortar. |
| 14 | Removing deteriorated or inappropriate mortar by carefully raking the joints, using hand tools or appropriate mechanical means to avoid damaging the masonry. | Using rotary grinders or electric saws to fully remove mortar from joints before repointing. In some instances it may be acceptable to make a single pass with a cutting disk to release tension in the mortar before raking the joint. Extreme caution must be used to prevent accidental damage. |

| | Recommended | Not Recommended |
|----|--|--|
| 15 | Using mortars that ensure the long-term preservation of the masonry assembly, and are compatible in strength, porosity, absorption and vapour permeability with the existing masonry units. Pointing mortars should be weaker than the masonry units; bedding mortars should meet structural requirements; and the joint profile should be visually compatible with the masonry in colour, texture and width. | Repointing with mortar of a higher Portland cement content than in the original mortar. This can create a bond stronger than the historic material (brick or stone) and cause damage as a result of the differing expansion coefficients and porosity of the materials. Repointing with a synthetic caulking compound. Using a 'scrub' coating technique to repoint instead of using traditional repointing methods. |
| 16 | Duplicating original mortar joints in colour, texture, width and joint profile. | |
| 17 | Replacing in kind extensively deteriorated or missing parts of masonry elements, based on documentary and physical evidence | Using a substitute material for the replacement part that neither conveys the same appearance as the masonry element, nor is physically or chemically compatible. |

| | Recommended | Not Recommended |
|-----|--|--|
| 18 | Repairing masonry by patching, piecing-in or consolidating, using recognized conservation methods. Repair might include the limited replacement in kind, or replacement with a compatible substitute material, of extensively deteriorated or missing masonry units, where there are surviving prototypes. Repairs might also include dismantling and rebuilding a masonry wall or structure, if an evaluation of its overall condition determines that more than limited repair or replacement in kind is required. | |
| 19 | Replacing in kind an irreparable masonry element, based on documentary and physical evidence. | Removing an irreparable masonry element and not replacing it, or replacing it with an inappropriate new element. |
| HEA | LTH, SAFETY AND SECURITY CONSIDERATIONS | |
| 20 | Removing hazardous materials from masonry, using the least-invasive abatement methods, and only after adequate testing has been conducted. | |
| SUS | TAINABILITY CONSIDERATIONS | |
| 21 | Selecting replacement materials from sustainable sources, where possible. For example, replacing deteriorated stone units using in-kind stone recovered from a building demolition. | |

ADDITIONAL GUIDELINES FOR RESTORATION PROJECTS

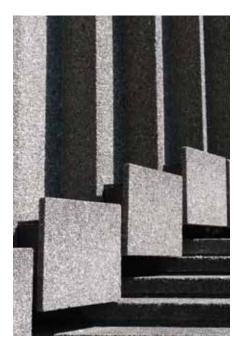
| | Recommended | Not Recommended |
|----|---|---|
| 22 | Repairing , stabilizing and securing masonry elements from the restoration period, using recognized conservation methods. Repairs should be physically and visually compatible and identifiable on close inspection for future research. | Removing masonry elements from the restoration period that could be stabilized and conserved. Replacing an entire masonry element from the restoration period, when repair and limited replacement of deteriorated or missing parts is possible. Using a substitute material for the replacement that neither conveys the same appearance as the surviving masonry, nor is physically or chemically compatible. |
| 23 | Replacing in kind a masonry element from the restoration period that is too deteriorated to repair, based on documentary and physical evidence. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Removing an irreparable masonry element from the restoration and not replacing it, or replacing it with an inappropriate new element. |

4.5.4 CONCRETE

These guidelines provide direction when concrete is identified as a character-defining element of an historic place. They also give direction on maintaining, repairing and replacing concrete elements.

Cape Race Lighthouse, on the southernmost tip of the Avalon Peninsula in Newfoundland and Labrador, is Canada's most prominent landfall marker. Built in 1906–1907, Cape Race was the first Canadian lighthouse to be constructed in reinforced concrete and probably the second lighthouse constructed in reinforced concrete in the world.

Early uses of concrete were typically utilitarian and formed part of structures that were hidden from view. The earliest concrete was massive, un-reinforced, castin-place construction containing variable aggregates that were obtained from local sources. Beginning in the early 1900s, the use of concrete as an aesthetic material became more common and was fully embraced by the middle of the 20th century. Reinforced concrete began appearing in the early 1900s, introducing more efficient designs of concrete members and structures. This, in turn, allowed for increased spans and the creation of architectural features, such as sculptural staircases and organic roof forms. Pre-cast concrete, where the members are fabricated off-site and brought to the site for erection, was first used in the 1930s. This coincided with the increased use of concrete as an exposed architectural, decorative and functional element, such as paving tiles and exterior wall cladding.



Special formwork or chemical or mechanical treatments can create a wide variety of concrete finishes, such as these pre-cast panels with exposed Laurentian granite aggregate at the National Arts Centre in Ottawa. Recreating these finishes when repairing or replacing-in-kind should be preceded by a mock up to ensure that the new work will be compatible with the historic place.

Architectural uses for concrete include exterior cladding, flooring and paving. The aesthetic qualities of concrete can include the texture created by formwork, such as smooth or board formed, and the colour and finish, such as exposed aggregate or terrazzo.

Finding recognized conservation techniques for concrete can be a challenge because these are part of a relatively new area of conservation. Some repair techniques may not have been thoroughly tested. A significant industry exists in Canada for repairing recent concrete structures; however, commonly used repair techniques and materials are usually not suited to historic concrete. The monolithic nature of concrete complicates its repair. High-quality workmanship and compatible materials are necessary in any repair to reduce the abrupt altering of the properties of the matrix, which could lead to shrinkage cracking.

These guidelines provide general recommendations for concrete and should be used in conjunction with 4.5.1, All Materials. Because concrete can also form part of the structure or cladding of a building or engineering work, also refer to Structural Systems or Exterior Walls in the Guidelines for Buildings.



Deterioration of concrete is a significant conservation issue, particularly in the Canadian climate.

Deterioration typically results from environmental factors, such as moisture, temperature and the presence of salts and carbon dioxide, which can corrode the steel reinforcements. Durability factors related to the original materials and workmanship, and improper maintenance, can also significantly affect concrete.



Important properties to match when patching concrete can include the modulus of elasticity, cement to aggregate ratio, aggregate gradation, compressive and shear strength, and coefficient of thermal expansion. In this case the coarse aggregate in the repair patch does not match that of the original concrete.



In the early 20th century, concrete was still an experimental material. The early designers and fabricators did not have full knowledge about the properties and characteristics of the concrete or its performance in the Canadian environment. Early examples of concrete construction often have inherent problems, are in poor condition and can require considerable conservation work.



The skills and expertise to repair or replace sections of cracked and chipped terrazzo flooring are still available. These specialised skills should be sought our when repairs are needed. The colourful, decorative and functional finish of this crest in the floor at the Royal Canadian Legion Branch N° 1 in Regina is an important character-defining feature of the building.

| | Recommended | Not Recommended |
|---|--|--|
| 1 | Understanding the properties and characteristics of the concrete of the historic place. | |
| 2 | Documenting the form, composition, strength, colour, texture, details and condition of the concrete before undertaking an intervention. For example, identifying the particular characteristics and source of the type of aggregate used. | Undertaking an intervention that affects concrete, without first documenting its existing character and condition. |
| 3 | Protecting and maintaining concrete by preventing moisture penetration; maintaining proper drainage; improving water shedding; and by preventing damage due to the overuse of ice-clearing chemicals. | Failing to identify, evaluate and treat the various causes of concrete deterioration. Applying water-repellent coatings to above-grade concrete to stop moisture penetration, when the problem could be solved by repairing failed flashings or other mechanical defects. |
| 4 | Cleaning concrete, only when necessary, to remove heavy soiling or graffiti. The cleaning method should be as gentle as possible to obtain satisfactory results. | Over-cleaning concrete surfaces to create a new appearance, thus introducing chemicals or moisture into the concrete. Using a cleaning method that involves water or liquid chemical solutions when there is a possibility of freezing temperatures. Cleaning with chemical products that damage the concrete. Failing to rinse off and neutralize appropriate chemicals on concrete surfaces after cleaning. Blasting the concrete with abrasives that permanently erode the surface and damage soft or delicate materials adjacent to it. Applying coatings or paint over the concrete to present a uniform appearance. |
| 5 | Testing cleaning methods in inconspicuous areas before cleaning the entire concrete surface, and observing the results of the cleaning tests over a sufficient period of time to determine their immediate and long-term effect. | |
| 6 | Inspecting painted concrete surfaces to determine whether repainting is necessary. | |
| 7 | Removing damaged or peeling paint, using the gentlest method possible before repainting. | Removing paint that is firmly adhered to concrete. |

| | Recommended | Not Recommended |
|----|--|--|
| 8 | Reapplying compatible paint or coatings, if necessary, that are physically and chemically compatible with the previous surface treatment, and visually compatible with the surface to which they are applied. | Removing paint from historically painted concrete unless it is damaging the underlying concrete. Removing stucco or cement parging from concrete that was historically never exposed. |
| 9 | Selecting an appropriate approach to corrosion protection to minimize damage to the concrete, including regular inspection and maintenance. | Introducing a corrosion protection system for the concrete, without verifying the effectiveness or the level of benefit achieved by the work, or without taking appropriate steps to address the cause of the corrosion. |
| 10 | Retaining sound and repairable concrete elements that contribute to the heritage value of the historic place. | Removing deteriorated concrete that could be stabilized or repaired. |
| 11 | Stabilizing deteriorated concrete elements by structural reinforcement and weather protection, or correcting unsafe conditions, as required, until repair work is undertaken. | |
| 12 | Repairing deteriorated concrete by patching or consolidating, using appropriate conservation methods. | Repairing concrete without treating the cause of deterioration. Replacing an entire concrete element when selective repair or replacement is possible. Using coatings or finishes to cover and hide surface repairs. |
| 13 | Minimizing damage to early concrete by limiting the size of the chipping equipment to better control the degree of removal, remembering that the compressive strength of early concrete may be much lower than modern concrete. | |
| 14 | Cleaning concrete before repair to remove contaminants, dirt and soil, so that the new concrete patches match the cleaned surface. | |
| 15 | Sealing inactive cracks in concrete by pointing with a cementitious mortar, or injecting epoxies to prevent moisture from entering the concrete mass. | Sealing active cracks with hard mortars or other hard materials that could prevent seasonal movements. Repairing cracks in concrete elements, without first determining the cause or significance of the crack. |
| 16 | Replacing in kind extensively deteriorated or missing parts of concrete elements, based on documentary and physical evidence. | Using replacement material that is incompatible with adjacent concrete work Recreating formwork finishes, such as form lines, wood grain, or knots, using grinders or trowels. |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended |
|-----|--|---|
| 17 | Repairing and reinforcing deteriorated concrete by encasing it in a jacket of new concrete, using appropriate conservation methods. | Failing to maintain the proportions or form of deteriorated concrete elements, when repairing by jacketing with new concrete. |
| 18 | Replacing in kind an irreparable concrete element, based on documentary and physical evidence. | Removing an irreparable concrete element and not replacing it, or replacing it with an inappropriate new element. |
| 19 | Applying appropriate surface treatments, such as breathable coatings, to concrete as a last resort, only if repairs, alternative design solutions, or flashings have failed to stop water penetration, and if a maintenance program is established for the coating. | Applying coatings to concrete instead of correcting the problem that caused the damage. |
| HEA | ALTH, SAFETY AND SECURITY CONSIDERATIONS | |
| 20 | Removing hazardous materials from concrete by using the least-invasive abatement methods and only after thorough testing has been conducted. | |

ADDITIONAL GUIDELINES FOR RESTORATION PROJECTS

| | Recommended | Not Recommended |
|----|--|--|
| 21 | Repairing deteriorated concrete from the restoration period by patching or consolidating, using recognized conservation methods. Repairs should be physically and visually compatible and identifiable on close inspection for future research. | Removing concrete from the restoration period that could be stabilized and conserved. Replacing an entire concrete element from the restoration period when repair and limited replacement of deteriorated or missing parts is possible. Using a substitute material for replacement that neither conveys the same appearance as the surviving concrete, nor is physically or chemically compatible. |
| 22 | Replacing in kind a concrete element from the restoration period that is too deteriorated to repair, based on documentary and physical evidence. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Removing an irreparable concrete element from the restoration period and not replacing it, or replacing it with an inappropriate new element. |

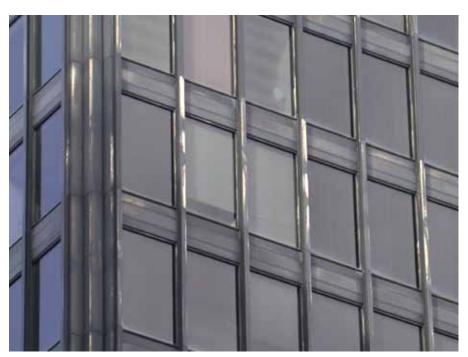
4.5.5 ARCHITECTURAL AND STRUCTURAL METALS

These guidelines provide direction when architectural or structural metals are identified as character-defining elements of an historic place. They also give direction on maintaining, repairing and replacing metal elements.

Structural metals typically include steel or iron columns, beams, trusses, or frames. Architectural metals encompass all other metal elements, which include a wide variety of architectural elements, such as sculpture, roofing, flashings, cladding, cresting, windows, doors, curtain-wall mullions and spandrel panels, railings and banisters, stairs, bathroom fixtures and partitions, hardware, gates, fences, and sign posts.

The metals used in the construction of historic places throughout Canadian history include, but are not limited to, iron (cast and wrought), steel, stainless steel, galvanized steel, tin, copper and copper alloys, zinc, aluminum, lead, nickel and bronze.

The long-term performance of metal components depends on their physical and chemical properties, the environment they are exposed to, design details, and their proximity to other metallic and non-metallic components. Typical forms of metal deterioration include corrosion, erosion, abrasion, deformation, cracking and fatigue, and flaws due to original design, manufacture or assembly.



Some metal elements of a historic place may originally have been finished with a protective coating under shop conditions that are difficult to reproduce on site when repairs are required. In this case, the character-defining black anodized aluminium mullions and spandrel panels have deteriorated due to decades of exposure to sunlight. The approach to repair should be based on the analysis of all repair options, thorough testing of the chosen techniques, and careful protection of the curtain wall from further damage during all interventions.



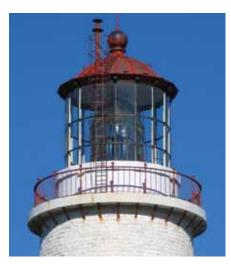
The first step in preserving architectural metals is to identify the type of metal. Before cleaning, determine that the method is appropriate for the particular metal: removing the patina from these bronze doors would not be appropriate if the patina is a character-defining finish of the metal, or if it provides a protective coating. Testing is recommended to ensure that the gentlest cleaning method possible is used.

Generally, metal components tend to be durable, but components that are not suited to a particular location or function, or not receiving adequate maintenance, may become fragile. To correct damage to a metal component, the cause of its deterioration must be understood and the type of metal correctly identified. If the metal's properties are not understood, inappropriate treatment may cause an adverse reaction and further deterioration. Some metals, such as wrought iron, cast iron and steel, are easy to recognize, but alloys can be challenging to identify. Accurately identifying an alloy may require help from a metals conservator or conservation professional.

These guidelines provide general recommendations for architectural and structural metals, and should be used in conjunction with 4.5.1, All Materials. For structural metals, also refer to Structural Systems in the Guidelines for Buildings.



Under certain circumstances, substitute materials may be appropriate. As part of a Rehabilitation project, new finials were designed based on original remains. The originals were fabricated of wafer-thin galvanized metal soldered together. The substitute material used in the new design was plate aluminum.



Most historic lighthouses have faced accelerated deterioration due to changes in how they operate; in addition, wet, salty costal environments are challenging conditions in which to conserve metals. The heat produced by the original light source once helped keep the lantern dry, as did roof top ventilators and gutter systems. Electric lights and the lack of regular on-site personnel to maintain and operate these features have necessitated a pro-active conservation approach and likely the involvement of metal conservators.





The two remaining decorative sheet metal urns at the top of the façade of the M & J Hardware Building in Lacombe, AB were determined to be beyond repair due to weathering over time. A third sheet metal urn (centre) was missing. The existing deteriorated elements and photographic documentation were used to replicate these elements. The M & J Hardware Building is an example where missing features from the restoration period have been re-instated based on physical and documentary evidence.

| | Recommended | Not Recommended |
|----|---|--|
| 1 | Understanding the properties and characteristics of metals and their finishes or coatings. | |
| 2 | Documenting the form, composition, and condition of metals, before undertaking an intervention. | Undertaking an intervention that affects metals without first documenting their characteristics and condition. |
| 3 | Protecting and maintaining metals from corrosion by preventing water penetration and maintaining proper drainage, so that water or organic matter does not stand on flat surfaces or accumulate in decorative features. | Failing to identify, evaluate and treat the causes of corrosion. |
| 4 | Ensuring that incompatible metals are not in contact with each other by installing an appropriate separator to prevent galvanic corrosion. | |
| 5 | Identifying the type of metal and the most appropriate cleaning method, and testing it in an inconspicuous area to ensure an appropriate level of cleanliness. | Over-cleaning metal elements. Using cleaning methods that alter or damage the character-defining colour, texture and finish of the metal. |
| 6 | Determining the appropriate level of patina before cleaning, and ensuring that this level is maintained for the entire element. | Removing the character-defining patina of a metal element. |
| 7 | Cleaning painted metals using appropriate techniques and products to remove corrosion and layers of paint, if required, before repainting. | Exposing metals intended to be protected from the environment. Applying paint or other coatings to metals that were meant to be exposed. |
| 8 | Cleaning soft metals, such as lead, tin, copper, aluminum, brass, silver, bronze and zinc, with appropriate non-abrasive methods. | Using abrasives on soft metals. |
| 9 | Using the gentlest cleaning methods for hard metals, such as cast iron, wrought iron and steel, to remove excessive paint build-up and corrosion. | |
| 10 | Applying an appropriate protective coating to an unpainted metal element that is subject to frequent use and handling, such as a bronze door or brass hardware, or to corrosion due to environmental factors, such as abrasives in winter. The coating should be regularly reapplied, as required, to ensure ongoing protection. | |

| | Recommended | Not Recommended |
|----|---|---|
| 11 | Re-applying appropriate paint or coating systems after cleaning to decrease the corrosion rate of painted or coated metals. | |
| 12 | Retaining all sound and repairable metals that contribute to the heritage value of the historic place. | Replacing metals that can be repaired. |
| 13 | Stabilizing deteriorated metals by structural reinforcement and weather protection, or correcting unsafe conditions, as required, until repair work is undertaken. | Removing deteriorated metals that could be stabilized or repaired. |
| 14 | Repairing parts of metal elements by welding, soldering, patching, or splicing, using recognized conservation methods. | Replacing an entire metal element, when repair and limited replacement of deteriorated or missing parts is possible. |
| 15 | Replacing in kind, extensively deteriorated or missing parts of metal elements, based on physical and documentary evidence. | Replacing an entire metal element, when limited replacement of deteriorated and missing parts is appropriate. Using a substitute material that neither conveys the appearance of the surviving parts of the metal element, nor is physically or chemically compatible. |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended |
|-----|--|--|
| 16 | Repairing metal elements by welding, soldering, patching, or splicing, using recognized conservation methods. Repair may also include the limited replacement in kind, or replacement with a compatible substitute material, of extensively deteriorated or missing metal elements, where there are surviving prototypes. | |
| 17 | Reinforcing metal elements, following recognized conservation methods to improve their strength. Reinforcement should be physically and visually compatible. | Replacing an entire metal element when reinforcement is feasible. |
| 18 | Replacing in kind an irreparable metal element, based on documentary and physical evidence. | Removing an irreparable metal element and not replacing it, or replacing it with an inappropriate new element. |
| HEA | LITH, SAFETY AND SECURITY CONSIDERATIONS | |
| 19 | Removing hazardous materials from metals using the least-invasive abatement methods and only after adequate testing has been conducted. | |

ADDITIONAL GUIDELINES FOR RESTORATION PROJECTS

| | Recommended | Not Recommended |
|----|--|--|
| 20 | Repairing , stabilizing and conserving fragile metal elements from the restoration period, using well-tested consolidants, when appropriate. Repairs should be physically and visually compatible and identifiable on close inspection for future research. | Removing metal elements from the restoration period that could be stabilized and conserved. |
| 21 | Replacing in kind a metal element from the restoration period that is too deteriorated to repair, based on documentary and physical evidence. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Removing an irreparable metal element from the restoration period and not replacing it, or replacing it with an inappropriate new element. |

4.5.6 GLASS AND GLASS PRODUCTS

These guidelines provide direction when glass and glass products are identified as character-defining elements of an historic place. They also give direction on maintaining, repairing and replacing glass elements.

Glass and glass products refer to the glass used in exterior and interior windows, doors and storefronts, built-in cabinetry and floors, and the glazing used in curtain walls, mirrors, floors, skylights and conservatories.

Glass elements can be considered character-defining due to their aesthetic or functional characteristics, including translucency or opacity, colour, texture, reflectivity or treatment. Glass varies in size and form, from tiny mosaic pieces to large flat sheets, or curved panes for corner windows. Glass elements may also be valued as artifacts from specific periods in the development of glass technologies, such as prismatic glass associated with the strategies to improve daylight in commercial spaces. Stained glass has been widely used in Canadian churches, colleges and public buildings, and to some extent in houses, in a range of aesthetic expressions. Conserving glass, particularly stained glass, requires specialists who may involve art conservators.



Historic glass has certain characteristics that cannot be matched by modern production techniques. Coloured, patterned or curved glass can be expensive or impossible to replace. Careful recording and regular monitoring of conditions are the most effective ways to conserve historic glass. If repairs are required, an experience stained-glass conservator can assess and recommend appropriate repair techniques.

Stained glass panels are susceptible to distortion over time, which may cause the glass to crack. Interventions to reinforce panels or protect windows with a second sash should be overseen by a conservator specializing in stained glass. The placement and method of installation of such work must be carefully designed to ensure that this does not cause further deterioration.



The type of glass and its division into multiple lights often defines the character of windows in historic buildings. The reflective quality of double-glazing from double sashes or storm windows is different than that of modern insulated glass. Inspections should be undertaken regularly to ensure that glazing putty is in good condition.



The character-defining transparency of the glass-enclosed factory wings of the National Printing Bureau in Gatineau, QC was preserved during conservation work on the glass and aluminium curtain walls. After the thin aluminium frames were cleaned, the opaque ribbed glass and clear plate glass were carefully reset in their original positions that reflect the pattern of solids and voids in the masonry wall behind.



Glass block has been manufactured in many different shapes, sizes, patterns and opacities. All these features should be considered when seeking a replacement block. Searching architectural salvage yards and contacting manufacturers may locate compatible replacements.

In the 20th century, a number of glass products were developed in response to curtain wall technology and other modern architectural forms. These products include *spandrel glass*, laminated glass, coloured glass panels or structural glass, and glass block, as well as thermallyinsulated double- or triple-pane glazing units that are the norm today.

Interventions to improve building envelope performance should focus on improving the efficiency of the entire wall assembly, rather than focusing on replacing glass or glass products such as windows. Double glazing changes the reflectivity and colour of the glass, and often requires changes to the framing or wall system supporting it.

These guidelines provide general recommendations for glass and glass products and should be used in conjunction with 4.5.1, All Materials. Because these materials are usually part of an assembly, their conservation must be closely coordinated with the related framing and structural elements and surrounding materials such as wood, metals or masonry. For recommendations on these assemblies, refer to Windows, Doors and Storefronts and Exterior Walls in the Guidelines for Buildings and to other appropriate sections in the Guidelines for Materials.

| | Recommended | Not Recommended |
|----|--|--|
| 1 | Understanding the properties and characteristics of glass and glass products, such as age and thickness, and the composition of any applied coatings. | Undertaking work that affects glass and glass products without first understanding their mechanical and chemical properties. |
| 2 | Documenting the composition, colour, texture, reflectivity, treatment and condition of glass and glass products before undertaking an intervention. | Undertaking an intervention that will affect glass and glass products without first documenting their existing characteristics and condition. |
| 3 | Identifying all of the different types of glass and glass products used and their unique properties. | |
| 4 | Assessing and treating the causes of glass damage, breakage, or deterioration of its frame or structure. | Failing to consider the impact and condition of surrounding frames or structural elements, before identifying the level of conservation work required. |
| 5 | Protecting glass from breakage, chipping and abrasion caused by ongoing maintenance. | |
| 6 | Assessing the impact of previous maintenance practices on glass and adjacent materials. | Failing to replace deteriorated sealants at glass joints to prevent moisture penetration. Failing to clean glass surfaces to prevent the accumulation of corrosive grease or dirt. |
| 7 | Identifying the type of glass and the most appropriate cleaning method, and testing it in an inconspicuous area to ensure an appropriate level of cleanliness. | Using cleaning methods that alter or damage the colour, texture or finish of the glass elements. |
| 8 | Retaining sound or deteriorated glass elements that can be repaired. | Removing or radically changing glass elements that contribute to the heritage value of the historic place. |
| 9 | Securing and protecting deteriorated glass by structural reinforcement and weather protection, or correcting unsafe conditions, as required, until repair work is undertaken. | Removing deteriorated glass elements that could be stabilized or repaired. Adding protective glazing or exterior storms to stained glass elements, without the involvement of a specialist conservator. |
| 10 | Repairing parts of glass elements by patching, piecing-in, or otherwise reinforcing, using recognized conservation methods. | Using a substitute material for the replacement part that neither conveys the same appearance as the surviving parts of the glass element, nor is physically or chemically compatible. |
| 11 | Replacing in kind irreparable or missing glass, based on documentary and physical evidence. | Replacing an entire glass element when repair and limited replacement of deteriorated and missing parts is possible. |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended |
|-----|---|--|
| 12 | Repairing a glass element using recognized conservation methods. Repairs might include the limited replacement in kind, or replacement with an appropriate substitute material, of extensively deteriorated or missing glass elements, where there are surviving prototypes. | Using an inappropriate substitute material. Failing to repair the deteriorated frame or structure around the glass element. |
| 13 | Replacing in kind an irreparable glass element based on documentary and physical evidence. | Removing an irreparable glass element and not replacing it, or replacing it with an inappropriate new glass element. |
| ПΕΛ | ITH SAFETY AND SECURITY CONSIDERATIONS | |

HEALTH, SAFETY AND SECURITY CONSIDERATIONS

| 14 | Removing hazardous materials from glass, such as lead paint, by using the least-invasive abatement methods, and only after adequate testing has been conducted. | |
|----|--|--|
| 15 | Monitoring , stabilizing and repairing glazing systems used in character-defining curtain walls, skylights and atriums, to ensure that any loose or cracked pieces are detected to prevent further deterioration. | Applying security film that cannot be removed at a later date. |

SUSTAINABILITY CONSIDERATIONS

Retaining and carefully storing historic glass elements and making them available for reuse.

ADDITIONAL GUIDELINES FOR RESTORATION PROJECTS

| | Recommended | Not Recommended |
|----|---|--|
| 17 | Repairing , securing and conserving fragile glass from the restoration period using appropriate methods and materials. Repairs should be physically and visually compatible and identifiable on close inspection for future research. | Removing glass from the restoration period that could be stabilized and conserved. |
| 18 | Replacing in kind a glass element from the restoration period that is too deteriorated to repair, based on documentary and physical evidence. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Removing an irreparable glass element from the restoration period and not replacing it, or replacing it with an inappropriate new element. |

4.5.7 PLASTER AND STUCCO

These guidelines provide direction when plaster or stucco is identified as a character-defining element of an historic place. They also give direction on maintaining, repairing, and replacing plaster and stucco and their coatings.

Plaster and stucco are finishing or surface materials made by applying a lime, gypsum or cement-based coating to a supporting lath or substrate. Plaster is an interior finishing material, while stucco is usually an exterior material. The supporting substrate, which may be lath, masonry or wood frame, is an integral component of the assembly that requires as much careful consideration as the plaster and stucco itself.

In the 20th century, technologies for applying plaster and stucco evolved to include new types of supports and finishes. These finishes could be character-defining, such as specific finishes applied to concrete, or specialty treatments, such as pebble-dash stucco.

As these materials continued to evolve, synthetic versions were developed. These synthetic stucco and plaster materials have different characteristics and should be avoided when repairing traditional stucco or plaster.

These guidelines provide general recommendations for plaster and stucco, and should be used in conjunction with 4.5.1, All Materials. Because these materials are usually part of an architectural assembly, their conservation must be closely coordinated with the assemblies and elements that support these materials, such as exterior walls, interior partitions, ceilings and columns. For recommendation on these assemblies, refer to Exterior Walls and to Interior Features in the Guidelines for Buildings.



The repair of a deteriorated intricate plaster cornice should involve recognized conservation techniques, such as consolidation of the original materials in good condition. One goal should be to limit the amount of introduced material. Surface repairs may be filled with a compatible traditional plaster mix, but for larger elements, some form of adhesive or fastener may be required, and should be carefully selected.



Before repairing or patching historic plaster or stucco, such as on the Commanding Officer's Residence at Fort Battleford NHSC in Saskatchewan, it is important to determine the composition of the material. Patches and repairs should be both visually and physically compatible with the existing historic material. Materials with different physical characteristics will likely not properly adhere to one another, necessitating repeated maintenance in the near future.





Certain stucco treatments, such as pebble-dash stucco, are difficult to replicate. Applying glass or rocky aggregate to the wet stucco is an art that is all but lost. Pebbles imported from Scotland for the Dr. Woods House in Leduc, AB are virtually impossible to replicate. The repairs resulted in a sound exterior envelope, but are clearly distinguishable from the original.

| | Recommended | Not Recommended |
|---|---|---|
| 1 | Understanding the properties and characteristics of the plaster or stucco of the historic place. | Undertaking work that affects plaster or stucco without understanding its mechanical and chemical properties. |
| 2 | Documenting the properties, characteristics and condition of the plaster or stucco before undertaking an intervention; for example, the chemical composition of the material and the type of substrate to which it is applied. | Undertaking an intervention that affects plaster or stucco, without first documenting its existing characteristics and condition. |
| 3 | Protecting and maintaining plaster and stucco from damage by preventing moisture penetration, accumulation of organic matter, and structural movement. | |
| 4 | Applying an appropriate coating or paint system. The selection of the system should be based on its compatibility with previous layers of character-defining paint, colour, finish and texture. | Using coatings of inappropriate colour, finish or texture that will have a negative impact on the heritage value of the historic place. |
| 5 | Removing layers of paint from plaster details to make them legible, using recognized conservation methods. | Using paint removal methods and materials that damage plaster details. Failing to test paint removal methods in an inconspicuous location before beginning the work. |
| 6 | Retaining sound or deteriorated plaster and stucco that can be repaired. | Removing or radically changing plaster or stucco that contributes to the heritage value of the historic place. |
| 7 | Securing and protecting deteriorated plaster and stucco by structural reinforcement and weather protection, or correcting unsafe conditions, as required, until repair work is undertaken. | Removing deteriorated plaster or stucco that could be stabilized or repaired. |
| 8 | Repairing plaster or stucco by patching, piecing-in, consolidating, or otherwise reinforcing, using recognized conservation methods. | Using a substitute material that neither conveys the same appearance as the surviving parts of the plaster or stucco, nor is physically or chemically compatible. |
| 9 | Replacing in kind irreparable or missing parts of plaster or stucco elements, based on documentary and physical evidence. | Replacing an entire plaster or stucco element when repair and limited replacement of deteriorated or missing parts is possible. |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended |
|-----|---|---|
| 10 | Repairing plaster or stucco following recognized conservation methods. Such repairs might include the limited replacement in kind, or replacement with an appropriate substitute material, of extensively deteriorated or missing plaster or stucco, where there are surviving prototypes. | |
| 11 | Repairing plaster or stucco by removing the damaged material and patching with new stucco or plaster that duplicates the old in strength, composition, colour, porosity, and texture. | Removing sound plaster and stucco, or repairing with new material that does not match the old in strength, composition, colour, porosity and texture. |
| 12 | Replacing in kind an irreparable plaster or stucco element, based on documentary and physical evidence. | Removing an irreparable plaster or stucco element and not replacing it, or replacing it with an inappropriate new element or material. |
| HEA | ALTH, SAFETY AND SECURITY CONSIDERATIONS | |
| 13 | Removing or encapsulating hazardous materials contained in plaster or stucco, such as asbestos, by using the least-invasive abatement methods, and only after adequate testing has been conducted. | |

ADDITIONAL GUIDELINES FOR RESTORATION PROJECTS

| | Recommended | Not Recommended |
|----|--|---|
| 14 | Repairing , securing and retaining plaster and stucco from the restoration period, using appropriate methods and materials. Repairs should be physically and visually compatible and identifiable upon close inspection for future research. | Removing plaster or stucco from the restoration period that could be stabilized and conserved. |
| 15 | Replacing in kind, plaster or stucco from the restoration period that is too deteriorated to repair, based on documentary and physical evidence. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Removing irreparable plaster or stucco from the restoration period and not replacing it, or replacing it with inappropriate new material. |

4.5.8 MISCELLANEOUS MATERIALS

These guidelines provide direction when a material, other than those specified above, is identified as a character-defining element of an historic place. This section includes recent materials produced by a fabrication process and interior and exterior materials that are not clearly categorized. Due to the range of materials these guidelines apply to, general guidance is given to help with maintaining, repairing, and replacing miscellaneous materials.

These diverse materials may be characterdefining in their own right, or used in character-defining assemblies or systems. Materials, such as plastic, plexiglass, asbestos, asphalt, rubber, thatch, sod and fiberglass, have served a multitude of uses in construction. Flooring surfaces, including cork, linoleum, carpet or ceramic tile, and decorative or functional treatments, such as fabrics, wall coverings and acoustical panels, may also be characterdefining. Modern materials, such as plastic have been used as lighter, less breakable alternatives to glass, metal or wood in exterior cladding, interior partitions, canopies, screens and signage.



Plastic and fibreglass can be moulded into a variety of shapes to create decorative, colourful wall panels. These green moulded panels are unique and difficult to replicate if damaged. Removing intact panels from a less visible part of the building to replace broken panels in a more prominent area is one possible strategy.



Mass-produced elements, such as ceramic tiles, are frequently used in buildings. Finding matching replacements for repair work can be almost impossible. If tile needs to be removed from one area, it is good conservation practice to save nd stockpile it for later use elsewhere in the building. These tiles from the washrooms in Union Station in Toronto were removed from one set of washrooms in order to provide a stockpile of tiles to use in the repair of the remainder of the washrooms.

Some miscellaneous materials are not expected to last indefinitely, such as carpeting or a fabric awning. Others may be difficult to clean or maintain when they age, such as plastics that can become brittle or discoloured, or experimental materials that have not stood the test of time. Some materials manufactured in factories using specialized techniques and processes are more difficult to repair than traditional materials, and almost impossible to replace, if the original manufacturing process has been discontinued. Other natural and synthetic materials historically used in construction have since been found to be toxic and can pose health risks. A material's properties, characteristics and contribution to the heritage value of the historic place must be fully understood before undertaking an intervention.

