



City of Toronto

Heritage
Preservation
Services

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Heritage Management Plan Phase 1



UNION STATION
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Front Street and Union Station

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in association with:



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photos of a restored detail on the façade of the Gladstone Hotel, Queen Street West.



Sunnyside Pavilion

SECTION A
Introduction



Great Hall, Union Station

The Heritage Management Plan Phase 1 provides Heritage Preservation Services at the City of Toronto with a framework and a strategy for the management of heritage resources and to position heritage management progressively – as an important part of city building.

In this Plan, conservation and development are not mutually exclusive objectives, but are part of an integrated process of city building. Heritage management is presented as integral to the City of Toronto’s mandate and interwoven with all City activities by focusing on: identifying heritage resources; determining their value; generating an understanding about this value; and providing guidance on how best to conduct interventions and continue the creation of a successful city to live, work, play and invest in.

Defining Heritage

The Ontario Heritage Policy Review (1990) defines heritage as “*All that society values and that survives as the living context – both natural and human – from which we derive our sustenance, coherence and meaning in our individual and collective lives.*”

This is a very broad definition. This Plan does not purport to focus on issues of the entire heritage field. For the purposes of this document, the term heritage resources refers to *built heritage* and *cultural heritage landscapes*. Archeological heritage is included in the Ontario definition; however, it is not addressed directly in this Heritage Management Plan, due to the complementary and concurrent development of the Archeological Master Plan, which includes a Management Strategy.

This Plan is based on the idea that heritage includes a broad range of building types, structures, uses and time periods, and includes interiors and exteriors, landscapes, streetscapes, neighbourhoods and urban areas.

One of the key qualities of Toronto’s history is the depth and diversity of its heritage resources. Heritage value emerges not from any single type, but from the significance we ascribe to the different structures, features, sites and landscapes that give Toronto shape, character and identity.

Key to this Plan, is also the notion that the identification of the city’s heritage recognizes and promotes the value of the cultural heritage landscape and urban contexts within which heritage resources reside.

History has context in time and place. It is within its context that each piece acquires meaning and cohesion. Recognizing our heritage requires us to pay attention to the overlapping layers of history, to the diversity of stories, symbolisms, cultural references, events, and interpretations that weave together each structure or landscape with the place where it is situated, and with the people who use it.

Studying the context (within history and within the urban environment) will broaden our understanding of individual heritage resources. And correspondingly, the collective identification and conservation of individual heritage resources will invigorate the character and viability of the larger city context.

Defining a Strategy for Heritage Management

Heritage Management, in this Plan, is defined as the development and prioritizing of the City’s heritage conservation objectives, the creation of an integrated framework for decision making, ensuring that decisions respect cultural heritage values, and the development of policies to strategically achieve these objectives, as enabled and directed by the Province of Ontario.

Heritage conservation has been identified by the City of Toronto and the Province of Ontario as a key policy objective. The City’s Culture Plan, approved by Council in 2003, recommended that a Heritage Management Plan be developed. The Provincial Policy Statement, 2005, identifies heritage conservation as a province-wide goal that municipal official plans shall be consistent with. The City of Toronto Official Plan adopted in November 2002 and approved by the OMB in July 2006 requires that a Heritage Management Plan be prepared and Adopted by Council (policy 3.1.5.13).

The Plan includes strategies, options and recommendations to assist the City in maximizing the use of its existing funding; it also presents recommendations relating to the identification and designation of heritage resources to increase the depth and quality of research relating to designation.

This document also identifies the areas of research that are required for subsequent phases of the Heritage Management Plan.



6 principles for heritage management

1 Conserve Toronto's Heritage

Protecting Toronto's heritage resources is of paramount importance for the sake of Torontonians now and for future generations.

Heritage structures and places are both unique and non-renewable. They tell a story about who we are and where we come from. Conserving these resources is about safeguarding and building upon this living memory.

2 City Building

Heritage conservation is an essential element of Toronto's quality of life.

It is an integral part of city building and the planning system. Heritage plays a crucial role in creating beautiful and sustainable urban environments. Heritage is often that which gives streets and neighbourhoods a sense of character, distinctiveness and identity making them a preferred place to live, work and visit. Heritage often provides an imaginative and successful starting point, and focal point, for new developments and for urban regeneration.

3 Managing the Impact of Change

Heritage management should serve to guide interventions in sites, properties and districts.

An effective heritage management system needs to strike a balance and make a connection between protecting what is important and enabling appropriate change. If, on one hand, we fail to preserve our heritage resources, we will deprive future generations of access to our history and to the origins of our culture and identity. If, on the other hand, we seek to prevent all change, our heritage resources may become unsustainable and unworkable. Protecting and evolving are not mutually exclusive objectives, but rather, they are both integral to conservation.

4 Awareness

An aware public understands, appreciates and encourages heritage conservation throughout Toronto.

Awareness is essential, and can be fostered through public education and by promoting and celebrating Toronto's heritage. Torontonians care passionately about the heritage character and identity of the city and its neighbourhoods, landscapes and buildings. They are part, and want to be part of the story telling. As the awareness for heritage matters grows, and a culture of conservation develops so will the quality and quantity of our heritage resources. If awareness is strong, all else will follow.

5 Collaboration

Managing heritage resources requires collaboration within the City of Toronto, and with the private and not-for-profit sectors, institutions, volunteers and the public.

The task of conservation falls to us all. Increasingly, people want to be involved in decision-making and projects. They want to be part of a city building project that emerges through conservation and heritage awareness. Ultimately, the quality and extent of conservation will only grow as more people are involved, and as different groups within the City and beyond are able to coordinate their efforts.

6 Consistency

Managing heritage resources and nurturing conservation efforts are long-term commitments that demand strong organizational management, professional integrity and on-going vigilance.

There is much about the current system of heritage management that works well. It has enabled the conservation of significant resources, public recognition of notable buildings and districts, and it has nurtured an emerging culture of conservation across the city. Heritage management is operated by a highly-skilled and dedicated work force and supported by many volunteers and heritage enthusiasts. The recommendations set out in this Plan are intended to build on their work, their commitment, and their enthusiasm. The Plan also seeks to ensure that the enterprise of conservation can continue to grow and thrive into the future.



3589. Bay St. showing parking on east side
Saturday before noon (From Wellington
St.W.)

Dec. 6/24.

The Heritage Management Plan, an overview

The Heritage Management Plan sets out to establish a framework and a strategy for the management of heritage resources within Toronto and is to be developed in several phases. This document is the outcome of Phase 1.

The Heritage Management Plan Phase 1 provides the framework for identifying heritage resources and identifies a strategic course of action, primarily for Heritage Preservation Services (HPS), but also includes the participation of other relevant City departments and agencies, as well as City Council.

Subsequent Phases of The Heritage Management Plan will begin implementing the recommendations laid out in this document, through actions such as mapping areas of the city for heritage resources and developing a Heritage Impact Assessment.

This Plan offers **6 principles** that establish a foundation for heritage management in Toronto, with the intent that they be adopted by the City, and serve to guide all future conservation efforts and decisions that impact heritage resources.

The Plan also offers a Framework and a Strategy for Heritage Management.

The Framework provides the essential tools and instruments for identifying, designating and managing heritage resources and includes:

Identifying Heritage Resources

Managing heritage resources begins by identifying them. The framework laid out in this Plan for identifying the cultural heritage value of properties, landscapes and districts within Toronto builds on existing policy, as well as provincial and federal legislation and includes:

- additional indicators for identifying potential cultural heritage value or interest;
- a recommendation for the implementation of a Heritage Impact Assessment;
- a process for listing and designating properties; and
- a process for identifying and designating Heritage Conservation Districts (HCDs).



The Management Structure

The central focus of this section has been to improve the City's organizational structure for managing heritage resources. This process identified constraints and opportunities in the existing structure. Subsequent phases of the Heritage Management Plan, through additional consultation, will provide a revised structure and a process for its phased implementation.

The Strategy employs the tools presented in the Framework to fulfil three basic goals: to conserve heritage resources; to generate awareness about them; and to appropriately fund their conservation. These 3 goals are created to provide a structure of actions for heritage management in Toronto and include specific objectives, strategies and required actions.

Goal: Conserve Heritage Resources

Related to this goal is a process for the identification, designation and management of heritage resources. This section provides a strategy to enhance the quality and quantity of conservation initiatives and is focused on three main objectives:

- to expand, maintain and update the Inventory of heritage resources;
- to foster accuracy and quality in conservation work; and
- to encourage the City to lead by example with stewardship of City owned properties.

Goal: Generate Awareness

Throughout the study process, and through the review of precedents from other cities, it became increasingly apparent that strong public awareness is instrumental to successful conservation at a city wide level. Consequently, a vital strategy for managing heritage resources focused on generating awareness with the public, property owners, and developers, but also at City Hall, by increasing the knowledge base and sense of value for heritage at Council and among staff from different departments. Key objectives include:

- to position heritage conservation as an important part of a liveable, sustainable, and contemporary city;
- to encourage heritage conservation in all projects, where heritage resources exist;
- to ensure heritage awareness grows throughout the city; and
- to generate awareness through partners outside HPS.

Goal: Appropriately Fund Conservation

Both the public and private sector need to invest in conservation if they are to benefit from conservation.



Photo of Bay Steet from Wellington Street, 2007.

From the public sector, heritage management demands leadership, investing resources and time. It entails not only increasing the availability and awareness of mechanisms and funds for heritage management, but also enabling and leveraging other financial resources that can make investing in conservation more attractive.

From the private sector, it also requires a visionary approach, recognizing the long-term value (economic, social, historical, educational, cultural and environmental).

Key objectives include:

- to ensure City staff have the resources necessary to fulfil the objectives of the Management Plan;
- to assist the private sector to avail itself of financial incentives; and
- to nurture the economic self-sufficiency of managing heritage conservation.

The Heritage Management Plan, priorities

This Plan (Phase 1) lays out a number priority actions, to help focus the next steps and to enable the sequencing of other actions.

