

Heritage Assessment and Planning

Introduction

Heritage conservation is a multifaceted process aimed at conserving and managing cultural heritage resources. This process encompasses several stages, including understanding, planning, and intervening to ensure the protection of historical assets. Heritage conservation in Canada follows the *Standards and Guidelines for the Conservation of Historic Places in Canada*, which is based on international best practices from ICOMOS and UNESCO. In British Columbia, heritage work is primarily governed by Part 15 of the Local Government Act (LGA), and many municipalities have established heritage policies and programs.

What does Heritage consultant do?

Heritage consultants focus on conserving and managing cultural heritage resources. This involves assessing the historical, cultural, and architectural significance of heritage assets and advising landowners and developers on how to maximize the value and retention of heritage assets during the process of development or other changes.

Heritage consultants undertake a range of work, largely organized into the following:

- **Heritage Values Assessments (HVA):** Documenting the historical, cultural, and architectural significance of heritage assets.
- **Statements of Significance (SOS):** Highlighting the aesthetic, cultural, historical, scientific, social, and/or spiritual values of heritage assets.
- **Heritage Impact Assessments (HIA):** Evaluating the potential impacts of proposed changes on heritage assets and recommending mitigation measures. A "Condition" report may also be needed to inform an HIA or an HCA.
- **Heritage Conservation Plans (HCA):** Outlining strategies for conserving and managing heritage resources.
- **Heritage Interpretation Plans (HIP):** Outlining strategies for conveying key information about heritage assets to key audiences.
- **Permits and Agreements:** Supporting landowners and developers in working with local governments to obtain necessary permits and approvals. .

Why are these requested?

- To study and articulate the heritage values of various assets.
- To determine the potential impacts of proposed developments on heritage resources.
- To recommend mitigation and conservation measures.
- To ensure compliance with heritage protection laws and regulations.
- To increase the protection and profile of heritage assets.

Scope of Work

1. Heritage Values Assessment

Purpose: To identify and document the significance of heritage assets.

When Needed: Often prior to any development – a community may ask for an HVA of an area to determine the heritage values and an appropriate approach to conserving heritage assets and values. If an HVA is involved in a development project, it should occur very early in the planning process, especially during pre-application meetings, to understand the heritage significance of a site, so that understanding can guide future planning, design, approvals and development.

Components:

- **Historical Research and Documentation:**
 - i. **Archival Research:** Conduct archival research to gather historical data and context about the heritage asset.
 - ii. **Photographic Documentation:** Document the current state of the heritage asset with photographs.
- **Assessment of Cultural, Architectural, and Historical Significance:**
 - i. **Cultural Significance:** Identify cultural values and significance associated with the asset.
 - ii. **Architectural Significance:** Assess architectural styles, features, and design elements.
 - iii. **Historical Significance:** Evaluate the historical context and importance of the asset.
- **Identification of Heritage Values and Character-Defining Elements:**
 - i. **Heritage Values:** Identification of key heritage values of the assets and areas under assessment, including aesthetic, historical, cultural, scientific, social or spiritual considerations.
 - ii. **Key Features:** Identify and document key features that are essential to the heritage value of the asset and need to be addressed and retained where possible in order for it to retain its heritage values, possibly including:
 - o Materials
 - o Forms
 - o Locations and orientation
 - o Spatial configuration
 - o Uses
 - o Cultural associations.
- **Preparation of a Comprehensive Report:**
 - i. **Client and stakeholder engagement:** Engage stakeholders as needed, possibly including Heritage Commissions and others.

- ii. Detailed Report: Compile findings into a detailed report outlining heritage values and character-defining elements. May require presentations on findings.

2. Statement of Significance (SOS)

Purpose: To articulate the values and character-defining elements of a heritage asset that define why it has heritage importance.

When Needed: After the Heritage Values Assessment confirms significant heritage values, or if there is clear or claimed heritage value that needs to be better articulated - typically required for development approvals.