Information on the repair and maintenance of rare materials may be difficult to find. Even seemingly simple cleaning instructions may no longer be available. Research and testing may be the only way to understand the material.

These guidelines provide general recommendations for materials not covered in sections 4.5.2 to 4.5.7 above, and should be used in conjunction with 4.5.1, All Materials.



Fabric awnings are subject to damaging environmental effects including sunlight, wind and water, which eventually may cause the loss of the historic awning fabric. Repairing the original frame or mechanism and installing new awning fabric are recommended and will also help provide shade. Awning manufacturers may be able to match or provide similar fabrics compatible with the character of the place, as was done at Laurier House in Ottawa.



Asbestos is an extremely durable material that is often found in excellent condition. Although loose asbestos fibres pose health risks, tightly bound asbestos found in extant siding or tile, such as at the Gulf of Georgia Cannery NHSC in Steveston, BC are not hazardous and should be retained where they contribute to the heritage character of the place. Broken or missing siding would need to be replaced with another material that matches its appearance as asbestos products are no longer manufactured.



Sod was a simple, inexpensive and accessible roofing material used widely throughout the North and shown here at Knut Lang's place in the Northwest Territories. It is both waterproof and insulating and would last for decades before needing to be replaced. Frequently, when it began to fail, canvas was used as a temporary cover until a new sod layer could be applied.

| | Recommended | Not Recommended |
|----|---|--|
| 1 | Understanding the properties and characteristics of miscellaneous materials and their finishes or coatings, such as the age and availability of replacements and the chemical make-up of the product. | |
| 2 | Documenting the properties, characteristics and condition of miscellaneous materials before undertaking an intervention; for example, the chemical composition of the material and the type of substrate to which it is applied. | Undertaking an intervention that affects miscellaneous materials, without first documenting their characteristics and condition. |
| 3 | Protecting and maintaining miscellaneous materials by protecting fragile elements and preventing exposure to damaging environmental conditions. | Failing to identify, evaluate and treat the causes of deterioration of miscellaneous materials, such as exposure to ultraviolet light, airborne pollution, and excessive moisture. |
| 4 | Cleaning miscellaneous materials using appropriate cleaning methods and products. | |
| 5 | Retaining or reapplying coatings that help protect miscellaneous materials from wear, moisture or ultraviolet light. | Removing appropriate coatings that protect surfaces. Ignoring the manufacturer's product information and application instructions when reapplying protective coatings. |
| 6 | Ensuring that new coatings are compatible with the material, its earlier treatments and its environment. | |
| 7 | Retaining sound and repairable miscellaneous materials that contribute to the heritage value of the historic place. | Replacing miscellaneous materials that can be repaired. |
| 8 | Stabilizing deteriorated miscellaneous materials by structural reinforcement and weather protection, or correcting unsafe conditions, as required, until repair work is undertaken. | Removing deteriorated miscellaneous materials that could be stabilized or repaired. |
| 9 | Repairing miscellaneous materials by patching, piecing-in, consolidating, or otherwise reinforcing, using recognized conservation methods. | Replacing an entire element when repair and limited replacement of deteriorated or missing parts are appropriate. |
| 10 | Replacing in kind extensively deteriorated or missing parts of miscellaneous materials, based on documentary and physical evidence. | Replacing an entire element when limited replacement of deteriorated and missing parts is possible. |

ADDITIONAL GUIDELINES FOR REHABILITATION PROJECTS

| | Recommended | Not Recommended |
|-----|---|--|
| 11 | Repairing miscellaneous materials by patching, piecing-in, consolidating, or otherwise reinforcing the material. Repair might include the limited replacement in kind, or replacement with an appropriate substitute material, of extensively deteriorated or missing materials, where there are surviving prototypes. | Replacing an entire material, when repair and limited replacement of deteriorated or missing parts is possible. Using a substitute material for replacement that neither conveys the same appearance, nor is physically or chemically incompatible with adjacent materials. |
| 12 | Testing repair methods before undertaking work when there are no established conservation methods. | |
| 13 | Replacing in kind irreparable miscellaneous materials, based on physical and documentary evidence. If using the same material is not technically or economically feasible, a compatible substitute material may be considered. | Removing miscellaneous materials and not replacing them, or replacing them with an inappropriate new material that does not convey the same appearance, or is physically or chemically incompatible with adjacent materials. |
| HEA | LTH, SAFETY AND SECURITY CONSIDERATIONS | |
| 14 | Removing hazardous materials, using the least-invasive abatement methods, and only after adequate testing has been conducted. | Removing or destroying character-defining materials by neglecting to conduct testing first. |
| SUS | TAINABILITY CONSIDERATIONS | |
| 15 | Salvaging character-defining miscellaneous materials that are no | |

ADDITIONAL GUIDELINES FOR RESTORATION PROJECTS

longer manufactured for reuse elsewhere in the building.

| | Recommended | Not Recommended |
|----|---|--|
| 16 | Repairing , stabilizing and conserving fragile miscellaneous materials from the restoration period, using well-tested consolidants, when appropriate. Repairs should be physically and visually compatible and identifiable on close inspection for future research. | Removing miscellaneous materials from the restoration period that could be stabilized and conserved. |
| 17 | Replacing in kind miscellaneous materials from the restoration period that are too deteriorated to repair based on documentary and physical evidence. The new work should be well documented and unobtrusively dated to guide future research and treatment. | Removing irreparable miscellaneous materials from the restoration period and not replacing them, or replacing them with inappropriate new materials. |

REFERENCES

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GLOSSARY

Accessibility: (accessibilité) The degree to which an historic place is easy to access by as many people as possible, including people with disabilities.

Allée: (allée) A pathway or road between two rows of trees.

Ancillary structure: (structure secondaire) A structure, machine or component that plays a secondary or supporting role in the functions of a civil engineering, industrial or military work.

Archaeological object: (objet archéologique)

An artifact, a sample or any material that is of archaeological interest.

Artisanal technology: (technologie artisanale)

Technology that is based on tradition rather than the application of scientific knowledge.

Atrium: (atrium) An interior courtyard that is open to the weather; or a significant interior space, often skylighted.

Berm: (talus) A mound created to reduce noise, act as a screen, or protect a construction from flooding.

Bollard: (bollard) A thick post used for securing ropes or to limit access to an area.

Brise-soleil: (brise-soleil) A screen, usually louvered, placed on the outside of a building to shield windows from direct sunlight.

Canadian Register of Historic Places (CRHP):

(Répertoire canadien des lieux patrimoniaux)
The pan-Canadian list of historic places of local, provincial, territorial and national significance.
The CRHP is administered by the Government of Canada, in collaboration with provincial and territorial governments.

Character-defining elements: (éléments

caractéristiques) The materials, forms, location, spatial configurations, uses and cultural associations or meanings that contribute to the heritage value of an historic place, which must be retained in order to preserve its heritage value.

Conservation: (conservation) All actions or processes that are aimed at safeguarding the character-defining elements of a cultural resource so as to retain its heritage value and extend its physical life. This may involve "Preservation," "Rehabilitation," "Restoration," or a combination of these actions or processes.

Consolidant: *(consolidant)* Repair material that penetrates and strengthens a deteriorated element.

Cultural landscape: (paysage culturel) Any geographical area that has been modified, influenced, or given special cultural meaning by people.

- Designed cultural landscapes were intentionally created by human beings;
- Organically evolved cultural landscapes developed in response to social, economic, administrative or religious forces interacting with the natural environment. They fall into two sub-categories:
 - □ Relict landscapes in which an evolutionary process came to an end. Its significant distinguishing features are, however, still visible in material form.
 - Continuing landscapes in which the evolutionary process is still in progress.
 They exhibit significant material evidence of their evolution over time.
- Associative cultural landscapes are distinguished by the power of their spiritual, artistic or cultural associations, rather than their surviving material evidence.

Curtain wall: (mur-rideau) An exterior wall that is fastened to a frame and protects the building from the weather; it has no structural function, and supports only its own weight.

DEW line: (ligne DEW) The Distant Early Warning line was a system of radar stations in the far northern Arctic region of Canada. It was set up to detect potential invasions during the Cold War.

Dew point: (point de rosée) Temperature at which a parcel of air must be cooled in order to reach full saturation.

Diefenbunker: (Diefenbunker) A nuclear fallout shelter built secretely between 1959 and 1961 to protect Canadian government officials against a nuclear attack. Its name was inspired by Prime Minister John G. Diefenbaker who commissioned its construction. The Diefenbunker is a large underground complex containing offices, dormitories, radio transmitting facilities and decontamination chambers.

Empirical engineering: (génie empirique) Design or construction based on practical experience, observation, trial and error, or experimental data, rather than the application of scientific method, knowledge or theory.

Glacis: (glacis) A slope extending down from a fortification

Herbaceous plants: (plantes herbacées) Plants with stems that are soft and not woody.

Heritage value: (valeur patrimoniale) The aesthetic, historic, scientific, cultural, social or spiritual importance or significance for past, present or future generations. The heritage value of an historic place is embodied in its character-defining materials, forms, location, spatial configurations, uses and cultural associations or meanings.

Historic place: (lieu patrimonial) A structure, building, group of buildings, district, landscape, archaeological site or other place in Canada that has been formally recognized for its heritage value.

Hoodmould: (*larmier*) A projecting molding over the head of an arch over a window or door opening, to throw off the rain.

In kind: (à l'identique) with the same form, material, and detailing as the existing.

Inspecting: (inspecter) Carrying out a survey or review of the condition of an historic place and its elements to determine if they are functioning properly; to identify signs of weakness, deterioration or hazardous conditions; and to identify necessary repairs. Inspections should be carried out on a regular basis as part of a maintenance plan.

In situ: (sur place) This term means 'in place' and as used in this document, it refers to the action of protecting, maintaining and/or stabilizing the existing materials in the location where they were found.

Interpretive Construct: (éléments interprétatifs)
construction designed to support or present
the interpretation of an archaeological site and
its character-defining elements, and to help
communicate its heritage value. Examples of
interpretive constructs include plaques and panels.

Intervention: (intervention) Any action, other than demolition or destruction, that results in a physical change to an element of a historic place.

Intumescent paint: (peinture intumescente) A type of paint that when heated swells to form a fire-protective coating.

Inukshuk: (inukshuk) An Inuit stone cairn having the rough outline of a human figure.

Joist sistering: (doublage des poutrelles)

Reinforcement or repair of joists by doubling.

Maintenance: (entretien) Routine, cyclical, non-destructive actions necessary to slow the deterioration of an historic place. It entails periodic inspection; routine, cyclical, non-destructive cleaning; minor repair and refinishing operations; replacement of damaged or deteriorated materials that are impractical to save.

Minimal intervention: (intervention minimale) The approach that allows functional goals to be met with the least physical intervention.

- **Mock-up:** (maquette) A full-sized model of a structure or intervention used for demonstration, study or testing.
- **Monitoring:** (surveillance) The systematic and regular inspection or measurement of the condition of the materials and elements of an historic place to determine their behavior, performance, and rate of deterioration over time.
- **Mothballing:** (mise sous cocon) To temporarily close up a building or other structure to protect it from the weather as well as to secure it from vandalism.
- **Muntin:** (meneau) A strip of wood or metal separating and holding panes of glass in a window or a vertical framing member set between two rails in a door.
- Non-destructive testing: (essai non-destructif)

 Testing that does not result in the permanent deformation or damage of the element being tested.
- Past performance: (rendement antérieur) The demonstration of a structure's ability to satisfactorily resist loads based on its history. Buildings and structures built in accordance with good building practices, prior to the development of building codes, may be considered to have proven their capacity to resist loads based on the fact that they have already been subjected to, and successfully resisted, these loads in the past.
- **Pergola:** (pergola) An arbor or a passageway of columns supporting a roof of trelliswork on which climbing plants are trained to grow.
- **Piecing in:** (rapiéçage) To repair or add to by inserting a piece.
- **Preservation:** (préservation) The action or process of protecting, maintaining, and/or stabilizing the existing materials, form, and integrity of a historic place or of an individual component, while protecting its heritage value.
- **Prototype:** (prototype) An original model on which something is patterned.
- **Rampart:** (rempart) A wide bank of earth, usually with a parapet on top, built around a fort to help defend it.

- **Rehabilitation:** (réhabilitation) The action or process of making possible a continuing or compatible contemporary use of a historic place or an individual component, while protecting its heritage value.
- **Repointing:** *(rejointoiement)* To repair masonry joints with mortar.
- **Restoration:** (restauration) The action or process of accurately revealing, recovering or representing the state of a historic place or of an individual component, as it appeared at a particular period in its history, while protecting its heritage value.
- **Spalled:** (effrité) Breaking up of a masonry surface into chips or fragments.
- **Spandrel (panel):** (tympan/panneau d'allège) Panel of wall between adjacent columns or pilasters; in multi-storey buildings, a panel between the top of one window and the sill of the window in the storey above.
- **Splicing:** (jointer) To join two pieces by overlapping and binding at the ends.
- Statement of Significance (SoS): (énoncé d'importance) A statement that identifies the description, heritage value, and character-defining elements of an historic place. A Statement of Significance is required in order for an historic place to be listed on the Canadian Register of Historic Places.
- **Statuary:** (statues) A collection of statues
- **Stratigraphy:** (stratigraphie) The composition and arrangement of geographic strata or layers of earth in a particular area.
- **Stressors:** (facteurs de stress) Elements or events that could potentially disturb or put pressure on the archaeological site's character-defining elements and/or heritage value.
- **Sustainability:** (durabilité) A group of objectives (economic, social and environmental) that must be coordinated and addressed to ensure the long term viability of communities and the planet.

Swale: (baissière) A low, usually wet piece of land.

Terrace: (terrasse) A flat level of land, often a component of a series of step-like flat levels on a slope.

Thermal bridge: (pont thermique) An element made of a material that is a poor heat insulator and that is placed in an assembly (between other materials, or between interior and exterior).

Truss: (ferme) A structural framework, made of either timber or metal, that is composed of individual members fastened together in a triangular arrangement.

Understorey: (sous-étage) Underlying layer of vegetation, especially the plants that grow beneath a forest's canopy.

Vernacular: (vernaculaire) Indigenous, made locally by inhabitants; made using local materials and traditional methods of construction and ornament; specific to a region or location.

Widow's walk: (promenade des veuves ou plate-forme d'observation) A railed platform atop a roof, typically on a coastal house, that was used to look out for returning ships.

Windbreak: (*brise-vent*) A row of tress or bushes planted to provide protection from the wind and, often, to prevent soil erosion.

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Acronyms of Heritage Organizations (in alphabetical order)

APTI: Association for Preservation Technology International www.apti.org/

AQPI : Association québécoise pour le patrimoine industriel www.aqpi.qc.ca/actions.html

DOCOMOMO: international committee for documentation and conservation of buildings, sites and neighbourhoods of the modern movement www.docomomo.com/

EH: English Heritage (UK) www.english-heritage.org.uk/

FHBRO: Federal Heritage Buildings Review Office www.pc.gc.ca/progs/beefp-fhbro/index_e.asp

HCF: Heritage Canada Foundation www.heritagecanada.org/eng/main.html

HELM: Historic Environment Local Management (UK) www.helm.org.uk/

ICOMOS: International Council on Monuments and Sites www.icomos.org/

ICOMOS CANADA

http://canada.icomos.org/home-E.html

ISCARSAH: International Scientific Committee on the Analysis and Restoration of Structures of Architectural Heritage

http://iscarsah.icomos.org/

11ttp://ibcarbarr.icomob.org/

NPS: National Parks Service (USA) www.nps.gov/index.htm

PCA: Parks Canada Agency www.pc.gc.ca/eng/index.aspx

SIA: Society for Industrial Archaeology www.siahq.org/

TICCIH: The International Committee for the Conservation of the Industrial Heritage www.mnactec.cat/ticcih/

UNESCO - WHC: United Nations Educational, Scientific and Cultural Organization - World Heritage Centre http://whc.unesco.org/

Provincial and Territorial Heritage Branches (November 2010)

Alberta, Culture and Community Spirit –
Historic Resources Management
http://culture.alberta.ca/heritage/resourcemanagement/
default.aspx

British Columbia, Ministry of Tourism, Trade and Investment – Heritage Branch www.tca.gov.bc.ca/heritage/index.htm

Manitoba, Culture Heritage and Tourism – Historic Resources Branch www.gov.mb.ca/chc/hrb/index.html

New Brunswick, Wellness, Culture and Sport – Heritage Branch www.gnb.ca/0131/heritage-e.asp

Newfoundland and Labrador, Tourism,
Culture and Recreation – Heritage
www.tcr.gov.nl.ca/tcr/heritage/index.html

Nova Scotia, Tourism, Culture and Heritage www.gov.ns.ca/Tch/heritage_mandate.asp

Northwest Territories, Education, Culture and Employment – Culture and Heritage www.pwnhc.ca

Nunavut, Culture, Language, Elders and Youth www.gov.nu.ca/cley/

Ontario, Ministry of Tourism and Culture – Heritage www.culture.gov.on.ca/english/heritage/act.htm

Prince Edward Island, Tourism and Culture – Culture, Heritage and Libraries www.gov.pe.ca/go/heritageplaces

Ouébec, Culture, Communications et Condition féminine – Patrimoine et muséologie www.mcccf.gouv.qc.ca/index.php?id=24

Saskatchewan, Tourism, Parks, Culture and Sport – Heritage Conservation Branch www.tpcs.gov.sk.ca/heritage

Yukon, Tourism and Culture – Historic Sites + Heritage Resources www.yukonheritage.com/

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| 224 | Tenby School | Historic Resources Branch, Manitoba Culture, Heritage and Tourism | 200 |
| 224 | Joseph Shepard Building | Public Works and Government Services Canada/ Isabelle Massicotte | 2010 |
| 224 | Brock Monument | Parks Canada/B. Morin | 200 |
| 224 | Modern masonry cladding | Public Works and Government Services Canada/ James Ashby | 2005 |
| 229 | Cape Race Lighthouse | Public Works and Government Services Canada/ Ian Cameron | 200 |
| 229 | National Arts Centre | Public Works and Government Services Canada/ Susan Coles | 201 |
| 230 | Deteriorated concrete close-up | Public Works and Government Services Canada/ Myles McDevitt | 200 |
| 230 | Early concrete wall | Public Works and Government Services Canada/ Jocelyn Paquette | 200 |
| 230 | Terrazzo | Government of Saskatchewan/M. Thomas | 201 |
| 230 | Concrete patch | Public Works and Government Services Canada/ Bob Kirkhope | 200 |
| 234 | Aluminium mullions and spandrel panels | Public Works and Government Services Canada/ James Ashby | 200 |
| 234 | Bronze door detail | Public Works and Government Services Canada/ Guy Masson | 198 |
| 235 | Lighthouse lantern | Public Works and Government Services Canada/ Caroline Guay | 200 |
| 235 | Replacement finials | City of Saint John/Jim Bezanson | 200 |
| 235 | M and J Hardware – before | Alberta Culture and Community Spirit/Tom Ward | 200 |
| 235 | M and J Hardware—after | Alberta Culture and Community Spirit/Ophelia Liew | 200 |
| 239 | Stained glass | Public Works and Government Services Canada/ Rebecca Casagrande | |
| 239 | Multiple divided lights | Public Works and Government Services Canada/ Susan Ross | 200 |
| 240 | National Printing Bureau | Public Works and Government Services Canada/ Susan Ross | 200 |
| 240 | Glass block | Public Works and Government Services Canada/ Susan Ross | 2009 |
| 243 | Fort Battleford | Kevin Hogarth Photography | 200 |
| 243 | Plaster cornice | Public Works and Government Services Canada/ Rebecca Casagrande | |

| Section | on 4.5 | | |
|---------|-------------------------|--|------|
| Page | Subject | Credit | Year |
| 243 | Dr. Woods House-overall | Alberta Culture and Community Spirit/Tom Ward | 2006 |
| 243 | Dr. Woods House—detail | Alberta Culture and Community Spirit/Tom Ward | 2006 |
| 246 | Moulded green panels | Public Works and Government Services Canada/ James Ashby | 2005 |
| 246 | Union Station tile | Fournier Gersovitz Moss & Associés Architectes | 2009 |
| 247 | Laurier House | Public Works and Government Services Canada/ Susan Ross | 2008 |
| 247 | Gulf of Georgia Cannery | Public Works and Government Services Canada/ Rebecca Casagrande | 2004 |
| 247 | Knut Lang's Place | Aurora Research Institute/Dick Hill | 1964 |
| Back | Cover | | |
| Subject | : | Credit | Year |
| Lunenb | ourg, NS | Public Works and Government Services Canada/ Susan Ross | 2006 |
| Beeche | y Island, NU | Parks Canada/I.K. MacNeil | 1977 |
| Britann | ia Mines, BC | Public Works and Government Services Canada/ Gerard van Rijn | 2001 |
| Quebec | c City, QC | Parks Canada/P. St-Jacques | 1995 |









www.historicplaces.ca

Charitable Road Tolls in Kawartha Lakes

Committee of the Whole September 1, 2020



Background and Rationale

- Charitable Road Tolls occur in our Municipality
- Regulated by By-law 2015-199
- Review of process and By-law started 2019
- Council presentation 2020 and recommendations

Background and Rationale

- Public concerns brought to the attention of staff regarding the:
 - conduct of charitable road tolls
 - safety of people collecting and driving
 - accountability for funds raised; and
 - impact on area businesses (+,-)

Consultation

- Staff have consulted with
 - Kawartha Lakes Police Services (KLPS & OPP)
 - Kawartha Lakes Fire Department
 - Municipal Law Enforcement and Licensing
 - Corporate Health and Safety
 - Director of Public Works
 - Insurance Risk Management Coordinator
 - Economic Development

Direction

Staff will provide Council with the results from the review of the current Charitable Road Toll by-law and processes and in the following areas:

- Application to conduct/permit standardized form
- Approval/denial who is consulted, standardized approval/denial form
- Enhance safety for vehicles, pedestrians and staff conducting tolls
- Reporting ensuring accountability regarding the funds raised

Next Steps

That the Charitable Toll Road presentation be received;

That staff prepare a report to be returned to Council Q4 2020; and

That the report will include an amended bylaw that enhances safety requirements and creates reporting requirement back to the City following a Charitable Toll Road event.

Questions



Backyard Chickens

Committee of the Whole September 1, 2020





Deputation to Council

- November 2019 deputation CW2019-200 was received, requesting By-law revisions to allow for backyard chickens
- A petition was also submitted with over 400 signatures
- Council requested staff to bring forward options to allow backyard chickens Q3 2020

Rationale

- Staff research regarding backyard chickens with consideration to the following:
 - By-law amendments to the Animal Control By-Law,
 - Zoning By-laws potential impacts and amendments (interim by-law)
 - Should backyard chickens be permitted in residential areas?
 - Licensing
 - Building permits
 - Requirements for lot size, coop size and location in a yard (setbacks)
 - Health and Safety (Chicken health, manure management, predators etc.)
 - Number of chickens
 - Prohibition of Roosters

Next Steps

- Staff is working with Communications to conduct a 2 week survey to gather public input and information for the future Council report (Late August or September)
- Consultations:
 - Internally: Planning, Building, Economic Development, Environmental Services
 - Externally: Health Unit (HKPR), Ontario Ministry of Agriculture and Rural Affairs (OMAFRA), Ministry of Natural Resources and Forestry (MNRF); and
 - Other Municipalities

Direction and Conclusion

- That the presentation be received; and
- That a report be provided to Council with the results from the public survey, descriptive information, internal and external consultation and provides Council with recommendations Q4 2020.

Questions



The Corporation of the City of Kawartha Lakes Committee of the Whole Report

Report Number CA2020-001

| Meeting Date: | September 1, 2020 | | | | | |
|--|---|--|--|--|--|--|
| Title: Charges | Update on Development Charges and Community Benefit | | | | | |
| • | This report apprises Council of the 2019-2020 amendments t Charges Act and Planning Act as they relate to development unity benefits charges. | | | | | |
| Ward Number: | All Wards | | | | | |
| Author and Title: | Adam Found, Manager of Corporate Assets | | | | | |
| Recommendation | on(s): | | | | | |
| That Report CA202 Benefits Charges, | 20-001, Update on Development Charges and Community be received; | | | | | |
| renamed "Developm \$70,000, financed S Development Charg | project 921204601 (Community Benefits Charges Strategy) be ment Charges Background Study", have its budget reset to 90% by the Administration Studies Account of the ges Reserve and 10% by the Contingency Reserve, and have ded to June 30, 2022; and | | | | | |
| That this recommendation be brought forward to Council for consideration at the next Regular Council Meeting. | | | | | | |
| | | | | | | |
| Department Head: | | | | | | |
| Financial/Legal/HF | R/Other: | | | | | |
| Chief Administrati Officer: | ive | | | | | |

Background:

The legislative environment in which development charges (DCs) operate has changed significantly over the previous 15 months due to the following:

- More Homes, More Choice Act, 2019: Creates a community benefits charges (CBC) authority under the Planning Act, makes several municipal services DC-ineligible under the Development Charges Act, and introduces various restrictions on the timing of the determination and collection of DCs.
- Plan to Build Ontario Together Act, 2019: Reverses aspects of the More Homes, More Choice Act as it relates to DCs and further defines the CBC authority.
- Coronavirus (COVID-19) Support and Protection Act, 2020: Provides for automatic extensions to DC by-laws expiring during the COVID-19 emergency declaration and the 6-month period following (this has no impact on the City).
- 4. <u>COVID-19 Economic Recovery Act, 2020</u>: Restores DC-eligibility to most municipal services, reverses other aspects of the More Homes, More Choice Act as it relates to DCs, restructures transformation of Section 37 of the Planning Act into a CBC authority, severely limits the types of development to which the CBC authority applies, clarifies the relationship between DCs and CBCs, and clarifies transitional matters.
- 5. Ontario Regulation 454/19, A Regulation to Amend Ontario Regulation 82/98 Under the Development Charges Act (2019): Provides for revised and expanded DC exemptions respecting certain types and quantities of residential development and other amendments made necessary by recent amendments to the Development Charges Act.

This report apprises Council of the principle implications of the foregoing measures, and makes recommendations regarding 2020 special project 921204601 (Community Benefits Charges Strategy) accordingly.

Rationale:

Assented to on June 6, 2019, the More Homes, More Choice Act dramatically changed the legislative landscape for DCs. The thrust of the act was to substitute a community benefits charges (CBC) authority for DCs respecting often-called "soft services" (e.g. parks and recreation, libraries, social housing etc.). The principle difference between DCs and CBCs is that DCs are levied on the quantity of development, which is meaningful measure of additional demands on municipal services, whereas CBCs are levied on development land value.

The shift of soft services from a DC to a CBC regime was generally unwelcomed by the municipal sector, and was intensely opposed by the Municipal Finance Officers Association of Ontario (MFOA), of which the City is a member. Generally speaking, the shift was understood to be an unnecessary complication to the legislative framework in which municipalities recover growth-related capital costs. By introducing various sources of uncertainty (e.g. land appraisal challenges, unclear applicability to multiuse buildings etc.) into the CBC process, it also appeared to conflict with the provincial government's goal, as stated in its publication *More Homes, More Choice: Ontario's Housing Supply Action Plan*, of enhancing predictability in development application and approval processes.

As a result of a vigorous oppositional campaign by MFOA, public consultations and evidently weak support for the CBC regime in the development industry, the provincial government has largely reversed course on the originally proposed DC-CBC shift through two measures. First, the Plan to Build Ontario Together Act removed commercial and industrial development from the types of development entitled to pay DCs over the 6-year period following building occupancy. Second, the COVID-19 Economic Recovery Act restored DC-eligibility for most of the soft services previously shifted from the DC regime to the CBC regime.

As of the time of writing, the principle relevant changes to the DC regime that have taken effect, or will come into force upon proclamation by the Lieutenant Governor, are as follows:

- 1. <u>Eligibility of Municipal Services</u>: Replacement of a prescribed set of ineligible services by a prescribed set of eligible services such that some services (e.g. airport, parking etc.) become DC-ineligible and others (e.g. landfills, museums etc.) remain DC-ineligible.
- 2. <u>Eligibility of Capital Costs</u>: Removal of the arbitrary limitation of 10 years on capital forecast horizons and the arbitrary 10% deduction of otherwise DC-eligible costs respecting services for which these provisions formerly applied.
- 3. <u>Timing of Determination of DCs</u>: Respecting development for which an application for site plan control or zoning by-law amendment is filed, DCs are to be determined based on DC rates in effect at the time of application, subject to a limit of 2 years after the approval of the application (if approval is granted).
- 4. <u>Timing of Collection of DCs</u>: Developers of rental housing, non-profit housing or one of several particular types of institutional use are entitled to pay DCs over several years after building occupancy, amounting to an

- extended deferral of DCs. For non-profit housing, the payment period is 21 years, whereas for the other noted types of development it is 6 years.
- 5. <u>Exemptions Respecting Residential Buildings</u>: Refinement of exemptions respecting new dwelling units created in existing residential buildings, and addition of exemptions respecting dwelling units in or ancillary to new residential buildings, subject to various restrictions.

Among the City's current services supported by DCs, only those of airport and parking will become DC-ineligible. These two services represent only about 0.5% of the City's DC revenue.

Turning to the newly created CBC regime, the More Homes, More Choice Act designed it to generally encompass all municipal services and types of development. This scope of applicability has been markedly reduced by the COVID-19 Economic Recovery Act. Specifically, the following types of development are exempt from CBCs:

- 1. Development of a proposed building or structure with fewer than five storeys at or above ground.
- Development of a proposed building or structure with fewer than 10 residential units.
- 3. Redevelopment of an existing building or structure that will have fewer than five storeys at or above ground after the redevelopment.
- 4. Redevelopment that proposes to add fewer than 10 residential units to an existing building or structure.
- 5. Any other such types of development or redevelopment prescribed by regulation.

In other words, the CBC authority has been restructured into one that is generally only useful to municipalities experiencing considerable amounts of dense development. Given the narrowed applicability of CBCs, and that no development in the City's recent history has been at, much less exceeded, five storeys, the CBC authority has been rendered unusable for the City's purposes.

This outcome is reinforced by the following facts: (i) that the City can continue with parkland dedication as provided for under Section 51.1 of the Planning Act but which may, at the City's option, be transferred to the CBC authority; (ii) that the City does not have a policy of making developers pay for increased density as permitted by Section 37 of the Planning Act and as continued under the CBC

¹ In accordance with the COVID-19 Economic Recovery Act, airport services remain DC-eligible only in the Regional Municipality of Waterloo.

authority; and (iii) that airport and parking, representing just 0.5% of the City's DC revenue, are the only services to be removed from the City's DC by-law and potentially placed under the CBC authority.

Recognizing the foregoing and that the City's DC by-law must be updated by July 21, 2022 to comply with the DC Act, staff is recommending that 2020 special project 921204601 (Community Benefits Charges Strategy) be transformed into a DC study, meaning the City would not pursue a CBC regime at this time. As the City's 2019 DC Task Force remains in effect, it will be leveraged to guide the 2021 DC by-law update and facilitate public and stakeholder consultations.

Other Alternatives Considered:

The alternative to the recommendations of this report is for Council to do the following:

- Maintain special project 921204601, inclusive of its funding from the Municipal Modernization Fund grant, but increase its budget from \$30,000 to \$50,000 given the increased requirements arising from legislation enacted after the 2020 budget was approved; and
- 2. Authorize the creation of a new 2020 special project entitled "Development Charges Background Study" with the same budget and funding as proposed in this report's recommendations.

Staff does not recommend this course because the CBC authority has been rendered useless to the City, meaning a CBC strategy would be a waste, and because a DC study is required regardless in order to bring the City's DC by-law into compliance with the DC Act by July 21, 2022.

Financial/Operation Impacts:

Under the recommended approach, the budget for special project 921204601 would increase from \$30,000 to \$70,000, where funding of the DC study would be 90% DC-recoverable and 10% tax levy-supported via the Contingency Reserve. It would, moreover, release \$30,000 of funding from the Municipal Modernization Fund grant to eventually be utilized to offset ratepayer support of another project eligible for the grant.

Relationship of Recommendation(s) To The 2016-2019 Strategic Plan:

The recommendations of this report relate to the following strategic goals and enablers identified in the Corporate Strategic Plan:

- 1. <u>Strategic Goals</u>: (i) A Vibrant and Growing Economy; (ii) An Exceptional Quality of Life.
- 2. <u>Strategic Enablers</u>: (i) Responsible Fiscal Resource Management; (ii) Efficient Infrastructure and Asset Management.

Consultations:

Municipal Finance Officers Association of Ontario Watson & Associates Economists Ltd.
Chief Administrative Officer

Department Head E-Mail: jrojas@kawarthalakes.ca

Department Head: Juan Rojas, Director of Engineering and Corporate Assets



Committee of the Whole Report

Report Number PLAN2020-042

Meeting Date: September 1, 2020

Title: New Road Names for Portions of Old Highway 7 at

Meadowview Road

Author and Title: Richard Holy, Manager of Planning

Joel Watts, Deputy Clerk

Recommendations:

That Report PLAN2020-042, New Road Names for Portions of Old Highway 7 at Meadowview Road, be received;

That the new service road (formerly Highway 7) created by the Ministry of Transportation north of Meadowview Road with its realignment of Highway 7 in the former Township of Emily be renamed to (**select one**):

- Guiry Court
- McCumber Court
- McQuade Court; or
- Switzer Court

That the new service road (formerly Highway 7) created by the Ministry of Transportation south of Meadowview Road with its realignment of Highway 7 in the former Township of Emily be renamed to (**select one**):

- Guiry Place or Road
- McCumber Place or Road
- McQuade Place or Road: or
- Switzer Place or Road

That the Office of the City Clerk send notice to all affected parties regarding the renaming of the service roads in accordance with the Notice By-law;

| Department Head: | |
|-------------------------------|--|
| Financial/Legal/HR/Other: | |
| Chief Administrative Officer: | |

That subject to any significant objections raised from the affected parties in the notice period, that a by-law to rename both service roads be prepared, approved, and adopted by Council; and

That this recommendation be brought forward to Council for consideration at the next Regular Council Meeting.

Background:

On July 17, 2020, the Ministry of Transportation contacted the Office of the City Clerk requesting new road names and an addressing plan for 2 portions of Old Highway 7 at Meadowview Road. The correspondence and map from the Ministry is attached to this report as Appendix A.

According to Policy 108 CCS 012 (Highway, Facility, and Parking Naming Policy), all requests for renaming will be forwarded to Council through the Clerk's Office accompanied by a report from the appropriate department of the Naming Group. The Policy also states that the costs of renaming shall be borne by the individual or group requesting the change. This report will include an outline of the request, any costs associated with the request and a justification for the reasons behind the request. This report addresses that direction.

