Committee of the Whole Report

Report Number:	**ED2022-006**
Meeting Date:	February 8, 2022
Title:	**Heritage Inventory Framework**
Description:	Proposed high level framework for identifying and inventorying historic properties in Kawartha Lakes
Author and Title:	Emily Turner, Economic Development Officer – Heritage Planning

Recommendations:

That Report ED2022-006, **Heritage Inventory Framework**, be received;

That the Heritage Inventory Framework as outlined in Appendix A be adopted; 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:

Kawartha Lakes is a large and geographically diverse municipality which contains a wealth of cultural heritage resources. These resources reflect the history, culture and identity of the City's rural and urban communities and their long-term conservation helps preserve a sense of place, community pride, and what makes Kawartha Lakes unique.

At present, the protection of heritage properties within the municipality is limited by the knowledge of what historic properties exist in the City's various communities and their significance. There is no systematic inventory or data set which outlines the cultural heritage resources within the municipality, where they are located, and what their significance is to the community. This lack of comprehensive data severely limits the ability of the City to make both short and long-term decisions regarding the conservation of heritage properties and whether that conservation is through direct protection under the Ontario Heritage Act, or indirect protection through high level development policy. The conservation of cultural heritage resources, particularly in relation to new development, is an important part of maintaining the sense of place and uniqueness in local communities. It is also directed by provincial and municipal policy.

In order to address this issue, staff are proposing to undertake a full inventory of the cultural heritage resources within the municipality, excluding archaeological resources, as discussed below. This project will document the heritage resources within the municipality and undertake evaluations of them to provide a comprehensive data set for future decision making. This report presents an overarching strategic framework to guide the inventory project, as well as background on the purpose and process for undertaking the inventory. The proposed framework is attached to this report as Appendix A.

At its meeting of January 13, 2022, the Kawartha Lakes Municipal Heritage Committee reviewed the proposed framework and made the following motion:

> **KLMHC2022-005**
> **Moved By** A. Adare
> **Seconded By** J. Hartman
>
> **That** Report KLMHC2022-002, **Heritage Inventory Framework**, be received;
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> **That** the proposed framework be endorsed; and

That this recommendation be forwarded to Council for approval.

Carried

Rationale:

In order to protect and conserve significant heritage resources within Kawartha Lakes' many communities, it is important that there is a clear understanding of what resources exist and their cultural heritage value. At present, the City's identification of heritage properties is largely piecemeal. There are a number of scenarios currently where properties are identified and protected:

- Owner-initiated designation requests: most designations undertaken by the City are at the request of property owners who self-identify their property as having heritage value. While this is a valuable exercise, it means that owners who are not familiar with the City's heritage programming but may be interested in protecting their property do not come forward.
- Listing of properties: staff and the Municipal Heritage Committee actively identify and bring properties forward to Council for listing on the City's Heritage Register. However, the properties proposed for listing are only those properties which are known and their identification, while aiming for inclusivity with regard to geography and type, is not systematic.
- Identification of historic resources through Planning Act applications: increasingly, staff are identifying properties which may have historic value through Preconsultation and Planning Act applications. While provincial policy supports the preservation of historic resources directly through the land use planning process, this method is reactive and is not as efficient or transparent as identifying these resources in advance of applications being made regarding a property.

The intention of undertaking an inventory is to ensure that the City's heritage planning program is data driven, systematic, and transparent in its identification and protection of significant heritage properties. Similarly, large scale data collection throughout the City allows for properties which may not be known to staff or members of the Municipal Heritage Committee, but which may hold significant heritage value to be identified and protected. In the past, smaller inventories were undertaken by pre-amalgamation Local Architectural Conservation Advisory Committees but these do not cover the full range of resources within the City and are also severely out of date.

An inventory of heritage resources is a key aspect of proactive cultural heritage management by allowing property owners and municipal decision-makers to have widespread data about what heritage resources exist and their value to the community. The five key goals of undertaking an inventory are to:

- Identify the cultural heritage resources in Kawartha Lakes
- Evaluate resources to determine their significance
- Protect resources through different heritage and planning mechanisms
- Engage with the community on the identification and protection of resources
- Provide comprehensive and transparent data on the City's cultural heritage resources

The collection of data regarding heritage resources supports the goal of proactive cultural heritage resource management. It assists the City in providing a comprehensive overview regarding the breadth and scope of the City's heritage resources and for guiding decision making. It assists property owners and those wishing to make investments in the community by being up front and transparent about the City's resources and their cultural heritage value.