Components:

- Detailed Description of the Heritage Assets:
 - i. Physical Description: Provide a detailed physical description of the assets, including architectural features and materials and other parameters.
- Identification of Aesthetic, Cultural, Historical, Scientific, Social, and/or Spiritual Values:
 - i. Heritage Values: Clearly articulate the various heritage values associated with the asset.
- Identification of Character-Defining Elements:
 - i. Key Features: Identify and document key features that are essential to the heritage value of the assets and need to be addressed and retained where possible in order for it to retain its heritage values, possibly including:
 - o Materials
 - o Forms
 - o Locations and orientation
 - o Spatial configuration
 - o Uses
 - o Cultural associations.
- Guidelines for Preserving Identified Values and Elements:
 - i. Preservation Guidelines: Develop guidelines for preserving and maintaining the identified heritage values and elements, including possibly preservation, restoration and rehabilitation.
- Reference to Historical Context Statements:
 - i. Contextual Information: Reference any available historical context statements to provide additional background and understanding.

3. Heritage Asset Condition Assessment

Purpose: To evaluate the condition of an important heritage asset.

When needed: When the asset appears to have some critical issues regarding its condition that may significantly impact the options available for its preservation, restoration or rehabilitation. This may occur at various stages in a heritage assessment or engagement.

Components:

- Review of the asset condition
 - i. A detailed assessment of the physical condition of the heritage asset from various perspectives – structural, materials, finishes, and others. This assessment may require additional technical support such as from structural engineers and others.
 - ii. An assessment of the asset's vulnerability in its current and future state, and its level of resilience to impact that might be associated with changes or development.
- Reporting
 - i. A report outlining the results of the study and associated recommendations for options or the optimum path for preservation of heritage values.

4. Heritage Impact Assessment (HIA)

Purpose: To evaluate the impact of proposed developments or alterations on heritage assets and recommend mitigation measures.

When Needed: Required for developments or alterations that may impact heritage assets, and typically used to inform planning, design and negotiations associated with the rezoning or development permit application stages of a project.

Components:

- Description of the Proposed Development or Alterations:
 - i. Project Details: Provide a detailed description of the proposed development or alterations, including plans and drawings.
- Assessment of Potential Impacts on Heritage Values and Character-Defining Elements:
 - i. Impact Analysis: Assess how the proposed changes will affect the heritage values and character-defining elements of the asset.
- Consideration of Alternatives and Mitigation Strategies:
 - i. Alternatives Analysis: Consider alternative approaches that could minimize or avoid impacts.
 - ii. Mitigation Measures: Develop strategies to mitigate any unavoidable impacts.
- Consultation with Stakeholders and Experts:
 - i. Stakeholder Engagement: Engage with stakeholders, including community groups, heritage organizations, and experts, to gather input and feedback.
- Preparation of a Detailed Report with Recommendations:

- i. **Comprehensive Report:** Compile a detailed report outlining the assessment findings and providing recommendations for conservation and impact mitigation.

5. Heritage Conservation Plan (HCA)

Purpose: To provide detailed guidelines for the conservation and management of heritage assets within a development project.

When Needed: Required for detailed design and construction phases, typically during the development permit or building permit application stages.

Components:

- **Incorporation of Findings from the SOS and HIA:**
 - i. **Integration of Previous Studies:** Integrate the findings and recommendations from the SOS and HIA into the conservation plan.
- **Strategies for Preserving and Enhancing Heritage Values:**
 - i. **Conservation Strategies:** Develop strategies for preserving and enhancing the identified heritage values.
- **Detailed Conservation Guidelines for Restoration, Rehabilitation, and Maintenance:**
 - i. **Conservation Guidelines:** Provide detailed guidelines for restoration, rehabilitation, and ongoing maintenance of the heritage asset.
- **Implementation and Monitoring Plans:**
 - i. **Implementation Plan:** Outline the steps and timeline for implementing the conservation strategies.
 - ii. **Monitoring Plan:** Develop a plan for monitoring the effectiveness of the conservation measures and ensuring ongoing compliance.