Stage A – 5 steps

- A1 Carry out subsequent phases of the Heritage Management Plan.** Including exploring the viability and details of different strategies, initiating the mapping and inventorying of different areas of the city and most noticeably, revising the organizational structure for Heritage Management.
- A2 Adopt enabling legislation,** including: the principles for heritage management presented in this Plan; the additional ‘indicators’ proposed in this Plan; and the “*Parks Canada’s Standards and Guidelines for the Conservation of Historic Places in Canada*”.
- A3 Focus on the Inventory.** Significantly increasing the understanding of heritage resources across the city – strategically, focusing on HCD studies, and:
- implement a Heritage Impact Assessment (HIA) process;
 - maintain a list of HCD study areas; and
 - prepare an inventory of natural features and cultural heritage landscapes.
- A4. Encourage participation from the private sector and the general public.**
- A5 Further develop alternative sources of funding.**

Stage B – 5 steps

- B1 Increase access to incentives** (identify, secure and leverage) for the public and private sectors.
- B2 Conduct studies for listing and designating,** for the heritage resources identified through the different mechanisms.
- B3 Focus on the stewardship and conservation of properties and districts on the Inventory.** These properties will require attention, supervision and ongoing interaction with property owners and stakeholders.
- B4 Lead by example.** The City has an obligation and an opportunity to show leadership in setting a high standard for heritage management and conservation, by focusing on the stewardship of City owned properties. These should become beacons for proper conservation, and function as catalysts, inspiring private sector involvement.
- B5 Continue to encourage participation from the private sector and the general public.** Increasing private sector involvement and public awareness will always be a priority.

In Closing

This document recognizes that Toronto has great diversity in its heritage resources: buildings, structures, monuments, landscapes, natural features, interiors and exteriors, neighbourhoods and districts. It also recognizes that there are great success stories in how heritage has been conserved and managed – resulting from the skill and passion of dedicated City staff and enthusiastic Torontonians. The Plan also recognizes that much has yet to be done if we are to conserve precious, non-renewable heritage resources for the sake of Torontonians and of future generations.

Phase 1 of the Heritage Management Plan is an important first step in identifying a renewed course of action for managing heritage resources in Toronto – one that builds on past accomplishments and capitalizes on new opportunities. The Plan is geared mostly to the activities of Heritage Preservation Services, but recognizes that heritage conservation is a shared responsibility. It also recognizes that managing heritage resources is a vital investment for the long term success of Toronto as desirable place to live, work and visit.



The Grange Park and the Ontario College of Art and Design

SECTION **B**

The Heritage Management Plan

The Heritage Imperative

“Although [...] heritage belongs to everyone, each of its parts is nevertheless at the mercy of any individual.”

Amsterdam Charter, 1975.

Heritage matters

This Plan is based on the idea that protecting Toronto’s heritage resources is inherently linked with Toronto’s quality of life and is of paramount importance for Torontonians now and for future generations.

Heritage conservation is not only about saving old buildings, rather it is fundamentally about enhancing the meaning and quality of life, by maintaining a unique sense of place, and supporting the cultural and economic vitality that accompanies areas with strong conservation. Areas of the City that have embraced heritage as part of contemporary urban life thrive, becoming cherished places for residents to live and work, and are rewarding destinations for visitors. This is an approach that is well recognized by different levels of government and is consistent with Provincial legislation.

The evidence of the value of conservation is documented by a number of organizations, such as The Heritage Resource Centre at the University of Waterloo, which has studied the long term economic impact of conservation in Ontario and has concluded that while the cost of restoration is only slightly higher than new construction (on average) there are long term economic benefits to be realized (Shiple et al, 2006). Reviewing case studies across the USA, Donovan Rypkema authored a study for the National Trust for Historic Preservation entitled *“The Economics of Historic Preservation”*, which make a compelling economic argument in favour of conservation as a form of investment both for the public and private sectors (Rypkema, 2005).

A Canadian example can be extracted from the City of Victoria, which has carefully documented the effects of conservation and concluded that: *“The City’s investment in heritage conservation has yielded many tangible paybacks...The return on this investment is seen in additional resources leveraged from the private sector and from other agencies and programs, in property assessment increases, in improvements to the building stock, in attracting tourists and tourism spending, and most importantly, in the improvement of the quality of life for Victorians.”* (Heritage Strategic Plan for the City of Victoria, 2002)

The value of conservation is also well recognized and promoted by organizations that seek parallel goals such as downtown revitalization (e.g. Congress of New Urbanism, the International Downtown Association), sustainable development (e.g. Centre for Sustainable Heritage), tourism (e.g. Canadian Tourism Commission), and culture (e.g. Toronto Artscape).

John Lorinc, undertaking a study of Canadian urban centres concludes that: *“In fact, if our governments genuinely want to create livable and aesthetically varied cities, they must find innovative and financially viable ways of protecting all sorts of heritage buildings and older neighbourhoods.”* (Lorinc, 2006)

It is time to act

The window of opportunity is diminishing.

Structures and landscapes across the city are demolished or altered every day. The great majority of them have not been studied for inclusion in the City’s Inventory. Therefore, it is nearly impossible to accurately document and estimate the rate of loss.

Eric Arthur studied much of the loss pre-1970 in his book ‘No Mean City’, which alongside Jane Jacobs’ recognition of heritage value, sparked much of Toronto’s current-day conservation movement. A more recent list of lost heritage properties was prepared by the City in *“A Glimpse of Toronto’s History: Opportunities for the Commemoration of Lost Historic Sites”*. This exercise however valuable, remains a reactive (and sometimes nostalgic)



The 1976 demolition of the “Lunatic Asylum” on 999 Queen Street West triggered a reaction by the public and heritage experts towards the need for greater conservation policies. (Image source: City of Toronto)

venture. Toronto needs heritage resources to be identified before they are threatened, when they can be conserved proactively and used successfully to achieve broader City goals.

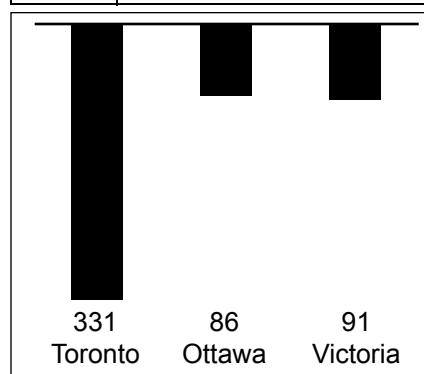
Toronto has the opportunity to capitalize on a wealth of heritage assets, but only if it is able to understand them, document them, and help guide their conservation.

As of 2006 the City of Toronto’s Inventory of Heritage Properties included approximately 7,350 properties. Of these, more than half (4,344) were added in the last ten years. This is a significant proportional increase, which is explained in part by the expansion of Toronto’s boundaries through amalgamation. Also of note is the fact that 85% of new listings (3,678) occurred through HCDs. This suggests:

- there has been a deliberate and strategic focus on HCD studies over the last 5 years;
- conservation groups and volunteers have increasingly focused their energy on HCDs; and
- HCDs have been especially effective at identifying and listing the greatest number of heritage properties.

However, the total number of properties on the Inventory (and properties studied for inclusion on the Inventory) is still a minuscule proportion of the total number of properties within Toronto. Even when compared to other Canadian cities. The lesson we take from recent HCD studies is that conducting such studies often results in the identification of heritage resources (previously unrecognized, and/or undocumented). If the properties and districts are not studied, their heritage value will remain unknown.

	Listed or Designated	Population	people / listing
Toronto	7,500	2,480,000	331
Ottawa	10,000	859,704	86
Victoria	867	78,659	91

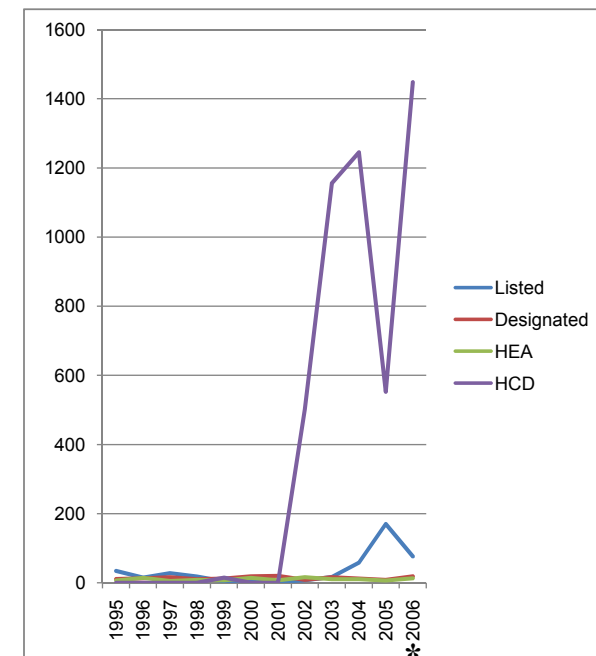


Number of properties on the City’s Inventory
A comparative analysis reveals that Toronto has fewer buildings on its Inventory per capita than other cities across Canada.

Number of properties included on the City of Toronto’s Inventory of Heritage Properties, including listings, designations, easements (HEA) and properties listed through the designation of a Heritage Conservation District (HCD).

	Listed	Designated	HEA	HCD
1995	34	11	6	0
1996	15	13	14	0
1997	28	16	5	0
1998	18	10	8	0
1999	4	12	7	15
2000	8	19	14	0
2001	2	20	7	0
2002	7	8	16	502
2003	17	16	10	1156
2004	58	12	10	1245
2005	170	8	6	552
2006	76	19	13	1448*

* Includes 1240 potential listings for properties in HCDs that in 2006 were either under appeal or already under study.



The Added Benefits of Conservation

Toronto and Torontonians benefit from conservation in many ways. They benefit from the sense of identity and character, from the memory and sense of history, and well as from sustained quality urban environments. These are all important reasons to engage in conservation. Heritage conservation is also associated with other economic, social and environmental benefits for the City:

Sustainability

Containing urban sprawl and intensifying inner city land use is a central component of sustainability. These planning objectives can, and should, be tied with conservation efforts. Regeneration in ‘the Kings’ in Toronto provides an example of the synergy between a sustainable urban approach and heritage conservation. In this case, the rehabilitation of older commercial or industrial buildings in a historic precinct resulted in an attractive opportunity for intensification that enables an efficient use of existing urban infrastructure.

In Toronto, ‘the Kings’ provides an example of the synergy between a sustainable urban approach and heritage conservation. The result of the revitalization effort was \$396,273,000 in total private investment for the King Spadina/King Parliament precincts between 1996-2001 (City of Toronto, 2003).