This report requests the Committee of the Whole to recommend a name for both sections of the 2 portions of Old Highway 7 now service roads. Once names have been recommended, the City Clerk's Office will send out appropriate notice (as per the requirements of the Notice By-law) to all affected parties, for a recommended adoption by by-law at the October 20, 2020 Regular Council Meeting.

Rationale:

The Ministry of Transportation (MTO) is near completion of a construction project at the intersection of Highway 7, Meadowview Road, and Lily Lake Road in the Township of Selwyn. This project involves the realignment of Highway 7 to the east of its current location and installing traffic control signals at the intersection with Lily Lake Road / Meadowview Road. This realignment of Highway 7 will reduce the number of private entrances with direct access to the provincial highway. Access to these entrances and to Emily Manor Drive will be maintained along the "old" Highway 7 alignment, which will be maintained as service roads to access the affected properties. There are two service roads created by this project, one north of Meadowview Road, and one south of Meadowview Road. The realigned portion of Highway 7 has been open to public travel since the end of July 2020 and the contractor is decommissioning the old portion of Highway 7.

To identify these service roads on new road signs and for 911 identification and emergency response, the MTO requires a by-law from the municipality identifying the road name and 911 address numbers. As all addresses being issued along the service roads will be on the Kawartha Lakes side of the boundary line with the Township of Selwyn, the City has been asked to supply potential street names and addresses. The Kawartha Lakes Clerk's Office has notified the Township of Selwyn's Clerk's Office of the upcoming changes, and the Township noted no objections to the City of Kawartha Lakes renaming the service roads, or the four potential names referenced below.

The MTO has been in direct contact with the following services to ensure that the new roadway configuration is understood and that service to the affected properties will continue uninterrupted until the renaming process is complete:

- City of Kawartha Lakes Police
- City of Kawartha Lakes Paramedic Service
- City of Kawartha Lakes Fire Department
- Canada Post
- Kawartha Lakes OPP Detachment
- OPP Orillia Communications Centre

Potential New Road Names

According to City Policy, when considering new names the following criteria should be considered:

- Names shall be easily spelled, read and clearly understood;
- Names shall be made up of only letters with no punctuation included;
- Names shall not sound similar to existing names;
- Names shall not duplicate existing names to the extent that only the suffix is changed (ie. Street versus Road);
- Streets shall not be named after existing businesses;
- Names shall not insinuate any political reference;
- Names which are discriminatory/derogatory in terms of race, sex, colour or creed shall be avoided;
- Names of former streets shall not be reused; and
- Continuous streets shall have one continuous name.

In keeping with policy, staff have consulted the Master Name List, which is comprised of various names of prominent citizens, where no named facility or street yet exists. For the area comprised of the former Township of Emily, four names exist on the Master Name List for consideration:

- Guiry
- McCumber
- McQuade; and
- Switzer

Initial research of the area shows no existing street or road names in Kawartha Lakes or in the neighbouring Township of Selwyn of the above four names. The City's Records and Archives Division performed some preliminary research on the potential names and noted the following:

Daniel Joseph **Guiry** was Reeve of Emily Township Council from 1935 - 1938 and Warden for the County of Victoria 1939. His son was a sergeant in the RCAF.

Don **McCumber** was the Reeve of Emily Township from 1979 - 1987, Warden for the County of Victoria 1986. As Reeve in 1979, he spearheaded an evening at Fleming College to discuss the pros and cons of Bill 17 (Line Fences

Amendment Act) and was mentioned in the remarks of the Legislative Assembly of Ontario for doing so. He also was Professor at Fleming College from 1971 - 2003, has been involved with the Canadian Cadet Organizations since 1961, and served as President of the Army Cadet League of Canada Ontario Branch. Mr. McCumber is a recipient of the Queen's Golden and Diamond Jubilee Medals. It is believed that Mr. McCumber used to live on the nearby Meadowview Road, and is a current resident of Nova Scotia.

Arthur McQuade was born in Cavan, Ireland in 1817 and was an early settler to the Township of Emily in 1837. He married Susannah Trotter in 1841 and was a schoolmaster for 15 years before entering politics. He was a lieutenant in the county militia and served on Emily Township Council from 1862 - 1873 first as Deputy Reeve then Reeve. He also represented the former riding of "Victoria South" in the House of Commons from 1874 - 1882. Although he was County Master for the Orange Lodge, as a Protestant, McQuade was elected to Parliament with mainly Catholic votes as "An indication of the good relations that existed between different communities in the region" (Murphy, Daniel 2000 - A History of Irish emigrant and Missionary Education Four Courts Pres p. 282). According to the Fenelon Falls Gazette June 3, 1882 he would have run again but was "unceremoniously thrust aside by other conservatives, who wished the riding to be represented by a resident of the county town."Emily residents were said to be "hopping" as he was "not only popular on account of his politics, for he has a genial, hearty manner that makes friends, and has been a public benefactor by his investment in improved stock".

William Christopher **Switzer** (January 29, 1853 - September 7, 1926) was Reeve of the Township of Emily in 1892 and 1896. He married Letitia A. Storey in March 25, 1884. It is believed he was a farmer in the community. The Switzer family is documented as part of the original Peter Robinson Settlers to the area.

Regarding appropriate road name suffixes, the type of road determines the appropriate suffix. Staff have determined that the southern service road should be defined as a major thoroughfare originally located in a rural setting, or as a cul-de-sac with a long entry. The northern service road should be defined as a cul-de-sac with a short entry. According to section 2.03 of the policy the following road name suffixes are appropriate to use for the southern portion (which also provides access to Emily Manor Drive):

- · Place; or
- Road

According the section 2.03 of the policy the following road name suffixes are appropriate to use for the northern portion:

Court

An addressing scheme for numbering will be prepared once names have been selected by the Committee of the Whole, and it will be sent out with the Notice to the affected parties following the meeting. Approximately three (3) properties will be readdressed on the northern portion, and ten (10) properties will be readdressed on the southern portion.

Due to the number of reasonable options available for City Council to select, staff are agreeable to have the Committee of the Whole recommend two of the above four vetted options from the Master Naming List.

Other Alternatives Considered:

Although City Council may opt to select a name not from the Master Naming List, this is not recommended as it would deviate from City Policy. However, another proposal could be considered if that name is eligible to be on the Master Naming List but is not currently there. The final notice and consultation would allow for final comments from interested parties before the October 20, 2020 Regular Council Meeting, should another name be considered.

Naming the service roads "Old Highway 7" is not recommended as addressing on numbered roads presents numerous future addressing challenges. The City Clerk's Office noted that several alternate versions of Highway 7 addresses were discovered on the Voters' List in the 2018 Municipal Election (such as: HWY 7, ON-7, Highway 7, Highway Seven, Ontario Number 7, etc.) and required corrections. Simple and consistent naming would also improve discoverability on future mapping systems used by Paramedics, Fire Departments, Police, and the public. Considering the numerous consistency issues, it is recommended that the service roads be renamed with a completely new name that does not include a number.

A resident suggested to Councillor Richardson the name "Emily Lane", however this is not recommended as the City already has the following duplicate or similar names in use:

- Emily Court
- Emily Creek Road
- Emily Manor Drive
- Emily Park Road
- Emily Street North

Alignment to Strategic Priorities

The Kawartha Lakes Strategic Plan 2020-2023 promotes "An Exceptional Quality of Life" as a strategic priority. Section 5 of this priority establishes Community Building as a priority which is inclusive of supporting and promoting arts, culture and heritage. Selecting a name with historic and heritage significance supports this section of the Strategic Plan.

Financial/Operation Impacts:

The Ministry of Transportation stated the following regarding the ownership and responsibility of the service roads: "The Ministry intends to retain ownership of the "existing" Highway 7 for the immediate future. However, at some point in the future the Ministry may want to have discussions with CKL regarding potential

road ownership transfers of this or other sites within your municipal boundaries.". As this is currently a provincial project, the costs associated with the renaming remain the responsibility of the Ministry of Transportation at this time.

Consultations:

Manager of Planning Mapping and GIS City Clerk's Office Ministry of Transportation Township of Selwyn

Attachments:

Appendix A – Initial Correspondence and Map from MTO



Appendix A.pdf

Department Head E-Mail: cmarshall@kawarthalakes.ca and

rtaylor@kawarthalakes.ca

Department Heads: Chris Marshall, and Ron Taylor

Ministry of Transportation

Project Delivery East 1355 John Counter Boulevard Postal Bag 4000 Kingston, Ontario K7L 5A3 Tel.: 613 329-8467

1-800-267-0295 Fax: 613-540-5106

Ministère des Transports

Zone d'exécution du projet de l'Est 1355, boulevard John Counter CP/Service de sacs 4000 Kingston (Ontario) K7L 5A3 Tél.: 613 329-8467

1-800-267-0295 Téléc. 613 540-5106



Friday July 17, 2020

Joel Watts, Deputy Clerk Clerk Department City of Kawartha Lakes 180 Kent Street West Lindsay, ON K9V 5R8

RE: New Road Name and 911 Identification Request for Old Highway 7 at Lily Lake Road

The Ministry of Transportation (MTO) has an ongoing construction project at the intersection of Highway 7 and Lily Lake Road. This project involves realigning Highway 7 to the east of its current location and installing traffic control signals at the intersection with Lily Lake Road / Meadowview Road.

This realignment of Highway 7 will reduce the number of private entrances with direct access to the provincial highway. Access to these entrances and to Emily Manor Drive will be maintained along the "old" Highway 7 alignment, which has been maintained as a service road to access the affected properties. To identify this service road on new road signs and for 911 identification and emergency response, the MTO will require a by-law from the municipality identifying the road name and 911 numbers.

The timing of the traffic switch to the new Highway 7 alignment is anticipated to occur in late July 2020. Recognizing that the new service road will not be named by this time, the MTO has been in direct contact with the following services to ensure that the new roadway configuration is understood and that service to the affected properties will continue uninterrupted:

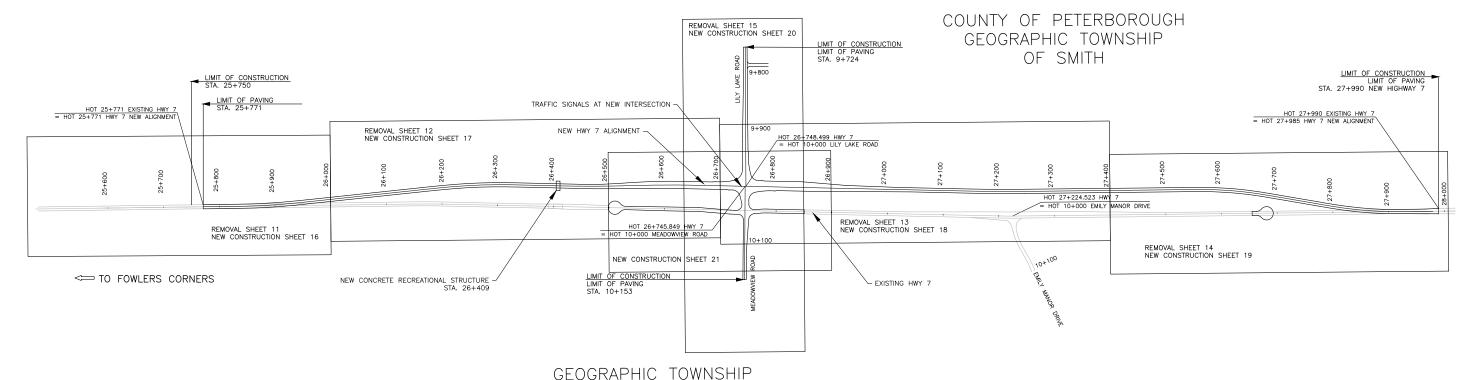
- City of Kawartha Lakes Police
- City of Kawartha Lakes Paramedic Service
- City of Kawartha Lakes Fire Department
- Canada Post
- Lindsay OPP detachment
- OPP Orillia Communications Center

I greatly appreciate your assistance with this issue. If you have any questions or concerns, please contact me directly at 613-329-8467 or at Corinne.Morden@ontario.ca.

Regards,

Corinne Morden P.Eng Project Engineer

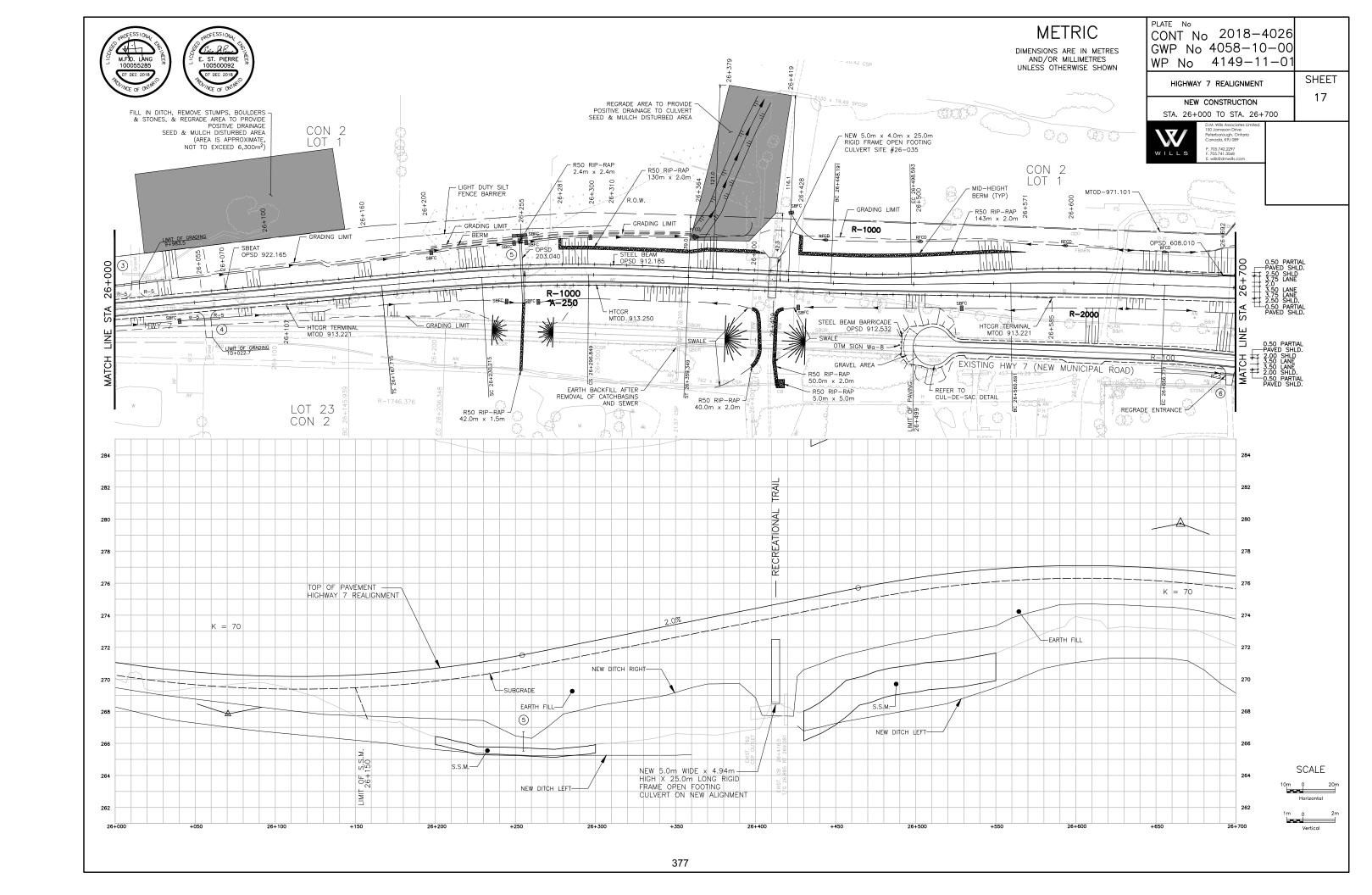


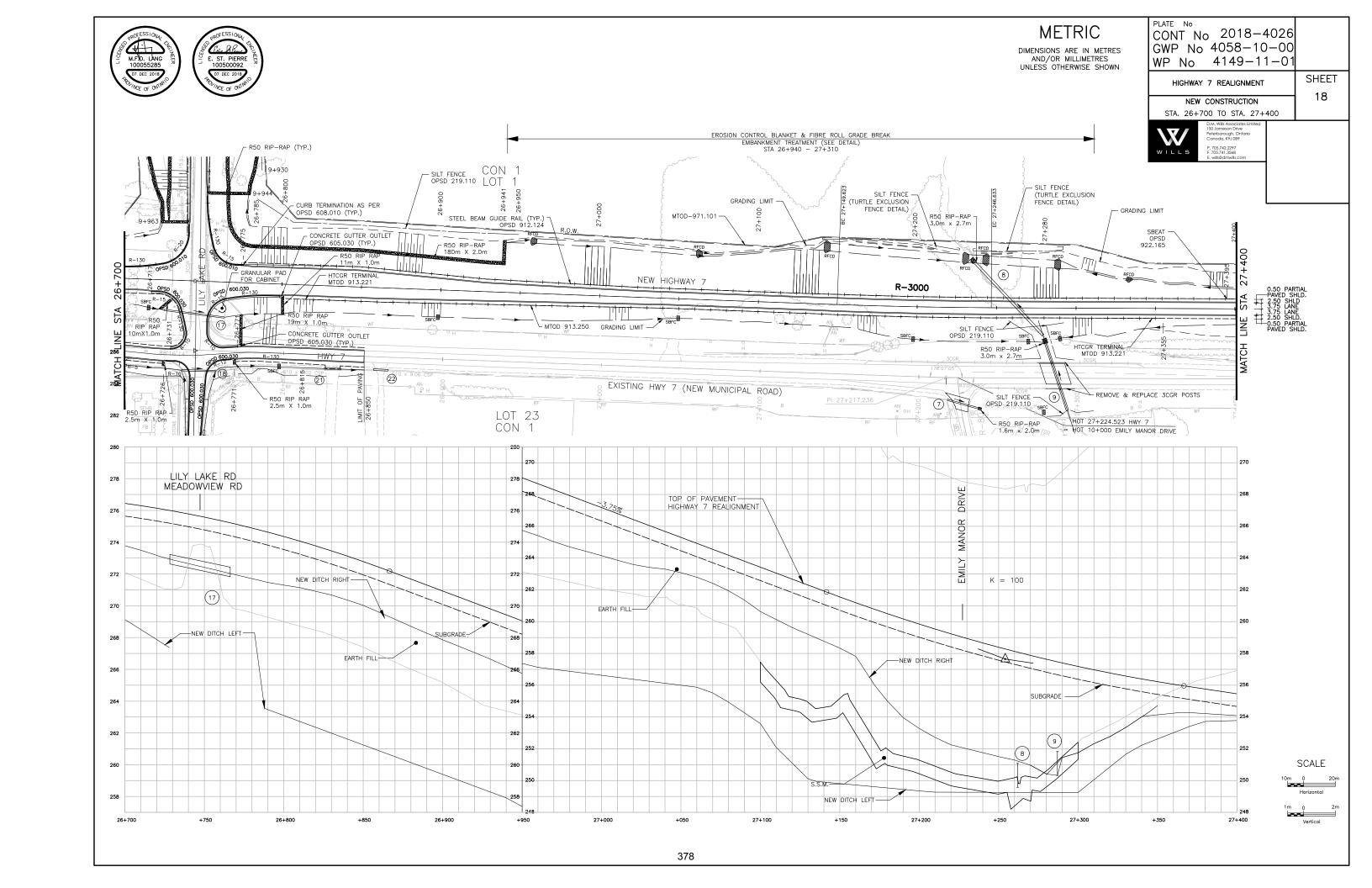


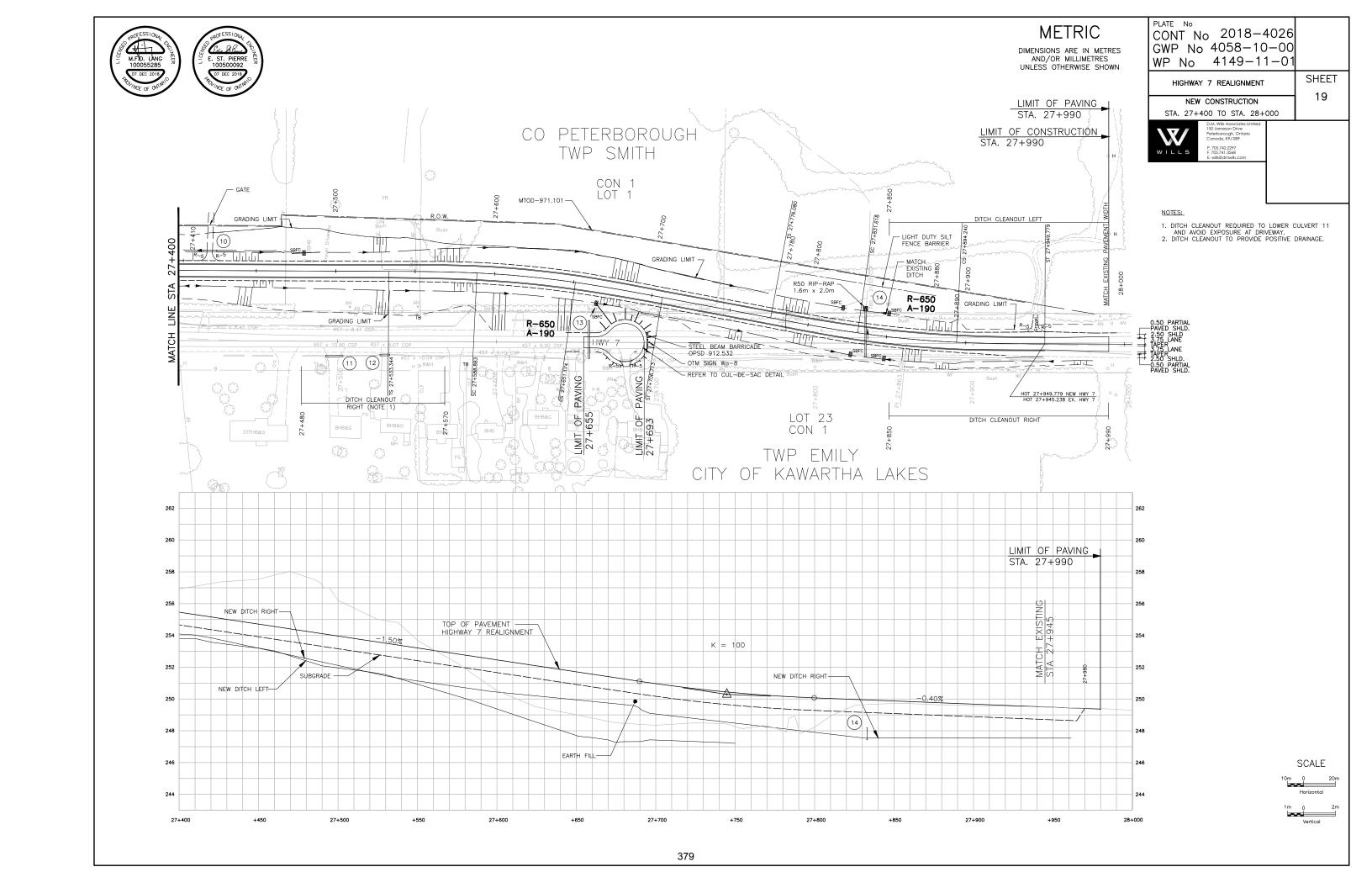
GEOGRAPHIC TOWNSHIP

OF EMILY

CITY OF KAWARTHA LAKES







The Corporation of the City of Kawartha Lakes Committee of the Whole Report

Report Number ED2020-018

| Meeting Date: | September 1, 2020 | | | | |
|--|--|--|--|--|--|
| Title: | Amendments to Non-Compliant Heritage By-laws | | | | |
| Description: | Amendments to several heritage designation by-laws to bring them into compliance with current legislative requirements | | | | |
| Ward Number: | 4 and 8 | | | | |
| Author and Title: | Emily Turner, Economic Development Officer – Heritage Planning | | | | |
| Recommendation | on(s): | | | | |
| That Report ED2020-018, Amendments to Non-Compliant Heritage By-laws, be received; | | | | | |
| • | -24, 2010-091, 2010-092, 2010-093, and 2010-094 be ught into compliance with the current requirements of the ct; | | | | |
| That the necessary amending by-laws be brought forward for adoption; and | | | | | |
| That this recommended next Regular Council | ndation be brought forward to Council for consideration at the cil Meeting. | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| Department Head: | | | | | |
| | R/Other: | | | | |

Chief Administrative Officer:

Background:

Section 30.1 (2) to (10) of the Ontario Heritage Act permits municipalities to make amendments to by-laws to clarify or correct the statement of cultural heritage value, the description of heritage attributes, or legal description of a property and to revise the language of the by-law to make it consistent with the current requirements of the Act or its Regulations. Many of the heritage designation by-laws in Kawartha Lakes were prepared prior to the 2005 amendments to the Ontario Heritage Act and the introduction of Ontario Regulation 9/06 which established provincial criteria for the designation of heritage property and, therefore, do not comply with current requirements for designation by-laws under the Act. Many by-laws prepared after 2005 also do not comply with the requirements of the Act. As a result, they require updating to clarify or correct the statement explaining the property's cultural heritage value or interest and the description of the property's heritage attributes.

Subsection 30.1 (5) requires Council to consult with its Municipal Heritage Committee prior to amending a heritage designation by-law. At its meeting of August 6, 2020, the Kawartha Lakes Municipal Heritage Committee reviewed the proposed by-law amendments and passed the following motion:

KLMHC2020-25 Moved By R. Macklem Seconded By W. Purdy

That Report KLMHC2020-12, **Heritage By-law Updates**, be received; and

That the proposed by-law amendments be forwarded to Council for adoption.

Carried

This report addresses that purpose.

Rationale:

In 2018, the City began to undertake the process of identifying and amending heritage designation by-laws that do not meet the current requirements for designation under Part IV S.29 of the Ontario Heritage Act. Regulation 9/06, which establishes criteria for designation under the Act, states that in order to be designated, a property must meet one or more of the following criteria:

- 1. The property has design or physical value if:
 - i. It is a rare, unique, representative or early example of a style, type, expression, material or construction method;
 - ii. It has a high degree of craftsmanship or artistic merit; or

- iii. It demonstrates a high degree of technical or scientific achievement.
- 2. The property has historical or associative value if:
 - i. It has direct associations with a theme, event, belief, person, activity, organization or institution that is significant to a community;
 - ii. It yields, or has potential to yield, information that contributes to an understanding of a community of culture; or
 - iii. It reflects the work or ideas of an architect, artist, building, designer or theorist who is significant to a community.
- 3. The property has contextual value if,
 - i. It is important in defining, maintaining or supporting the character of an area:
 - ii. It is physically, functionally, visually or historically linked to its surrounding; or
 - iii. It is a landmark.

Part IV, S.29 of the Act also requires that the municipality must prepare a statement of cultural heritage value, identifying what the significance of the property is based on the Regulation 9/06 criteria, which includes a description of the heritage attributes of the property that must be retained to conserve its cultural heritage value or interest. The identification of heritage attributes to be protected should be a selective process and only contain the principal features that reflect the core heritage value of the property. These requirements and Ontario Regulation 9/06 were introduced as part of a significant overhaul of the Act in 2005.

Many of the City's older by-laws, particularly those which predate amalgamation, do not adequately identify the reasons for designation or do not specify features to be protected. This poses challenges with regard to processing alterations for applications and providing clear direction on conserving the important heritage attributes of a property. By-laws that were passed prior to the 2005 changes to the Act did not have the same requirements at the time they were written and are therefore lacking by current standards. There are also a number of by-laws which were passed after 2005 which do not adequately fulfil the requirements of the Act. Amending the by-laws allows for additional clarity for both staff and property owners and removes ambiguity in older by-laws with regard to what features are protected and the significance of the property. The updating of older by-laws to conform to the requirements of the Act is recognized as a municipal best practice and becomes particularly important when major changes are contemplated to a designated property.

At its meeting of September 25, 2018, Council amended 47 heritage designation by-laws after consultation with property owners and inspections of each property in order to bring them into compliance with the Act. The owners of these properties were consulted regarding the proposed amendments to the by-laws

and appropriate notice has been provided as per the requirements for the amendment of designation by-laws under the Ontario Heritage Act. During the consultation process, owners were able to review and provide comment on the new statements of significance and designated heritage attributes identified in the appended draft by-laws, which goes beyond the consultation and notice requirements under the Act.

At that time, amendments were drafted for five additional properties but were not brought forward to Council. These properties are:

- 4249 Highway 7, Omemee (Emily Cemetery Chapel)
- 56 King Street, Woodville
- 121 King Street, Woodville
- 124 King Street, Woodville
- 145 King Street, Woodville

After following up with the owners in fall 2019, it was determined that the owners believed that their by-laws were being updated in 2018 with the other 47 by-laws which were updated at that time. The proposed amendments were reviewed and approved by the owners in 2018 and included in the appropriate public notice required under the Ontario Heritage Act. Staff believe that these by-laws were overlooked in error when the updated by-laws were brought forward to Council in 2018 and are now bringing them forward for amendment. The Municipal Heritage Committee reviewed these amendments at their meeting of August 6, 2020 and have recommended that the amendments be adopted.

4249 Highway 7 in Omemee was designated by a by-law from the former Township of Emily and is being revised to bring it into compliance with the 2005 changes to the Ontario Heritage Act, including providing a statement of cultural heritage value or interest for the property and more clearly identifying its heritage attributes. The four properties in Woodville were designated in 2010 but require amendments to provide statements of cultural heritage value that accurately reflects the evaluation criteria established by Regulation 9/06 and more technically accurate descriptions of heritage attributes. The content of the amendments does not change the protection of the properties, nor the owners' abilities to make changes to their properties, but rather provide clarity and transparency in the long-term protection of the property and bring these older bylaws into conformity with current legislative requirements.

The proposed amendments and original designating by-laws are appended to this report.

Other Alternatives Considered:

There is no requirement under the Act to update non-compliant by-laws. Council could choose not to amend the designation by-laws for these properties. However, this would mean the by-laws are not fully up to date with regards to the requirements under the Act. From a best practices perspective, this is not a recommended alternative.

Financial/Operation Impacts:

There are costs associated with the registration of designation by-laws on title for each property. These costs are covered under the existing Heritage Planning budget.

Relationship of Recommendation(s) To The 2020-2023 Strategic Plan:

In general, the designation of properties under Part IV of the Ontario Heritage Act supports the strategic priority of an Exceptional Quality of Life by supporting and promoting arts, culture and heritage. Designation recognizes and promotes heritage resources in the municipality and supports long-term heritage conservation and planning.

The amendment of heritage by-laws to reflect current legislative requirements also aligns with the municipality's guiding principle of Open and Transparent because it provides clarity for both property owners and the municipality regarding the heritage attributes of a property and its significance which can inform future decision making.

Consultations:

Municipal Heritage Committee

Attachments:

Appendix A – Township of Emily By-law 2000-14 (4249 Highway 7, Omemee)



Township-of-Emily-By

Appendix B – Proposed Amendments to By-law 2000-14



2020 Bylaw Amendment 4249 Hig Appendix C – By-law 2010-091 (145 King Street, Woodville)

A PDF

2010-091 Heritage Designation - 145 Kin

Appendix D – Proposed Amendments to By-law 2010-091



2020 Bylaw Amendment 145 King

Appendix E – By-law 2010-092 (56 King Street, Woodville)



2010-092 Heritage Designation - 56 King

Appendix F – Proposed Amendments to By-law 2010-092



2020 Bylaw Amendment 56 King S

Appendix G – By-law 2010-093 (121 King Street, Woodville)



2010-093 Heritage Designation - 121 Kin

Appendix H – Proposed Amendments to By-law 2010-093



2020 Bylaw Amendment 121 King

Appendix I – By-law 2010-094 (124 King Street, Woodville)



2010-094 Heritage Designation - 124 Kin

Appendix J – Proposed Amendments to By-law 2010-094



2020 Bylaw Amendment 124 King

Department Head E-Mail: cmarshall@kawarthalakes.ca

Department Head: Chris Marshall, Director of Development Services

THE CORPORATION OF THE TOWNSHIP OF EMILY

BY-LAW NUMBER 2000-14

BEING A BY-LAW TO DESIGNATE THE INTERIOR AND EXTERIOR OF THE CHAPEL LOCATED WITHIN THE EMILY CEMETERY, TOWNSHIP OF EMILY, 4249 HIGHWAY #7, ON CONCESSION 4 PART LOT 12, RP57R819 PART 1 TO 2, PRESENTLY OWNED BY THE EMILY CEMETERY COMPANY, AS A DESIGNATED PROPERTY UNDER THE ACT.

WHEREAS the Ontario Heritage Act, R.S.O., 1990 Chapter 0.18 authorizes the Council of a Municipality to enact by-laws to designate real property, including all the buildings and structures thereon, to be of historic or architectural value or interest; and

WHEREAS the Council of the Corporation of the Township of Emily has caused to be served upon the owner of the lands and premises known as the Chapel at the Emily Cemetery, Township of Emily, at 4249 Highway #7, on Concession 4 Part of Lot 12, RP57R819 Part 1 to 2, upon the Ontario Heritage Foundation notice of intention to so designate the aforesaid property and has caused such notice of intention to be published in a newspaper having a general circulation in the Municipality once for each of three consecutive weeks; and

WHEREAS the reasons for designation are set out in Schedule "A" hereto; and

WHEREAS no notice of objection to the said proposed designation has been served upon the Clerk of the Municipality;

THEREFORE, The Council of the Corporation of the Township of Emily ENACTS AS FOLLOWS:

- 1. There is designated as being of architectural value or interest the real property known as the Chapel at the Emily Cemetery, Township of Emily, at 4249 Highway #7, on Concession 4 Part of Lot 12, RP57R819 Part 1 to 2
- 2. The Township Clerk is hereby authorized to cause a copy of this By-Law to be registered against the property described in Schedule A" hereto in the proper Land Registry Office.
- 3. The Township Clerk is hereby authorized to cause a copy of this By-Law to be served upon the owner of the aforesaid property and upon the Ontario Heritage Foundation and to cause notice of this By-Law to be published in a newspaper having general circulation in the Township of Emily.

READ A FIRST TIME THIS 21ST DAY OF AUGUST, 2000.

READ A SECOND TIME THIS 21ST DAY OF AUGUST, 2000.

READ A THIRD TIME AND PASSED THIS 21ST DAY OF AUGUST, 2000.

REÉVE

CLERK

SCHEDULE "A"

Reasons for the designation of the Chapel at Emily Cemetery, Township of Emily, 4249 Highway #7, Concession 4 Part Lot 12, RP57R819 Part 1 to 2

STRUCTURE:

Style of an old English Church of unique stone wall structure. One storey rectangular building with arched entrance way facing south and a rear walkout from the basement.

ROOF:

Steel roof.

WINDOWS:

Arched stained glass windows that tilt in at the top.

DOOR:

Arched entrance with double oak doors with raised panels.