The adoption of a heritage inventory framework as proposed in this report provides a high level road map for undertaking the inventory. The framework itself is intended to:

- Provide a rationale for inventorying heritage properties
- Identify the types of heritage resources that will be surveyed through the inventory
- Identify current and existing resources
- Provide a high level overview of the process for surveying, evaluating and recommending properties for protection
- Identify priority areas for inventory

The framework is the guiding document for the inventory project and outlines what the City is undertaking and what it is trying to achieve by identifying and evaluating its heritage resources. The adoption of a framework allows the City to be transparent about its aims and provides a clear end goal for this project.

Property Evaluation

Part of the inventory process will be undertaking heritage evaluations for each of the properties inventoried to determine cultural heritage significance. The significance of the property will provide the basis for future recommendations regarding the protection

of the property, either individually or as part of a wider initiative. The properties will not undergo a full heritage evaluation report as is prepared for the designation of an individual property or when assessing a cultural heritage resource as part of a Planning Act application through a Cultural Heritage Evaluation Report (CHER). Rather, they will undergo a high level evaluation to determine if they have cultural heritage value. The evaluation criteria will be based on Ontario Regulation 9/06 which is used to determine cultural heritage value for designation under Part IV of the Act. The use of this criteria ensures that all evaluations undertaken on heritage resources in the City are consistent. A heritage evaluation matrix has been prepared and is attached to this report as Appendix B.

An important part of this project will be the preparation of geographic and thematic context statement which will aid in the evaluation of property. Cultural heritage resources do not exist within a vacuum and their context informs their significance. Historic context statements will be prepared for the various geographic areas of the City, as well as major themes which have shaped the development of the municipality. The creation of historic context statements as a key elements of property evaluation has been recognized as a best practice in cultural heritage inventorying and evaluation practice. They are intended to be a high level analytical framework for identifying, discussing and evaluating historic properties geographically, within time, and within the unique events and activities that have shaped a place. A focus on context as a primary indicator for significance, as opposed to architectural significance alone, creates a more holistic and robust picture of what heritage resources actively contribute to a sense of place and identity within local communities; this is recognized both within international heritage practice and in Ontario through O. Reg. 9/06. An example of a thematic historic context statement for the Kawartha Lake context has been prepared and is attached as Appendix C of this report.

Protection of Heritage Properties

The ultimate intention of this project is to ensure that the City is adequately protecting and conserving its significant cultural heritage resources as directed by provincial and municipal policy. There are a number of mechanisms that the City may use to ensure the conservation of heritage properties, which may include direct protection through the Ontario Heritage Act or more indirect protection through broader land use planning policies. These protection mechanisms include:

- Direct protections:
  - Individual designation under Part IV of the Ontario Heritage Act
  - Designation as part of a heritage conservation district under Part V of the Ontario Heritage Act
  - Listing on the City's Heritage Register
  - Entering into a heritage easement agreement
- Indirect Protections:
  - Official Plan policies
  - Heritage zoning overlays/form-based code/pattern zoning provisions within the Comprehensive Zoning By-laws
  - Tertiary/neighbourhood plans
  - Place-based and community specific architectural design guidelines
  - Demolition control by-laws

The appropriate protection mechanism for a property, or a group of properties, can only be determined if existing cultural heritage resources have been identified and evaluated. The data collected through this project will help Council and staff make informed decisions regarding the best and most appropriate methods for conserving historic properties and resources throughout the municipality.

It is important to note that inclusion on an inventory does not automatically confer protection on a property. Staff are not intending on notifying property owners directly if their property is included on the inventory because of the significant volumes of properties. However, property owners will be able to access the data from the project online and the inventory results will be identified through public engagement. The inventory itself is a data collection and evaluation exercise only. The data gleaned from the inventory project will be used in future to guide decision-making with regard to protection. This will include recommending properties for designation and listing, in consultation with the community, as well as using the data to inform higher level policy making. A property may be considered for listing on the City's Heritage Register if it demonstrates cultural heritage significance when evaluated by fulfilling at least one, if not more, of the criteria identified in the evaluation matrix. For properties considered for listing, the City's usual notification processes will apply. The majority of inventoried properties will not receive direct protection through one of the mechanisms under the Ontario Heritage Act but data will be available on them, should it be required for future decision-making. It is more likely that the cultural heritage values of properties and landscapes will be preserved, where warranted, through higher level policy initiatives that this inventory will be used to inform.

Resources may also be identified and conserved through capital project planning undertaken by the City. The recognition of cultural heritage resources in capital projects is already undertaken through the preparation of CHERs as part of Environmental Assessments; the inventory provides additional data for the preparation of those reports.