Urban Revitalization

Heritage-based revitalization is an important economic catalyst whose positive economic changes are seen across entire districts that have experienced heritage restoration in only a small sample of buildings. Revitalization may be manifested in an increase of cultural establishments, restaurants and cafes, real estate values, and business traffic.

“Virtually every example of sustained success in downtown revitalization – regardless of the size of the city – has included historic preservation as a key component of the strategy.” (Rypkema, 2005)

The restoration of the Stanley Theatre in Vancouver has resulted in significant economic activity in the surrounding area: a 21% increase in the presence of restaurants, cafes, and bars; an increase in retail sales of over 100%; real estate sales increase of 72%; and dramatic increase in the area-wide share of building permits from 1% to 16% (Jones et al, 2003).



‘The Kings’, Toronto. (Source: Webshots)



Stanley Theatre, Vancouver. (Source: Webshots)



Vieux Quebec. (Source: Flickr)



Elora, Ontario



Port Hope Heritage Conservation District, Ontario.

Heritage Management Plan Phase 1

Job Creation

Heritage conservation generates employment in a wide variety of sectors including heritage institutions, the public sector, professional services, heritage crafts, skilled heritage trades, engineering, architects, and contractors. In addition, as the building stock ages, an increase in employment in these sectors is anticipated.

The Cultural Human Resources Council estimates that across Canada, there are between 3,800 and 5,300 people employed directly in specialty built heritage trade professions carrying out over \$250 million in capital expenditures in heritage institutions. Although this number does not represent a large component of the number of people employed by heritage institutions across the country (between 10,000-15,000) this number is expected to rise as increasing numbers of post-1945 structures are identified as possessing heritage value. (Cultural Human Resources Council, 2006).

Tourism

Cultural and heritage tourists are more likely to stay longer, spend more money, stay in hotels, motels or bed and breakfasts, spend more time shopping, and engage in more local activities than average travellers visiting urban areas. These activities generate higher returns for the tourism sector.

Despite the propensity to spend more money, Heritage Tourism Enthusiasts (as this group is defined by the Canadian Tourism Commission) are evenly distributed across income ranges and age cohorts. This group is also growing in popularity (Canadian Tourism Commission, 2003).

Property Values and Taxes

Conservation activities have a positive impact on property values and assessment values. Overall economic activity increases as a result of heritage conservation projects. Higher property taxes have a direct benefit for municipalities, and designated heritage properties have higher average real estate values; a positive outcome for both the property owner and the City.

A study conducted in 2000 on property values of heritage buildings found that designated heritage properties performed very well in the real estate market with 74% achieving above average sale prices. Furthermore designated heritage properties are more resistant to negative fluctuations in the market, (Shiple, 2000).

A Model for Heritage Management

Our precedent study and research have offered insights into different models and approaches for managing heritage resources. Some of the most noticeable and recent approaches to heritage management include:

‘The Venice Charter’ (International Charter for the conservation and restoration of monuments and sites, 1964) set the stage for most of the modern-day thinking about conservation. At this time signatures recognize the importance of: the urban and rural setting in which heritage resources reside, respecting the original materials and fabric; identifying heritage resources from all periods and scales; and the maintenance of heritage resources for a socially useful purpose.

From The Venice Charter, and from the work of organizations that adopted the Charter such as the International Council on Monuments and Sites (ICOMOS), emerged new and refined perspectives.



City Hall competition models, 1958. (Source: Mean City, 2007)

‘Integrated Heritage’ Approach

The ‘integrated’ approach emerged from the 1975 ‘Amsterdam Charter’; many of whose ideals remain valid today. Essentially, it espouses the idea that heritage must be understood to include and integrate:

- the context where heritage resources are present: streetscapes, neighbourhoods, views, landscapes, etc. ;
- the spiritual, cultural, social and economic value of heritage;
- a harmonious social balance, to which the structure of historic centres is especially conducive;
- restoration, but also pedagogy and other ways of guiding effective interventions;
- a variety of types and styles, including modern architecture;
- conservation of the architectural heritage with the urban and regional planning process; and
- the cooperation of all – residents, the public, all generations, current and future inhabitants, and legal, administrative, financial and technical support.

The ‘integrated’ approach was built upon by organizations such as the International Centre for the Study of Preservation and Restoration of Cultural Property (ICCROM). More recently ICCROM has moved to develop a ‘living heritage’ model.

‘Living Heritage’ Approach

The ‘living heritage’ model promotes the idea that heritage must include not only the physical elements, but also the activities within them and the people who engage in these activities. The objective is to “*successfully engage with local populations in the continued long-term conservation and maintenance of sites*” (http://www.iccrom.org/eng/prog2006-07_en/06built_en/living_en.shtml).

This approach has found great resonance in Asia and communities where inhabitants retain important knowledge for the management, care and understanding of heritage sites. It has been effective at linking the conservation of physical heritage resources with the traditional land uses and practices necessary to sustain community health and survival.

‘Cultural Diversity and Sustainable Development’ Approach

The idea of linking heritage conservation to sustainable practices has been the subject of many conferences and has been articulated by several organizations, including the Vancouver based International Centre for Sustainable Cities, and the Centre for Sustainable Heritage (CSH) which is part of the Bartlett School of Graduate Studies (BSGS) at University College London (UCL).

The idea is to make a mental shift from the “*heritage burden*” to a “*sustainable benefit*” recognizing that “*there is a direct link between global environmental protection, energy conservation, and the kind of measures that are appropriate to enhance and maintain the built environment*” (Cassar, 2004).

Many of the organizations involved attempt to grapple with significant issues, ranging from understanding the impact of environmental conditions such as global warming and pollution on heritage sites, to understanding the social, cultural and economic dimension of heritage sites, which are instrumental to developing a sustainable conservation practice. This later dimension is well presented by the Organisation of World Heritage Cities (OWHC), which adopted a “*Declaration for inter-American cooperation to ensure the preservation of historic cities of the Americas*” in Quebec City, (April, 2001) with the mayors of several Canadian cities as signatories (though not Toronto). Of particular interest to this Management Plan, the Declaration seeks to:

- reconcile the apparently contradictory demands of conservation and development, by recognizing that heritage plays an important role in development, contributing to the sustainable cultural, social and economic prosperity of the resident community;
- ensure local authorities have the funding, logistical support and fiscal policy necessary for conservation;
- ensure the creation of permanent structures at the local level to enable the sharing and optimal use of the human, material, informational and financial resources;
- entrench conservation as an integral part of the City’s planning framework, principles and guidelines;
- create the necessary conditions for democratic and participatory management to:
 - enable people to recognize and identify with the value of their historic cities, so that all citizens feel responsible for their conservation and participate in their development;
 - structure decision-making procedures in such a way as to involve citizens;
 - raise awareness among the entire population, particularly among young people, of the presence of their own history in the city, and teach them ways to participate in its conservation; and
 - support partnerships and private investment.

A heritage management model for Toronto

Each city, each context, each property entails a different approach and model for heritage management. Subsequent phases of this Plan should continue to research and document different approaches that result in successful conservation. For Toronto and this Plan, it is important to recognize that the experience gained from other places can inform the approach we take, the principles we adopt, and the strategies that result. From the models presented above, this Plan moves forward with an approach that seeks:

- the ‘integration’ of context, heritage resources, participants, and processes;
- to consider heritage resources as ‘living’ – part of a dynamic urban environment and population; and
- to espouse a sustainable practice – social, cultural, economic, and environmental.

This approach informs the Principles for Heritage Management.

Approach

Approach

This Plan puts forth an approach to heritage management in the City of Toronto that seeks to allow conservation efforts to thrive and for heritage to be at the forefront of decisions on the ongoing development and maintenance of Toronto’s structures and landscapes.

Our city’s heritage resources are some of the most valuable pieces of Toronto; however, they are non-renewable resources and must be treated preciously. Our city’s most thriving revitalization efforts, our sense of identity, the quality of urban spaces, some of our most successful tourist attractions, and the language and rhythm of the City are all supported by its heritage resources. Our appreciation of heritage is, in part, what defines Toronto to ourselves, and it is our cultural legacy for future generations.

The process of undertaking the Heritage Management Plan Phase 1 uncovered that while much is currently being done well, the management the city’s heritage resources is challenged by limited access to funding paralleled with the ever increasing number of properties and districts that require dedicated attention. In its present state, the capacity of Heritage Preservation Services to undertake conservation projects proactively, thereby participating in setting the heritage agenda, is diminished. As a result, heritage decisions are often made reactively as development applications arise – which in turn results in the decisions being perceived as arbitrary. The fractured approach to heritage management must be remedied if Toronto is to be known as a City with a strong cultural identity, inspired by its heritage – and is to reap the economic and social benefits of that distinction.

This Plan presents **6 principles** that establish a foundation for heritage management in Toronto. It is the intent of this Plan that these principles be adopted by the City, and serve to guide all future conservation efforts and decisions that affect heritage resources.

The Plan also presents a Framework and a Strategy for Heritage Management in Toronto.

The Framework provides the essential tools and instruments for identifying, designating and managing heritage resources and includes: criteria for determining cultural heritage value or interest; a recommendation to introduce a Heritage Impact Assessment; methods for identifying and designating properties and districts; and the need for a management and decision-making structure.

The Strategy employs the tools presented in the Framework to fulfil three basic goals: to conserve heritage resources; to generate awareness about them; and to appropriately fund their conservation. Under each goal, specific objectives, strategies and actions are identified. The 3 goals are created to provide a structure of actions for heritage management in Toronto.



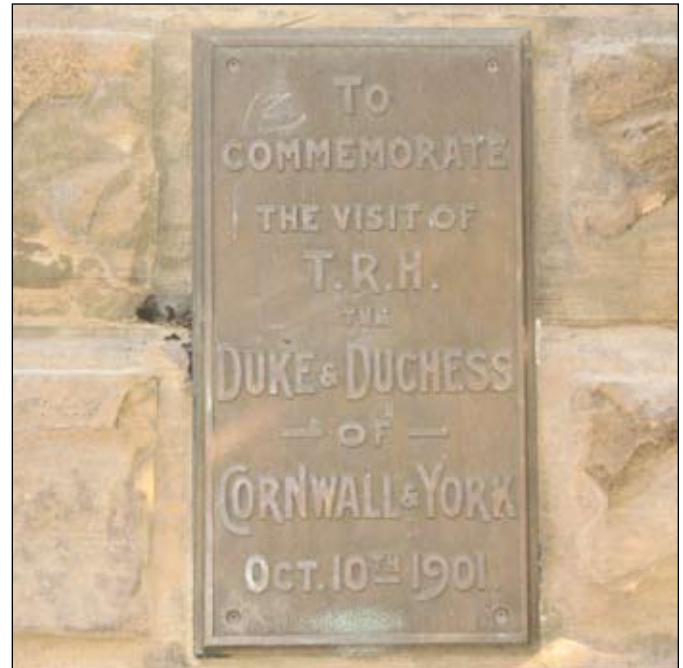
Principles for Heritage Management

- 1 Conserve Toronto's Heritage**
Protecting Toronto's heritage resources is of paramount importance for the sake of Torontonians now and for future generations.
- 2 City Building**
Heritage conservation is an essential element of Toronto's quality of life.
- 3 Managing the Impact of Change**
Heritage management should serve to guide interventions in sites, properties and districts.