BELL:

Stately bell tower adds the final touch to this historic building.

INTERIOR FEATURES:

Stucco interior and beamed ceiling with hardwood floor and wooden church like pews.

The Corporation of the City of Kawartha Lakes

By-Law 2020-XXX

A By-law to Amend By-Law 2000-14 (former Corporation of the Township of Emily), being a By-law to Designate the Interior and the Exterior of the Chapel Located with the Emily Cemetery, Township of Emily, 4249 Highway #7, on Concession 4 Part Lot 12, RP57R819 Part 1 to 2, Presently Owned by the Emily Cemetery Company, as a Designated Property Under the Act

Recitals

- 1. Section 30.1 of the Ontario Heritage Act, R.S.O. 1990, provides that a Council of a municipality may amend a by-law designating a property within the bounds of a municipality to correct a legal description of a property, clarify the statement of a property's cultural heritage value, or to make it consistent with the requirements of the Act.
- 2. A notice of the proposed amendment has been served on the owner of the property in accordance with subsection 30.1(4) of the Act.
- 3. No objection to the proposed amendment has been served on the Clerk of the Municipality.
- 4. An amendment is required to clarify the statement of cultural heritage value for the property located at 4249 Highway 7 and to make the bylaw consistent with the requirements of the Act.
- 5. These changes require an amendment to the original by-law.

Accordingly, the Council of The Corporation of the City of Kawartha Lakes enacts this By-law 2020-XXX.

Section 1.00: Definitions and Interpretation

1.01 **Definitions**: In this by-law,

"City", "City of Kawartha Lakes" or "Kawartha Lakes" means The Corporation of the City of Kawartha Lakes and includes its entire geographic area;

"City Clerk" means the person appointed by Council to carry out the duties of the clerk described in section 228 of the Municipal Act, 2001:

"Council" or "City Council" means the municipal council for the City;

"Director of Development Services" means the person who holds that position and his or her delegate(s) or, in the event of organizational changes, another person designated by Council.

"Property" means property as set out in Section 2.01.

"Township of Emily" means the former Corporation of the Township of Emily, now amalgamated into the City of Kawartha Lakes.

1.02 Interpretation Rules:

- (a) The Schedules attached to this by-law form part of the by-law, and are enforceable as such.
- (b) The words "include" and "including" are not to be read as limiting the meaning of a word or term to the phrases or descriptions that follow.
- 1.03 Statutes: References to laws in this by-law are meant to refer to the statutes, as amended from time to time, that are applicable within the Province of Ontario.
- 1.04 **Severability:** If a court or tribunal of competent jurisdiction declares any portion of this by-law to be illegal or unenforceable, that portion of this by-law shall be considered to be severed from the balance of the by-law, which shall continue to operate in full force and effect.

Section 2.00: Amendments

2.01 **Amendment to Schedule A:** Schedule A of Township of Emily By-law 2000-14 shall be deleted and substituted for Schedule A attached to this By-law.

Section 3.00: Administration and Effective Date

- 3.01 **Administration of the By-law:** The Director of Development Services is responsible for the administration of this by-law.
- 3.02 **Effective Date:** This By-law shall come into force on the date it is finally passed.

| By-law read | a first, | second | and thire | d time, | and finall | y passed, | this | XXX | day of |
|-------------|----------|--------|-----------|---------|------------|-----------|------|-----|--------|
| XXX, 2020. | | | | | | | | | |

| Andy Letham, Mayor | Cathie Ritchie, City Clerk |
|--------------------|----------------------------|

Schedule 'A' to By-law 2020-XXX

Being a By-law to Amend By-law 2004-14 (former Corporation of the Township of Emily) Being a By-law to Designate the Interior and Exterior of the Chapel Located within the Emily Cemetery, Township of Emily, 4249 Highway #7, on Concession 4 Part Lot 12, RP57r819 Part 1 to 2, Presently Owned by the Emily Cemetery Company, as Designated Property Under the Act

Property

4249 Highway 7, Emily Township

Legal Description

CON 4 PT LOT 12 RP 57R819; PART 1 TO 2

PIN: 63256-0436

Statement of Cultural Heritage Value

4249 Highway 7, known locally as the Emily Cemetery Chapel, is an excellent and representative example of a cemetery chapel constructed in the English Gothic style. It retains many of its original features that are key aspects of this architectural type including its stone wall structure, lancet windows, and bell-cote. Many of its features are original with minor restorations. Designed by Toronto architect George Roper Gouinlock, the building has historical significance as part of the Emily Cemetery which opened in 1872 when the community identified the need for a non-denominational buried ground. The chapel was constructed in 1929 and donated to the cemetery by Flora McCrae Eaton, Lady Eaton, as a memorial to her family and was originally named the McCrea Memorial Chapel. Lady Eaton was born in Omemee in 1880 and is an important figure locally because of her significant impact on the architectural development of Omemee in the early twentieth century. The first ceremony in this chapel took place in 1929 when the cemetery groundskeeper, Stephen Paragreen, passed away. The property has contextual significance as a defining built feature of the Emily Cemetery and as a local landmark in Emily Township. It retains an important contextual relationship with the surrounding cemetery grounds.

Heritage Attributes

Exterior

- One-storey stone construction
- Gable roof
- Cut stone walls
- South facing main entrance including:
 - Double oak lancet-shaped doors with wrought iron hinges
 - Limestone and granite elements
- Fenestration including:
 - Lancet windows
 - Rusticated surrounds

- Bell-cote with date stone (1928) and corbels
- Stone chimney
- Iron door knob
- Brackets
- Soffits and fascia
- Buttresses

Interior

- Open scissor truss timber roof
- Hardwood floor
- Wooden pews with trefoils
- Grouped lancets on the north elevation
- Stained glass

THE CORPORATION OF THE CITY OF KAWARTHA LAKES

BY-LAW 2010 - 091

A BY-LAW TO DESIGNATE 145 KING STREET, KNOWN AS "QUALITY HILL HOUSE", WOODVILLE

Recitals

- 1. Section 29 of the Ontario Heritage Act, R.S.O. 1990, provides that the Council of a municipality may pass a by-law designating a property within the boundaries of the municipality to be of cultural heritage value or interest.
- 2. Notice of Intention to Designate 145 King Street, Woodville, now in the City of Kawartha Lakes, described further in Schedule "A", has been given in accordance with Section 29 of the Ontario Heritage Act.
- 3. No objection to the proposed designation has been served on the Clerk of the Municipality.
- 4. Reasons for Designation are set forth in Schedule "B".

Accordingly, the Council of The Corporation of the City of Kawartha Lakes enacts this By-law 2010-091.

Section 1.00: Definitions and Interpretation

- 1.01 **Definitions**: In this by-law:
 - (a) "By-law" means this by-law, as it may be amended from time to time. The Recitals to, and the Schedules attached to this By-law are considered integral parts of it.
 - (b) "City" means The Corporation of the City of Kawartha Lakes.
 - (c) "Clerk" means the person within the administration of the City which fulfils the function of the City Clerk as required by the Municipal Act 2001 S. O. c.25.
 - (d) "Council" means the municipal council for the City.
 - (e) "Director of Development Services" means the person who holds that position and his or her delegate(s) or, in the event of organizational changes, another person designated by Council;
 - (f) "Heritage Victoria" means the municipal heritage committee established by By-law 2002-49 pursuant to the Ontario Heritage Act.
 - (g) "Foundation" means the Ontario Heritage Foundation;
 - (h) "Property" means property as set out in Section 2.01.

1.02 Interpretation Rules:

- (a) Wherever this By-law refers to a person or thing with reference to gender or the gender neutral, the intention is to read the By-law with the gender applicable to the circumstances.
- (b) References to items in the plural include the singular, as applicable.
- (c) The word "include" is not to be read as limiting the phrases or descriptions that precede it.
- 1.03 **Statutes**: References to laws in this by-law are meant to refer to the statutes, as amended from time to time, that are applicable within the Province of Ontario.
- 1.04 <u>Severability</u>: If a court or tribunal of competent jurisdiction declares any portion of this by-law to be illegal or unenforceable, that portion of this by-law shall be considered to be severed from the balance of the by-law, which shall continue to operate in full force and effect.

| Section 2.00: | Desiar | natior |
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Mayor

- 2.01 145 King Street, Woodville, now in the City of Kawartha Lakes, is designated as being of historic interest and value, described further in Schedule "A". This designation shall not preclude any changes that may be deemed necessary for the efficient use of the building but that any and all such changes shall be in keeping with the original and present character of the building and in consultation with the municipal heritage committee.
- 2.02 The Municipality is hereby authorized to cause a copy of this by-law to be registered against the property described above in the proper Land Registry Office
- 2.03 The Clerk is hereby authorized to cause a copy of this by-law to be served on the owner of the aforesaid property and on the Ontario Heritage Foundation, and to cause notice of the passing of this by-law to be published in the newspaper.

| Section 3.00: Administration and Effective Date |
|---|
| 3.01 Administration: The Director of Development Services is responsible for the administration of this by-law. |
| 3.02 Effective Date : This By-law shall come into force on the date it is finally passed |
| |
| By-law read a first, second and third time, and finally passed, this 25th day of May, 2010 |
| |
| |
| |

Clerk

SCHEDULE 'A' TO BY-LAW 2010-091

BEING A BY-LAW TO DESIGNATE 145 KING STREET, WOODVILLE, SITUATED ON PLAN 119, PT BLK B, GEOGRAPHIC TOWNSHIP OF WOODVILLE NOW IN THE CITY OF KAWARTHA LAKES, AS BEING OF CULTURAL HERITAGE VALUE AND INTEREST.

THE LANDS ARE MORE PARTICULARLY DESCRIBED AS FOLLOWS:

145 King Street, Woodville – PIN 63180-0097(LT) PT BLK B S OF KING ST PL 119 AS IN R447923; KAWARTHA LAKES

SCHEDULE 'B' TO BY-LAW 2010-091

BEING A BY-LAW TO DESIGNATE, 145 KING STREET, WOODVILLE, AS BEING OF CULTURAL HERITAGE VALUE AND INTEREST.

Description of Property

145 King Street, Woodville, is located on the south side of King Street in Woodville, now in the City of Kawartha Lakes.

Statement of Cultural Heritage Value or Interest

Morrison House in Woodville, known as Quality Hill House was built in 1867. The plans for the house came from Scotland and it is considered such a fine edifice that a drawing of it appeared in the 1881 Victoria County Atlas. The "Honourable John Morrison" built this house. He was instrumental in changing the name of the village from what was then known as Irish Corners to Woodville. Mr. Morrison officiated as Reeve of Eldon during 1860-61. In 1870, a Minister of Parliament from Scotland gave out the land grants in the drawing room of this house to many of the Scottish immigrants.

Description of Heritage Attributes

- Complete exterior of house, including Victorian gingerbread trim which is original
 to the house. The soffits are wide planks of pine, tongue and groove, and cover
 the full length of the house.
- All exterior wooden windows, shutters, transom lights and sidelights around front entrance are to be preserved. The sunroom windows are not designated.
- Main Jacobean staircase banister.
- Three faux marble fireplace mantles in the library, dining room and drawing room.
- Medallion on the drawing room ceiling. The medallion was designed by Robert Adam who was an architect from the 18th century. This style was copied in Europe and brought over from Scotland to America in around 1867.
- Vaulted door frames
- Large round window at the top of the staircase landing.
- Exterior stone work. They are large square-cut Ashlar field stones.
- · Chamfered brickwork around windows.
- Maid's back staircase is preserved and original and is enclosed.
- Original glass in windows are unique and therefore receive honourable mention, however, the original glass is not designated.

The Corporation of the City of Kawartha Lakes By-Law 2020-XXX

A By-law to Amend By-Law 2010-091, being a By-law to Designate 145 King Street, Woodville

Recitals

- 1. Section 30.1 of the Ontario Heritage Act, R.S.O. 1990, provides that a Council of a municipality may amend a by-law designating a property within the bounds of a municipality to correct a legal description of a property, clarify the statement of a property's cultural heritage value, or to make it consistent with the requirements of the Act.
- 2. A notice of the proposed amendment has been served on the owner of the property in accordance with subsection 30.1(4) of the Act.
- 3. No objection to the proposed amendment has been served on the Clerk of the Municipality.
- 4. An amendment is required to clarify the statement of cultural heritage value for the property located at 145 King Street and make the by-law consistent with the requirements of the Act.
- 5. These changes require an amendment to the original by-law.

Accordingly, the Council of The Corporation of the City of Kawartha Lakes enacts this By-law 2020-XXX.

Section 1.00: Definitions and Interpretation

1.01 **Definitions**: All defined terms in the amending By-law take their meaning from By-law 2010-091 of the City of Kawartha Lakes.

1.02 Interpretation Rules:

- (a) The Schedules attached to this by-law form part of the by-law, and are enforceable as such.
- (b) The words "include" and "including" are not to be read as limiting the meaning of a word or term to the phrases or descriptions that follow.
- 1.03 **Statutes:** References to laws in this by-law are meant to refer to the statutes, as amended from time to time, that are applicable within the Province of Ontario.
- 1.04 **Severability:** If a court or tribunal of competent jurisdiction declares any portion of this by-law to be illegal or unenforceable, that portion of this by-law shall be considered to be severed from the balance of the by-law, which shall continue to operate in full force and effect.

Section 2.00: Amendments

- 2.01 **Amendments to Schedule A:** Schedule A of By-law 2010-091 shall be deleted and substituted for Schedule A attached to this By-law.
- 2.02 **Amendments to Schedule B:** Schedule B of By-law 2010-091 shall be deleted from the By-law.

Section 3.00: Administration and Effective Date

- 3.01 **Administration of the By-law:** The Director of Development Services is responsible for the administration of this by-law.
- 3.02 **Effective Date:** This By-law shall come into force on the date it is finally passed.

By-law read a first, second and third time, and finally passed, this XXX day of XXX, 2020.

| _ | _ |
|--------------------|----------------------------|
| Andy Letham, Mayor | Cathie Ritchie, City Clerk |

Schedule 'A' to By-law 2020-XXX

Being a By-law to Amend By-law 2010-091, being a By-law to Designate 145 King Street, Woodville

Property

145 King Street, Woodville – Morrison House

Legal Description

PT BLK B S OF KING ST PL 119 AS IN R447923; KAWARTHA LAKES

PIN: 63180-0097

Statement of Cultural Heritage Value

145 King Street, known locally as both Morrison House and Quality Hill House. has architectural value as a representative example of a Victorian residential building. It retains a number of architecturally significant features including: two over two double-hung windows with inlaid brick lintels solid pine window sills and decorative brick surrounds; bay windows; and a stately entrance with transom windows. It also retains decorative gingerbread trim in the gables which is typical of this style of house. Constructed in 1867, the plans for the house came from Scotland and it was considered such a fine structure at the time of its construction that a drawing of it appeared in the 1881 Victoria County Atlas. A decorative medallion in the drawing room ceiling is believed to be based on a design by the prominent eighteenth century Scottish architect, Robert Adam. The property also has historical significance due to its connections to the history of Woodville and the local Scottish community. Morrison House was constructed in 1867 for Scottish immigrant John Morrison, who served as Reeve of Eldon between 1860 and 1861 and was elected to the first Dominion Parliament as the Liberal MP for Victoria North. He was instrumental in changing the name of the village from what was then known as Irish Corners to Woodville. In 1870, a Minister of Parliament from Scotland gave out the land grants in the drawing room of this house to many Scottish immigrants.

Heritage Attributes

Exterior:

- Two-and-a-half storey construction
- Gable roof
- Buff brick exterior
- Gingerbread trim
- Wide pine planked tongue and groove soffits
- Fenestration including:
 - Original wooden windows
 - Shutters
 - Voussoirs
 - Front bay window
- Front entrance including:
 - Transom and sidelights

- Large square-cut ashlar field stones in foundation
- Decorative brickwork around most windows
- Quoins
- Chimneys

Interior

- Main Jacobean staircase banister
- Three faux marble fireplace mantles in the library, dining room and drawing room
- Medallion on the drawing room ceiling
- Arched window in the staircase landing

THE CORPORATION OF THE CITY OF KAWARTHA LAKES

BY-LAW 2010 - 092

A BY-LAW TO DESIGNATE 56 KING STREET, WOODVILLE

Recitals

- 1. Section 29 of the Ontario Heritage Act, R.S.O. 1990, provides that the Council of a municipality may pass a by-law designating a property within the boundaries of the municipality to be of cultural heritage value or interest.
- 2. Notice of Intention to Designate 56 King Street, Woodville, now in the City of Kawartha Lakes, described further in Schedule "A", has been given in accordance with Section 29 of the Ontario Heritage Act.
- 3. No objection to the proposed designation has been served on the Clerk of the Municipality.
- 4. Reasons for Designation are set forth in Schedule "B".

Accordingly, the Council of The Corporation of the City of Kawartha Lakes enacts this By-law 2010-092.

Section 1.00: Definitions and Interpretation

1.01 **Definitions**: In this by-law:

- (a) "By-law" means this by-law, as it may be amended from time to time. The Recitals to, and the Schedules attached to this By-law are considered integral parts of it.
- (b) "City" means The Corporation of the City of Kawartha Lakes.
- (c) "Clerk" means the person within the administration of the City which fulfils the function of the City Clerk as required by the Municipal Act 2001 S. O. c.25.
- (d) "Council" means the municipal council for the City.
- (e) "Director of Development Services" means the person who holds that position and his or her delegate(s) or, in the event of organizational changes, another person designated by Council;
- (f) "Heritage Victoria" means the municipal heritage committee established by By-law 2002-49 pursuant to the Ontario Heritage Act;
- (g) "Foundation" means the Ontario Heritage Foundation;
- (h) "Property" means property as set out in Section 2.01.

1.02 Interpretation Rules:

- (a) Wherever this By-law refers to a person or thing with reference to gender or the gender neutral, the intention is to read the By-law with the gender applicable to the circumstances.
- (b) References to items in the plural include the singular, as applicable.
- (c) The word "include" is not to be read as limiting the phrases or descriptions that precede it.
- 1.03 **Statutes**: References to laws in this by-law are meant to refer to the statutes, as amended from time to time, that are applicable within the Province of Ontario.
- 1.04 **Severability**: If a court or tribunal of competent jurisdiction declares any portion of this by-law to be illegal or unenforceable, that portion of this by-law shall be considered to be severed from the balance of the by-law, which shall continue to operate in full force and effect.

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| CCCUUII | _ | . ()() . | DESIGN | танкл |

Mayor

- 2.01 56 King Street, Woodville, now in the City of Kawartha Lakes, is designated as being of historic interest and value, described further in Schedule "A". This designation shall not preclude any changes that may be deemed necessary for the efficient use of the building but that any and all such changes shall be in keeping with the original and present character of the building and in consultation with the municipal heritage committee.
- 2.02 The Municipality is hereby authorized to cause a copy of this by-law to be registered against the property described above in the proper Land Registry Office.
- 2.03 The Clerk is hereby authorized to cause a copy of this by-law to be served on the owner of the aforesaid property and on the Ontario Heritage Foundation, and to cause notice of the passing of this by-law to be published in the newspaper.

| Section 3.00: Administration and Effective Date |
|---|
| 3.01 Administration: The Director of Development Services is responsible for the administration of this by-law. |
| 3.02 Effective Date : This By-law shall come into force on the date it is finally passed. |
| |
| By-law read a first, second and third time, and finally passed, this 25th day of May, 2010. |
| |
| |

Clerk

SCHEDULE 'A' TO BY-LAW 2010-092

BEING A BY-LAW TO DESIGNATE 56 KING STREET, WOODVILLE, SITUATED ON PLAN 119 PT BLK C RP 57R2654 PART 1 RP 57R4801 PART 1 GREOGRAPHIC TOWNSHIP OF WOODVILLE NOW IN THE CITY OF KAWARTHA LAKES, AS BEING OF CULTURAL HERITAGE VALUE AND INTEREST.

THE LANDS ARE MORE PARTICULARLY DESCRIBED AS FOLLOWS:

56 King Street, Woodville – PIN 63179-0333 (LT) PT BLK C OR CHURCH LT PL 119 PT 1 57R2654 & PT 1 57R4801; KAWARTHA LAKES

SCHEDULE 'B' TO BY-LAW 2010-092

BEING A BY-LAW TO DESIGNATE, 56 KING STREET, WOODVILLE, AS BEING OF CULTURAL HERITAGE VALUE AND INTEREST.

Description of Property

56 King Street, Woodville, is located on the north side of King Street in Woodville, now in the City of Kawartha Lakes.

Statement of Cultural Heritage Value or Interest

56 King Street, Woodville, known as the old Presbyterian Manse, was built in 1837 with solid brick exterior walls on cut granite stone foundation. It features 5 fireplaces, library, wine cave, faux marble, original pine floors, spiral stairs and multi-pane windows.

Description of Heritage Attributes

- Three fireplaces: 1) original mantle and hearth of fireplace with faux marble finish located in the living room in the west side of the house; 2) original hearths found in two fireplaces in the front of the house.
- The brick exterior.
- Stone foundation
- All exterior windows on three sides excluding the main entrance and sidelights.
 Windows are double-hung colonial windows 6 over 6 and are shuttered.
 Windows in the back of the house are authentic Peter Robinson windows from Omemee.
- · Original pine floors, which have been painted over
- Spiral, tower style, staircase with walls on two sides (enclosed) and inset windows.
- Two gothic style yellow brick chimneys.
- Fireplace opening, brick work and hearth in the basement.

The Corporation of the City of Kawartha Lakes By-Law 2020-XXX

A By-law to Amend By-Law 2010-092, being a By-law to Designate 56 King Street, Woodville

Recitals

- 1. Section 30.1 of the Ontario Heritage Act, R.S.O. 1990, provides that a Council of a municipality may amend a by-law designating a property within the bounds of a municipality to correct a legal description of a property, clarify the statement of a property's cultural heritage value, or to make it consistent with the requirements of the Act.
- 2. A notice of the proposed amendment has been served on the owner of the property in accordance with subsection 30.1(4) of the Act.
- 3. No objection to the proposed amendment has been served on the Clerk of the Municipality.
- 4. An amendment is required to clarify the statement of cultural heritage value for the property located at 56 King Street and make the by-law consistent with the requirements of the Act.
- 5. These changes require an amendment to the original by-law.

Accordingly, the Council of The Corporation of the City of Kawartha Lakes enacts this By-law 2020-XXX.

Section 1.00: Definitions and Interpretation

1.01 **Definitions**: All defined terms in the amending By-law take their meaning from By-law 2010-092 of the City of Kawartha Lakes.

1.02 Interpretation Rules:

- (a) The Schedules attached to this by-law form part of the by-law, and are enforceable as such.
- (b) The words "include" and "including" are not to be read as limiting the meaning of a word or term to the phrases or descriptions that follow.
- 1.03 **Statutes:** References to laws in this by-law are meant to refer to the statutes, as amended from time to time, that are applicable within the Province of Ontario.
- 1.04 **Severability:** If a court or tribunal of competent jurisdiction declares any portion of this by-law to be illegal or unenforceable, that portion of this by-law shall be considered to be severed from the balance of the by-law, which shall continue to operate in full force and effect.

Section 2.00: Amendments

- 2.01 **Amendments to Schedule A:** Schedule A of By-law 2010-092 shall be deleted and substituted for Schedule A attached to this By-law.
- 2.02 **Amendments to Schedule B:** Schedule B of By-law 2010-092 shall be deleted from the By-law.

Section 3.00: Administration and Effective Date

- 3.01 **Administration of the By-law:** The Director of Development Services is responsible for the administration of this by-law.
- 3.02 **Effective Date:** This By-law shall come into force on the date it is finally passed.

By-law read a first, second and third time, and finally passed, this XXX day of XXX, 2020.

| _ | _ |
|--------------------|----------------------------|
| Andy Letham, Mayor | Cathie Ritchie, City Clerk |

Schedule 'A' to By-law 2020-XXX

Being a By-law to Amend By-law 2010-092 Being a By-law to Designate 56 King Street, Woodville

Property

56 King Street, Woodville

Legal Description

PLAN 119 PT BLK C RP 57R2654;PART 1 RP 57R4801 PART 1 RP;57R10155 PART 3

PIN: 63179-0446

Statement of Cultural Heritage Value

56 King Street was constructed in Woodville in 1837 and is an excellent, representative example of a Georgian style house. Constructed on a center hall plan, It demonstrates the typical symmetrical massing and restrained ornamentation of Georgian houses and key features of this style. These include six over six sash windows with shutters, a central entrance with transom and sidelights and symmetrical chimneys. The property has also retained a number of original interior features including three fireplaces, original pine floors, original Peter Robinson windows and a spiral, tower style staircase and original cooking fireplace in basement. The property also has historical significance as the Presbyterian manse and contextual significance as part of the historic landscape of King Street in Woodville and in its connections to the former Presbyterian Church.

Heritage Attributes

Exterior

- Two-storey construction
- Gable roof
- Red brick exterior
- Stone foundation
- Fenestration including:
 - Double-hung six over six Colonial windows
 - Peter Robinson windows
 - Shutters
 - Voussoirs
- Chimneys
- Return eaves
- Front entrance with sidelights and transom

Interior

- Fireplaces including:
 - Mantle and hearth of fireplace with faux marble finish located in the living room in the northwest side of the house;
 - Original additional hearths found in two other fireplaces

- Original pine floors
- Enclosed spiral, tower style staircase and inset window
 Fireplace, brickwork and hearth in second storey front room

THE CORPORATION OF THE CITY OF KAWARTHA LAKES

BY-LAW 2010 - 093

A BY-LAW TO DESIGNATE 121 KING STREET, WOODVILLE, "STODDART HOUSE"

Recitals

- 1. Section 29 of the Ontario Heritage Act, R.S.O. 1990, provides that the Council of a municipality may pass a by-law designating a property within the boundaries of the municipality to be of cultural heritage value or interest.
- 2. Notice of Intention to Designate the exterior of "121 King Street Woodville, now in the City of Kawartha Lakes, described further in Schedule "A", has been given in accordance with Section 29 of the Ontario Heritage Act.
- 3. No objection to the proposed designation has been served on the Clerk of the Municipality.
- 4. Reasons for Designation are set forth in Schedule "B".

Accordingly, the Council of The Corporation of the City of Kawartha Lakes enacts this By-law 2010-093.

Section 1.00: Definitions and Interpretation

1.01 **Definitions**: In this by-law:

- (a) "By-law" means this by-law, as it may be amended from time to time. The Recitals to, and the Schedules attached to this By-law are considered integral parts of it.
- (b) "City" means The Corporation of the City of Kawartha Lakes.
- (c) "Clerk" means the person within the administration of the City which fulfils the function of the City Clerk as required by the Municipal Act 2001 S. O. c.25.
- (d) "Council" means the municipal council for the City.
- (e) "Director of Development Services" means the person who holds that position and his or her delegate(s) or, in the event of organizational changes, another person designated by Council;
- (f) "Heritage Victoria" means the municipal heritage committee established by By-law 2002-49 pursuant to the Ontario Heritage Act.
- (g) "Foundation" means the Ontario Heritage Foundation
- (h) "Property" means property as set out in Section 2.01.

1.02 Interpretation Rules:

- (a) Wherever this By-law refers to a person or thing with reference to gender or the gender neutral, the intention is to read the By-law with the gender applicable to the circumstances.
- (b) References to items in the plural include the singular, as applicable.
- (c) The word "include" is not to be read as limiting the phrases or descriptions that precede it.
- 1.03 **Statutes**: References to laws in this by-law are meant to refer to the statutes, as amended from time to time, that are applicable within the Province of Ontario.
- 1.04 <u>Severability</u>: If a court or tribunal of competent jurisdiction declares any portion of this by-law to be illegal or unenforceable, that portion of this by-law shall be considered to be severed from the balance of the by-law, which shall continue to operate in full force and effect.

| Section 2.00: | Desiar | natior |
|---------------|--------|--------|
|---------------|--------|--------|

Mayor

- 2.01 The exterior of 121 King Street, Woodville, "STODDART HOUSE", in the City of Kawartha Lakes, is designated as being of historic interest and value, described further in Schedule "A". This designation shall not preclude any changes that may be deemed necessary for the efficient use of the building but that any and all such changes shall be in keeping with the original and present character of the building and in consultation with the municipal heritage committee.
- 2.02 The Municipality is hereby authorized to cause a copy of this by-law to be registered against the property described above in the proper Land Registry Office
- 2.03 The Clerk is hereby authorized to cause a copy of this by-law to be served on the owner of the aforesaid property and on the Ontario Heritage Foundation, and to cause notice of the passing of this by-law to be published in the newspaper.

| Section 3.00: Administration and Effective Date | |
|---|-----|
| 3.01 Administration: The Director of Development Services is responsible for the administration of this by-law. | |
| 3.02 Effective Date : This By-law shall come into force on the date it is finally passe | ed. |
| By-law read a first, second and third time, and finally passed, this 25 th day of May, 201 | 0. |

Clerk

SCHEDULE 'A' TO BY-LAW 2010-093

BEING A BY-LAW TO DESIGNATE PARTS OF THE EXTERIOR OF 121 KING STREET, WOODVILLE, "STODDART HOUSE", SITUATED ON PLAN 119, LOTS 13 AND 14, GEOGRAPHIC TOWNSHIP OF WOODVILLE NOW IN THE CITY OF KAWARTHA LAKES, AS BEING OF CULTURAL HERITAGE VALUE AND INTEREST.

THE LANDS ARE MORE PARTICULARLY DESCRIBED AS FOLLOWS:

PIN 63180-0134(LT) - LT 13 S/S KING ST AND W/S AGNES ST PL 119 LT 14 S/S KING ST AND W/S AGNES ST PL 119 S/T A29215, KAWARTHA LAKES

SCHEDULE 'B' TO BY-LAW 2010-093

BEING A BY-LAW TO DESIGNATE, 121 KING STREET, WOODVILLE, "STODDART HOUSE" AS BEING OF CULTURAL HERITAGE VALUE AND INTEREST.

Description of Property

121 King Street , Woodville, contains a brick house and is located on the south side of King Street in Woodville, now in the City of Kawartha Lakes.

Statement of Cultural Heritage Value or Interest

Known as the "Stoddart House", this house was built in the 1870's by Dr. Grant with solid brick exterior walls on field stone foundation. The property is in original condition. The house is one of the oldest and ornate Victorian homes in Woodville. It originally served as the Doctor's house. The house features a wrap around porch on three sides, porch brackets and ginger bread trim and has two sets of ornate stain glass windows

Description of Heritage Attributes

- Wraparound porch, which is in Queen Anne revival style, the porch brackets, gingerbread trims, and railings. Slat of gingerbread trim between posts and brackets that are part of the posts are of Queen Anne revival style and have eclectic stick and ball design, which are original to the house.
- Two sets of ornate stained glass windows on the front of building and North facing.
- One ornate stained glass window at the rear of the house.
- Transoms above the windows on the front of building, second floor.
- · Brick work and quoining.

The Corporation of the City of Kawartha Lakes By-Law 2020-XXX

A By-law to Amend By-Law 2010-093, being a By-law to Designate 121 King Street, Woodville, "Stoddart House"

Recitals

- 1. Section 30.1 of the Ontario Heritage Act, R.S.O. 1990, provides that a Council of a municipality may amend a by-law designating a property within the bounds of a municipality to correct a legal description of a property, clarify the statement of a property's cultural heritage value, or to make it consistent with the requirements of the Act.
- 2. A notice of the proposed amendment has been served on the owner of the property in accordance with subsection 30.1(4) of the Act.
- 3. No objection to the proposed amendment has been served on the Clerk of the Municipality.
- 4. An amendment is required to clarify the statement of cultural heritage value for the property located at 121 King Street and make the by-law consistent with the requirements of the Act.
- 5. These changes require an amendment to the original by-law.

Accordingly, the Council of The Corporation of the City of Kawartha Lakes enacts this By-law 2020-XXX.

Section 1.00: Definitions and Interpretation

1.01 **Definitions**: All defined terms in the amending By-law take their meaning from By-law 2010-093 of the City of Kawartha Lakes.

1.02 Interpretation Rules:

- (a) The Schedules attached to this by-law form part of the by-law, and are enforceable as such.
- (b) The words "include" and "including" are not to be read as limiting the meaning of a word or term to the phrases or descriptions that follow.
- 1.03 **Statutes:** References to laws in this by-law are meant to refer to the statutes, as amended from time to time, that are applicable within the Province of Ontario.
- 1.04 **Severability:** If a court or tribunal of competent jurisdiction declares any portion of this by-law to be illegal or unenforceable, that portion of this by-law shall be considered to be severed from the balance of the by-law, which shall continue to operate in full force and effect.

Section 2.00: Amendments

- 2.01 **Amendments to Schedule A:** Schedule A of By-law 2010-093 shall be deleted and substituted for Schedule A attached to this By-law.
- 2.02 **Amendments to Schedule B:** Schedule B of By-law 2010-093 shall be deleted from the By-law.

Section 3.00: Administration and Effective Date

- 3.01 **Administration of the By-law:** The Director of Development Services is responsible for the administration of this by-law.
- 3.02 **Effective Date:** This By-law shall come into force on the date it is finally passed.

By-law read a first, second and third time, and finally passed, this XXX day of XXX, 2020.

| Andy Letham, Mayor | _ Cathie Ritchie, City Clerk |
|--------------------|---------------------------------|

Schedule 'A' to By-law 2020-XXX

Being a By-law to Amend By-law 2010-093 Being a By-law to Designate 121 King Street, Woodville, "Stoddart House"

Property

121 King Street, Woodville

Legal Description

PLAN 119 LOTS 13 & 14

PIN# 63180-0134

Statement of Cultural Heritage Value

Traditionally known as the "Stoddart House", this house was built in the 1870s by Dr. Grant with solid brick exterior walls on field stone foundation. It is an excellent and representative example of a Victorian residential building and is currently in original condition. The house is one of the oldest and most ornate Victorian homes in Woodville. The house features a Queen Anne Revival style wraparound verandah on three sides which contains decorative brackets, gingerbread trims and railings, and slats of gingerbread trim between posts and brackets that are characteristic of the Queen Anne revival style. Two sets of ornate stained glass windows decorate the two storeys of the front facade of the home. The property has historical significance because of its associations with the Stoddart family and their businesses within the community of Woodville and in Victoria County. The Stoddart family has operated funeral establishments in the area in 1858 and, after the construction of the house, ran a cabinet making and funeral business from this building. They continue to operate their funeral business in the county from a different location. The property also has contextual significance as part of the historic landscape of King Street in Woodville.