Typical Report Contents

- **Executive Summary:** A brief summary of findings and key recommendations.
- **Terms of Reference:** Outline of the scope of work and specific objectives of the heritage study.
- **Project Details:** Background information, site description, and overview of proposed development plans.
- **Site Investigation:** Detailed description of site reconnaissance, historical research, and stakeholder consultations.
- **Evaluation and Analysis:** Interpretation of data, assessment of heritage values, and evaluation of potential impacts.
- **Design Recommendations:** Specific recommendations for heritage conservation, impact mitigation, and site management.
- **Plans/Drawings/Statements:** Site plans, conservation guidelines, and other relevant drawings.

- References/Appendices: List of literature references and appendices with detailed data, historical records, and supplementary information.

6. Heritage Interpretation Plan (HIP)

Purpose: To provide a plan and guidelines for the provision of information regarding a heritage asset to preserve and enhance its heritage value and status.

When Needed: When the provision of information about a heritage asset is a key part of a heritage conservation strategy.

Components:

- Asset assessment
 - i. An assessment and description of the heritage assets and their characteristics / elements that will be the focus of the interpretation program.
- Goals and objectives
 - i. Establishing a set of goals and objectives for the interpretation program.
- Themes and messages
 - i. Outlining the key themes and messages that will be central to the interpretation program to reach different audiences in different ways.
- Audience analysis
 - i. Assessing the audiences intended to be reached and the ways to reach them with the desired messages.
- Interpretive strategy
 - i. Outlining the types of media that will be involved and techniques used to reach the audiences with the desired messages.
- Budgeting and implementation planning
 - i. Creating an implementation plan and the appropriate budgets.
- Content development
 - i. Creating and refining the interpretive content with key stakeholders.
- Interpretive asset development
 - i. Creating the specific interpretive collateral – written, graphic, digital, etc.
- Implementation and monitoring
 - i. Implementing the interpretation plan and monitoring and refining it over time, including maintenance of physical assets (signage, plaques, other elements).

Note: In most cases, there will be a minimal interpretation program associated with a development project that will not require a full Interpretation plan, as it will usually only involve some signage.

Heritage Alteration Permits and Heritage Revitalization Agreements

Heritage consultants may be needed to assist in the process of considering Heritage Alteration Permits (HAP) or Heritage Revitalization Agreements (HRA). The studies and work outlined above, are often in service of or required for one of these types of agreements between a local government and a developer or other applicant.

Heritage Alteration Permit (HAP)

A HAP is required to alter any “designated” heritage asset and the process typically requires an application be submitted to the local government, assessment by a panel of knowledgeable individuals (eg: Heritage Commission), and a decision by the local government council. The heritage consultant may be required to write some form of heritage report addressing the issues posed by the proposed change.

Heritage Revitalization Agreement (HRA)

A HRA is a significant level of approval for a local government and a developer, in that in BC, it can entirely replace all aspects of a zoning and a development permit. It cannot alter OCP parameters. HRAs are a tool local governments and developers can use to permit significant creativity in development approvals to allow development so as to provide resources to preserve, restore and rehabilitate heritage assets. HRAs are generally based closely on the aspects and recommendations of a Heritage Conservation Plan.

What is generally required at each stage in the development process?

Due diligence / securing land	<ul style="list-style-type: none">• Heritage Values Assessment
Concept Development	<ul style="list-style-type: none">• Statement of Significance• Heritage Impact Assessments (if required)• Heritage Conservation Plan (if required such as for a Heritage Restoration Agreement)
Heritage Revitalization Agreement (HRA)	<ul style="list-style-type: none">• Heritage Conservation Plan• Heritage Interpretation Plan (if required)
Development Permit	<ul style="list-style-type: none">• Heritage Conservation Plan• Heritage Alteration Permit
Building Permit	<ul style="list-style-type: none">• Heritage Alteration Permit