Archaeology

The inventory project will not address the City's archaeological resources. Kawartha Lakes is a municipality with a significant concentration of archaeological resources, including a large number of pre-settlement First Nations sites. However, archaeological resources are unique within the land use and cultural heritage planning framework in that they are afforded automatic protection through Part VI of the Ontario Heritage Act and through the Funeral, Burial and Cremation Services Act if they contain human remains. Archaeological resources are also unique in that they only become known when unearthed through an archaeological assessment or by accident. In general, the identification of archaeological resources will continue to be as a result of archaeological assessments required for development and will otherwise remain undisturbed. The location of these resources is also confidential data which cannot be shared with the public, as is the intention with the data collected as part of the inventory project.

The management of archaeological resources is currently addressed through policies contained in Section 10 (Culture and Heritage) in the City's Official Plan. The preparation of an Archaeological Management Plan for the City, as directed by the Provincial Policy Statement (2020) and recommended in the Official Plan, and associated policies are also in the early stages of development and will be presented to Council at a later date.

Data Collection and Management

The data for this project will be collected and managed through ArcGIS, the City's existing mapping software. In-field data collection will use the ArcGIS Collector app which will populate the data points within the City's mapping system. A data collection form has been created within ArcGIS to ensure that the data input into the system is consistent across different types of heritage resources and the different individuals undertaking the data collection in the field. A PDF version of the data collection form is attached as Appendix D. The survey will use ArcGIS Collector as the primary method of

data input, with paper surveys as a backup if required. The input of this data directly into the City's existing mapping systems will allow for it to be easily accessed by staff and updated in future as necessary.

The ultimate goal for this project is to have the information gathered as part the survey accessible through the City's online mapping portal so that staff, Council and members of the public have access to information on the City's heritage assets. Providing this information publically helps everyone understand what heritage resources exist, the protections placed on them, and their relationship to the wider context of heritage resources in Kawartha Lakes. No personal data will be shared as part of the data set. The framework and format for public access will be determined as the project develops so that the data can be interpreted and presented in a user-friendly manner.

Community Involvement

One of the key goals of this project is the involvement of the public in the identification and protection of heritage resources in their own communities. It is the intent to actively involve the public in this process. Staff are intending on holding a number of public information sessions in the early stages of this project in order to build community awareness, answer questions, and provide opportunities for members of the community to get involved, as well as using the City's Jump In platform. Involvement may include participating in the inventory process or providing background information on certain properties in the community. Community participation is particularly important when determining the significance of certain properties which may have cultural heritage value that is not known outside of the community. The Municipal Heritage Committee will provide an important resource for outreach as its members are actively involved in their communities and are keen to participate this this process. Preliminary outreach has shown there is interest in this project and in getting involved with it.

It is also the intent of this project to build awareness of the City's heritage planning program more generally and to create familiarity and understanding of heritage processes, rationale, and outcomes within the community at large.

Priority Areas and Work Plans

Staff have identified a number of priority areas and property types where inventorying should be undertaken first. These priority areas have been identified because they are

subject to high development pressures, they are at specific risk of demolition, or they are unique properties within specific important attributes within the municipality. They may also be areas where data collection in the short term will be of assistance to various policy initiatives. The first priority for this project is in Lindsay, Bobcaygeon, Fenelon Falls, Omemee and Woodville because of the high concentration of historic properties and most new development will be directed to these areas in the coming years.

A work plan for the project will be developed by staff to ensure a consistent and long term path to completing the inventory. At present, staff are intending on starting the inventory project in Bobcaygeon in late spring or early summer 2022 to begin engaging with the public and to test the data collection system. Bobcaygeon has been chosen as the first community to be inventoried because it is one of the priority areas for inventory, the size of the community is both manageable for a test inventory and large enough to provide a sizable data set, and there are already members of the community interested in participating in the project as volunteers. Public engagement and information sessions will be held prior to the initiation of the survey.

It is anticipated that the project as a whole will take between five to ten years to complete, depending on staff workload and the interest from community groups in participating. Staff will have a better idea of the time requirements for this project once the test inventory has been completed.

Inventorying in Other Municipalities

Undertaking comprehensive heritage inventories is increasingly recognized as an important best practice for municipal heritage resource management. Within the past several years, a number of other large Ontario municipalities, including the City of Ottawa, the City of Toronto, and the City of Hamilton, have embarked on or completed large scale inventories which span their geographic entirety. These projects have assisted with understanding what heritage resources exist within the municipality and allowed for data-focussed discussion regarding what should be protected and how. This trend has also been increasing on an national and international level as a best practice for long term cultural heritage management and planning.