Heritage Attributes

- One and a half storey construction
- Gable roof
- Red brick construction
- Wrap around porch with decorative woodwork including:
 - Chamfered columns
 - Brackets
 - Spindlework
- Fenestration including:
 - Stained glass
 - o Transoms
 - Rounded windows
 - Buff brick voussoirs
- Buff brick quoins
- Decorative bargeboard in the centre gable
- Symmetrical massing

THE CORPORATION OF THE CITY OF KAWARTHA LAKES

BY-LAW 2010 - 094

A BY-LAW TO DESIGNATE 124 KING STREET, WOODVILLE

Recitals

- 1. Section 29 of the Ontario Heritage Act, R.S.O. 1990, provides that the Council of a municipality may pass a by-law designating a property within the boundaries of the municipality to be of cultural heritage value or interest.
- 2. Notice of Intention to Designate the exterior of 124 King Street Woodville, now in the City of Kawartha Lakes, described further in Schedule "A", has been given in accordance with Section 29 of the Ontario Heritage Act.
- 3. No objection to the proposed designation has been served on the Clerk of the Municipality.
- 4. Reasons for Designation are set forth in Schedule "B".

Accordingly, the Council of The Corporation of the City of Kawartha Lakes enacts this By-law 2010-094.

Section 1.00: Definitions and Interpretation

1.01 **Definitions**: In this by-law:

- (a) "By-law" means this by-law, as it may be amended from time to time. The Recitals to, and the Schedules attached to this By-law are considered integral parts of it.
- (b) "City" means The Corporation of the City of Kawartha Lakes.
- (c) "Clerk" means the person within the administration of the City which fulfils the function of the City Clerk as required by the Municipal Act 2001 S. O. c.25.
- (d) "Council" means the municipal council for the City.
- (e) "Director of Development Services" means the person who holds that position and his or her delegate(s) or, in the event of organizational changes, another person designated by Council;
- (f) "Heritage Victoria" means the municipal heritage committee established by By-law 2002-49 pursuant to the Ontario Heritage Act.
- (g) "Foundation" means the Ontario Heritage Foundation
- (h) "Property" means property as set out in Section 2.01

1.02 Interpretation Rules:

- (a) Wherever this By-law refers to a person or thing with reference to gender or the gender neutral, the intention is to read the By-law with the gender applicable to the circumstances.
- (b) References to items in the plural include the singular, as applicable.
- (c) The word "include" is not to be read as limiting the phrases or descriptions that precede it.
- 1.03 **Statutes**: References to laws in this by-law are meant to refer to the statutes, as amended from time to time, that are applicable within the Province of Ontario.
- 1.04 **Severability**: If a court or tribunal of competent jurisdiction declares any portion of this by-law to be illegal or unenforceable, that portion of this by-law shall be considered to be severed from the balance of the by-law, which shall continue to operate in full force and effect.

| Section 2.00: | Design | natior |
|---------------|--------|--------|
|---------------|--------|--------|

Mayor

- 2.01 The exterior of 124 King Street, Woodville, now in the City of Kawartha Lakes, is designated as being of historic interest and value, described further in Schedule "A". This designation shall not preclude any changes that may be deemed necessary for the efficient use of the building but that any and all such changes shall be in keeping with the original and present character of the building and in consultation with the municipal heritage committee.
- 2.02 The Municipality is hereby authorized to cause a copy of this by-law to be registered against the property described above in the proper Land Registry Office
- 2.03 The Clerk is hereby authorized to cause a copy of this by-law to be served on the owner of the aforesaid property and on the Ontario Heritage Foundation, and to cause notice of the passing of this by-law to be published in the newspaper.

| Section | n 3.00: Administration and Effective Date |
|---------|--|
| 3.01 | Administration: The Director of Development Services is responsible for the administration of this by-law. |
| 3.02 | Effective Date : This By-law shall come into force on the date it is finally passed. |
| By-law | read a first, second and third time, and finally passed, this 25th day of May, 2010 |

Clerk

SCHEDULE 'A' TO BY-LAW 2010-094

BEING A BY-LAW TO DESIGNATE PARTS OF THE EXTERIOR OF124 KING STREET, WOODVILLE, SITUATED ON PLAN 119, LOT 8, GEOGRAPHIC TOWNSHIP OF WOODVILLE NOW IN THE CITY OF KAWARTHA LAKES, AS BEING OF CULTURAL HERITAGE VALUE AND INTEREST.

THE LANDS ARE MORE PARTICULARLY DESCRIBED AS FOLLOWS:

124 King Street, Woodville – PIN 63179-0221 (LT) LT 8 N/S KING ST AND W/S NAPPADALE ST PL 119; KAWARTHA LAKES

SCHEDULE 'B' TO BY-LAW 2010-094

BEING A BY-LAW TO DESIGNATE, 124 KING STREET, WOODVILLE, AS BEING OF CULTURAL HERITAGE VALUE AND INTEREST.

Description of Property

124 King Street, Woodville, contains a brick house and is located on the north side of King Street in Woodville, now in the City of Kawartha Lakes.

Statement of Cultural Heritage Value or Interest

124 King Street, Woodville, was built in 1879 by the founder of Woodville, (Morrison) for his daughter. The house is a fine example of early Canadian brick cornices design. The original trim, porches, gables windows and polychromatic brick are still in place.

Description of Heritage Attributes

- All exterior brickwork (Greek style) and windows
- Exterior trim of house. The exterior trim has quoined corners.
- Front porch. The porch in the front of the house is in Queen Anne revival style with bellcast roof.
- Two round windows on the second floor.
- Roman arches Italianate exterior brickwork over second floor windows with keystone.
- Barn with low ceiling at the rear of the house is unique and receives honourable mention; however the barn is not designated.

The Corporation of the City of Kawartha Lakes By-Law 2020-XXX

A By-law to Amend By-Law 2010-094, being a By-law to Designate 124 King Street, Woodville

Recitals

- 1. Section 30.1 of the Ontario Heritage Act, R.S.O. 1990, provides that a Council of a municipality may amend a by-law designating a property within the bounds of a municipality to correct a legal description of a property, clarify the statement of a property's cultural heritage value, or to make it consistent with the requirements of the Act.
- 2. A notice of the proposed amendment has been served on the owner of the property in accordance with subsection 30.1(4) of the Act.
- 3. No objection to the proposed amendment has been served on the Clerk of the Municipality.
- 4. An amendment is required to clarify the statement of cultural heritage value for the property located at 124 King Street and make the by-law consistent with the requirements of the Act.
- 5. These changes require an amendment to the original by-law.

Accordingly, the Council of The Corporation of the City of Kawartha Lakes enacts this By-law 2020-XXX.

Section 1.00: Definitions and Interpretation

1.01 **Definitions**: All defined terms in the amending By-law take their meaning from By-law 2010-094 of the City of Kawartha Lakes.

1.02 Interpretation Rules:

- (a) The Schedules attached to this by-law form part of the by-law, and are enforceable as such.
- (b) The words "include" and "including" are not to be read as limiting the meaning of a word or term to the phrases or descriptions that follow.
- 1.03 **Statutes:** References to laws in this by-law are meant to refer to the statutes, as amended from time to time, that are applicable within the Province of Ontario.
- 1.04 **Severability:** If a court or tribunal of competent jurisdiction declares any portion of this by-law to be illegal or unenforceable, that portion of this by-law shall be considered to be severed from the balance of the by-law, which shall continue to operate in full force and effect.

Section 2.00: Amendments

- 2.01 **Amendments to Schedule A:** Schedule A of By-law 2010-094 shall be deleted and substituted for Schedule A attached to this By-law.
- 2.02 **Amendments to Schedule B:** Schedule B of By-law 2010-094 shall be deleted from the By-law.

Section 3.00: Administration and Effective Date

- 3.01 **Administration of the By-law:** The Director of Development Services is responsible for the administration of this by-law.
- 3.02 **Effective Date:** This By-law shall come into force on the date it is finally passed.

By-law read a first, second and third time, and finally passed, this XXX day of XXX, 2020.

| _ | _ |
|--------------------|----------------------------|
| Andy Letham, Mayor | Cathie Ritchie, City Clerk |

Schedule 'A' to By-law 2020-XXX

Being a By-law to Amend By-law 2010-094 Being a By-law to Designate 124 King Street, Woodville

Property

124 King Street, Woodville

Legal Description

LT 8 N/S KING ST AND W/S NAPPADALE ST PL 119; KAWARTHA LAKES

PIN: 63179-0221

Statement of Cultural Heritage Value

124 King Street in Woodville has cultural heritage value as a representative and intact example of a late Victorian house. Constructed in 1879, the house retains many of its architectural features. These include its L-shaped massing, buff brick quoins, rounded windows, moulded decorative window hoods, corner porch, and entrance with transom window. The house was built for the daughter of Woodville Postmaster John Morrison, who also served as Reeve of Eldon between 1860 and 1861, whose own house is located across the road. The property has contextual value as part of the historic streetscape of King Street in Woodville. The street which forms the main thoroughfare through town retains a wide array of late nineteenth century residential properties and this property contributes to that intact historic landscape.

Heritage Attributes

- One and a half storey construction
- Gable roof
- Red brick exterior
- Rusticated buff brick quoins
- Fenestration including:
 - o Rounded and rectangular windows
 - Buff brick decorative hood moulds
- Front porch including columns and entablature
- Entrance with transom

The Corporation of the City of Kawartha Lakes Committee of the Whole Report

Report Number ED2020-019

| weeting Date: | September 1, 2020 | |
|--|--|--|
| Title: Deferral of the Kawartha Lakes Cultural Centre Task Force | | |
| Description: | Report to defer the Kawartha Lakes Cultural Centre Task Force and the 2020 Cultural Centre Feasibility Study due to COVID-19 | |
| Ward Number: | All | |
| Author and Title: | Donna Goodwin, Economic Development Officer – Arts & Culture | |
| Recommendati | on(s): | |
| That Report ED202 received; | 20-019, Kawartha Lakes Cultural Centre Task Force , be | |
| the Kawartha Cultu | or deferral received from the Kawartha Lakes Arts Council and Iral and Heritage Network of the Kawartha Lakes Cultural and the 2020 Cultural Centre Feasibility study be granted; | |
| That the \$50,000 b timeframe; | oudgeted for the project be extended to reflect the new | |
| That the Term of the Taskforce be extended one year to March 31, 2022; and | | |
| That this recommendation be brought forward to Council for consideration at the next Regular Council Meeting. | | |
| | | |
| | | |
| Department Head: | | |
| Financial/Legal/HR/Other: | | |
| Chief Administrative Officer: | | |
| | | |

Background:

At the Special Council Meeting of November 26, 2019, Council adopted the following resolution:

CR2019-672

That Decision Unit Identifier 202, Cultural Centre Feasibility Study in the amount of \$50,000.00, be added to the 2020 Special Projects Budget. **Carried**

At the Council Meeting of January 28, 2020, Council adopted the following resolution:

CW2020-011

That Report ED2020-002, Kawartha Lakes Cultural Centre Task Force, be received; and

That the Terms of Reference for the Kawartha Lakes Cultural Centre Task Force in the form of Appendix A to report ED2020-002 be approved and adopted by Council.

Carried

At the Council Meeting of March 19, 2020 the following members of the public be appointed to the Kawartha Lakes Culture Centre Task Force:

CR2020-104

Susan Taylor for a term ending March 31, 2021

Beverly Jeeves for a term ending March 31, 2021

Dianne Lister for a term ending March 31, 2021

Patrick Murphy for a term ending March 31, 2021

Barbara Doyle for a term ending March 31, 2021.

Carried

This report addresses that direction.

Rationale:

Since the Council meeting of March 19, 2020 appointing the Task Force members for the Cultural Centre Feasibility Study, the COVID-19 pandemic

forced the shutdown of non-emergency municipal activities once the emergency was declared.

Council had establishing a Task Force to support the 2020 Cultural Centre Feasibility Study. The blending of public and private dollars to fund the hiring of a consultant necessitated the establishment of a public process with community and administrative oversight.

The Task Force was to stand for one year with a mission to provide advice and recommendations to Council and Staff to:

- Participate in the RFP process
- Assess the proposed model of a Cultural Centre/hub
- Recommendations for a proposed site(s) following up on the City's Core Services review
- Recommendations for associated capital and operating model(s)
- Review and recommend potential funding sources
- Recommend potential governance models

Staff had developed the Terms of Reference and the five Task Force appointments were in effect until March 31. 2021.

The cessation of all non-emergency work due to COVID-19 has greatly altered the work and associated timelines associated with this project. Thus, the community partners: Kawartha Lakes Arts Council and the Kawartha Culture and Heritage Network have passed motions requesting a deferral to April 1, 2021.

A revised Terms of Reference is attached as Appendix A.

Other Alternatives Considered:

No other alternatives were considered.

Financial/Operation Impacts:

A \$50,000 contribution to the feasibility study was included in the Special Projects budget for 2020. This is to be matched with \$50,000 from the Kawartha Lakes Arts Council.

Relationship of Recommendation(s) to the 2020-2023 Strategic Plan:

The striking of a Task Force to undertake a Cultural Centre Feasibility Study responds to Goal 2 of the Council Adopted 2020-2023 Strategic Plan.

Goal 2 – An Exceptional Quality of Life

Objective 2.1: Improve the Health and Wellbeing of residents

Activity 2.1.5: Update and Execute the Cultural Master Plan Support and promote arts, cultural and heritage

Consultations:

Cultural Centre Committee Working Group

Attachments:

Appendix A - Terms of Reference



Department Head E-Mail: cmarshall@kawarthalakes.ca

Department Head: Chris Marshall

Terms of Reference - Revised

Name: Kawartha Lakes Cultural Centre Feasibility Task Force

Date Established by Council: January 28, 2020

Date of Deferal of the Task Force: September 15, 2020

Date of reactivation of Task Force: April 1, 2021

Task Force Completion/Reporting Date: March 31, 2022

Mission:

 The Kawartha Lakes Cultural Centre Feasibility Task Force is established to provide advice and recommendations to Council and Staff to:

- Participate in the RFP process
- Assess the proposed model of a Cultural Centre/hub
- Recommendations for a proposed site(s) following up on the City's Core Services review
- Recommendations for associated capital and operating model(s)
- Review and recommend potential funding sources
- Recommend potential governance models

Roles and Responsibilities:

It is the responsibility of all appointed members to comply with:

- the City Code of Conduct for Task Force Members
- the City Procedural By-law
- Other applicable City by-laws and policies
- Municipal Act
- Municipal Freedom of Information and Protection of Privacy Act
- Municipal Conflict of Interest Act

No individual member or the Task Force as a whole has the authority to make direct representations of the City to Federal or Provincial Governments.

Members shall abide by the rules outlined within the Municipal Conflict of Interest Act and shall disclose any pecuniary interest to the Secretary and absent himself or herself from meetings for the duration of the discussion and voting (if any) with respect to that matter.

The Task Force will abide by any terms and conditions which may be set out by the City's Council, CAO, City Clerk, City Solicitor, Auditor and/or Insurer for any activities relating to Task Force business in keeping with the Task Force's Terms of Reference and established Policies.

The Task Force scope of practice is restricted to the implmenetation of the RFP and sign-off of the consultation process.

Activities:

The following represent the general activities of the Task Force:

- a) Representives (up to 3) from the Task Force will sit on the hiring committee to contract the firm to undertake the feasibility study— as recommended and approved by Council
- Will provide information, contacts, suggestions to ensure a fulsome stakeholder and public consultation to gather information related to the tasks as outlined in the RFP
- c) Provide written feedback to the recommendations related to the tasks as outlined in the RFP
- d) To make recommendations to Council and Staff on the study recommendations received from the consultant(s) at the end of the project.
- e) To make recommendations to Council and Staff on strategy, policies and various issues to achieve Council's strategic priorities relating to the Task Force's established scope of work as defined in the Terms of Reference.

Composition:

The Task Force shall be comprised of a maximum of 7 members consisting of up to 5 members of the public.

Composite of members is, where possible:

One representative from Kwartha Lake Arts Council;

One representative of Culture & Heritage Network;

One representative of the Creative Economy; and,

Two representatives of the public at large.

Two Council representative(s) all of whom will have full authority to debate and vote.

The Task Force shall consist of a minimum of 5 members. Task Force members will be appointed by Council in accordance with established policy.

All appointed voting members may be represented at meetings by a designated alternate (if applicable). A designated alternate must be formally designated by an appointed member in writing to the Task Force to represent them. Designated alternates must be approved by the Task Force and are subject to all of the requirements and criteria set out in the Terms of Reference.

Appointment of Officers:

The Task Force shall, at its first meeting, elect from its membership a Chair, and Vice-Chair. It is acknowledged that there are no per diems for any Task Force positions and it is acknowledged that none of the above positions shall be paid for their services. All Task Force members are considered volunteer positions.

Term of Appointment:

Task Force members will be appointed for a term ending upon final recommendation to Council/Staff and prior to December 31, 2020. Any extension to this Term shall be recommended to Council via the liaison department through a report to Council prior to the expiration date with the final decision being that of Council.

Resources:

The Economic Development Department will provide support in the form of advice, day-to-day liaison with the City and information sharing.

A member of staff shall be designated as Recording Secretary by the liaison department. The Recording Secretary shall prepare and publish agendas; attend all formal business Task Force Meetings for the purpose of taking Minutes; and prepare and publish minutes in an accessible format acceptable to the City Clerk's Office.

The Recording Secretary shall ensure that a current Terms of Reference for the Task Force has been provided to the City Clerk's Office and is posted on the City website.

Timing of Meetings:

Meetings will be held on a set day and time as may be determined by the Task Force or at the call of the Chair.

Location of Meetings:

The location of the meetings will be set by the Task Force and must be held in an accessible City facility.

Meetings:

The Task Force shall hold a minimum of 3 meetings during their term. The Chair, through the liaison department, shall cause notice of the meetings, including the agenda for the meetings, to be provided to members of the Task Force and posted to the City website a minimum of three (3) business days prior to the date of each meeting through the Recording Secretary. Quorum for meetings shall consist of a majority of the members of the Task Force. No meeting shall proceed without quorum.

At the first meeting of the Task Force, an Orientation Session shall be held for members.

Working meetings throughout the term to advance the efforts of the work plan shall be held at the call of the Chair with the Chair providing notice of the working meetings to all members of the Task Force a minimum of three (3) business days prior to the date of each meeting through the Recording Secretary. No formal minutes are required to be taken at working meetings; however, notes shall be taken.

Procedures:

Procedures for the formal business meetings of the Task Force shall be governed by the City's Procedural By-law and Legislation or, where both of these are silent, by Robert's Rules of Order.

Closed Meetings:

The Task Force shall not be permitted to hold Closed Meetings.

Agendas and Minutes:

A copy of the Agenda shall be provided to the City Clerk's office at the same time it is provided to Task Force Members. The City Clerk's office will distribute the agenda to Council members as per established procedures.

Minutes of all formal business meetings and notes from working meetings of the Task Force shall be forwarded to the liaison department, and to the City Clerk's Office, not later than two weeks after the meeting. Action items requested of staff and/or Council will be brought to the attention of the Economic Development Department at that time. The City Clerk's Office will electronically circulate the formal business meeting minutes to all members of Council for their information. The City Clerk's Office will maintain a set of printed minutes on file for public review.

The Recording Secretary shall ensure that all Task Force Agendas and Minutes are posted to the City website at the same times as they are circulated to the City Clerk's Office.

Reports:

The Task Force recommendations shall be brought forward to Council via the liaison department through a report to Council.

It will be the responsibility of the Task Force Chair to provide a memo to the liaison department identifying the Task Force recommendations for final preparation of the report.

Purchasing Policy:

This Task Force has no purchasing or procurement responsibilities.

Insurance:

The City of Kawartha Lakes' General Liability Policy and Errors and Omissions Liability Policy will extend to this Task Force and its members. The applicable insurance policies extend to Task Force members while in the performance of his/her duties and to those activities authorized by the City of Kawartha Lakes and Council. Members must adhere to the policies and procedures of the City of Kawartha Lakes and Council, including the Terms of Reference.

The Task Force must provide, via the liaison department an annual updated listing of all members, including member positions, to the City of Kawartha Lakes to ensure the applicable insurance coverage remains in force.

Task Force members are not entitled to any benefits normally provided by the Corporation of the City of Kawartha Lakes, including those provided by the Workplace Safety and Insurance Board of Ontario ("WSIB") and are responsible for their own medical, disability or health insurance coverage.

Expulsion of Member:

Any member of the Task Force who misses three consecutive formal business meetings, without being excused by the Task Force, may be removed from the Task Force in accordance with adopted policy.

Any member of the Task Force may be removed from the Task Force at the discretion of Council for reasons including, but not limited to, the member being in contravention of the Municipal Act, the Municipal Freedom of Information and Protection of Privacy Act, the Provincial Offences Act, The Municipal Conflict of Interest Act or the Code of Conduct for Task Force Members; disrupting the work of the Task Force; or other legal issues. The process for expulsion of a Task Force member is outlined in the City's **Council Committee**, **Board and Task Force Policy**.

Terms of Reference:

The Recording Secretary shall ensure that a current Terms of Reference for the Task Force has been provided to the City Clerk's Office and is posted on the City website.

Any responsibilities not clearly identified within these Terms of Reference shall be the responsibility of the City of Kawartha Lakes. Council may, at its discretion, change the Terms of Reference for this Task Force at any time. Any changes proposed to these Terms of Reference by the Task Force shall be recommended to Council via the liaison department through a report to Council.

At the discretion of Council the Task Force may be dissolved by resolution of Council.

MEMORANDUM

To: Mayor and Council

From: Donna Goodwin, Economic Development Officer, Arts & Culture

Date: November 13, 2019

Subject: \$50,000 to match funds from Kawartha Lakes Arts Council and conduct a feasibility study assessing the construction and operation of a Kawartha Lakes Cultural

Centre

In April 2019, Council adopted a resolution which set out the establishment of a working group to initiative a feasibility study and to include up to \$100,000 as a decision unit in the 2020 budget.

CW2019-049

Moved By Deputy Mayor Elmslie Seconded By Councillor Dunn

That the City work with the Cultural Centre Committee to establish a working group to prepare an RFP for a Cultural Centre(s) Feasibility Study to be conducted by an independent qualified consultant;

That representatives from the municipality, including economic development staff and other required staff and councillors Seymour-Fagan and Richardson, be added to the Cultural Centre Committee or working group;

That the City include up to \$100,000 as a decision unit in the 2020 budget as the City's contribution towards the cultural Centre(s) Feasibility Study

That the working group, in consultation with staff, propose options for the oversight of the feasibility study for Council's consideration; and

That staff be directed to complete the 2019 Cultural master Plan by the end of 2019 which will include engagement with community stakeholders on their need and aspirations for a future cultural centre and their future vision and strategies for Kawartha Lakes cultural sector growth.

Carried

As follow up to this direction, the Cultural Centre Committee Working Group put forth on October 29, 2019 the following request to Council:

endorse the multiple hub model for future KL cultural facilities

- Commit to matching funds for the Feasibility Study by endorsing a \$50,000 commitment from the City to match the Kawartha Lakes Arts Council's private donation of \$50,000
- Endorse the positioning of the future KL cultural facilities initiative as a partnership between the City and the Culture Centre Committee
- That there be a 50/50 partnership in ongoing planning and oversight of the feasibility study
- Council endorse the establishing of a Cultural Centre Steering Committee
- Council endorse the provision of City staff / technical support as required to the Cultural Centre Steering Committee

Background

Research conducted for the 2020-2030 Cultural Master Plan included meetings with the boards of directors from all twelve Kawartha Lakes not-for-profit cultural organizations. All organizations had an opportunity to consider potential cultural centre models. They understood that while no model for cultural facilities and cultural program operations had yet been determined, their input, as well as potential consideration by the municipality in terms of its long term asset management plans would determine any outcomes.

This is important because 7 out of 12 cultural organizations operate out of City-owned buildings. Responses from community stakeholders reveals wide support for a new cultural centre model recognizing that collections storage space and existing infrastructure is inadequate, and that existing venues are not sufficient to attract visitors year round nor to provide a foundation for creative economy and cultural tourism growth.

The preferred model is a 'hub and spoke' model with a central hub or collections storage facility functioning as a shared resource that all outlying hubs (museums or cultural venues) could utilize for collection storage and care, with space in the central hub allocated for each to create mini-exhibits that showcase 'what's on' in outlying museums and venues.

- Each outlying hub would be an existing cultural facility that functions as a multipurpose cultural space, each with its own unique focus and identity, but also providing space for local cultural activities, workshops or classes.
- The spokes represent programming and operation connections that enable coordination and the sharing of resources.

Connections to the Economic Development Strategy

The economic impact of arts and culture in Kawartha Lakes continues to grow.

In 2014, Ontario's cultural sector contributed 301,933 jobs as well as \$27.7 billion in direct economic impact, or 4.1% of the province's GDP. This also represents 45% of the total cultural GDP in Canada.

According to the most recent statistics from the Ministry of Tourism, Culture and Sport on cultural activities pursued by visitors to Kawartha Lakes, 13,648 people attended a festival or event in Kawartha Lakes, 4,764 people visited an art gallery or museum, 6,309 people visited a historic site and 2,196 people took in cultural performances. Visitor spending at cultural tourism destinations was \$1,817,419 in Kawartha Lakes in 2016, and over \$6 million on retail product.

Although Council's resolution indicated up to \$100,000 could be put forward as a decision unit in the 2020 budget, the committee feels that matching the working groups' \$50,000 allocation would adequately address the needs of the feasibility study.

Therefore, it is requested that Council allocate \$50,000 to match KLAC's private donation and initiate a feasibility study that would enable the Cultural Centre Committee Working Group to test the viability of a project concept by a number of different measures and provide objective analyses on a variety of areas such as the following:

- Assessing a proposed model for a Cultural Centre/hub
- · Follow up on the City's Core Services review for a proposed site
- Recommend capital budget and an operating budget
- Review potential funding sources
- Recommend potential governance models
- · Provide further community communication and engagement

There is a direct correlation between cultural activities and economic development. Money allocated to assess the feasibility of a cultural centre is an investment in an economic cluster that continues to see gains in sales and employment within the City of Kawartha Lakes.

Respectfully

Donna Goodwin, Economic Development Officer, Arts & Culture

The Corporation of the City of Kawartha Lakes Committee of the Whole Report

Report Number RS2020-011

| Meeting Date: | September 1, 2020 | | | |
|--|--|--|--|--|
| Title: | Proposed Surplus Declaration, Closure, and Sale of a Portion of Shoreline Road Allowance adjacent to 68 Greenwood Road, Kirkfield | | | |
| Description: | Proposed Surplus Declaration, Closure, and Sale of the Property Legally Described as Part of the Original Shoreline Road Allowance Lying in Front of Lot 8, Concession 4, in the Geographic Township of Laxton, City of Kawartha Lakes | | | |
| Ward Number: | 1 | | | |
| Author and Title: | Laura Carnochan, Law Clerk – Realty Services | | | |
| Recommendations: | | | | |
| That Report RS2020-011, Proposed Surplus Declaration, Closure, and Sale of a Portion of Shoreline Road Allowance adjacent to 68 Greenwood Road, Kirkfield, be received; | | | | |
| That the subject property, being the shoreline road allowance adjacent to 68 Greenwood Road, Kirkfield and legally described as Part of the Shoreline Road Allowance Lying in Front of Lot 8, Concession 4, in the Geographic Township of Laxton, City of Kawartha Lakes, be declared surplus to municipal needs; | | | | |
| That the closure of the portion of road allowance and sale to the adjoining landowner be supported, in principle, in accordance with the provisions of By-Law 2018-020, as amended, and the Municipal Act, 2001, and subject to the parties entering into a conditional Agreement of Purchase and Sale; | | | | |
| That staff be directed to commence the process to stop up and close the said portion of road allowance; | | | | |
| Department Head: | | | | |
| Financial/Legal/HF | R/Other: | | | |

Chief Administrative Officer: _

Report RS2020-011
Proposed Surplus Declaration, Closure, and Sale of SLRA adjacent to 68 Greenwood Road, Kirkfield
Page 2 of 5

That a by-law (with any amendments deemed necessary) to close the road and authorize its disposition shall be passed if appropriate;

That a deeming by-law be passed contemporaneously with the disposition;

That the Mayor and Clerk be authorized to sign all documents to facilitate the road closing and conveyance of the lands; and

That these recommendations be brought forward to Council for consideration at the next Regular Council Meeting.

Background:

The Land Management Committee received a request from the owner of the property municipally known as 68 Greenwood Road, Kirkfield to purchase the portion of shoreline road allowance which is adjacent to their property.

The Land Management Committee reviewed this request at their meeting on November 11, 2019 and had no objections to the request.

Public Notice advertising the potential surplus declaration and sale of the subject shoreline road allowance was completed by newspaper circulation in the Kawartha Lakes This Week on the 12th, 19th, and 26th days of March, 2020. Realty Services did not receive any public comments or concerns with regards to the proposed closure and sale of the subject shoreline road allowance.

The purpose of this report is to recommend that the subject property be declared surplus to municipal needs and that approval be given, in principle, for the closure and sale of the requested portion of shoreline road allowance to the adjoining landowner.

Rationale:

Shoreline road allowances exist on many lakes within the City of Kawartha Lakes. Although many of these allowances were never opened as public municipal roads, they remain public property. Recreational and residential property owners of "lakefront" property often do not own their lots right up to the water's edge. In many circumstances, the adjacent property owner has encroached onto this space and utilized it as a lot addition.

In this area various portions of the shoreline road allowance have already been stopped up, closed and conveyed to adjoining landowners. Accordingly, the Land Management Committee felt that it would be appropriate to proceed with stopping up, closing and conveying the subject portion of shoreline road allowance to the adjacent landowner.

Other Alternatives Considered:

Council may decide not to sell the shoreline road allowance and derive no financial benefit whatsoever. That would be inconsistent with past practice and is not recommended in this circumstance.

Financial Impacts:

The parties will be asked to enter into a conditional Agreement of Purchase and Sale with a non-refundable \$1,000.00 deposit to cover initial road closing costs. The price for a shoreline road allowance adjacent to a lake was established by By-Law 2018-020, as amended, and is set at a minimum of \$23.00 per linear foot (based on a 66 foot width) of water frontage adjacent to a lake. All costs of the transaction, plus a \$1,500.00 fee to cover the City's staff time expenses will be paid for by the purchasers. The City will receive revenue of approximately \$1,564.00 for the subject land. The net revenue will be placed into the Property Development Reserve.

Relationship of Recommendations To The 2020-2023 Strategic Plan:

The recommendations set out in this Report align with the following strategic priority:

- Good Government
 - o Effective management of the municipal building and land portfolio

Consultations:

Land Management Committee Land Registry Office Mapping and GIS

Attachments:

Appendix A – General Location Map



Appendix A -General Location Ma

Appendix B – Aerial Photo



Appendix B -Aerial.pdf

Appendix C - Map



Appendix C -Map.pdf

Report RS2020-011
Proposed Surplus Declaration, Closure, and Sale of SLRA adjacent to 68 Greenwood Road, Kirkfield
Page 5 of 5

Department Head E-Mail: rcarlson@kawarthalakes.ca

Department Head: Robyn Carlson

Department File: L06-19-RS048

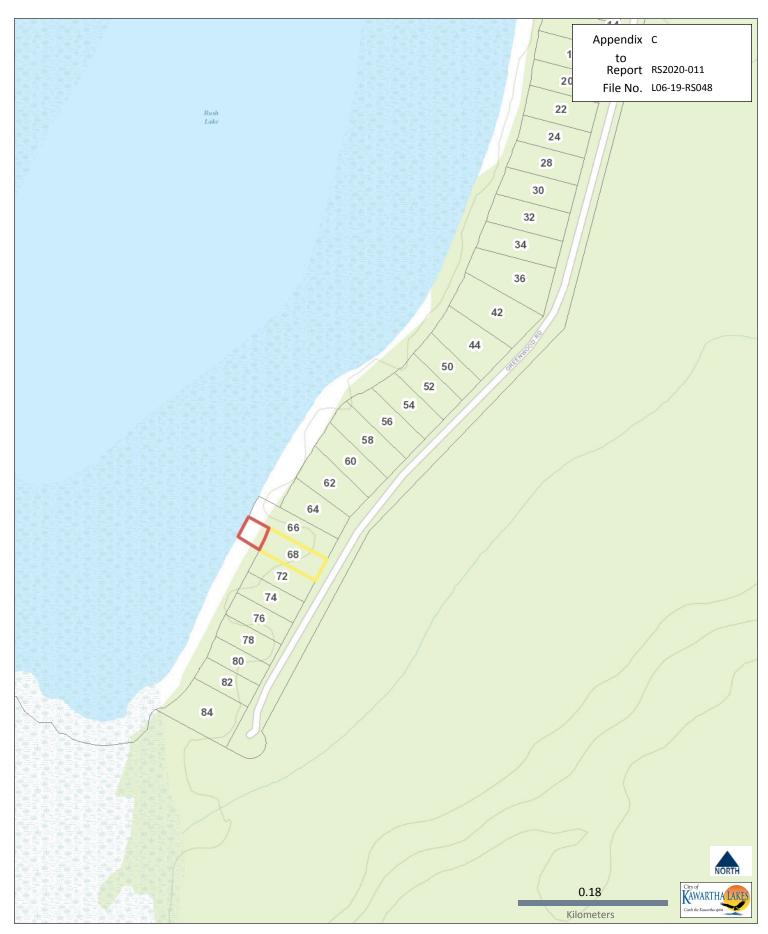


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Committee of the Whole Report

Report Number RS2020-013

| Meeting Date: | September 1, 2020 | | | |
|---|--|--|--|--|
| Title: | Proposed Surplus Declaration, Closure, and Sale of Portions of Shoreline Road Allowance adjacent to 72-76 Greenwood Road, Kirkfield | | | |
| Description: | Proposed Surplus Declaration, Closure, and Sale of the Property Legally Described as Part of the Original Shore Road Allowance Along Rush Lake Lying in Front of Lots 26, 27, and 28 on Plan 366, in the Geographic Township of Laxton, City of Kawartha Lakes | | | |
| Ward Number: | 1 | | | |
| Author and Title: | Laura Carnochan, Law Clerk – Realty Services | | | |
| Recommendations: That Report RS2020-013, Proposed Surplus Declaration, Closure, and Sale of Portions of Shoreline Road Allowance adjacent to 72-76 Greenwood Road, Kirkfield, be received; That the subject property, being the shoreline road allowance adjacent to 72-76 | | | | |
| Greenwood Road, Kirkfield and legally described as Part of the Original Shore Road Allowance Along Rush Lake Lying in Front of Lots 26, 27, and 28 on Plan 366, in the Geographic Township of Laxton, City of Kawartha Lakes, City of Kawartha Lakes, be declared surplus to municipal needs; | | | | |
| That the closure of the portion of road allowance and sale to the adjoining landowner be supported, in principle, in accordance with the provisions of By- | | | | |
| Department Head: | | | | |
| Financial/Legal/HR/Other: | | | | |

Chief Administrative Officer:___

Report RS2020-013 Proposed Surplus Declaration, Closure, and Sale of SLRA adjacent to 72-76 Greenwood Road, Kirkfield Page 2 of 5

Law 2018-020, as amended, and the Municipal Act, 2001, and subject to the parties entering into a conditional Agreement of Purchase and Sale;

That staff be directed to commence the process to stop up and close the said portion of road allowance;

That a by-law (with any amendments deemed necessary) to close the road and authorize its disposition shall be passed if appropriate;

That a deeming by-law be passed contemporaneously with the disposition;

That the Mayor and Clerk be authorized to sign all documents to facilitate the road closing and conveyance of the lands; and

That these recommendations be brought forward to Council for consideration at the next Regular Council Meeting.