- 4 Awareness**
An aware public understands, appreciates and encourages heritage conservation throughout Toronto.
- 5 Collaboration**
Managing heritage resources requires collaboration within the City of Toronto, and with the private and not-for-profit sectors, institutions, volunteers and the public.
- 6 Consistency**
Managing heritage resources and nurturing conservation efforts are long-term commitments that demand strong organizational management, professional integrity and on-going vigilance.

a) action required: Adopt the principles for Heritage Management.





photos of Philosopher's walk. Landscapes and open spaces are integral to understanding and conserving Toronto's heritage. Currently, however, landscapes are under represented in the City's Inventory of Heritage Properties.

The Framework provides the essential tools and instruments for identifying, designating and managing heritage resources and includes: criteria for determining cultural heritage value or interest; a recommendation to introduce a Heritage Impact Assessment; methods for identifying and designating properties and districts; and an organizational structure for heritage management.

The basic framework for managing heritage resources is established by the Province of Ontario. The City of Toronto has the authority to adopt further levels of policy consistent with provincial legislation. The following framework for Heritage Management builds on provincial legislation and provides recommendations to assist the City of Toronto with the identification and designation of heritage resources. The Framework for the Heritage Management Plan works within existing By-laws and includes:

Identifying Heritage Resources

- 1.1 Criteria for determining cultural heritage value or interest
- 1.2 Heritage Impact Assessments
- 1.3 Properties of Cultural Heritage Value or Interest (OHA Part IV)
- 1.4 Heritage Conservation Districts (OHA Part V)

The Management Structure

- 2.1. Improve the structure of heritage management.

Identifying Heritage Resources

Rationale: Identifying, documenting, evaluating, listing and designating heritage resources is essential to the conservation of these resources.

Current Condition: The current Inventory of Heritage Properties and existing Heritage Conservation Districts represent only a fraction of the heritage resources in the City of Toronto. Quite simply, many of these resources have not yet been identified. Further, the ‘reasons for designation’ in some of the existing designations need to be updated. Recently, there has been an increase in the number of Heritage Conservation Districts created in the City, due in large part to the initiative of resident associations and volunteers.

With the general public, there is a lack of understanding about what constitutes heritage resources, and it is assumed that if buildings are not listed, designated, or part of a Heritage Conservation District they do not have heritage attributes or value. As a result, Toronto’s heritage resources are unrecognized and are being compromised, destroyed or irreversibly altered.

Response: A strategy of conservation should be to increase the number of properties and districts that are studied for designation under Part IV and Part V of the Ontario Heritage Act.

A comprehensive Inventory of heritage resources will provide clarity and will help confirm conservation expectations for the community, politicians, and property owners. This Inventory must be well researched and scholarly and continual updating must be an important goal. However, to do so is an exceptional task that will demand significant staff time. In the interim, it is crucial to develop a mechanisms (i.e. a Heritage Impact Assessment process) to assist in the assessment and evaluation of heritage resources that are not on the Inventory.

1.1 Criteria for determining cultural heritage value or interest

1.1.1. Criteria for designating a property or a HCD.

The Ontario Heritage Act (Regulation 9/06) establishes the following criteria for determining cultural heritage value or interest:

1. Has design value or physical value because it:

- is a rare, unique, representative or early example of a style, type, expression, material or construction method,
- displays a high degree of craftsmanship or artistic merit, or
- demonstrates a high degree of technical or scientific achievement.

2. Has historical value or associative value because it:

- has direct associations with a theme, event, belief, person, activity, organization or institution that is significant to a community,
- yields, or has the potential to yield, information that contributes to an understanding of a community or culture, or
- demonstrates or reflects the work or ideas of an architect, artist, builder, designer or theorist who is significant to a community.

3. Has contextual value because it:

- is important in defining, maintaining or supporting the character of an area,
- is physically, functionally, visually or historically linked to its surroundings, or
- is a landmark.

The Ontario Heritage Tool Kit elaborates further on the identification of cultural heritage value in districts, suggesting that “*it is important to understand that the value of the district as a whole is always greater than the sum of its parts*”. (Ontario Heritage Toolkit, 2006)

The criteria above must be used when designating a property (under Part IV of the Ontario Heritage Act) or designating a Heritage Conservation District (under Part V of the Ontario Heritage Act).

1.1.2. Indicators to assist with the identification of properties and HCD Study Areas, with potential cultural heritage value or interest.

All properties and HCDs are subject to the criteria for determining cultural heritage value provided by the Ontario Heritage Act, Regulation 9/06. The City of Toronto has the ability to establish additional indicators that are consistent with the Ontario Heritage Act, to assist with the identification of heritage resources.

The following indicators are intended – not for determining cultural heritage value – but rather, for the purpose of assisting with the identification of properties and districts (including natural features and cultural heritage landscapes) that may be considered for listing under the City of Toronto Inventory of Heritage Properties or be considered for a Heritage Conservation District Study. These indicators can be used, for example, with the ‘Heritage Impact Assessment Phase 1’ and when creating the list of HCD Study Areas.

The following indicators will help detect resources that should be studied for their cultural heritage value, including: individual properties and structures, cultural heritage landscapes and natural features, and heritage conservation districts.

A property or district should be studied further if it has one of the following:

represents a significant example of design

This indicator is intended to ensure the evaluation of examples of architecture, urban planning, urban design, and landscape architecture that are noteworthy or have been recognized within their profession, and may be indicative of cultural heritage value. These may include designs of any era and/or style and different scales.

Example properties: celebrated modern buildings, noteworthy interior designs

Example landscapes: a park or plaza with a prominent design, a masterful garden

Example districts: a recognized planned neighbourhood

has a distinctive architecture, structure and/or space

This indicator is intended to ensure the evaluation of elements that stand out through the quality and distinctiveness of their design.

Example properties: a building that is notably different within its context, due to a particularly ornamented façade

Example landscapes: a garden that stand out from its surroundings, given

Example districts: its design and configuration
a street layout or block pattern with a recognizable identity

□ represents a period of settlement, construction and/or development that suggests a potential cultural heritage value

While age alone may not solely be a determinant factor, it may help identify properties with potential cultural heritage value. Structures older than 50 years should, in most cases, be examined.

By and large, a minimum of 25 years should have passed to adequately understand the historic implication of a structure or district. Qualifying resources should generally be at least 25 years old. However, even structures that are 5 years or less, given their design, history and context, may offer significant cultural heritage value. Exceptions to the 25 year benchmark should be considered on a case-by-case basis and determined on individual merit.

Natural landscapes may have significant value and be much older in origin. A ravine, for example, may be deemed to have heritage value for its significant contribution to our understanding of natural history and to how Toronto developed as a city. Features in the landscape that may capture and/or illustrate the history of natural environments (e.g. creek beds, shore lines, ravines) should be studied and evaluated.

The current implementation of the Archaeological Master Plan, through the mapping of ‘Areas with Archaeological Potential’, and the process of an ‘Archaeological Impact Statement’ has resulted in the identification of properties that should also be considered for their cultural heritage value.

Example properties: New City Hall, in only a few years became part of the city’s identity and an important heritage building
Example landscapes: Fort York and the Garrison Lands
Example districts: Fort York Heritage Conservation District

□ is associated with and/or effectively illustrative of a particular style

Certain structures, landscapes, or areas of the city are associated with a particular design style or construction method. Such depictions will often be made in historical studies of Toronto’s urban development, architecture, landscapes and natural environments. When these are identified by professionals, scholars, and/or historians, it may be an indication that a property or collection of properties should be evaluated further.

Example properties: a Victorian structure
Example landscapes: a landscape that is reminiscent of an earlier rural life-style
Example districts: post-WWII Victory housing

□ is associated with and/or effectively illustrative of broad patterns of cultural, social, political, military, economic, environmental, land use and/or urban settlement history

This indicator is intended to identify heritage resources that somehow capture part of Toronto’s history and identity.

Example properties: An industrial building may be a worthy example of a part of the city that developed through a particular type of industry
Example landscapes: The waterfront is integral to Toronto’s formation and contains elements that may illustrate and conserve the city’s heritage
Example districts: Queen Street West has been a centre for commerce and culture, and a defining element in the city’s street layout

□ has a recognizable and significant cultural presence

Properties and areas of the city that are associated with a particular culture (past or present) or a cultural use, should be studied and evaluated.

Example properties: an ethnic marketplace
Example landscapes: a civic plaza, a local meeting place
Example districts: a university campus, an ethnic neighbourhood

□ has a distinctive sense of identity and/or a sense of time and place

Some properties or districts have a distinct sense of identity that may be recognizable through their age, design, function, visual coherence, and/or cultural associations (both tangible and intangible qualities).

A sense of time and place is the compelling feeling that a property or district has a distinct history, traditional use, design and/or function, which is unique, is recognizable by residents and/or visitors, and which sets it apart from other properties and areas of the city. When this special identity is recognized, the property(s) and context should be studied for their cultural heritage value.

Example properties: a church courtyard
 Example landscapes: a geographic feature
 Example districts: neighbourhoods that stand out in the city for their distinct sense of identity

□ heritage resources are concentrated or are physically and/or visually associated

The proximity of heritage resources suggests that further examination is warranted. For example, a grouping of buildings, a network of open spaces, the repetition of design details, may be indicative of a condition where one element derives meaning from, and is integral to, a greater context. The association of heritage resources may also derive from their function, scale, size, proportions, volume or quality.