Provincial Policy Conformity

Provincial Policy Statement (2020)

The Provincial Policy Statement (PPS) sets the policy foundation for development and land use planning Ontario. The policy intends to balance growth and economic development with the need for ensuring a high quality of life, public safety and health, and the conservation of natural and cultural heritage resources. Section 2.6 (Cultural Heritage and Archaeology) requires municipalities to conserve significant built heritage resources and significant cultural heritage landscapes as part of the land use planning process, stating that "Significant built heritage resources and significant cultural heritage landscapes shall be conserved."

Significant built heritage resources, as defined by the PPS, are those which have been determined to have cultural heritage value or interest as established by the criteria under the Ontario Heritage Act. It is imperative that municipalities identify and evaluate heritage properties throughout their geographic area to ensure that these resources are being conserved as part of the land use planning process. Inventorying facilitates the identification and protection of these properties as directed by the PPS and the inventory framework provides a guiding document for achieving this.

A Place to Grow: Growth Plan for the Greater Golden Horseshoe (2019)

A Place to Grow: Growth Plan for the Greater Golden Horseshoe was prepared by the Ontario government in order to help guide the land use planning process and assist communities within the Greater Golden Horseshoe achieve a high quality of life, positive economic development, and protection for important local resources. The City of Kawartha Lakes is included in the outer ring of the Greater Golden Horseshoe.

Section 4.2.7 (Cultural Heritage Resources) requires municipalities to conserve their cultural heritage resources as part of the land use planning process "in order to foster a sense of place and benefit communities". The Growth Plan defines cultural heritage resources as "built heritage resources, cultural heritage landscapes, and archaeological resources that have been determined to have cultural heritage value or interest for the important contribution that make to our understanding of the history of a place, event, or a people. While some cultural heritage resources may already be identified and inventoried by official sources, the significance of others can only be determined after evaluation."

The identification of properties through inventorying allows municipalities to proactively protect significant heritage properties as directed by the Growth Plan through the various legislative and policy mechanism available in the land use planning process.

Inventorying is identified in the Growth Plan as a method for understanding what cultural heritage resources exist within a municipality and the framework provides a roadmap for undertaking that initiative.

City of Kawartha Lakes Official Plan (2012)

The City of Kawartha Lakes Official Plan contains a number of cultural heritage policies to guide the management of cultural heritage resources. These policies are contained in Section 10 (Culture and Heritage) which was amended in 2017 to include strengthened policies in this area. Official Plan Amendment 26 outlines those amendments.

The City's policies require it to identify and conserve significant historic properties and the heritage inventory framework provides a roadmap for the identification and protection of those properties. Through the inventory, staff and Council will be able to understand the scope and breadth of the historic resources within the municipality and conserve and protect significant properties through the various legislative and policy tools available.

Other Alternatives Considered:

The heritage inventory framework is intended to provide high level guidance for the identification of heritage resources within the municipality to allow for the heritage planning program to be proactive and data driven in its approach. Council could choose not to adopt the framework and the identification of heritage resources could continue piecemeal. However, this is not a recommended alternative as it does not constitute good or transparent long range planning for managing cultural heritage resources.

Alignment to Strategic Priorities

The identification and evaluation of cultural heritage resources supports the following goals from the Council adopted Strategic Plan:

- A Vibrant and Growing Economy
- An Exceptional Quality of Life

The identification and evaluation of heritage assets in the community promotes and exceptional quality of life by supporting and promoting arts, culture and heritage within the municipality. The inventory will provide data that assists with the long term protection of these resources through various mechanisms available. Inventorying is an

open and transparent method of identifying and evaluating resources and adoption of a framework facilitates the City being transparent about this project and what it is trying to achieve.

The protection of heritage resources in the municipality also assists in the growth of the local economy in general by identifying, protecting, and celebrating places where people want to live, work and visit. It encourages investment in local communities by ensuring and promoting attractive places for residents and businesses to be. It also has a direct impact on developing local tourism through the identification and preservation of sites and landscapes that people want to visit. However, this can only be achieved if those resources are known and recognized which is facilitated through the inventory.

Financial/Operation Impacts:

There will be costs associated with this project with regard to mileage, the purchase of technology to facilitate data collection, and for public meetings. These costs have been included in the existing heritage planning budget.

Consultations:

Municipal Heritage Committee
Manager, Economic Development
Manager, Planning
Mapping and GIS Division

Attachments:

Appendix A – Heritage Inventory Framework

Adobe Acrobat
Document

Appendix B – Heritage Evaluation Matrix

Heritage Evaluation
Matrix.docx

Appendix C – Example Historic Context Statement

Lumber Industry
Historic Context Stater

Appendix D – Heritage Resource Survey Form

Heritage Resource
Survey Form.docx

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