Background:

The Land Management Committee received a request from the owner of the property municipally known as 74 Greenwood Road, Kirkfield to purchase the portion of shoreline road allowance that is adjacent to their property.

The Land Management Committee reviewed this request at their meeting on October 15, 2019 and had some concerns regarding drainage in the area which would potentially necessitate an easement over a portion of the applicants' property. Accordingly, the Land Management Committee felt that proceeding with a sale of the shoreline road allowance should be conditional upon the applicant granting an easement over their property.

Upon a further review of the area by Public Works, it was determined that an easement would not be required and therefore, the Land Management Committee had no further concerns with the request to purchase the subject portion of shoreline road allowance.

Subsequent to submitting their initial request to purchase the portion of shoreline road allowance adjacent to 74 Greenwood Road, the applicants advised that they would also be interested in purchasing the portions of shoreline road allowance adjacent to 72 and 76 Greenwood Road, which they also own. The City Solicitor reviewed this request in the context of the direction given by the Land Management Committee had no concerns with the sale of these additional parcels of shoreline road allowance.

Public Notice advertising the potential surplus declaration and sale of the subject shoreline road allowance was completed by newspaper circulation in the Kawartha Lakes This Week on the 13th, 20th, and 27th days of August, 2020. An ad was also placed on the City's website. Realty Services did not receive any public comments or concerns with regards to the proposed closure and sale of the subject portions of shoreline road allowance.

The purpose of this report is to recommend that the subject properties be declared surplus to municipal needs and that approval be given, in principle, for the closure and sale of the requested portions of shoreline road allowance to the adjoining landowners.

Rationale:

Shoreline road allowances exist on many lakes within the City of Kawartha Lakes. Although many of these allowances were never opened as public municipal roads, they remain public property. Recreational and residential property owners of "lakefront" property often do not own their lots right up to the

water's edge. In many circumstances, the adjacent property owner has encroached onto this space and utilized it as a lot addition.

In this area various portions of the shoreline road allowance have already been stopped up, closed and conveyed to adjoining landowners. Accordingly, the Land Management Committee felt that it would be appropriate to proceed with stopping up, closing and conveying the subject portions of shoreline road allowance to the adjacent landowners.

Other Alternatives Considered:

Council may decide not to sell the shoreline road allowance and derive no financial benefit whatsoever. That would be inconsistent with past practice and is not recommended in this circumstance.

Alignment to Strategic Priorities

The recommendations set out in this Report align with the following strategic priority:

- Good Government
 - o Effective management of the municipal building and land portfolio

Financial/Operation Impacts:

The parties will be asked to enter into a conditional Agreement of Purchase and Sale with a non-refundable \$1,000.00 deposit to cover initial road closing costs. The price for a shoreline road allowance adjacent to a lake was established by By-Law 2018-020, as amended, and is set at a minimum of \$23.00 per linear foot (based on a 66-foot width) of water frontage adjacent to a lake. All costs of the transaction, plus a \$1,500.00 fee to cover the City's staff time expenses will be paid for by the purchasers. The City will receive revenue of approximately \$4,646.00 for the subject lands. The net revenue will be placed into the Property Development Reserve.

Consultations:

Land Management Committee Land Registry Office Mapping and GIS

Attachments:

Appendix A – General Location Map



Appendix B - Aerial Photo



Appendix B - Aerial Photo.pdf

Appendix C - Map

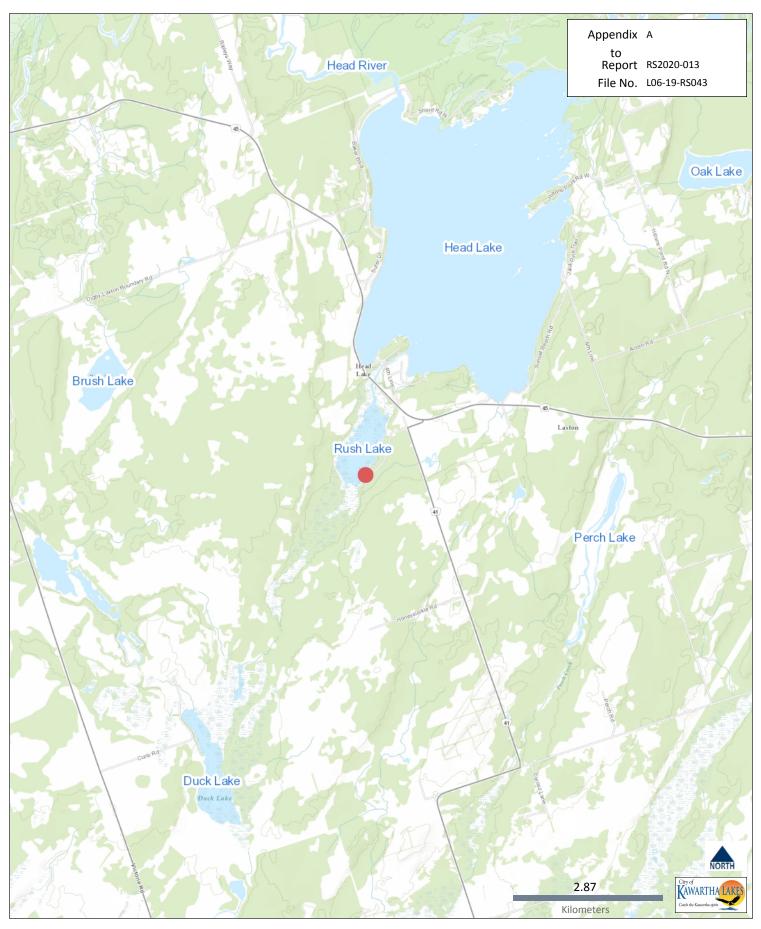


Appendix C -Map.pdf

Department Head E-Mail: rcarlson@kawarthalakes.ca

Department Head: Robyn Carlson

Department File: L06-19-RS043

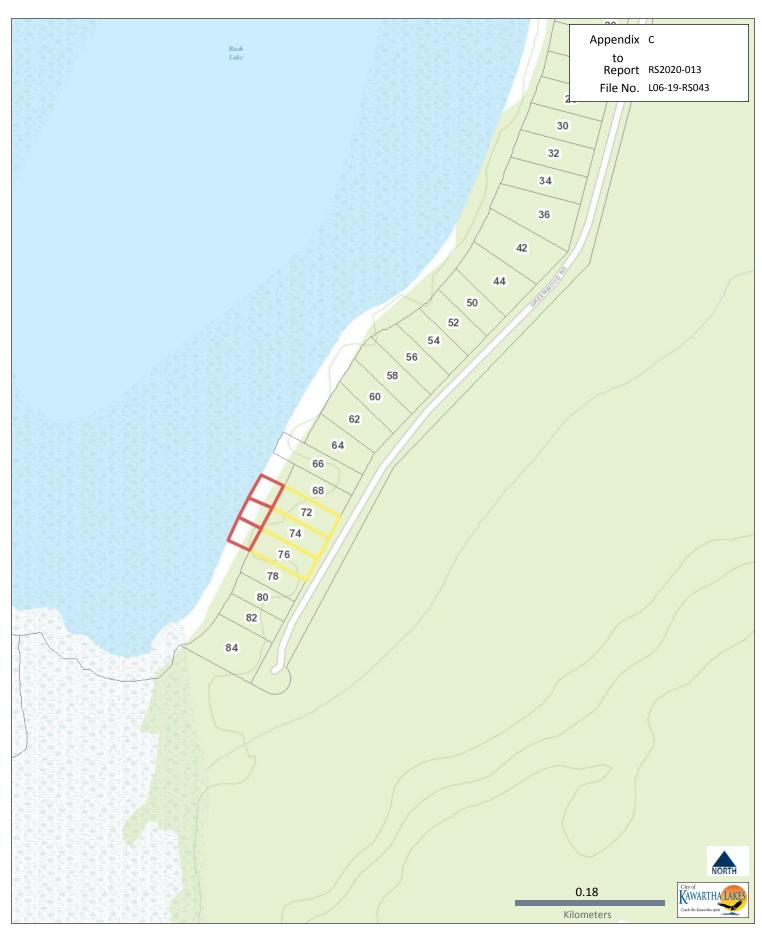


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Committee of the Whole Report

Report Number RS2020-014

| Meeting Date: | September 1, 2020 | | |
|---------------------------------------|--|--|--|
| Title: | Proposed Surplus Declaration, Closure, and Sale of a Portior of Road Allowance Known as Deane Street, Lindsay | | |
| Description: | Proposed Surplus Declaration, Closure, and Sale of a Portion of Road Allowance Legally Described as Deane Street or Plan 8P between Holtom Street and Dobson Street, Except Part 3 on Plan 57R-9577, in the Geographic Town of Lindsay City of Kawartha Lakes, designated as Part 2 on Plan 57R-9577 | | |
| Ward Number: | 7 | | |
| Author and Title: | Laura Carnochan, Law Clerk – Realty Services | | |
| | ons: 20-014, Proposed Surplus Declaration, Closure, and Sale ad Allowance Known as Deane Street, Lindsay, be | | |
| Street, and legally and Dobson Street | operty, being a portion of road allowance known as Deane described as Deane Street on Plan 8P between Holtom Street, Except Part 3 on Plan 57R-9577, in the Geographic Town of wartha Lakes, designated as Part 2 on Plan 57R-9577, be municipal needs; | | |
| | the portion of road allowance and sale to the adjoining orted, in principle, in accordance with the provisions of By- | | |
| Department Head: | | | |
| Financial/Legal/HI | R/Other: | | |

Chief Administrative Officer:

Report RS2020-014
Proposed Surplus Declaration, Closure, and Sale of a
Portion of Road Allowance Known as Deane Street, Lindsay
Page 2 of 5

Law 2018-020, as amended, and the Municipal Act, 2001, and subject to the parties entering into a conditional Agreement of Purchase and Sale;

That Council set a price of \$15,000.00 as consideration for the subject portion of road allowance:

That staff be directed to commence the process to stop up and close the said portion of road allowance;

That a by-law (with any amendments deemed necessary) to close the road and authorize its disposition shall be passed if appropriate;

That the Mayor and Clerk be authorized to sign all documents to facilitate the road closing and conveyance of the lands; and

That these recommendations be brought forward to Council for consideration at the next Regular Council Meeting.

Background:

The Land Management Committee received a request from the owner of the property legally described as Part of Parklot J1 on Plan 8P, designated as Part 1 on Plan 57R-9706 lying West of Deane Street on Plan 8P, Except Plan 57M-787; Together With an Easement Over Part of Parklot S1 and B2 on Plan 8P, being Parts 1, 2, and 3 on Plan 57R-9688 as in KL23301, in the Geographic Town of Lindsay, City of Kawartha Lakes, to purchase the portion of the road allowance legally described as Deane Street on Plan 8P between Holtom Street and Dobson Street, Except Part 3 on Plan 57R-9577, in the Geographic Town of Lindsay, City of Kawartha Lakes, designated as Part 2 on Plan 57R-9577, which is adjacent to their property.

As noted in the above legal description, the applicant's property is subject to an easement for a storm water quality and retention pond and for all vehicular and pedestrian ingress and egress related to same.

The Land Management Committee reviewed this request at their meeting on January 20, 2020 and had no objections to the request.

Public Notice advertising the potential surplus declaration and sale of the subject road allowance was completed by newspaper circulation in the Kawartha Lakes This Week on the 13th, 20th, and 27th days of August, 2020. During this threeweek advertising period, notice was also posted on the City's website. Realty Services did not receive any public comments or concerns with regards to the proposed closure and sale of the subject road allowance.

The purpose of this report is to advise Council that the Land Management Committee recommends that the subject property be declared surplus to municipal needs and that approval be given, in principle, for the closure and sale of the requested portion of the road allowance to the adjoining landowner.

Rationale:

The Land Management Committee has determined that this portion of road allowance is not required for municipal purposes, as the road will be re-aligned pursuant to a Plan of Subdivision.

The interested party owns property which borders the subject portion of road allowance. As a result, pursuant to the City's By-law to Regulate the Disposition of Municipal Real Property (By-Law 2018-020, as amended) that portion of the road allowance can be conveyed to the adjoining landowner, with the balance of the road allowance to the East remaining in municipal ownership and developed as a municipal road in the future, as per a Plan of Subdivision.

The subject road allowance does not lead to water, it borders private property, and therefore, the stop up, closure and sale would not contravene section 8.00 of By-Law 2018-020, as amended.

As per section 4.03 of By-Law 2018-020, as amended, Council may set a price for the land to be disposed of. By-Law 2018-020, as amended, further states that Council may set a price without requiring an appraisal, as long as the minimum price set out in Schedule C of By-Law 2018-020, in this case being \$15.00 per linear foot, is recovered. As the purchaser is intending to merge the portion of road allowance with his adjacent property and later subdivide the merged property into three developable lots to be sold, the Land Management Committee recommends setting a price of \$15,000.00 as consideration for the subject portion of road allowance.

Other Alternatives Considered:

Council could refuse to close and convey the road allowance and derive no financial benefit. That would be inconsistent with past practice and is not recommended in this circumstance.

Council could decide not to set a price that is higher than the minimum price set by By-Law 2018-020 and dispose of the subject portion of road allowance for the minimum price of \$15.00 per linear foot of road allowance (based on a 66-foot width). Should Council decide to proceed to dispose of the property using the price of \$15.00 per linear foot of road allowance, consideration for the subject portion of road allowance is calculated as \$1,528.79. This is not recommended in this circumstance, given that the purchaser stands to gain a significant financial benefit by adding the subject portion of road allowance to his adjacent property in order to subdivide and sell three lots. Setting a higher price creates a transaction that, while still advantageous to the purchaser, is more beneficial to the general taxpayer.

Alignment to Strategic Priorities:

The recommendations set out in this Report align with the following strategic priority:

- Good Government
 - Effective management of the municipal building and land portfolio

Financial Impacts:

The parties will be asked to enter into a conditional Agreement of Purchase and Sale with a non-refundable \$1,000.00 deposit to cover initial road closing costs.

All costs of the transaction, plus a \$1,500.00 fee to cover the City's staff time expenses will be paid for by the purchaser.

If Council sets the price of land at \$15,000.00, the City will receive net revenue in that amount, which will be placed in the Property Development Reserve. Alternatively, if Council disposes of the land using the price of \$15.00 per linear foot, the City will receive net revenue in the amount of \$1,528.79, which will be placed in the Property Development Reserve.

Consultations:

Land Management Committee Land Registry Office Mapping and GIS

Attachments:

Appendix A – General Location Map



Appendix A -General Location Ma

Appendix B – Aerial Photo



Appendix B - Aerial Photo.pdf

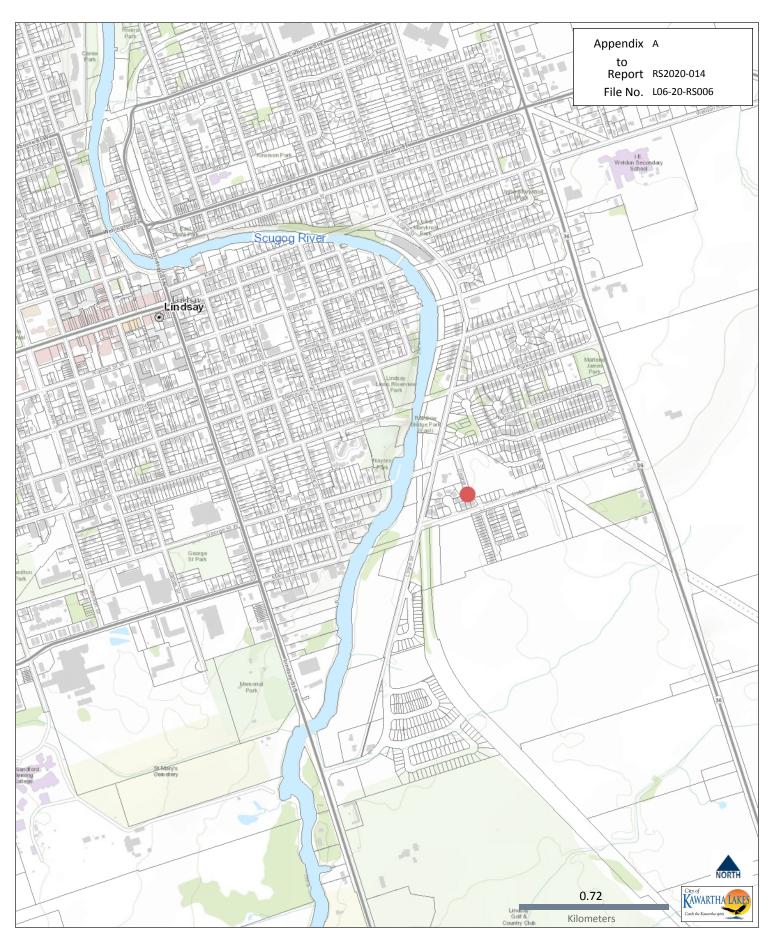
Appendix C – Reference Plan 57R-9577



Appendix C -Reference Plan 57R-

Department Head E-Mail: rcarlson@kawarthalakes.ca

Department Head: Robyn Carlson **Department File:** L06-20-RS006

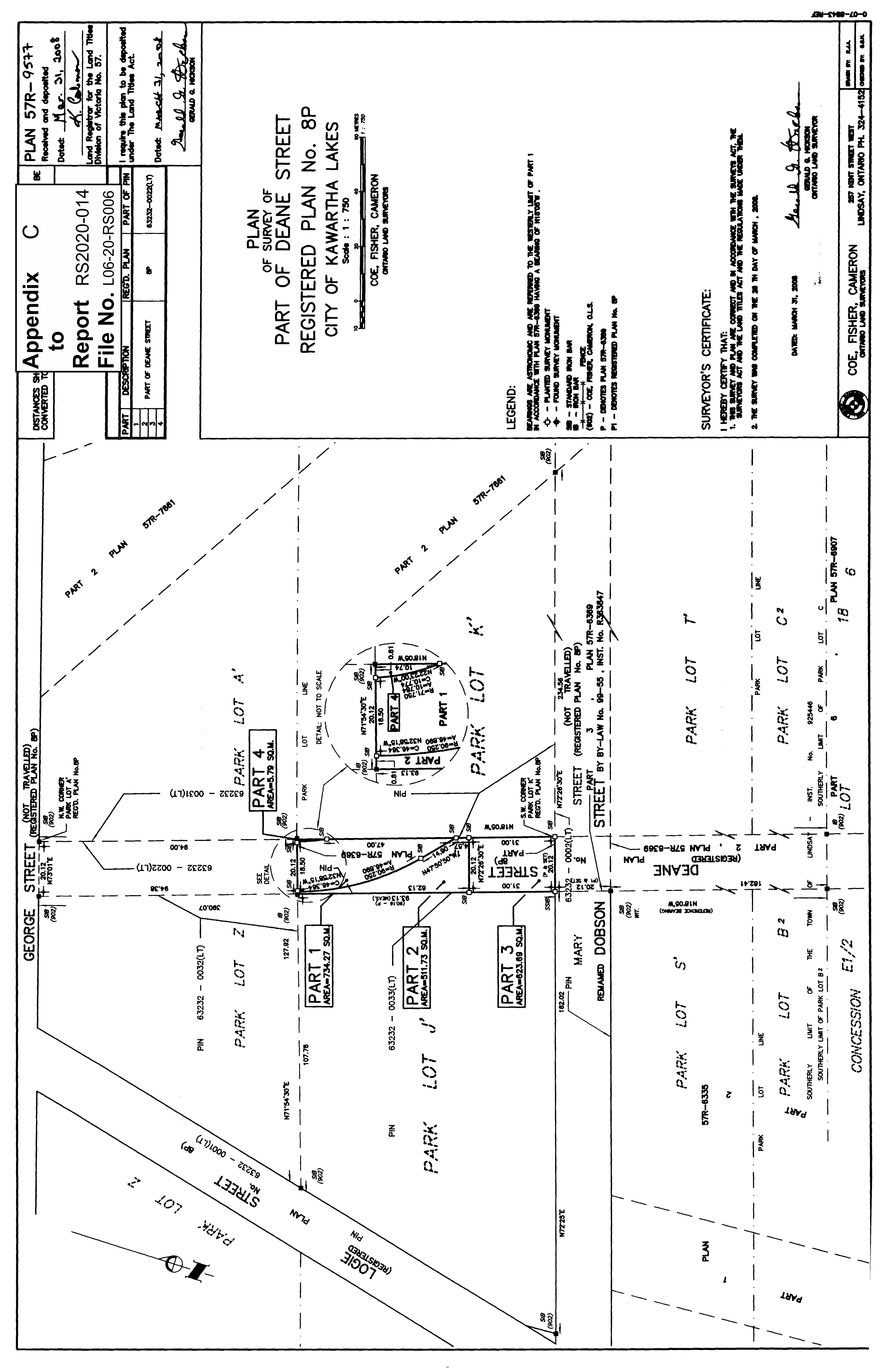


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Committee of the Whole Report

Report Number RS2020-015

| Meeting Date: | September 1, 2020 | | | |
|--|--|--|--|--|
| Title: | Proposed Direct Sale of City-Owned Property – Juniper Street, Fenelon Falls | | | |
| Description: | Proposed Direct Sale of City-Owned Property located on Juniper Street, Fenelon Falls for the Purpose of a Low Income Housing Development | | | |
| Author and Title: | Laura Carnochan, Law Clerk – Realty Services | | | |
| Recommendati | ons: | | | |
| • | 20-015, Proposed Direct Sale of City-Owned Property – nelon Falls, be received; | | | |
| and legally describe R283173; Blake St and Hill Street; Par Part 7 on Plan 57R Kawartha Lakes to principle, in accord and the Municipal A Agreement of Purc | | | | |
| costs associated w | operty be sold for no less than the appraised value, plus all ith the transaction; | | | |
| That a by-law (with any amendments deemed necessary) to authorize disposition of the subject property shall be passed if appropriate; | | | | |
| Department Head | : | | | |
| Financial/Legal/H | R/Other: | | | |

Chief Administrative Officer:

Report RS2020-015 Proposed Direct Sale of City-Owned Property Juniper Street, Fenelon Falls Page 2 of 6

That the Mayor and Clerk be authorized to sign all documents to and conveyance of the lands; and

That these recommendations be brought forward to Council for consideration at the next Regular Council Meeting.

Background:

At the Council Meeting of January 28, 2014, Council adopted the following resolution:

CR2014-101

Moved By Councillor Strangway

Seconded By Councillor Yeo

Resolved That Report LM2014-003, Surplus Declaration of City Owned Lands in Wards 4, 5, and 6, be received;

That the following City owned lands be declared surplus to municipal needs:

| ID # | Roll Number | Legal Description | Street Location |
|---------|-----------------|---|-----------------|
| 54 | 165124000320140 | PLAN 100 LOTS 247 TO 249 and 256 and PT HILL ST and PT BLAKE STBEING RP 57R6341 PARTS 1 3 and 7 TO 9 AM100 | Juniper St |

That notice be given in accordance with By-laws 2008-065 and 2010-118, as amended:

That the properties be investigated and, if suitable, prepared and marketed for sale to the general public in accordance with any current or future policies in place and be sold to the interested parties for no less than the appraised value plus any and all costs associated with the transaction;

That all costs associated with investigating, preparing or marketing the properties be taken from the Property Development Reserve;

That on completion of the public notice, Council shall consider any deputation or public input in opposition of the sale, if any, and if

Report RS2020-015
Proposed Direct Sale of City-Owned Property
Juniper Street, Fenelon Falls
Page 4 of 6

appropriate, pass a by-law (with amendments deemed necessary) to authorize the disposition; and

That the Mayor and Clerk be authorized to execute any documents and agreements by the approval of this decision.

This report addresses that direction.

Following the surplus declaration of the property, Realty Services staff completed research into the property to determine its suitability for sale on the open market. As the property is zoned Recreational Open Space, the Land Management Committee determined that the property was not suitable for sale on the open market as is, and discussed the possibility of a City-initiated rezoning in order to make the property more saleable.

There is a creek through the property. Accordingly, a portion of the property is regulated by the Kawartha Region Conservation Authority. The KRCA regulated area is more specifically shown on Appendix D.

The property is also subject to an easement (registered as Instrument R283173) in favour of The Victoria County Board of Education (now Trillium Lakelands District School Board) for subsurface hydro-electric service and subsurface storm water drainage. The easement is shown as Part 8 on Plan 57R-6341, which is attached as Appendix E.

However, prior to taking any action to rezone the property, the Land Management Committee received a request from the Fenelon Community Housing Initiative requesting to purchase the City-owned property on Juniper Street for the purpose of developing affordable housing units.

The Land Management Committee reviewed this request at their meeting on March 9, 2020 and had no objections to the request.

Public Notice advertising the potential surplus declaration and sale of the subject property was completed by newspaper circulation in the Kawartha Lakes This Week on the 13th, 20th, and 27th days of August, 2020. During this three-week advertising period, notice was also posted on the City's website and a "Potential Surplus Property" sign was posted on-site. Realty Services did not receive any public comments or concerns with regards to the proposed sale of the property.

The purpose of this report is to advise Council that the Land Management Committee recommends that direction for the subject property be amended to allow for a direct sale of the property, instead of a general market sale.

Rationale:

As noted above, this property was declared surplus on January 28, 2014 for the purpose of investigating its suitability for a general market sale. Research confirmed that the property is zoned Recreational Open Space and is not currently serviced, making the property not ideal for a general market sale.

The Land Management Committee had entertained several options for the property, including a City-initiated rezoning to Residential prior to listing or reaching out to the neighbouring school for a potential direct sale with current zoning.

Other Alternatives Considered:

Council could decide not to proceed with a direct sale and instead sell the property by placing it on the market for a 10-day period. Then, the highest offer received within the 10-day period will be accepted, subject to final approval. Although the City may be able to obtain more revenue this way, this offer indicates an interest in development for affordable housing, which is also a priority of the City.

Alignment to Strategic Priorities

The recommendations set out in this Report align with the following strategic priority:

- Good Government
 - o Effective management of the municipal building and land portfolio

Financial Impacts:

The parties will be asked to enter into a conditional Agreement of Purchase and Sale with a \$4,500.00 deposit (which has already been provided) to cover initial costs. All costs of the transaction, plus a \$1,500.00 fee to cover the City's staff time expenses will be paid for by the purchaser.

The property value will be determined by an appraisal, which is currently in progress. The MPAC value of the property is \$32,000.00, so it is estimated that the City will recover a net amount in excess of \$32,000.00. The proceeds of the sale will be placed in the Property Development Reserve.

Consultations:

Land Management Committee Land Registry Office Mapping and GIS

Attachments:

Appendix A – General Location Map



Appendix A -General Location Ma

Appendix B – Aerial Photo



Appendix B - Aerial Photo.pdf

Appendix C – Map



Appendix C -Map.pdf

Appendix D - KRCA Regulated Area



Appendix D - KRCA Regulated Area.pdf

Appendix E – Reference Plan 57R-6341 (TLDSB Easement)

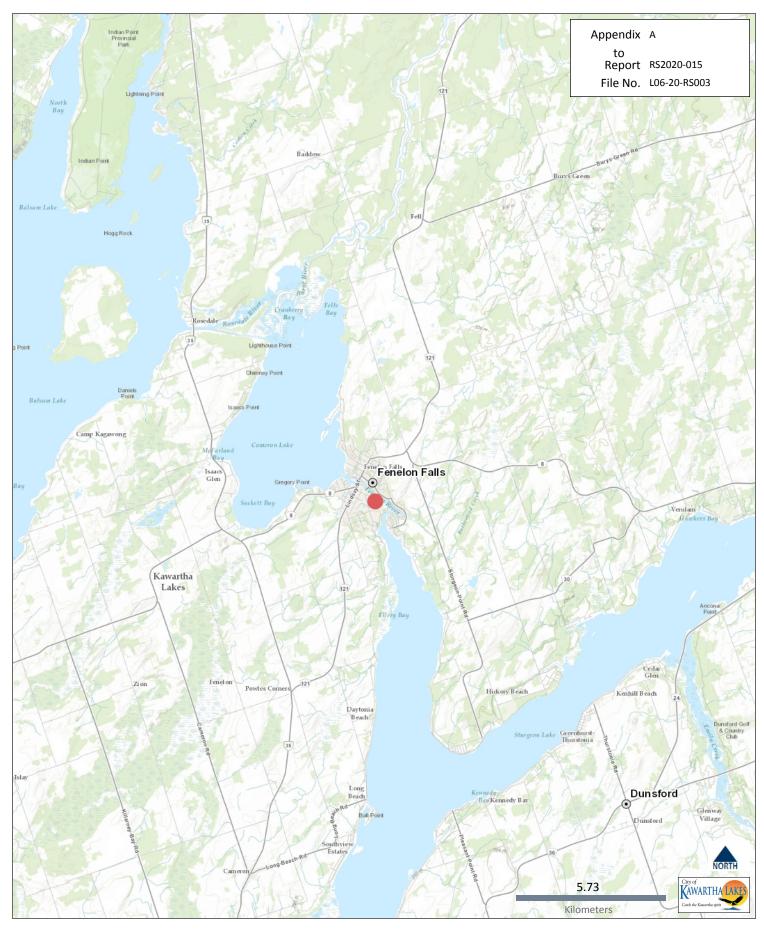


Appendix E -Reference Plan 57R-

Department Head E-Mail: rcarlson@kawarthalakes.ca

Department Head: Robyn Carlson

Department File: L06-20-RS003

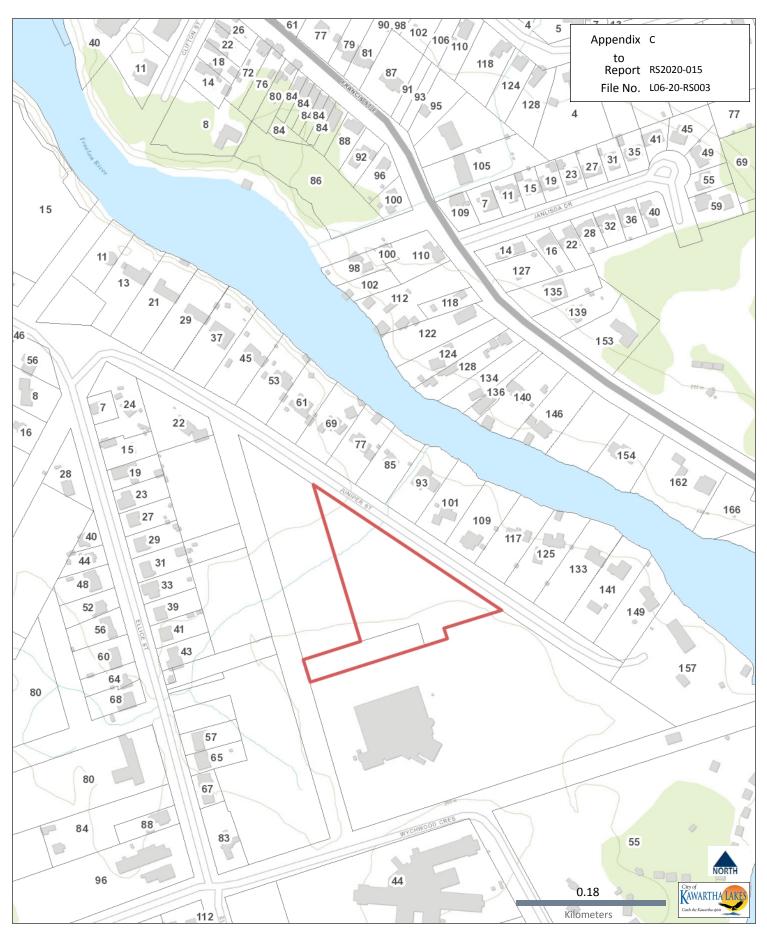


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
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Date:





Committee of the Whole Report

Report Number RS2020-016

| Meeting Date: | September 1, 2020 | | |
|--|--|--|--|
| Title: | Proposed Amendments to Real Property Acquisition Policy | | |
| Description: | Proposed Amendments to Council Policy 205 CAO 044, being the Corporation of the City of Kawartha Lakes' Real Property Acquisition Policy | | |
| Author and Title: | Sharri Dyer, Manager – Realty Services | | |
| Recommendation | ons: | | |
| That Report RS202 Acquisition Policy | 20-016, Proposed Amendments to Real Property v, be received; | | |
| That Policy 205 CA | O 044 be amended in accordance with Appendix A; and | | |
| That these recommend the next Regular Co | nendations be brought forward to Council for consideration at ouncil Meeting. | | |
| Danarimani Haad | | | |
| | <u>:</u> | | |
| Financial/Legal/HR/Other: | | | |
| Chief Administrative Officer: | | | |

Background:

The existing policy is outdated and some requirements are unnecessarily restrictive, specifically those regarding Environmental Assessments and appraisals.

The purpose of this Report is to update the existing policy to amend/remove unnecessary restrictions to acquiring property at the best value to the City.

Rationale:

Currently, Policy 205 CAO 044 requires that all real property acquisitions be supported by a current market value appraisal completed by a member in good standing with the Appraisal Institute of Canada.

The cost of an appraisal can range from \$1,500.00 - \$5,000.00 +/-. This cost is unnecessary when the City is acquiring land for no consideration and the landowner has not requested a tax receipt.

The proposed amendments, specifically set out in Appendix A, will require an appraisal only when the City is intending to provide consideration for the land, or if the landowner requests a tax receipt.

A housekeeping amendment is also included at section 7 of the policy. Currently, section 5.3 of the policy states that the City can obtain property by donation. Section 7 currently states that the City shall acquire property based on fair market value. The amendment clarifies that section 7 applies unless the property is acquired by donation.

Other Alternatives Considered:

None

Alignment to Strategic Priorities

The recommendations set out in this Report aligns with the following strategic priority:

- Good Government
 - Asset management
 - Effective management of the municipal building and land portfolio

Financial Impacts:

Report RS2020-016 Proposed Amendments to Real Property Acquisition Policy Page 3 of 3

There will be costs savings to the City if the proposed amendments are approved, as the City will no longer be required to obtain appraisals or environmental assessments unless specific criteria are met. However, the total costs savings are unquantifiable at this time.

Consultations:

Land Management Committee

Attachments:

Appendix A – Policy 205 CAO 044, inclusive of proposed amendments in tracked change format



Appendix B – Policy 205 CAO 044, inclusive of proposed amendments in clean format



Department Head E-Mail: rcarlson@kawarthalakes.ca

Department Head: Robyn Carlson



| Council Policy No.: | 205 CAO 044 |
|---|----------------------------------|
| Council Policy Name: | Real Property Acquisition Policy |
| Date Approved by Council: | May 26, 2015, CR2015-588 |
| Date revision approved by Council: | |
| Related SOP, Management Directive, Council Policy, Forms | |

Policy Statement and Rationale:

The City of Kawartha Lakes acquires real property rights as required, for a municipal need consistent with City-mandated programs, projects and policies.