Example properties: the combination of a house and barn. An individual storefront may be significant to the context of a mainstreet corridor. A single townhouse may gain significance as part of a row of townhouses

Example landscapes: individual trees and gardens that come together to form a significant streetscape

Example districts: a neighbourhood with a concentration of buildings of consistent design, size or relationship to the street

□ has visual prominence

If a structure or landscape stands out visually from its context, it should be evaluated. Firstly, the prominence may be by age or design, and may be indicative of cultural heritage value. Secondly, the visibility may be derived from topography (e.g. hills, ridges, ravines,) or from the location relative to its context (e.g. a church steeple may be taller and may step out from the street wall). In this instance, the prominence demands that it be carefully evaluated.

Example properties: a visual terminus, a tall building
 Example landscapes: a view corridor
 Example districts: the context of significant urban features (e.g. City Hall)

a) action required: Adopt the indicators, and employ them for Heritage Impact Assessment Phase 1, and for the identification of potential HCD Study Areas.

1.1.3. Integrity

When listing a property or undertaking the study of a district, the integrity of heritage resources should be documented and evaluated. Consider:

□ do heritage resources that are important to the identification of the heritage character retain a degree of integrity capable of supporting interpretation, and their condition warrant conservation?

Evaluating integrity should consider whether alterations and additions support or detract from the heritage attributes or character of a heritage property. For example, in the case of a significantly altered building, where the attributes are linked to the original design, the heritage value may be lost. But, if in the same building, the attributes are related to an event that is linked with the property, it may still retain heritage value.

Additive alterations or additions (that do not destroy heritage attributes) may simply obscure integrity and interpretation. It is possible that these actions are reversible (e.g. cladding, storm windows, signage). A building that appears significantly altered may still possess significant heritage attributes that are entombed under the accretions.

The integrity of heritage resources should be documented as part of the study process, and the integrity considered when preparing a Conservation Plan.

a) action required: Evaluate and document the integrity of each property during the HIAs.

1.2 Heritage Impact Assessments

Key to successful conservation is the timely identification of heritage resources.

The majority of alternations and rehabilitations to existing buildings by the private sector are done on buildings, structures and landscapes that are not part of an inventory of heritage properties (Shiple et.al, 2006). This in part speaks to: a) the need to expand the number of properties that are studied for inclusion in the Inventory, and b) the need for a mechanism to assist private sector conservation by identifying the heritage value of properties early in the process.

Keeping pace with the Inventory has proved to be challenging, given the due diligence required for designation, and given the extent of properties yet to be studied.

With the objective of maintaining, updating, and expanding the Inventory of Heritage Properties, and of providing the necessary information for conservation, this Plan recommends requiring a Heritage Impact Assessment (HIA) for all Official Plan Amendments (OPA), Site Plan Applications, and Rezonings. The HIAs will serve to:

- document the condition of a property and its context;
- identify properties that should be evaluated for designation;
- assist in the preparation of Conservation Plans; and
- increase the understanding of the context of heritage resources, their configuration, groupings, and patterns. This information will assist in evaluating areas for HCD studies.

The HIA should function in two phases as follows:

1.2.1 Heritage Impact Assessment Phase 1 (HIA1)

A HIA1 has the objective of providing an initial assessment to determine if further review is required. With the basic information provided by the applicant in a standard sheet format, HPS staff will make a determination based on the criteria to determine cultural heritage value offered by the Province, and the additional indicators recommended in this Plan. The HIA1 should have the following characteristics:

- Has the primary objective of determining if a HIA Phase 2 study is required.

- Is in simple form, prepared by applicant, including photos of subject and context.
- Evaluation undertaken by City staff.
- May be triggered by: a) a request by a person with ownership interest; b) as part of the Preliminary Review Process of an application; and c) upon a formal application for development or demolition.
- City should consider charging a fee to process a HIA1. This option may compensate for any additional workload generated for HPS, and serve to fulfil an objective of self-sufficiency for HPS.

Allowing a HIA be initiated by persons with ownership interest, or as part of the Preliminary Review Process will assist property owners and potential developers to understand the cultural heritage value of a property early in the process of considering a property for purchase or development.

1.2.2 Heritage Impact Assessment Phase 2 (HIA2)

A HIA2 is identified as required by the HIA1, and has the objective of determining if a property has cultural heritage value, if it should be listed on the Inventory of Heritage Properties, and if its designation ought to be considered. It is a more rigorous exercise than HIA1 and requires further documentation and research. The applicant will be required to retain a heritage consultant able to undertake the required investigation and analysis. A final recommendation will be prepared by City staff.

A HIA2 will also help determine when a Conservation Plan is warranted. Currently, it is common practice to require a Conservation Plan as part of an application for OPAs or Rezonings that involve heritage properties. This practice has proven successful and should be formally instituted as part of the application requirements for alternation to properties with identified heritage attributes.

- a) action required: During the second phase of the Heritage Management Plan: develop the requirements for the HIA including a standardized form for HIA1; develop a system for mapping the results of HIAs across the city; and develop a strategy and timeline for the implementation of the HIAs.
- b) action required: Continue to require a Conservation Plan with applications for alternation in properties with identified heritage attributes.



The presence and function of public art may constitute a significant heritage resource and/or may be an important contributor to the heritage value and heritage character of a district. The cultural heritage value of public art should also be evaluated when identifying heritage properties and HCDs.

top - Yorkville Park, Toronto.

bottom - Yorkville Park, Toronto.



1.3 Properties of Cultural Heritage Value or Interest (OHA Part IV)

1.3.1 Listing

The City currently maintains an Inventory of Heritage Properties that includes listed and designated properties. The purpose of the Inventory is to identify and manage properties that have cultural heritage value.

The Inventory, however, does not represent a thorough review of all properties in the city. This fact is a source of confusion, since often applicants, property owners and developers will wrongfully assume that properties that are not listed do not have cultural heritage value.

Increasing the number of properties that have been considered for inclusion, or not, in the Inventory is a priority (see Section B: 3.1.).

The policy tools for listing properties are deemed to be sufficient and effective. The issue recognized in this Plan has to do with the methods and resources needed to significantly increase the number of properties that are evaluated and included on the Inventory. The Plan recommends two new methods of identifying properties with the potential to be included in the Inventory. These are:

- Heritage Impact Assessments. A HIA will assist with the process of identifying and evaluating properties that may be listed. It will also focus the evaluation of heritage resources on properties that may be subject to change in the short term.
- The application of the additional indicators for determining cultural heritage value or interest. The additional indicators are intended to identify properties that may have heritage value. It is an early identification system that can help determine if further review is warranted.

1.3.2 Designating

Properties being proposed for designation (under section 29 of the Ontario Heritage Act) require in-depth study by a qualified individual or committee. This involves:

- Understanding the context, physical and historical.
- Researching the history and cultural associations.
- Examining and recording the property, site and context for any physical

evidence of its heritage features or attributes, past use or cultural associations.

When identifying and designating heritage properties (e.g. buildings, structures and landscapes) following provincial policy (Ontario Heritage Act and Regulation 9/06) the following must be provided:

Description of the property

A legal description of the property and extent of what is being designated, as well as a description of the general character. Should include a photograph of the property and one or more photographs of the context.

Statement of cultural heritage value or interest

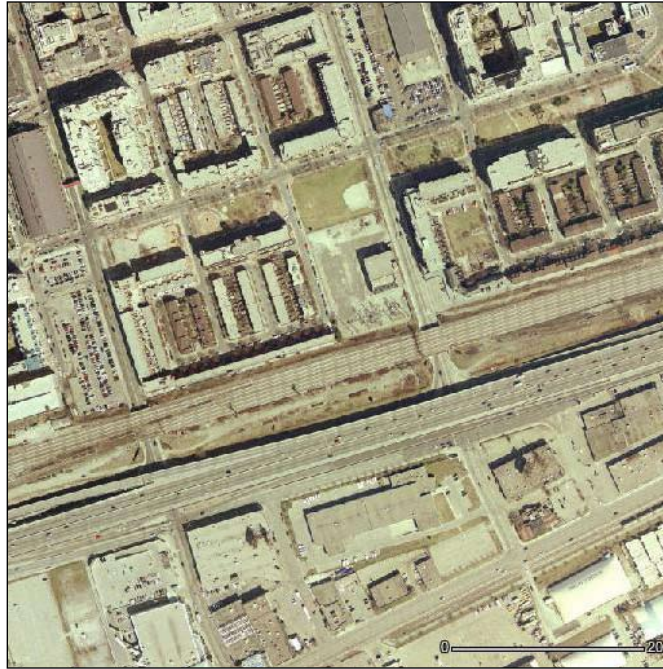
The cultural heritage value or interest should determine whether a property is contributing or not, by evaluate the following:

- design or physical value;
- historical or associative value; and
- contextual value.

Ensure that the evaluation of heritage resources and the subsequent report which provides the reasons for designation, include a statement for all categories. Rather than listing a heritage resource under one category or another, if it is deemed to be contributing, a statement should be made under all categories, to guide future interventions and conserve its contribution to the heritage attributes.

Description of heritage attributes

The level of detail should be sufficient to guide the approval, modification or denial of a proposed development or alternation, and should be sufficient to allow effective enforcement of heritage property standards.



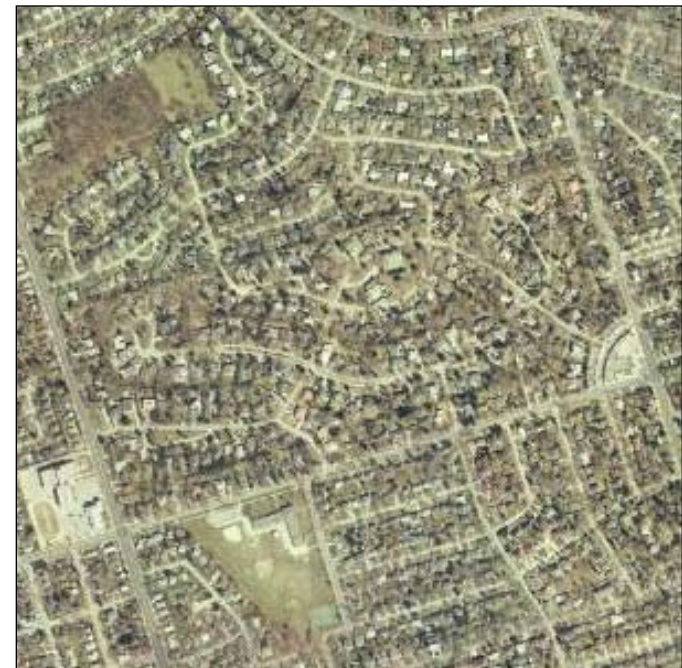
Heritage resources must be understood within their context. It is often precisely the context itself – the planning of neighbourhoods, the open space systems, the urban design – which constitute the heritage attributes and value.

top left - St. Lawrence Neighbourhood, (Source: City of Toronto Maps)

top right - Leaside, (Source, City of Toronto Maps)

bottom left - Don Mills, (Source: City of Toronto Maps)

bottom right - Thorncrest Village, (Source: City of Toronto Maps)



1.4 Heritage Conservation Districts (OHA Part V)

HCDs as a legislative tool can be used in a wide variety of ways, ranging from the conservation of structures within their context to cultural heritage landscapes. In instances where heritage attributes emerge from a collection of heritage resources, an HCD should be considered as a valuable conservation tool, in addition to designating individual properties.