The purpose of this Policy is to ensure that a consistent and equitable framework is followed in acquiring real property interests which support Council-approved projects, programs and policies.

Scope:

This Policy applies where real property is acquired by the City of Kawartha Lakes and includes any right, interest or benefit in land, but is not limited to, fee simple acquisitions, leases, permanent easements, rights-of-way and other limited interests such as joint-use agreements, temporary working easements, consents to enter and licences.

This Policy applies to all City of Kawartha Lakes employees, any agents or assigns acting on behalf of the City and consultants authorized to acquire real property on behalf of the City. Real property such as road dedications and easements that are acquired through the planning/subdivision processes will continue to be dealt with as part of that process and in accordance with the Planning Act and any regulations therein.

In addition, the following municipal and provincial legislations give the City of Kawartha Lakes authority to acquire land:

Municipal Act, 2001, S.O. 2001, c. 25, s. 6, s.8 and s.10 Expropriations Act, 1990, c. E.26



Housing Development Act, 1990, c. H.18, s. 17 Ontario Heritage Act, R.S.O 1990, c. O. 18

Definitions:

Appraisal – an estimate or opinion of value or the act or process of estimating value.

Asset Rationalization – a process to support decision-making related to the acquisition, remediation or disposal of real property, in a cost effective manner, while assuring that essential program and service delivery objectives are not compromised.

Capital Projects – have funding or budgets in place and are included in the City's Capital Budget.

City Mandated Programs – support City of Kawartha Lakes initiatives.

Client Department – a City department that is a client of the Realty Services Division and requires a real property for an approved program or project.

Council Approval Report – a report to Council recommending approval of an acquisition by the City of Kawartha Lakes.

Signing Authority – authority to approve pursuant to By-law 2016-009, as amended, being a By-law to Provide Authority for the Execution of Certain Documents and Affix the Corporate Seal on behalf of the City of Kawartha Lakes.

Departmental Needs Assessment – a client department's report documenting the need for and purpose of acquiring real property.

Expropriation – acquiring real property without the consent of the owner, by an expropriating authority in the exercise of its statutory powers.

Market Value – the amount that land and improvements might be expected to realize, if sold in the open market by a willing seller to a willing buyer.

Public–Private Partnerships – legal agreements between government and private sector entities, for the purpose of providing public infrastructure, community facilities and related municipal services.

Policy:

1. Policy Requirements

The City's Realty Services Division shall undertake the acquisition of real property interests in adherence with this Policy, unless otherwise directed by City Council.



2. Departmental Needs Assessment

Prior to initiating an acquisition other than lands required for infrastructure, acquisition of environmental/waterfront lands and pursuant to the Planning Act, the client department will prepare on its behalf, or on behalf of a partner agency, a departmental acquisition needs assessment that sets out the justification and rationale for the proposed acquisition. All assessments shall be vetted through Land Management Committee in collaboration with the client department to determine whether the City's existing real property inventory, or any capital works initiatives, may fulfill the client's requirements. This process could include an asset rationalization as defined in the Integrated Asset Rationalization and Disposal Strategy of Real Property. Should it be determined that the client's needs cannot be met through the existing inventory, Land Management Committee will initiate the acquisition.

3. Council Approval

City Council approval of a project shall include authority for the appropriate person(s) or body to initiate and undertake legal surveys, appraisals, negotiations, expropriations, legal and other such related activities, as may be required.

A budget item must be approved for the program or project, including the costs of acquiring a real property and operational budget impacts, before action is taken to acquire property.

4. Funding

Funding for the acquisition of real property must be identified through a Councilapproved budget item, specific to the program, project or policy defining the need, or allocated from an approved departmental budget.

5. Methods of Acquisition

5.1 Negotiation

Negotiation is the preferred method of obtaining real property rights, with compensation provided as though acquisition was pursuant to the Expropriations Act.

5.2 Expropriation

Where project requirements must be met in a timely manner, or where negotiation is unsuccessful, expropriation may be considered. The City of Kawartha Lakes has the authority to expropriate land in accordance with the provisions of the Expropriations Act. Expropriation will be used as a last resort for



acquisition purposes. Where necessary, client departments shall allow for a minimum of 12 months lead time in their project planning, in anticipation that real property acquisition by expropriation may be required.

5.3 Charitable Donations

The City may acquire real property through gifts or donations, subject to Council approval, or that of its delegated authority. Before acceptance or rejection of a gift of real property, an analysis to determine the conditions of the gift, existing restrictions of encumbrances and assumption of liabilities or any tax implications, shall be carried out. A charitable donation receipt may be issued in the amount of the appraised market value of the donated real property. An independent appraisal shall determine the market value of any donated real property. A satisfactory Phase I Environmental Site Assessment will also be required. Any costs associated with the above will be borne by the donor or the client department.

5.4 Development Approval Process

The Development Services department deals with land requirements such as parkland, road widening through conditions of final approval for subdivisions, site plans or other development approvals under delegated authority.

5.5 Tax Sales – Vesting in Municipality

The municipality may acquire real property, pursuant to Part XI of the Municipal Act, 2001 (Sale of Land for Tax Arrears) and by registering a Notice of Vesting, Section 379.

5.6 Public-Private Partnerships

The City of Kawartha Lakes may acquire or dispose of an interest in real property as part of a Public-Private Partnerships to provide infrastructure, community facilities and related services that would benefit the municipality, the private sector and City residents.

5.7 Other Agencies

The City of Kawartha Lakes may acquire real property as the result of a transfer of jurisdiction from one level of government to another, such as transfer of highways, boat launches.

6. Appraisal

All rReal property acquisitions for consideration or tax receipt shall be supported with a current market value appraisal. An appraisal will be completed by a



member in good standing of the Appraisal Institute of Canada with either a CRA or AACI designation, whichever is required for the type of property to be acquired and in accordance with the CUSPAP, Canadian Uniform Standards of Professional Appraisal.

Appraisal reports will be based on the "Highest and Best Use" of the property and will be prepared by a member of the Appraisal Institute of Canada with either a CRA or AACI designation, whichever is required for the type of property to be acquired and in accordance with the CUSPAP, Canadian Uniform Standards of Professional Appraisal.

7. Acquisition at Market Value

Subject to section 5.3 of this policy, Rreal property shall be acquired on the basis of market value, and where applicable, entitlements, as defined by the Expropriations Act, unless other considerations are included in the transaction and approved by City Council.

Where there is a variance between the appraised value and the acquisition price, such that the acquisition exceeds the appraised value, that variance shall be explained in the approval report.

8. Environmental Due Diligence

The City of Kawartha Lakes shall complete environmental pre-screening on all real property to be acquired to identify potential contamination issues associated with real property.

When the acquisition is for the entire fee simple interest (total buyout) a Phase I Environmental Site Assessment (ESA) will be conducted. If the acquisition is of a lesser interest but there is evidence further assessment is required, a Phase 1 ESA may need to be completed. All such ESAs shall be completed in accordance with the Canadian Standards Association (CSA) and site remediation criteria, as set out by provincial regulations. Whenever possible or appropriate, acquisition agreements may provide for the indemnification of the City of Kawartha Lakes by the vendor for environmental conditions.

9. Heritage Properties

The City of Kawartha Lakes Land Management Committee will consider the City's accommodation needs before constructing or leasing new buildings."

When acquiring real property that may have a heritage designation or historical value, a comprehensive analysis of that property shall be conducted involving the Land Management Committee and appropriate City departments. The analysis will include:



- Identification of the heritage designation or historical value of the real property
- Confirmation of the City of Kawartha Lakes program(s) to be implemented at this heritage property
- Identification of the heritage value of the real property
- Identification of the desired long-term use or protection of the real property
- Assessment of the impact of the operational costs of the real property on the City
- Development of an asset management plan, which forecasts the capital renewal and re-investment requirements, to preserve the heritage property.

Prior to the acquisition of a heritage property, Realty Services Division requires confirmation that the client department and/or City Council have provided the funding and approval for the acquisition.

10. Responsibilities

10.1 Council

City Council approval is required for projects requiring acquisition of real property, including any limited interest therein except where the total cost of the acquisition does not exceed the threshold of delegated authority.

10.2 Signing Authority

The City Solicitor in accordance with the provisions of City of Kawartha Lakes By-law 2016-009, as may be amended from time to time, has the authority to complete the acquisition of real property in accordance with the provisions of that By-law.

10.3 Client Department

The client department is responsible for reviewing, in collaboration with the Realty Services Division and the Asset Manager, the existing real property inventory and other acquisition initiatives, to determine if real property needs can be met through current inventory or initiatives, prior to the initiation of an acquisition. The client department is directly involved in the asset rationalization effort and confirms that the acquisition requirement satisfies its City-mandated program. The client department is responsible for carrying the Capital Budget in support of the real property acquisition.

10.4 Legal Services

The Realty Services Division is a division of the Legal Services Division within the CAO Department and advises the City on real property transactions.



Monitoring/Contraventions

The Realty Services Division will monitor the application of this Policy to ensure that all policy requirements are met.

References

Disposal of Real Property Policy

Legislative and Administrative Authorities

City of Kawartha Lakes Disposition of Property By-law 2018-020 City of Kawartha Lakes Disposition Policy Expropriations Act, R.S.O. 1990, c. E.26 Environmental Assessment Act, R.S.O. 1990, c. E. 18 Ontario Heritage Act, R.S.O. 1990, c. O.18 Housing Development Act, R.S.O. 1990, c. H.18 Municipal Act, 2001, S.O. 2001, c. 25 Local Planning Appeal Tribunal Act, 2017, S.O. 2017, c. 23, Sched. 1 Planning Act, R.S.O. 1990, c. P.13

Revision History:

Proposed Date of Review:

| Revision | Date | Description of changes | Requested By |
|----------|-----------------|---|-----------------|
| 1.0 | May 2019 | Updated formatting to new policy template | Realty Services |
| 2.0 | January 2020 | Update by-law and legislative references and references to City Divisions and Titles | City Solicitor |
| 3.0 | September 2020 | Amendments to appraisal requirements (clarification to Section 7 – Acquisition at Market Value) | Realty Services |



| Council Policy No.: | 205 CAO 044 |
|---|----------------------------------|
| Council Policy Name: | Real Property Acquisition Policy |
| Date Approved by Council: | May 26, 2015, CR2015-588 |
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5.2 Expropriation

Where project requirements must be met in a timely manner, or where negotiation is unsuccessful, expropriation may be considered. The City of Kawartha Lakes has the authority to expropriate land in accordance with the provisions of the Expropriations Act. Expropriation will be used as a last resort for



acquisition purposes. Where necessary, client departments shall allow for a minimum of 12 months lead time in their project planning, in anticipation that real property acquisition by expropriation may be required.

5.3 Charitable Donations

The City may acquire real property through gifts or donations, subject to Council approval, or that of its delegated authority. Before acceptance or rejection of a gift of real property, an analysis to determine the conditions of the gift, existing restrictions of encumbrances and assumption of liabilities or any tax implications, shall be carried out. A charitable donation receipt may be issued in the amount of the appraised market value of the donated real property. An independent appraisal shall determine the market value of any donated real property. A satisfactory Phase I Environmental Site Assessment will also be required. Any costs associated with the above will be borne by the donor or the client department.

5.4 Development Approval Process

The Development Services department deals with land requirements such as parkland, road widening through conditions of final approval for subdivisions, site plans or other development approvals under delegated authority.

5.5 Tax Sales – Vesting in Municipality

The municipality may acquire real property, pursuant to Part XI of the Municipal Act, 2001 (Sale of Land for Tax Arrears) and by registering a Notice of Vesting, Section 379.

5.6 Public-Private Partnerships

The City of Kawartha Lakes may acquire or dispose of an interest in real property as part of a Public-Private Partnerships to provide infrastructure, community facilities and related services that would benefit the municipality, the private sector and City residents.

5.7 Other Agencies

The City of Kawartha Lakes may acquire real property as the result of a transfer of jurisdiction from one level of government to another, such as transfer of highways, boat launches.

6. Appraisal

Real property acquisitions for consideration or tax receipt shall be supported with a current market value appraisal. An appraisal will be completed by a member in



good standing of the Appraisal Institute of Canada with either a CRA or AACI designation, whichever is required for the type of property to be acquired and in accordance with the CUSPAP, Canadian Uniform Standards of Professional Appraisal.

Appraisal reports will be based on the "Highest and Best Use" of the property and will be prepared by a member of the Appraisal Institute of Canada with either a CRA or AACI designation, whichever is required for the type of property to be acquired and in accordance with the CUSPAP, Canadian Uniform Standards of Professional Appraisal.

7. Acquisition at Market Value

Subject to section 5.3 of this policy, real property shall be acquired on the basis of market value, and where applicable, entitlements, as defined by the Expropriations Act, unless other considerations are included in the transaction and approved by City Council.

Where there is a variance between the appraised value and the acquisition price, such that the acquisition exceeds the appraised value, that variance shall be explained in the approval report.

8. Environmental Due Diligence

The City of Kawartha Lakes shall complete environmental pre-screening on all real property to be acquired to identify potential contamination issues associated with real property.

When the acquisition is for the entire fee simple interest (total buyout) a Phase I Environmental Site Assessment (ESA) will be conducted. If the acquisition is of a lesser interest but there is evidence further assessment is required, a Phase 1 ESA may need to be completed. All such ESAs shall be completed in accordance with the Canadian Standards Association (CSA) and site remediation criteria, as set out by provincial regulations. Whenever possible or appropriate, acquisition agreements may provide for the indemnification of the City of Kawartha Lakes by the vendor for environmental conditions.

9. Heritage Properties

The City of Kawartha Lakes Land Management Committee will consider the City's accommodation needs before constructing or leasing new buildings."

When acquiring real property that may have a heritage designation or historical value, a comprehensive analysis of that property shall be conducted involving the Land Management Committee and appropriate City departments. The analysis will include:



- Identification of the heritage designation or historical value of the real property
- Confirmation of the City of Kawartha Lakes program(s) to be implemented at this heritage property
- Identification of the heritage value of the real property
- Identification of the desired long-term use or protection of the real property
- Assessment of the impact of the operational costs of the real property on the City
- Development of an asset management plan, which forecasts the capital renewal and re-investment requirements, to preserve the heritage property.

Prior to the acquisition of a heritage property, Realty Services Division requires confirmation that the client department and/or City Council have provided the funding and approval for the acquisition.

10. Responsibilities

10.1 Council

City Council approval is required for projects requiring acquisition of real property, including any limited interest therein except where the total cost of the acquisition does not exceed the threshold of delegated authority.

10.2 Signing Authority

The City Solicitor in accordance with the provisions of City of Kawartha Lakes By-law 2016-009, as may be amended from time to time, has the authority to complete the acquisition of real property in accordance with the provisions of that By-law.

10.3 Client Department

The client department is responsible for reviewing, in collaboration with the Realty Services Division and the Asset Manager, the existing real property inventory and other acquisition initiatives, to determine if real property needs can be met through current inventory or initiatives, prior to the initiation of an acquisition. The client department is directly involved in the asset rationalization effort and confirms that the acquisition requirement satisfies its City-mandated program. The client department is responsible for carrying the Capital Budget in support of the real property acquisition.

10.4 Legal Services

The Realty Services Division is a division of the Legal Services Division within the CAO Department and advises the City on real property transactions.



Monitoring/Contraventions

The Realty Services Division will monitor the application of this Policy to ensure that all policy requirements are met.

References

Disposal of Real Property Policy

Legislative and Administrative Authorities

City of Kawartha Lakes Disposition of Property By-law 2018-020 City of Kawartha Lakes Disposition Policy Expropriations Act, R.S.O. 1990, c. E.26 Environmental Assessment Act, R.S.O. 1990, c. E. 18 Ontario Heritage Act, R.S.O. 1990, c. O.18 Housing Development Act, R.S.O. 1990, c. H.18 Municipal Act, 2001, S.O. 2001, c. 25 Local Planning Appeal Tribunal Act, 2017, S.O. 2017, c. 23, Sched. 1 Planning Act, R.S.O. 1990, c. P.13

Revision History:

Proposed Date of Review:

| Revision | Date | Description of changes | Requested By |
|----------|-------------------|---|-----------------|
| 1.0 | May 2019 | Updated formatting to new policy template | Realty Services |
| 2.0 | January 2020 | Update by-law and legislative references and references to City Divisions and Titles | City Solicitor |
| 3.0 | September 2020 | Amendments to appraisal requirements (clarification to Section 7 – Acquisition at Market Value) | Realty Services |



Committee of the Whole Report

Report Number HH2020-003

| Meeting Date: | September 1, 2020 |
|--------------------------------------|--|
| Title: | 2019 Annual Housing and Homelessness Plan (HHP) Report |
| Author and Title: | Hope Lee, Manager, Human Services (Housing) |
| Recommendati | on(s): |
| | 20-003, 2019 Annual Housing and Homelessness Plan received for information; |
| That this recomme next Regular Counc | ndation be brought forward to Council for consideration at the cil Meeting. |
| | |
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| | |
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| | |
| | |
| | |
| | |
| | |
| Department Head | |
| Financial/Legal/HI | R/Other: |
| Chief Administrati | ive Officer: |

Background:

On February 11th, 2014, Council approved the "Building Strong Communities – 10 Year Housing & Homelessness Plan" for 2014-2023.

The Housing & Homelessness (HHP) is consistent with legislation, Ontario Regulations and the provincial Housing Policy Statement, and:

- Identifies current and future housing needs;
- Sets out objectives and targets (goals) relating to housing needs;
- Proposes actions to meet the goals; and,
- Establishes a process to measure and report progress towards meeting the goals.

Each year, by June 30th, an annual report on progress of the plan must be made available to the Ministry and to the public. The report will provide details on the measures taken to meet the objectives of the plan.

The pandemic situation resulted in a delay in producing this year's annual report. An extension to September 30th was granted by the Ministry.

Rationale:

The sixth annual report, highlighting 2019, is included as Attachment A. Copies of the report will be made available to the public through the City and County websites and through distribution to key stakeholders.

This is the final report on the 2014-23 HHP. The 2020 annual report will highlight progress based on the new HHP (2020-2029) which was approved by Council in late 2019.

Other Alternatives Considered:

Not applicable.

Alignment to Strategic Priorities

This report aligns with the Strategic Goal of an Exceptional Quality of Life.

Financial/Operation Impacts:

Not applicable

Consultations:

Program Supervisor, Housing Services Affordable Housing Program Coordinator Homelessness System Coordinator

Attachments:

Attachment A: 2019 Annual Report



Building Strong Communities 2019 A

Department Head E-Mail: rsutherland@kawarthalakes.ca

Department Head: Rod Sutherland

Building Strong Communities

10 Year Housing & Homelessness Plan (2014-2023) 2019 Annual Report







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The cover image features the following housing in the City of Kawartha Lakes and County of Haliburton: roof (Bond St. East, Lindsay) • top window (48 St. Paul St., Lindsay)

- left window (57 Parkside, Minden) right window (610 Mountain, Haliburton)
- door (20 Sussex, Lindsay) main building (68 Lindsay St. North, Lindsay).

The City of Kawartha Lakes

As Service Manager (SM) for Kawartha Lakes and Haliburton County, the City of Kawartha Lakes is responsible for the financial support of existing social housing and serves a key role in the delivery of new affordable housing programs. The SM also administers homeless support and homelessness prevention programs.

SMs are required, as part of the Province's Long-term Affordable Housing Strategy and the **Housing Services Act**, to complete a 10 Year Housing and Homelessness Plan (HHP). The City adopted its 10 Year Plan in February 2014. This is the 6th and final annual report on the 2014-23 plan. In 2019 the plan was refreshed creating a new 10 year (2020-29) plan. In 2021 this annual report will reflect progress on the refreshed Plan.





For the full Housing and Homelessness Plan and background reports visit the City's website: **www.kawarthalakes.ca**

Message from the City Mayor & County Warden

Our vision is to provide adequate, stable, affordable, well maintained and diverse housing choices with access to a variety of flexible supports enabling people to meet their housing needs throughout their lifetime. To plan for affordable housing and homelessness needs for 2014-2023, the HHP has seven goals derived from studies and reports with the themes generated from a combination of community consultation, a project coordinating committee and municipal staff input.

Although the City of Kawartha is the designated Service Manager for both the City and the County, the County and the City actively collaborate in order to ensure that housing and homelessness is addressed throughout the area.

Annually a progress report on our local HHP is created in order to keep the public informed on the progress and especially to help the community to remain engaged. In order to achieve the objectives and actions, community engagement and significant collaboration is needed. We are proud of the accomplishments made toward meeting the goals of the plan in 2019 which include:

- assisting 618 households to retain their housing through Homelessness Prevention Supports
- assisting 78 previously homeless individuals and families to find housing (those who were housed from chronic homelessness)
- refreshed our existing plan resulting in a new 10 year plan for 2020-29

We are pleased to share this year's report with you and look forward to our ongoing accomplishments.





Andy Letham Mayor, City of Kawartha Lakes



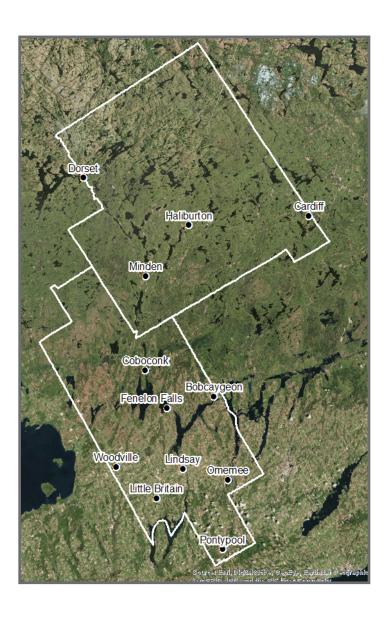


Liz Danielson 2019 Warden, County of Haliburton

Area Context

The City of Kawartha Lakes covers a land area of 3,067 square kilometres, a population of approximately 75,420 residents and has over 250 lakes. The County Simcoe and the District of Muskoka are to the northwest, the County of Haliburton to the northeast, to the east is the County of Peterborough and on the south and southwest is Durham Region.

The County of Haliburton also known as the Haliburton Highlands, is comprised of four separate municipalities covering over 4,000 square kilometres of natural landscapes and over 600 lakes. The County is home to approximately 18,065 residents. As previously noted, the County is to the northeast of the City and shares boundaries with the District of Muskoka, Hastings County, the District of Nipissing and the County of Peterborough.



Principles

- Housing is a social determinant of health
- Homelessness prevention and rapid rehousing through a Housing First approach are key to ending long-term homelessness
- People should have access to affordable housing in good repair within or close to the community of their choice
- All persons have the right to be treated with dignity and respect
- Investing in affordable housing fosters inclusive communities and supports economic development

Assessment of Current State and Future Housing Needs

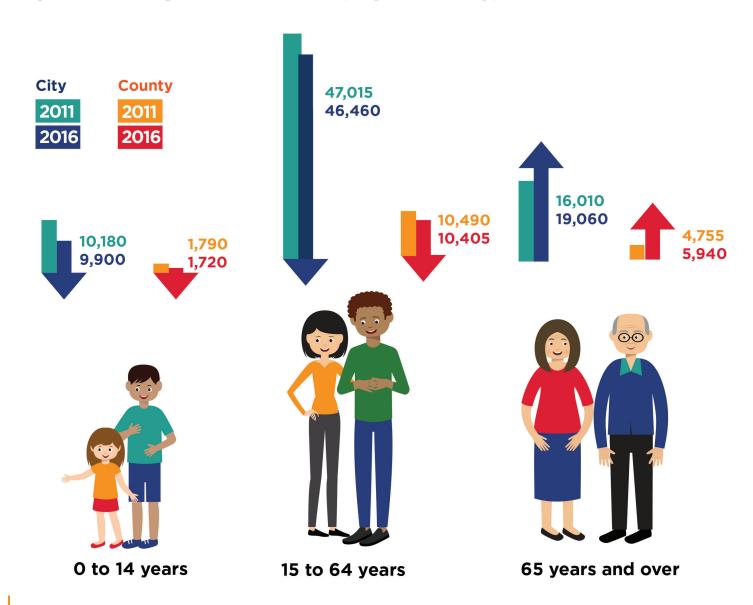
The objectives, outcomes and targets within the plan are based on a comprehensive review of local data from a variety of sources including Statistics Canada, Canada Mortgage and Housing Corporation, Ministry of Finance, the City and County, etc. The CKL-H Housing & Homelessness Assessment Report provides details on the data reviewed and considered.

Key themes:

In both the City and County the population continues to age

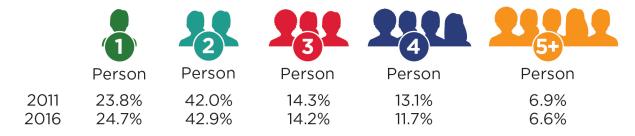
- In the City, those 65 and over grew from 21.9% in 2011 to 25.3% in 2016, or an increase from 16.010 residents 65 and over to 19.060 residents 65 and over
- In the County, those 65 and over grew from 27.9% in 2011 to 32.9% in 2016, or an increase from 4,755 residents 65 and over to 5,940 residents 65 and over

Population Changes in Service Area (City and County)

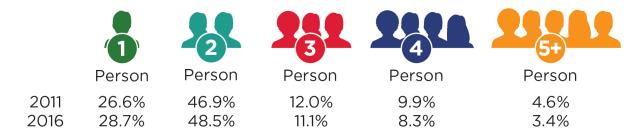


Two thirds of all housing across the service area is occupied by only one or two people.

Household Sizes (City)



Household Sizes (County)



Single detached homes continue to make up the majority of the living spaces creating a mismatch to the aging population and the number of smaller households

- 83% in the City
- 90% in the County
- In the City between 2011-2016, 73% of all additional housing created were single detached homes
- In the County between 2011-2016, 88% of all additional housing created were single detached homes

Between 2011 and 2016 there has been an increase in the percentage of renters that are spending 30% or more of their income on rent

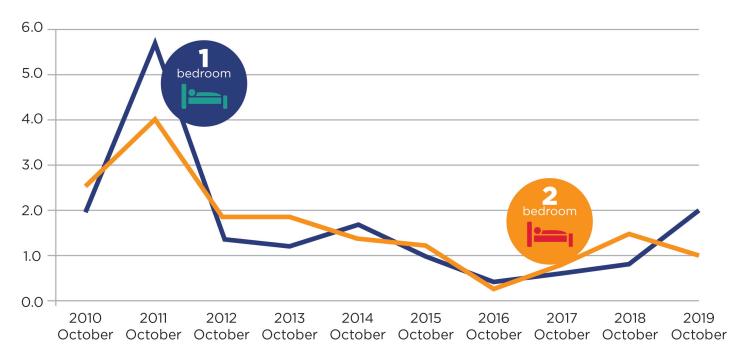
- Increased from 46% to 51.7% in the City
- Increased from 38.7% to 49.5% in the County

Shelter Costs for Renters in Service Area (City and County)

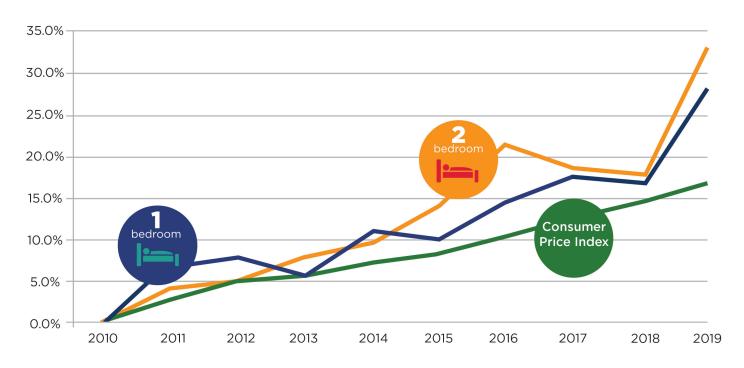
| | | | | City | County |
|--|-------------|-----------|--------------|----------------|----------------|
| Less than 30% of their income goes towards rent | \$ → | ## | 2011 2016 | 54.0% 48.3% | 61.3% 50.5% |
| More than 30% of their income goes towards rent | \$- | | 2011 2016 | 46.0% 51.7% | 38.7% 49.5% |

The average market rent for an occupied unit has increased approximately 30% since 2010 while vacancy rates decrease.

Vacancy Rates (Service Area)



Market Rent Increase (Service Area)



Housing System

Not every household has the same housing needs. Factors such as household size, household income, occupants' stages-in-life and other contributing circumstances determine the requirements to maintain appropriate, stable and affordable housing.

Some factors which influence housing needs:



Housing is considered affordable if shelter costs account for less than 30% of before-tax household income. We know the homeowners in the City of Kawartha Lakes spend 17.7% of their income towards housing, where homeowners in the County of Haliburton spend 20.8% towards shelter costs. However, renters in both regions are paying considerably more than 30% of their income towards housing costs.



More than 30% of income going to housing costs

The chart on the next page provides an outline describing the range of housing programs and services available to households experiencing housing instability and affordability challenges. The housing system and programs highlighted in this report work to support households transitioning to more independent housing situations while recognizing some households may require ongoing housing subsidies and/or support services due to unique life circumstances and associated financial barriers.

How Affordable Housing Translates in Our Community

| | Affordable Permanent Housing | | | | |
|--|---|---|--|--|--|
| Emergency & Temporary Housing | Low Income (Households with income at or below the 30th percentile) | Middle Income (Households with income between the 30th and 60th percentile) | Supportive | | |
| | Renter Income (at or below) City - \$22,800 County - \$21,000 | Renter Income (between) City - \$22,800 & \$42,100 County - \$21,000 & \$36,600 | Households or individuals with need for permanent supportive housing | | |
| Households or individuals without permanent housing options | Affordable Rent (at or below) City: \$570 County: \$520 | Affordable Rent (between) City - \$570 & \$1,050 County - \$520 & \$920 | | | |
| | Owner Income (at or below) City - \$46,500 County - \$39,400 | Owner Income (between) City - \$46,500 & \$84,600 County - \$39,400 & \$73,200 | | | |
| | Affordable Housing Price (at or below) City - \$164,900 County - \$139,800 | Affordable Housing Price (between) City - \$164,900 & 299,900 County - \$139,800 & \$259,500 | | | |
| | What is the need | | | | |
| Shelter at capacity Lack of upfront diversion/ prevention Provincial shift away from emergency shelter and short term solutions | Smaller households are the predominant type Significant senior population which is expected to remain above average Limited supply of private market rental that is in affordable range Community Housing Provider portfolio is significant and must be maintained Few culturally-specific housing options and services for indigenous households | | Frail health Physical disabilities Homelessness Mental Health Addictions | | |
| Type of housing required | | | | | |
| Quicker access to permanent housing | One and two bedroom rental units Smaller affordable homes Model where seniors can age in place Energy Efficient buildings | | Accessible units Affordable units with support services provided | | |

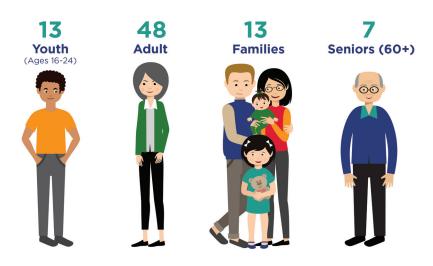
By Name List

The By Name List is a real-time list of all people experiencing homelessness in CKL-H. The BNL helps community partners to know every person experiencing homelessness by name, understand what their unique needs are, and then prioritize them for the most appropriate and available housing intervention.



At the end of 2019, 81 households were on the By Name List.

Demographics:



64
Households were from
City of Kawartha Lakes

17
Households were from the County of Haliburton

9% Identified as Indigenous

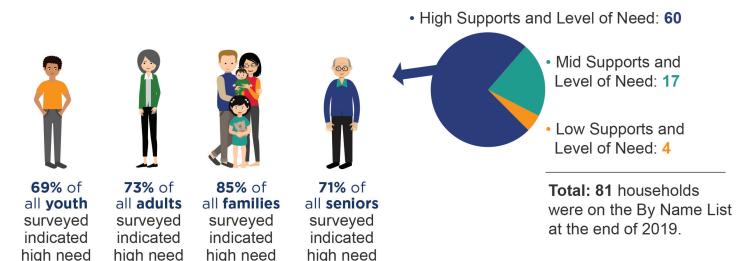
Sleeping Location:



Level of Need (Acuity):

- High need These are individuals that face complex and often multiple co-occurring wellness challenges around physical, mental health or substance use and require intensive and sometimes permanent supportive housing
- **Mid need** These are individuals who typically have faced some financial stress as well as some challenges around one or two areas of wellness, where rapid re-housing with temporary supports can resolve their housing crisis
- **Low need** These are individuals who have generally faced homelessness due to financial causes and their homelessness can be resolved by accessing homelessness preventions benefits such as last month's rent funding

Total Level of Need Breakdown

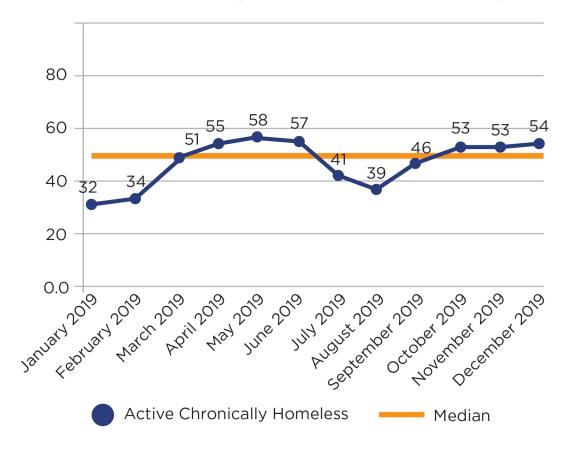


Increasing Level of Need



During registry week 2016, 44% of households surveyed scored in the highest need category. In 2018, the portion of households in the highest need category increased to 67%. In 2019, the portion of households that scored in the highest needs category increased again to 74%. This suggests that the depth of need continues to increase year after year. Continuous investment in permanent supportive housing is needed to support these households transition out of homelessness.

Total Number of Chronically* Homeless on the BNL: January 2019 - December 2019



*homeless for 6 or more months in a year

Progress on Ending Chronic Homelessness

67% of all individuals on the By Name List at the end of 2019 reported being homeless for 6 or more months in the last year, identifying them as chronically homeless. There was an average of 48 people experiencing chronic homelessness each month. 78 households experiencing chronic homelessness were housed in 2019. Of those who entered homelessness in 2019, only 5 returned from housing which confirms what we know about Housing First - it works! This success speaks to the skills of the housing support staff, the hard work of the clients, and the willingness of partner agencies to work collaboratively to keep people housed.



78 households experiencing chronic homelessness were housed in 2019.

Permanent Supportive Housing and Housing First

Permanent Supportive Housing combines rental or housing assistance with individualized, flexible and voluntary support services for people with high needs. It is one option to house chronically homeless individuals with high acuity.

Housing First is a recovery-oriented approach to ending homelessness that centers on quickly moving people experiencing homelessness into independent and permanent housing and then providing additional supports and services as needed

68 Lindsay Street North

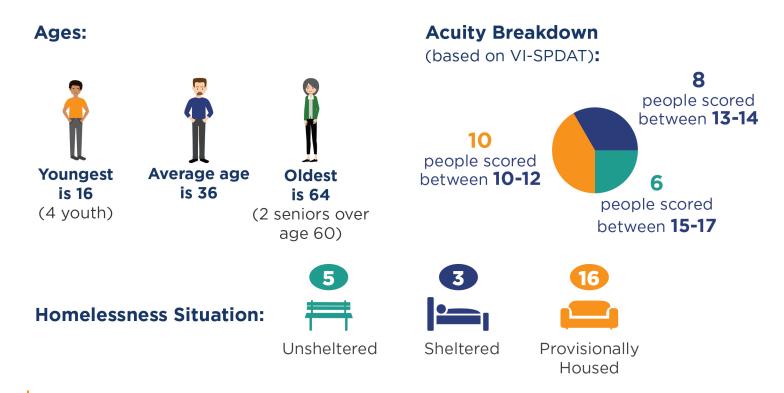
In 2019, 68 Lindsay Street North in Lindsay became home to 24 chronically homeless individuals with high acuity. The building provides 24 - 1 bedroom self contained apartments and combines permanent supportive housing and the housing first approach.

Five on-site staff provide supports to the 24 tenants using Org Code's "Five Essential and Sequence Elements" which include:

- 1. Focus on Housing Before Anything Else
- 2. Create an Individualized Service Plan
- 3. Increase Self Awareness
- 4. Support Achievements in Self Management
- 5. Allow the Client to Reframe/Rebuild One's Life and Future

The first 24 tenants started occupying the building in June 2019 coming from the By Name List.

The first 24 had some of the following characteristics:





Intensive Case Management in Kawartha Lakes

The 68 Lindsay Street North model uses an Intensive Case Management (ICM) approach. Although permanent supportive housing, Housing First and Intensive Case Management are all nationally proven models, they were piloted in Kawartha Lakes starting in 2016 using a scattered site model. In order to understand how this would work locally Kawartha Lakes engaged Trent University to evaluate the pilot.

The evaluation methodology combined longitudinal and cross-sectional data collection by repeatedly surveying individuals from two groups:

- 1. clients receiving intensive case management support (28 individuals)
- 2. general community members who were clients of A Place Called Home, but not receiving intensive case management (31 individuals)

Reduction in:

Improvement in:

Chronic homelessness

Physical pain/ difficulties taking medication

Self-reported depression and anxiety

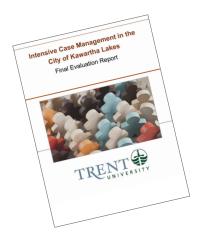
Hospital use and spending

Quality and length of housing

The reduction in hospital use and spending was significant.



Yearly hospital
SAVINGS
from ICM program:
\$269,844



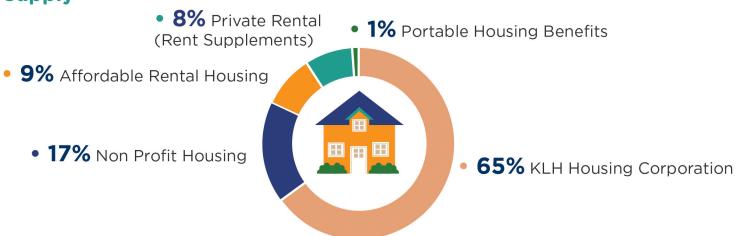
A full copy of the evaluation report can be found here: https://www.kawarthalakes.ca/en/living-here/resources/KLH-Housing/CKL-Intensive-Case-Management---Final-Evaluation-Report-Accessible.pdf

Financially Assisted Housing

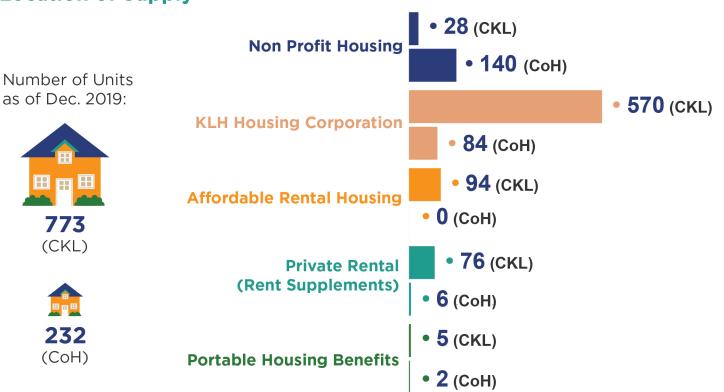
Ontario is divided into 47 service manager areas to support the delivery of a variety of provincially regulated social service programs. The City of Kawartha Lakes' Human Services Department is the service manager for The City of Kawartha Lakes and the County of Haliburton. It administers, among other things, the local financially assisted housing and homelessness system.

The service manager is required to maintain 871 financially assisted housing units providing rent-geared-to income housing to eligible low-income households. Of the mandated 871 units, one municipally managed provider and five non-profit housing providers own and operate 792 units. The other units are provided through rent supplement payments to private landlords and other non-profit housing providers.





Location of Supply



Centralized Waiting List for Community Housing Units



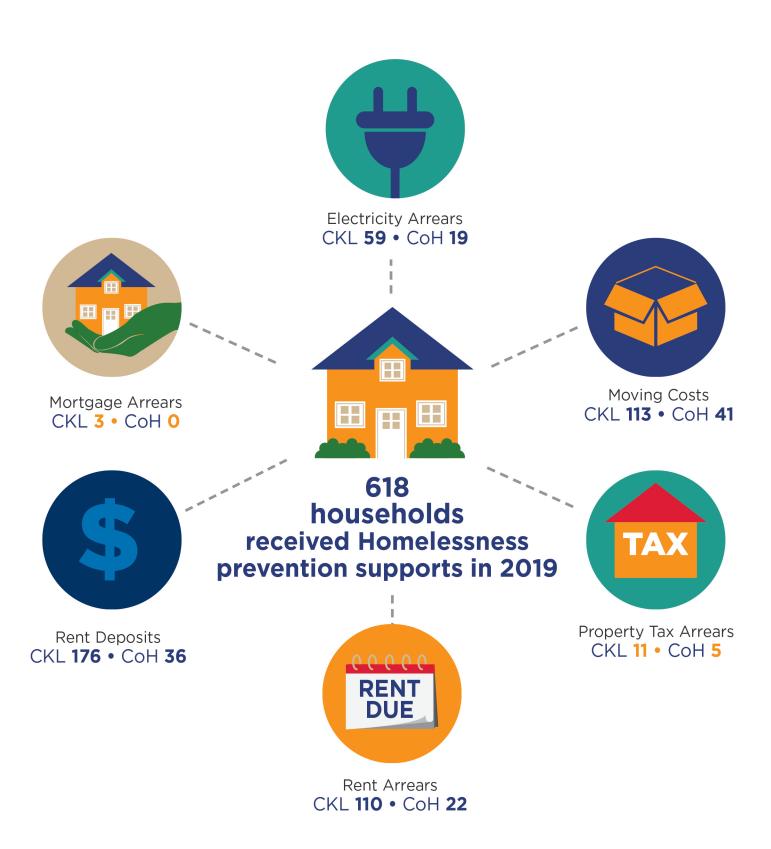
| Unit Size | Over the past 4 years, average wait time for most applicants (years) | | | |
|-----------|--|------------|---------|------------------------------|
| | All | Haliburton | Lindsay | Kawartha Lakes (not Lindsay) |
| 1 bedroom | 4.64 | 3.61 | 5.23 | 3.40 |
| 2 bedroom | 4.01 | 2.78 | 4.11 | 1.58 |
| 3 bedroom | 3.60 | 1.29 | 3.61 | N/A |
| 4 bedroom | 1.13 | 1.13 | N/A | N/A |
| Bachelor | 4.56 | N/A | 4.56 | N/A |
| Total | 4.30 | 3.58 | 4.83 | 3.39 |



Households who apply today may wait as long as 7 years.

Homelessness Prevention Supports

✓ Available to eligible low-income households in Kawartha Lakes and the County of Haliburton.



Contact

City of Kawartha Lakes-Housing Services





www.kawarthalakes.ca/housing

Kawartha Lakes Office

PO Box 2600, 68 Lindsay Street North Lindsay, ON K9V 4S7

County of Haliburton Office

Unit 8
49 Maple Avenue, Haliburton ON KOM 1SO
PO Box 728



Council Memorandum

Date: September 1st, 2020

To: Council

From: Mayor Letham

Re: Update on Economic Recovery Task Force.

Recommendations;

THAT the Memorandum from Mayor Letham, regarding an Update on Economic Recovery Task Force, be received;

THAT the Lindsay Downtown Phase 3 Reconstruction Project, and the Fenelon Falls Downtown Reconstruction Project, be included as priority projects for consideration in the 2021 budget; and

THAT this recommendation be forwarded to Council for consideration at the next regular council meeting.

Rationale;

On August 11th, the Economic Recovery Task Force held it's 4th meeting. The main goal of this meeting was to have a discussion around the definition of the Kawartha Lakes Economy and how we are marketing it for best value over the next year. Staff provided to the Task Force an informational report entitled **Economic Development Marketing Updates** (see attached).

Also attached is a presentation from Dr. Tom Phillips, a member of the task force, titled Prospects for Growth, How Economies Transform. This was provided to give Task Force members an idea of what economic recovery might look like and how that economy moving forward will need to be different than what we had before the pandemic.

Shovel ready infrastructure projects were presented and the task force felt that downtown reconstruction projects were the "biggest bang for the buck", so to speak,



from an economic recovery perspective. These are not new projects but provided multiple benefits and stimulus for local business recovery.

Attachments;

Report - Economic Development Marketing Updates



Presentation – Prospects for Growth, How Economies Transform



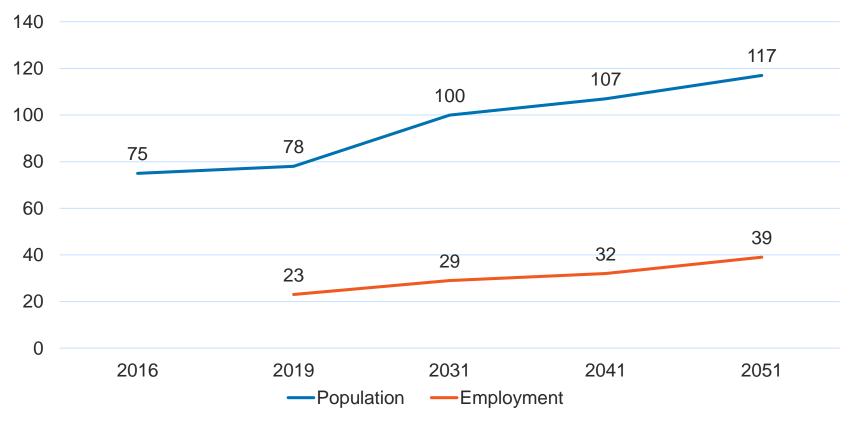
Attachment -Prospects for Growt

Kawartha Lakes Economy

Economic Recovery Task Force August 11, 2020



Kawartha Lakes Forecast Population and Employment to 2051



Source: 2016 Census, EMSI 2019, Proposed Amendment 1 to Growth Plan for the Greater Golden Horseshoe, 2019

Our Local People

KL Commuters

Commuting to KL

KL Live and Work

44% 10,960 *2016 Census 20% 3,390 *2016 Census

56%

*2016 Census

College/University

45% KL 59% Ontario

*2016 Census

Apprenticeship

10% KL 6% Ontario

*2016 Census

Median household income

\$67,187 KL \$74,287 Ontario Median Age

51.2 KL41.3 Ontario

*2016 Census

Local Business

Jobs in KL

Businesses (employees)

2,131

Businesses (no employees)

Residents in labour force

22,649

*EMSI Canada (2019.3) *December 2019 Canadian Business Count 5,011

*December 2019 Canadian Business Count 36,160

* 2016 Census

Jobs in KL

- 17% Healthcare and social assistance
- 15% Retail trade
- 9% Public administration
- 8% Accommodation and food service

*EMSI Canada (2019.3)

Job strength in KL

Agriculture Healthcare Retail trade

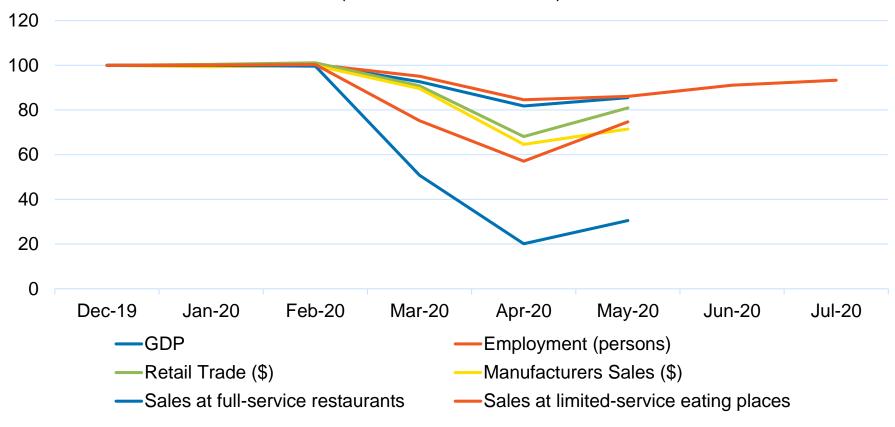
*EMSI Canada (2019.3) Location Quotient >1.25 Businesses in KL (with employees)

- 21% Construction
- 14% Retail trade
- 9% Other services
- 8% Professional, scientific, tech services
- 7% Healthcare and social assistance
- 7% Accommodation and food services

*December 2019 Canada Business Counts

COVID Impact

Canadian Economic Dashboard Index (December 2019=100)



Source: Statistics Canada Canadian Economic Dashboard and COVID-19 August 10, 2020

Between February and April 2020, estimated that COVID-19 reduced the Eastern Ontario Gross Domestic Product (GDP) by about \$1.8 billion, and has reduced employment by the equivalent of 64,000 full-time jobs.

(Eastern Ontario Leadership Council, Limestone Analytics)

KL Businesses not operating

KL Business has decreased

KL Business has increased

KL No change in business

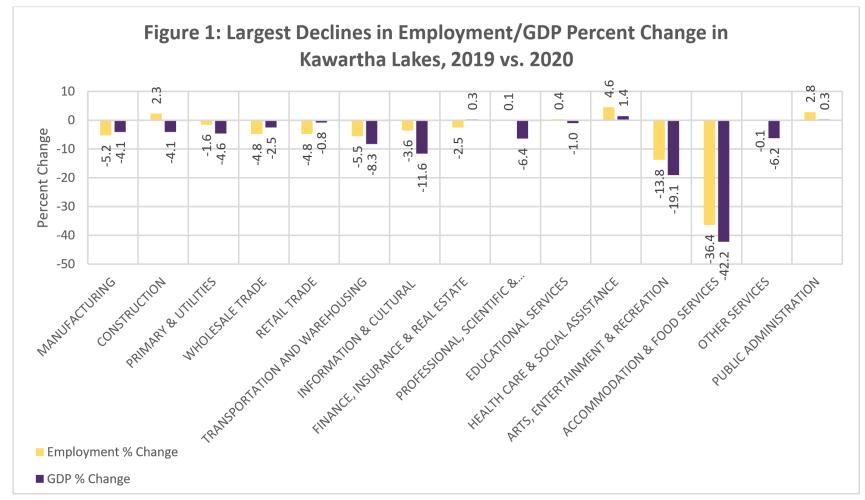
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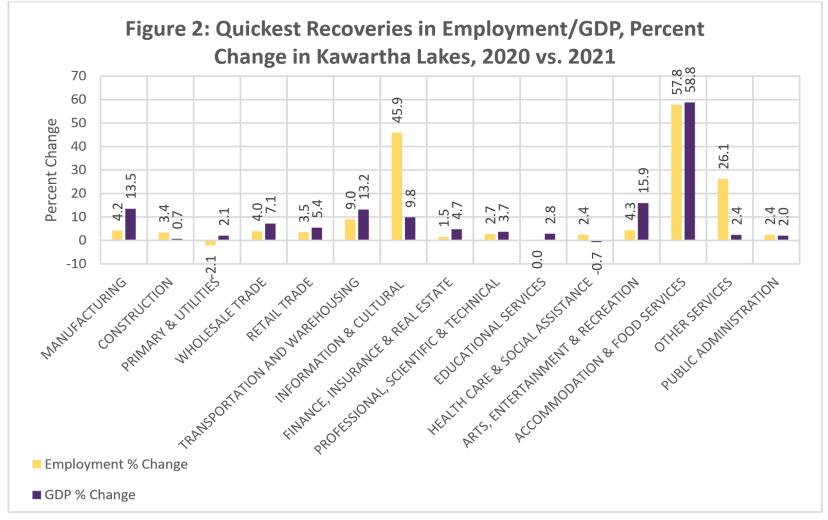
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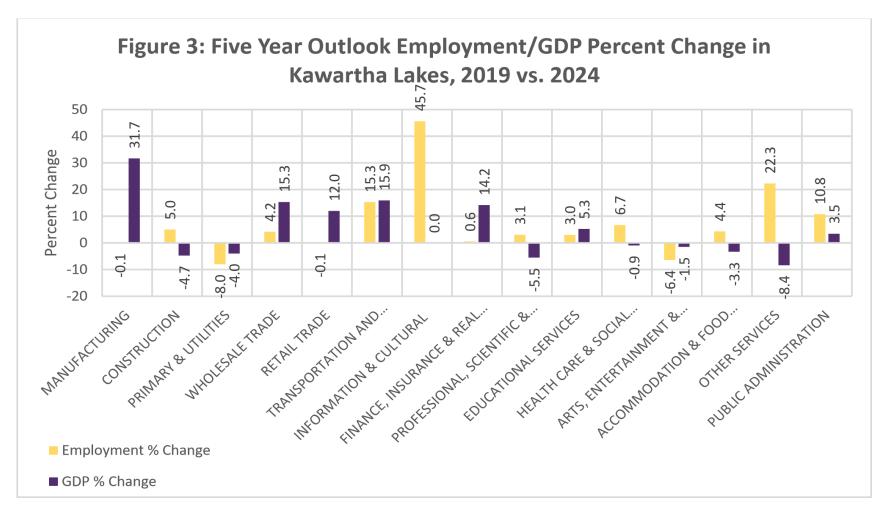
*Kawartha Lakes COVID-19 Business Survey (May-June ,2020)



Source: The Conference Board of Canada. Unpublished custom research, 2020.



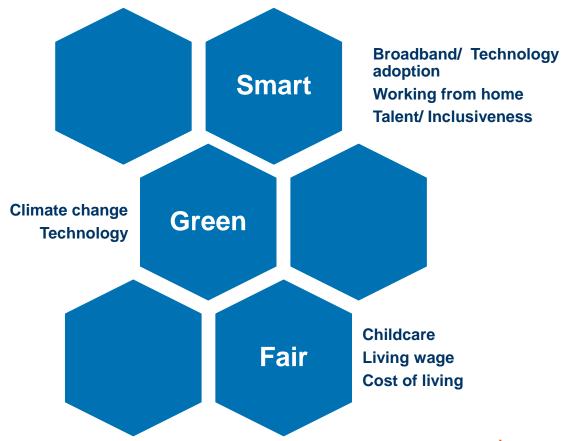
Source: The Conference Board of Canada. Unpublished custom research, 2020.



Source: The Conference Board of Canada. Unpublished custom research, 2020.

Local economic development is about creating the conditions to support business, job and income growth.

Rebuilding a transformational economy



Local Strategic Plans

Economic Development Strategic Goals



Goal 1: Adopt a City-wide focus



Goal 2: Grow specific business sectors



Goal 3: Encourage a positive business community culture



Goal 4: Align and inspire City resources



Goal 5: Attract and retain a new generation of great entrepreneurs and workforce

Kawartha Lakes Strategic Plan 2020



Rebuilding our economy...

Prospects for Growth

How Economies Transform

Tom Phillips, Ph.D. July 21, 2020.

Fleming College

The Source of the Economic Recovery and the Post-COVID-10 Economy

- The recovery will be driven by DEMAND, not SUPPLY
- DEMAND the ability of consumers and governments to spend on goods and services
- SUPPLY the ability to produce i.e., combining technology, labour, and raw materials to produce good and service
 - currently we can produce more than we are i.e., technology, labour, and raw materials are under utilized – they will only be utilized when there is sufficient demand (and the ability to spend) on goods and services
 - there is no reason why the revival of production will combine technology, labour, and raw materials in the same quantities and proportions post-COVID-19 than was the case pre-COVID-19

The economy that will emerge through the recovery will be structurally different from the pre-COVID-19 economy.

Technology will be used in different ways; people will interact with technology (and one another) differently.

General observations of organizations – public and private – over the past four months:

- 1. When the COVID-19 outbreak struck organizations deal with individual issues as they came up. Decisions were made based on the best information available. Each issue was dealt with independently. The underlying presumption was that if each issue was dealt with well, they would add up to a good result, overall. That is, the sum of all the good micro decisions adds up to a good macro result. This is an example of the Fallacy of Composition. In economics, the whole is never equal to the sum of its parts.
- 2. The micro decisions being made have been operational in nature. Again, there is an underlying presumption that looking back on the operational decisions, overall tactics will eventually become apparent, and the strategy driving the tactics will emerge.

The usual path is: Strategy -> Tactics -> Operations

What has been more common recently is: Operations -> Tactics -> Strategy In terms of strategy, this isn't likely to go well.

An ECONOMIC STRATEGY for recovery

- a new phase of economic development - needs to be addressed - eventually

Lessons from the past few months. It was easier than we thought to use existing technology to conduct our day-to-day business.

- Businesses and governments have quickly adopted technology to provide services and generate revenue
- Students and teachers learned how education can be delivered differently
- More uses of technology, and ways to work, emerge daily

The big change is in HOW we do things. The technology was already there. We use technology well through

NECESSITY AND INGENUITY

We very quickly abandoned longstanding ways of doing things by creating new ways of getting things done. This is an example of

CREATIVE DESTRUCTION

A perspective on economic growth.

Economic growth comes from the COMBINATION of:

TECHNOLOGICAL CHANGE and COMPLEMENTARY CHANGES IN SOCIAL INSTITUTIONS

New technologies without complementary changes in social institutions cannot reach their economic growth potential.

Economic growth is more determined by changing the role of government, how business is conducted, how education is delivered, how the family is structured, etc., than it is by technology alone.

This is:

TRANSFORMATIONAL GROWTH

Our current place in terms of Transformational Growth:

- No need to wait for technological change the technology is already available
- How can we ensure through decisions of governments, institutions, and businesses – that technology is deployed and adopted so that it can have positive impacts on economic growth? The old way of doing things – old social institutions will not be sufficient to stimulate economic growth – and there are only diminished opportunities for economic growth if we were return to where we were in January 2020.
- We must practice CREATIVE DESTRUCTION. Some things we have been doing must be left behind for the sake of creating new economic opportunities. No longer can government or business be continually 'additive' i.e., keep all that is currently done and add more to what exists. No longer can businessed or governments keep underperforming processes (i.e., combinations of technology and labour) and expect economic success for themselves or the economy.

544

The decisions governments face:

- 1. Cut spending
- 2. Increase taxes
- 3. Invest in economic growth

History has taught us that only investing in economic growth has the potential to move an economy from recession/depression to robust growth in a timely manner.

Given the technologies that already exist, TRANSFORMATIONAL GROWTH can occur if we choose to change our social institutions – i.e., make decisions that consciously break with returning to the 'old' economy.

The fundamental choice is between a:

- Vicious Cycle of decline based on existing social institutions, whether new or old technologies, and
- Virtuous Cycle of transformational growth based on creative destruction in technologies and social institutions.

COMMENTS? QUESTIONS?



Memorandum

Date: September 1, 2020

To: City Council

From: Rod Sutherland, Director of Human Services, on behalf of Task Force Co-chairs

Amy Terrill and Heather Kirby

Re: Update from Community Pandemic Recovery Task Force

Recommendation

That the Memorandum from Rod Sutherland, Director of Human Services, **Update from Community Pandemic Recovery Task Force**, be received for information purposes; and

That this recommendation be brought forward to Council for consideration at the next Regular Council Meeting.

Rationale

The Community Pandemic Recovery Task Force is continuing to meet twice per month along with the two working groups, focusing on gaps and funding opportunities.

Working Groups

The Gaps Working Group has completed a survey of community organizations to better understand the challenges and concerns of local agencies and community service providers. The survey results are currently being reviewed and will assist in identifying common needs and priorities. This will also align to the work of the Funding Working Group, which is currently focusing on identifying potential funding opportunities, including how to support organizations in pursuing them, such as grant writing support. Members have connected with Economic Development staff to discuss the delivery of grant-writing workshops.



Engagement Support of the Office of Strategy Management

Staff of the City's Office of Strategy Management (OSM) have been supporting the current engagement process of the Task Force, including managing the Jump In, Kawartha Lakes website and survey. The continued support of OSM, in particular relating to the development of indicators and outcome measures in pursuing funding opportunities, was requested by the Task Force.

Community Safety and Well-Being Plan

In 2019 the Province legislated that municipalities must develop and adopt a Community Safety and Well-Being (CSWB) Plan. While originally required to be in place by January 1, 2021, due to the pandemic the deadline for the adoption of a plan has now been extended. Although a new deadline has not been identified, the province has encouraged municipalities to continue to develop their CSWB Plans.

The goal of CSWB planning is "to achieve the ideal state of a sustainable community where everyone is safe, has a sense of belonging, access to services and where individuals and families are able to meet their needs for education, health care, food, housing, income, and social and cultural expression."

The planning process allows municipalities to take a leadership role in defining and addressing priority risks in the community through proactive, integrated strategies that ensure vulnerable populations receive the help they need from the providers best suited to support them.

Plans must include:

- identifying priority risks;
- identifying strategies to reduce the prioritized risk factors; and
- · setting measurable outcomes.

The provincial framework for the development of a CSWB Plan identifies very specific requirements, including the community engagement process and the creation of an advisory committee to oversee the process.

City staff were in the early stages of planning for the CSWB Plan when the COVID-19 pandemic began.

As the goal of the CSWB Plan is aligned with that of the Community Pandemic Recovery Task Force staff recommended to the Task Force that a working group be established to act as the Advisory Committee for the CSWB Plan.

At their August 24, 2020 meeting, the Task Force supported this approach and passed the following resolution:

That the Community Pandemic Recovery Task Force establish a working group to fulfill the role of Advisory Committee for the development of the Community Safety and Well-Being Plan.

The Advisory Committee will be established and initiated in the coming months in consultation and co-ordination with the Chief Administrative Officer.

As prescribed by the Province, advisory committees, at a minimum, must include the following members:

- A person who represents the local health integration network, or an entity that provides physical or mental health services;
- A person who represents an entity that provides educational services;
- A person who represents an entity that provides community or social services in the municipality, if there is such an entity;
- A person who represents an entity that provides community or social services to children or youth in the municipality, if there is such an entity;
- A person who represents an entity that provides custodial services to children or youth in the municipality, if there is such an entity;
- An employee of the municipality or a member of municipal council; and
- A representative of a police service board or, if there is no police service board, a detachment commander of the Ontario Provincial Police (or delegate).

In February 2020 the Chief Administrative Officer held initial planning discussions with Chief Mark Mitchell of the Kawartha Lakes Police Service and Ontario Provincial Police Detachment Commander Tim Tatchell regarding the City's role in co-ordinating the CSWB Plan process and they were both supportive of that approach.



Date: September 1, 2020

To: Committee of the Whole

From: Councillor Ashmore

Re: Heights Road from Highway 7 to Mount Horeb

Recommendation

That the Memorandum from Councillor Ashmore, regarding Heights Road from Highway 7 to Mount Horeb Road, be received;

That staff report back by Q4, 2020 on short term options for improvement of this road section including pulverizing to gravel, or life cycle extension consideration in the 2021 budget; and

That this recommendation be forwarded to Council for consideration at the next Regular Council Meeting.

Rationale

Heights Road from Trans Canada Highway 7 to Mount Horeb Road has deteriorated to the point where it requires rehabilitation.

There is now a limited gravel base on the road making it difficult to maintain a crown for proper drainage.

There are also two major businesses' employing several people located on this road that have experienced several business interruptions as a result of the road conditions.



Date: September 1st, 2020

To: Committee of the Whole

From: Councillor Ashmore

Re: Online Petitions

Recommendation

That the Memorandum from Councillor Ashmore, regarding an Online Petition Option, be received;

That Staff create an online petition option, in addition to the current hard-copy process, for bringing petitions to Council;

That Staff report back by Q4, 2020 with options for an online petition that meet the requirements of the municipal act; and

That this recommendation be forwarded to Council for consideration at the next Regular Council Meeting.

Rationale:

A petition is a document presented by the community to Council to voice their opinion on or support for an issue or cause of municipal importance. It is one of the best ways to express support for a matter to Council.

The current petition protocol allows for no electronic web-based documents and requires each signatory to allow the City of Kawartha Lakes to publish their address.

The Covid-19 pandemic health protocols have made it more difficult for citizens to civically engage.

An online petition process has been used by the Parliament of Canada since 2015, alongside a traditional paper petition option, with good success. Rather than publishing the addresses of petition signatories, it gathers and secures that information in a way that protects privacy and verifies identity with an email link.



Date: September 1, 2020

To: Committee of the Whole

From: Councillor Ashmore and Councillor Richardson

Re: Grassy Road Lifecycle Extension Program

Recommendation

That the memorandum from Councillor Ashmore and Councillor Richardson, regarding Grassy Road Lifecycle Extension Program, be received;

That Grassy Road from Emily Park Road to Hawke Drive be considered for the Lifecycle Extension Program for 2021; and

That this recommendation be forwarded to Council for consideration at the next Regular Council Meeting.

Rationale

Grassy Road is a combination hard surface and gravel road located east of Omemee running east to west. Hawke Drive in the west to Bethel Road in the east. The section from Hawke Drive to Emily Park Road is located in both Wards 6 and 8. This section of hard surface has deteriorated over the past few years and has caused safety issues for the residents using it.

This section of road would be a prime candidate for the Lifecycle Extension Program to stabilize and extend the life of this road until it is fully resurfaced on a future date.



Date: September 1, 2020

To: Committee of the Whole

From: Deputy Mayor O'Reilly

Re: Logie Street Park Traffic Calming

Recommendation

That the Memorandum from Deputy Mayor O'Reilly, regarding Logie Street Park Traffic Calming, be received;

That concerns regarding both vehicular and pedestrian traffic entering and leaving Logie Street Park be considered;

That staff be directed to compare and contrast available traffic calming measures and report back to Council in Q1, 2021; and

That this recommendation be forwarded to Council for consideration at the next Regular Council Meeting.

Rationale

Residents have contacted the police regarding speed concerns along Logie Street. Police have set up radar on several occasions in order to combat this issue.

Due to excessive vehicular speeds, pedestrian safety along Logie Street has been called into question.

Potential safety concerns for park users both entering and leaving the park will become a greater concern when the park opens to the public. For this reason, proactive measures should be considered.



Date: September 1, 2020

To: Mayor and Council

From: Lindsay Legacy C.H.E.S.T. Fund Grant Committee

Re: 2021 Grants

Recommendation

That the memorandum from the Lindsay Legacy C.H.E.S.T. Fund Grant Committee regarding 2021 Grants be received; and

That the grant award and distribution process for the 2021 year for the Lindsay Legacy C.H.E.S.T. Fund be suspended so funds can be utilized to assist with relief efforts to charitable and non profit organizations within the Town of Lindsay; and

That this recommendation be brought forward to Council at the next regular Council Meeting.

Rationale

In light of COVID19 the Lindsay Legacy C.H.E.S.T. Fund Grant Committee believes that funds usually awarded through the grant process should be available to assist with relief efforts to charitable non profit organizations and supports Council's use of funds for such a purpose. At the recent meeting of the Lindsay Legacy C.H.E.S.T. Fund Grant Committee the following motion was passed:

LLCF2020-014
Moved By J. Sanderson
Seconded By P. Blenkin

That the Lindsay Legacy C.H.E.S.T. Fund Grant Committee resolves to advise City Council, the Economic Recovery Task Force, and the Community Pandemic Recovery Task Force that the Committee is willing and open to assist with relief efforts to



charitable non profit organizations within the Lindsay boundary and that those efforts be discussed with the Committee through the appropriate channels.

Carried

To accommodate this the suspension of awards would need to take place for the 2021 year. Upon approval from Council the Committee would then work with Communications to advise the public of the suspension of awards for the 2021 year.



Date: September 1, 2020

To: Mayor and Council

From: Mark Pankhurst, Fire Chief

Re: Open Air Burning and Setting off of Fireworks

Recommendation

That the July 28, 2020 Memorandum from Mark Pankhurst, Fire Chief, regarding open air burning and the discharge of fireworks, be received;

That staff bring forward a by-law to restrict the times of discharge of consumer fireworks to between dusk and 11 pm:

- 1. Victoria Day
- 2. the day immediately preceding Victoria Day
- 3. the day immediately following Victoria Day
- 4. Canada Day
- 5. the day immediately preceding Canada Day or
- 6. the day immediately following Canada Day.

That the bylaw include the following regarding the sale of fireworks:

- 1. No person shall sell any firecrackers
- 2. No person shall sell any prohibited fireworks
- 3. No person shall sell consumer fireworks except on the following days:
 - 3.1 Victoria Day and Canada Day and
 - 3.2 each of the seven business days immediately preceding Victoria Day and Canada Day

That staff bring forward a by-law to prohibit open air burning in Lindsay as follows:

1. No open air burning permitted in the built up geographical area of Lindsay.

Rationale

There has been numerous complaints received from residents regarding the setting off of fireworks in the City of Kawartha Lakes and open air burning in the geographical area of Lindsay.

Nuisance fireworks are creating a quality of life and a noise problem in the City of Kawartha Lakes. Complaints have been received regarding excessive noise, scared or lost pets, and disturbing the sleep of adults and children. Restricting the times for discharging and selling of fireworks will help to ensure that fireworks are only used during specific celebration times.

The recommendations for fireworks would not apply to professional fireworks displays as these go through a permitting process.

Many complaints and calls to 911 for burn complaints in Lindsay have occurred because of the proximity of properties in this built up area. In the current bylaw the only type of burning that is allowed in a built up area is campfire burning (open air burning equal to or less than 2ft in diameter) as long as the property owner is able to meet the minimum setbacks of 15 metres from any building or structure and 5 metres from fences, trees, brush piles, property lines, water shorelines or combustible materials. The recommendation would prohibit all types of open air burning in the geographical area of Lindsay.

These recommendations would require support and enforcement from the Municipal Law Enforcement team.