HCDs should be used in conjunction with other planning and urban design policy tools (e.g. urban design guidelines and precinct plans). An HCD should only be designated in districts that have resources that meet the criteria for determining cultural heritage value.

1.4.1 Listing

Currently, the City maintains a list of areas where Council has requested HCD studies, pending funding. All properties in these areas should be listed pending completion of the HCD study. The current list of potential HCDs is enhanced by mapping prepared by Urban Design, which considers certain areas as requiring an HCD study.

The list of HCD study areas, however, has not been adopted as a formal part of the process of evaluating cultural heritage resources. This Plan recommends that this list be structured and formalized with the following characteristics:

- The listing process can be initiated through a) nomination by community groups; b) nomination by City Council; or c) identification by City staff.
- The indicators for detecting potential cultural heritage value or interest presented in this Plan be employed.
- The cumulative information gained from HIAs be reviewed to identify when clusters or patterns suggest an area should be studied for its HCD potential.
- That HPS Staff manage the list.

The purpose of this list is to identify areas of the city that should be studied for potential HCDs. This list does not constitute a determination of whether different areas have or do not have cultural heritage value, and should not be used as an indicator of such value (or lack of). If a district is not listed, it should not be interpreted as suggesting that the district does not have cultural heritage value.

The City may consider placing an interim control By-law on an area that is to be studied for a potential HCD.

- a) action required: During subsequent phases of the Heritage Management Plan, apply the indicators for identifying potential cultural heritage value or interest across the city to map potential HCD study areas. With districts that are listed for HCD studies, City staff may consider listing all properties.

1.4.2 Designating

When studying and designating a Heritage Conservation District (HCD) provide:

- A Description of place.

A general description of the area, the location and context. The purpose is to situate the district within the city and to provide a historical background.

- A Heritage Character Statement (HCS).

The heritage character may emerge from a) a concentration of heritage resources; b) a framework of structured elements, including natural features, streets, development patterns, and urban planning/design elements; c) a sense of visual coherence; and/or d) a distinctiveness that distinguishes the district from its surroundings.

The HCS should indicate how conserving the District's heritage character has value to the community and/or to the city.

- In some instances people who inhabit a district will recognize the heritage value and seek to conduct an HCD study, to assist with conservation efforts and as a pro-active mechanism to manage interventions within the HCD.
- In other instances the heritage value of the district will be recognized by the City. The district will be studied, and if appropriate an HCD will be designated.

Note that to qualify for the Canadian Register of Historic Places, developed under the federal Historic Places Initiative, the HCS must function as a 'Statement of Significance' and identify heritage values and character defining elements.



The heritage value of many buildings, structures, landscapes, and urban spaces is not yet recognized by the public. Conserving heritage resources begins with a thorough inventory, and must also include a public awareness component.

top left - Canada Malting Company Silos on the waterfront

top right - Robarts' Library, University of Toronto

bottom left - Lord Landsdowne Public School

bottom right - Imperial Oil Building (Source: Emporis)

- List of heritage attributes.

Heritage attributes are the features of the HCD that define its cultural heritage value or interest. Heritage attributes are drawn from, and apply to, properties as well as to the context, including: natural features, landscapes, streetscapes and public open spaces, the spatial pattern and configuration of the district, the arrangement of built features, vegetation and landscaping patterns, prominent or historic landmarks and views, and all other elements and features used to determining cultural heritage value or interest.

- An Inventory of properties.

All properties within the HCD study area must be inventoried and their heritage value evaluated.

- List of properties that contribute, or not, to the heritage character and heritage attributes.

Heritage resources that contribute to the heritage character must be clearly identified and conserved. Structures and landscapes that do not contribute to the heritage character may be altered or demolished as long as the replacement structures are in keeping with the HCD's guidelines. Adherence to the guidelines should be done to ensure that as the district evolves, its heritage character is conserved and strengthened.

Some HCDs in the past have used a grading system (e.g. A, B, C...) to determine different levels of contribution. This Plan recommends the use of a two level grading system, based on whether resources are 'contributing' or 'non-contributing'. This basic distinction should provide clarity on whether a heritage resource can or cannot be demolished. Once this base distinction is established, individual HCDs may choose (or not) to develop additional grading levels (and corresponding guidelines for each level) in response to unique circumstances.

- A clearly defined boundary.

The boundary of the HCD should be established as the area where the HCS and the heritage attributes and guidelines apply.

- List of guidelines.

Heritage attributes are most useful when they result in corresponding guidelines, that will apply as interventions occur within the HCD. Different heritage attributes and guidelines may apply to different heritage character areas within the HCD.



Legislation exists to assist the conservation of cultural heritage landscapes, but landscapes in Toronto have not been inventoried, nor duly recognized. Focusing efforts on landscapes should be a priority, including parks, streetscapes, natural systems, the ravines, and other open spaces.



top left - Crombie Park, St. Lawrence Neighbourhood

top right - Western Beaches and Sunnyside Pavilion

bottom left - Toronto Centre Island

bottom right - Humber River Park



2. The Management Structure

Rationale: Fundamental to heritage management is the provision of an organizational structure that is effective and allows for decision-making rooted in due diligence.

Current Condition: There is a lack of clarity and agreement with respect to the roles and responsibilities that various parties involved in heritage management and decision making process play and/or should play, including HPS staff, the TPB, Heritage Toronto, and the Community Panels. As a result, some of these resources are at times under utilized, such as volunteers, while others are stretched to the limit, such as HPS staff.

Response: It is imperative to ensure that a structure for the management of the city’s heritage resources is designed with clear lines of communication, identification of roles and responsibilities, and that appropriate resources are allocated to ensure it can be implemented.

2.1. Improve the structure of heritage management.

The system for organizing heritage related activities should bring together all stakeholders involved in conservation and heritage awareness. These include residents, users, property owners, City Council, City staff from its various departments, other government agencies, advisory bodies, academic institutions, as well as all interested organizations and volunteers.

This Plan recommends reconsidering through additional consultation the roles, responsibilities and relationship of each existing participating body, including HPS, the Toronto Preservation Board, and the Community Panels. The intent is to achieve a structure for heritage management that results in a process for decision making that is increasingly:

- effective at managing a greater number of listings, designations, HCDs and applications;
- accountable for recommendations, based on due diligence; and
- integrated with other City departments and processes;

The interaction of such bodies with Heritage Toronto should also be reviewed, increasing the ability to:

- raise awareness for heritage management;
- partner with non-governmental organizations and agencies, residents,

educational institutions, interest groups, media and cultural and business communities; and

- be accessible to, and inclusive of, the general public.

Subsequent phases of The Heritage Management Plan, should result in a recommended process for decision-making and management that includes the role and responsibility of all participants and stakeholders. This task should entail a dedicated consultation process that includes participants and stakeholders.

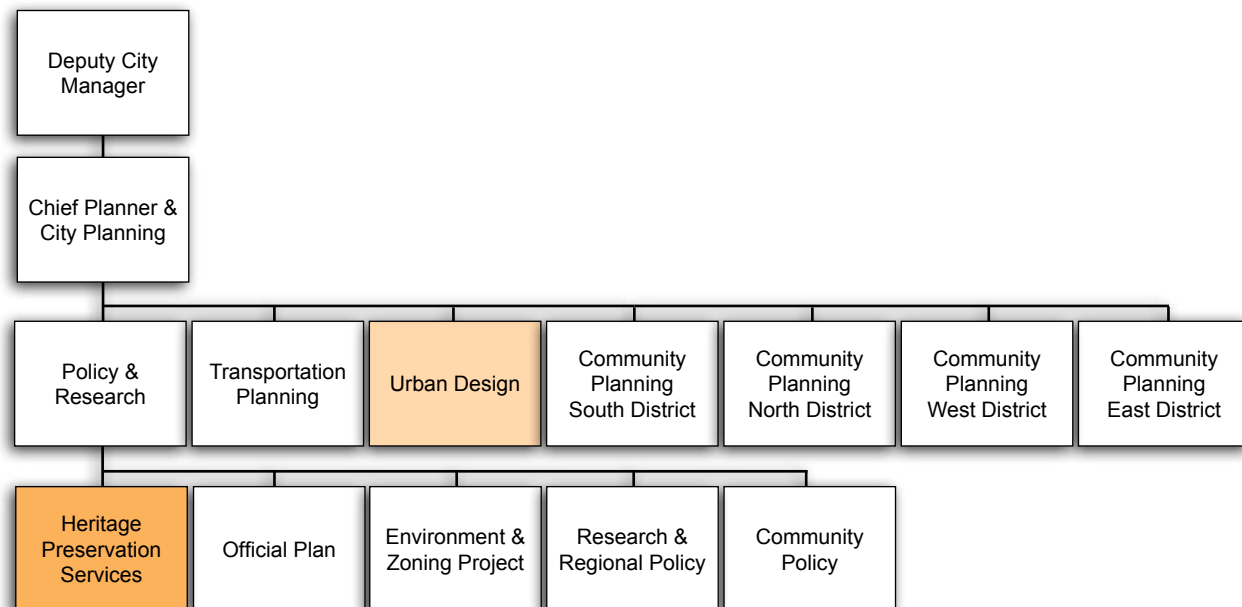
a) action required: In subsequent phases of the Heritage Management Plan, study and consider specific changes to the organizational structure based on issues identified through Phase 1.

In undertaking the next phase analysis of the overall approach to heritage management, consideration should be given to the following ideas/opportunities that became evident through the Phase 1 reconnaissance and analysis:

- Enable strong and defensible rulings on applications for alteration to designated heritage resources.
 - Ensure that decision-making and advisory bodies have the ability to make recommendations on heritage conservation with expertise and due diligence.
- Improve access to information.
 - Consolidate a critical mass of expertise, knowledge, and information and foster inter-departmental sharing of information.
 - Increase the public’s understanding of conservation practices, standards and guidelines.
- Enable advisory bodies to function properly, as per a role and function that is redefined in the next phase.
 - Review the role of the TPB, and the most effective mechanism for advisory boards to add value to the process.
 - Continuously improve the expertise, commitment at bodies such as the Toronto Preservation Board.
 - Consider providing nominal remuneration for service on advisory bodies.
- Consider enabling HPS staff to operate at a local scale, increasing their access to specific heritage resources and the public.
- Consider the role of Heritage Toronto with regard to heritage awareness and fundraising. As well, consider ways to better utilize all types of heritage

Structure of City Bureaucracy (current)

This Plan espouses the benefits of integrating the broad goals and objectives of city planning with heritage management. These often are manifest at the scale of the public realm and urban design. In addition to considering the Structure of Heritage Management (diagrams of current condition presented in the Background section) subsequent phases of the Plan should consider ways of further integrating the mandate and operations of Heritage Preservation Services with Urban Design and other sections under the City Planning Division.



volunteers.

- Direct volunteer efforts where they will be most useful, for example awareness campaigns and archival research.
- Identify concrete tasks and roles that volunteers may undertake, without compromising the defensibility of heritage evaluations.
- Identify ways to recognize and reward volunteer efforts.

A strategy for Heritage Management

The ‘Strategy’, speaks to the implementation of the ‘Framework’ (previous section) for heritage management. The Framework establishes a process for the identification and designation of heritage resources. The Strategy establishes a direction and an approach for the management of such heritage resources. There are three key goals as part of this strategy: to conserve heritage resources, to generate awareness and to appropriately fund conservation. These include specific objectives, strategies and required actions and are outlined as follows:

3. Goal: Conserve Heritage Resources

3.1. Objective: Expand, maintain and update the status of heritage resources.

- 3.1.1. Strategy: Increase the number of structures being evaluated for designation.
- 3.1.2. Strategy: Increase the number of Heritage Conservation Districts Studies.
- 3.1.3. Strategy: Study and designate Cultural Heritage Landscapes.
- 3.1.4. Strategy: Study and designate prominent trees and stands of trees.
- 3.1.5. Strategy: Maintain and monitor heritage easements.
- 3.1.6. Strategy: Use the Inventory as a centralized database for heritage information.

3.2. Objective: Foster accuracy and quality in conservation work.

- 3.2.1. Strategy: Preserve the integrity of Districts once they are designated.
- 3.2.2. Strategy: Improve the guidelines for conservation projects.
- 3.2.3. Strategy: Develop a strategy to manage signage on heritage properties.
- 3.2.4. Strategy: Provide links and seek synergies with other concurrent City initiatives.

3.3. Objective: Lead by example.

- 3.3.1. Strategy: Excel at heritage conservation and celebrate City-owned heritage.

4. Goal: Generate Awareness

4.1. Objective: Position heritage conservation as an important part of a liveable, sustainable, and contemporary city.

- 4.1.1. Strategy: Increase awareness on City Council about the value of conservation.
- 4.1.2. Strategy: Develop and publicize information materials.

4.2. Objective: Encourage heritage conservation in all projects, where heritage resources exist.

4.2.1. Strategy: Promote the understanding that heritage conservation can provide economic benefits.

4.2.2. Strategy: Engage the private sector in heritage conservation.

4.3. Objective: Ensure heritage awareness grows throughout the city.

4.3.1. Strategy: Extend efforts to those areas of the city that are under-represented.

4.3.2. Strategy: Celebrate and publicize conservation successes.

4.4. Objective: Generate Awareness through partners outside HPS.

4.4.1. Strategy: Promote public awareness of heritage resources and the value of conservation in all City initiatives.

4.4.2. Strategy: Educate the public about conservation and about Toronto’s heritage.

5. Goal: Appropriately Fund Conservation

5.1. Objective: Continue to ensure City staff are able to fulfil their mandate with professional integrity.

- 5.1.1. Strategy: Match HPS workload with the number HPS staff.
- 5.1.2. Strategy: Ensure that staff at HPS are valued.
- 5.1.3. Strategy: Continually enhance the heritage expertise of City staff.
- 5.1.4. Strategy: Ensure funds are available for the study and management of HCDs.

5.2. Objective: Assist the private sector to avail itself of financial incentives.

- 5.2.1. Strategy: Enhance the Heritage Grant Program.
- 5.2.2. Strategy: Combine heritage grants with the Façade Improvement Program.
- 5.2.3. Strategy: Combine heritage grants with other types of grants.
- 5.2.4. Strategy: Implement Tax Increment Financing (TIF).
- 5.2.5. Strategy: Assist property owners and private developers to leverage funds for use in conservation and adaptive re-use projects.
- 5.2.6. Strategy: Identify and implement mechanisms to offset the risk to owners of heritage properties.
- 5.2.7. Strategy: Consider a separate tax system for heritage properties.
- 5.2.8. Strategy: Consider different packages of incentives for large developers and small scaled property owners.

5.3 Objective: Nurture the economic self-sufficiency of managing heritage conservation.

- 5.3.1. Strategy: Implement user fees for services.
- 5.3.2. Strategy: Consider introducing a system of fines.

Places and structures that have a civic function are often associated with heritage resources. Recognizing the heritage value within its context, including landscapes, plazas and open spaces, will help enhance the long term integrity of the civic functions.

With city owned properties there is a unique opportunity (and responsibility) to lead by example, and successfully demonstrate quality conservation.

Heritage resources are found throughout Toronto. Planners in all districts should be cognisant of the value of these resources during the development approvals process.

- top left - Toronto City Hall
- middle left - North York Civic Centre (Source: TO Built)
- bottom left - York Civic Centre (Source: TO Built)
- top right - Scarborough Civic Centre (Source: TO Built)
- middle right - East York Civic Centre
- bottom right - Etobicoke Civic Centre



3. Goal: Conserve Heritage Resources

Rationale: Other parts of the document have sought to establish the value – social, cultural, environmental, pedagogical, historical, urban, and economic – of conservation. This section considers that heritage management needs to be strategic in how it directs its energy and funds.

Current Conditions: Attention paid to heritage resources across Toronto is inconsistent. Some are better understood, documented and conserved, while others have received scarce attention. This is due, in part, to an inconsistent understanding by key players of the value of heritage management and conservation.

Response: Based on the framework presented earlier for identifying heritage resources, a strategy is required to focus the energy of HPS, to coordinate the joint efforts of all City departments, and to support and encourage the active participation of the private sector.

3.1. Objective: Expand, maintain and update the Inventory of heritage resources.

This Plan recognizes the need to narrow the gap between unidentified heritage resources and properties that have been identified, documented, and conserved. While it is acknowledged that the Inventory of Heritage Properties is an ongoing exercise (as the city grows and evolves, so will the Inventory), at present, a large number of properties with cultural heritage value remain unidentified. The uncertainty has resulted in a reactive approach towards listing and designating that engenders a loss of trust between the heritage community and property owners. In response to this condition, the Plan recommends focusing energy on increasing the number of properties that have been evaluated for their cultural heritage value.

In the chapter dedicated to the Framework for Heritage Management, the Plan identifies new and existing mechanisms for achieving this objective. New mechanisms include:

- adopt and employ new indicators for identifying properties and areas of the city with potential cultural heritage value;
- implement a Heritage Impact Assessment (HIA) process; and
- maintain a list of potential HCD study areas.

Additional strategies, presented below, include:

- increase the number of structures being evaluated for designation;
- increase the number of Heritage Conservation District Studies;

- study and designate cultural heritage landscapes;
- maintain and monitor heritage easements; and
- use the Inventory as a centralized database for heritage information.

3.1.1. Strategy: Increase the number of structures being evaluated for designation.

In 2004 Heritage Preservation Services commissioned and undertook a test case study (‘Heritage Resource Identification and Evaluation’) for the identification of heritage resources in the North District. The objective was to develop, illustrate and test a prototypical process that could later be applied across Toronto. This experience, and the conclusions drawn from this report, offers a methodology for a systematic study of the city.

This Heritage Management Plan offers additional strategies to assist the process of expanding the Inventory of heritage resources.

The information obtained through the Heritage Impact Assessment process will assist with the identification of: a) heritage resources that should be considered for listing and designating; and b) areas in the city where additional heritage resources and/or HCDs may be located.

- a) action required: Undertake the necessary studies for listing and designation of structures that are identified as significant heritage resources through the HIA.

Conducting thematic studies is another effective strategy for the identification of heritage properties (e.g. reviewing all churches of a certain style or denomination). A thematic study should be conducted to address specific issues (e.g. the loss of a particular heritage stock) or when effective partnerships can be struck. For example, by forging a partnership with School Boards, a thematic study of schools across Toronto can be conducted to determine their heritage value. This strategy may have the added benefit of identifying late-20th Century properties with heritage value.

A concern identified in this Plan has been the need to recognize the cultural heritage value of structures, properties, and landscapes from the late-20th Century. These resources are especially prone to demolition and/or significant alterations given that their heritage value is not well understood or recognized by the general public. Conducting an inventory of these properties may help increase awareness, while ensuring that significant examples are conserved.

- b) action required: Study significant structures of the 20th Century for new listings and designations.



The City of Mississauga has recently conducted an Inventory of Cultural Landscapes. This exercise has resulted in the recognition of sensitive heritage resources and the resulting ability to direct conservation efforts, funds and policy.

above - City of Mississauga, Inventory of Cultural Landscapes.

The Federal government does not currently provide money for conservation (except for federally owned properties). However, it does assist with generating awareness and profile for heritage resources listed on the Canadian Register of Historic Places. Under the current system only municipalities can forward a designation to the Canadian Register, not property owners. The City should forward designations that can profit, directly or indirectly, now or in the future, from federal support. Overtime, the federal government may increase the programs and means available to properties on the Canadian Register. For this reason, it will be advantageous to have as many municipal designations listed on the Canadian Register as possible.

c) action required: Consider forwarding designation to the Canadian Register of Historic Places.

An additional concern regards the consistency of existing listing and designations, which were completed under different regimes (pre-amalgamation, and pre new Heritage Act) where different policies and standards applied. A review of the designation By-laws will ensure that they are updated and complete to the most recent standards.

d) action required: Review and update listed and designated structures' documentation and By-laws and reasons for designation to be in keeping with changes to the Heritage Act.

3.1.2. Strategy: Increase the number of Heritage Conservation Districts Studies.

HCDs emerged as a policy tool when the conservation movement recognized that designating individual buildings was not sufficient to capture all the valued heritage attributes present in any given context. Over the last several decades they have increasingly become a key mechanism for conservation. In Toronto alone the trend towards making use of HCDs is evident.

Today, HCDs are widely supported by conservationists as an important mechanism and a key strategy for conservation. When there is opposition to the concept of an HCD, it tends to emerge from a selection of property owners concerned over property values and development rights. Acknowledging that every context is different, these concerns have been the subject of several studies, which generally coincide in concluding that "there is no credible evidence whatsoever that local historic districts reduce property values. In the vast majority of cases properties subject to the protections of local historic districts experience rates of property appreciation greater than the rest of the local market and greater than in similar, undesignated neighbourhoods. Generally the worst case is that

values of properties within a local historic district move in tandem with the local market as a whole.” (Rypkema, 2005, pg 3)

HCDs present the opportunity for the City to identify a large number of properties with heritage value and to regulate alterations and demolitions to those properties. This has been the experience most recently in Toronto, where 85% of listings in the last 5 years have emerged through the process of an HCD study. HCDs as well, more so than individual designations, focus attention on the context where heritage resources are embedded. This is a strategy that has also proved successful in other cities. For example, The City of New York, through the Landmarks Preservation Commission has led the designation of 66 Districts. District designation has assisted with the pro-active stabilization of significant areas of the city and helped recognize and develop the City’s ‘sense of place’. By focusing on districts, N.Y. has been able to identify, conserve and augment the heritage character of the city itself (in addition to individual structures).

The policy framework for HCDs allows the inclusion of a broad range of heritage resources, including, but not limited to, buildings, structures, natural features and landscapes. In Toronto, only HCDs in residential neighbourhoods have been designated. A few HCD studies in mixed-commercial areas are underway and may be approved in the near future. It is important to ensure that HCD studies include all eras, building types, landscapes and land uses with significant heritage attributes. The study and inventory of Toronto’s diverse heritage resources will also serve to broaden awareness of the value of these heritage resources.

All areas identified on the list of potential HCD study areas should be studied. This, however, will be an ongoing process and may take many years. This Plan suggests prioritizing areas where the conditions are most conducive to successful designation, by focusing efforts on areas of high potential that have either: a) strong community support; or b) significant value to the city.

Areas with strong community support (residents, property owners, tenants, users and other stakeholders) may be able to focus volunteer efforts and fundraise towards the study process.

Areas with significant value to the city, as identified by City staff, should be studied to ensure that conservation (if warranted) begins as soon as possible. The prioritization of HCD study areas should be done in concert with maintaining the list of HCD study areas.

An HCD, however, is not an end in itself. HCDs should only be designated when the HCD study results in the identification of valuable heritage resources, heritage attributes, and a heritage character worthy of conservation.

It is important to note that increasing the number of HCDs results in an increased number of properties and applications that are monitored and reviewed by HPS. The long term effectiveness of HCDs relies on their consistent management. Therefore, when designating new HCDs, the City should ensure that there is sufficient dedicated staff for their ongoing management.

- a) action required: Focus efforts towards the creation of new HCDs identified on the list of HCD study areas that have either: a) strong community support; or b) significant value to the city.
- b) action required: Create a standardized approach to documenting and evaluating HCDs to ensure the studies and designations are consistent.

In order to further assist community groups with understanding the merits and process of an HCD study, this Plan recommends the creation of succinct information package that illustrates the process and guidelines for the study and designation of an HCD, including some standardized tools such as a template for an inventory sheet. These will help HPS engage and manage interested community groups.

- c) action required: Create and publish an information package that illustrate the process and guidelines for the study and designation of an HCD.

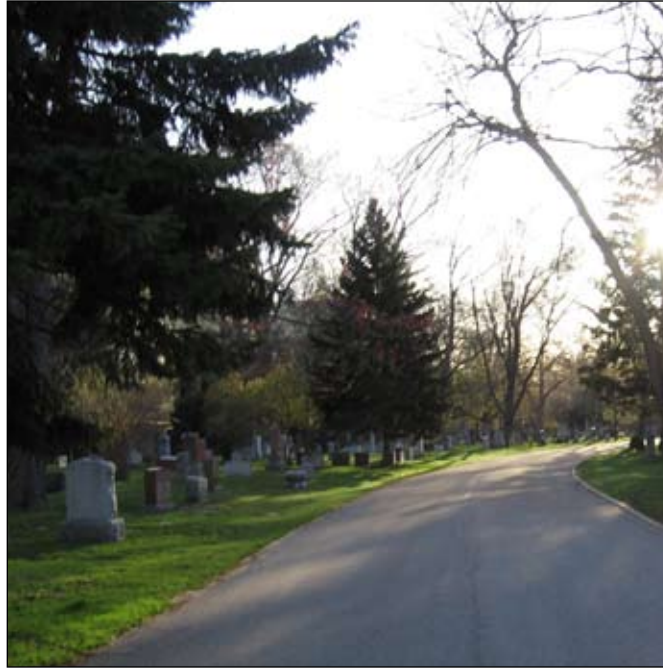
Increasingly, in Toronto, community groups have become interested in HCDs. In some instances they have taken a leading role. Their participation is an integral component to any HCD study. Informing and encouraging community organizations to become involved in HCD studies may:

- encourage proactive designation with community input and support;
- focus volunteer efforts effectively;
- assist with fundraising for HCD studies, management and conservation; and
- increase awareness and understanding of HCDs and HCD studies.

- d) action required: Encourage Community Panels, ratepayers, residents and business improvement associations to consider listing their areas for HCD studies.

3.1.3. Strategy: Study and designate Natural Features and Cultural Heritage Landscapes.

The Ontario Heritage Act permits the listing and designating of natural features and landscapes as either individual properties or as part of an HCD. However, there are



Natural features such as a tree with a cultural association, as well as landscapes such as cemeteries, parks, public squares, parkettes, courtyards, can be listed and designated for their individual heritage value. They can also be a significant contextual element, and a contributor to the heritage character and attributes of a district.

While natural features and landscapes in Toronto have been included as part of the heritage attributes of HCDs, none have yet been listed under the Inventory of Heritage Properties.

top left - Mount Pleasant Cemetery

top right - Little Norway Park

bottom - St. Alban's Square, Toronto.



currently no Natural Features or Cultural Heritage Landscapes listed in the City’s Inventory, although there are many potential candidates for such designations. The City of Mississauga, for example, has created a Cultural Landscape Inventory which has helped raise awareness about these landscapes, and has helped focus conservation efforts.

Conducting such an Inventory of Cultural Heritage Landscapes should ensure that the evaluation of heritage resources include natural features with a cultural association and natural environments and urban spaces such as ravines, creeks, squares, streetscapes, street layouts and patterns, views and view planes with cultural heritage value. Undertaking studies for a broad range of cultural heritage landscapes will enhance the understanding and awareness of their cultural heritage value.

Once identified, Provincial legislation provides a wide range of options for managing cultural heritage landscapes, all of which are currently being applied in some capacity by the City on different properties. These include Part IV and V of the Ontario Heritage Act, area-wide or site-specific plans and policies, easements, development agreements, landscape conservation plans, and others.

- a) action required: Create an inventory of cultural heritage landscapes during subsequent phases of the Heritage Management Plan.
- b) action required: Conduct the necessary documentation and evaluation of natural features and cultural heritage landscapes that may be listed and/or designated under Part IV or Part V of the Ontario Heritage Act.

3.1.4. Strategy: Study and designate prominent trees and stands of trees.

Trees and stands of trees may be considered as a natural feature and designated when they have a cultural association. They may also contribute to the heritage attributes and character of a property or district. This Plan singles out trees and stands of trees from other natural features (such as topography) given that their heritage value can often remain unrecognized, and their integrity can often be altered in a very short period of time (i.e. cut down). As a precedent, the City of Victoria has opted to designate significant native trees, and administers their conservation jointly between the Planning and Parks Departments.

A strategy for the conservation of trees and stands of trees should be developed and should consider:

- identifying and designating prominent trees and stands of trees that have cultural heritage value;

- formulating and enacting regulatory measures aimed at conserving trees;
- formulating maintenance guidelines aimed at extending the lives of trees; and
- disseminating this information.

a) action required: Include historic trees and stands of trees as part of the Inventory.

b) action required: Develop measures and guidelines for the conservation of trees and stands of trees.

3.1.5. Strategy: Maintain and monitor heritage easements.

Currently heritage easements on heritage properties are held by the City and by the Province (OHT). Easements are an effective tool for conservation, and through a Conservation Plan offer specific benchmarks and targets that can serve to monitor conservation and ensure maintenance. However, easements are only effective if they are monitored periodically and consistently. As the number of heritage easements increase, the task of monitoring them will also increase. Engaging different City departments in this task (e.g. building inspectors) and ensuring easy access to information will become increasingly important.

- a) action required: Create cross-departmental mechanisms to be aware of requirements for heritage easements and specifically charge and train staff in this role.

3.1.6. Strategy: Use the Inventory as a centralized database for heritage information.

The City’s inventory and database of heritage information should continue to be made publicly accessible on a centralized website. New features could include improving its usability with search functions, increased information on each site and designing a look and feel that will appeal to a variety of user groups, such as home owners and tourists, as well as city officials.

- a) action required: Continue to update and manage a comprehensive website. Expand usability, accessibility, depth of information and links to heritage partners.

3.2. Objective: Foster accuracy and quality in conservation work.

3.2.1. Strategy: Preserve the integrity of Districts once they are designated.

HCDs will be effective to the extent that they continue to be managed and their guidelines enforced. An important strategy, in addition to ensuring the increased demand on HPS staff is accounted for, is to maintain the active participation of stakeholders, volunteers, residents, community groups, and other interested parties.

Many property owners are willing to work within HCD guidelines, but often lack the necessary information to do so. Providing this information early in the process may help instill an appreciation for the value of heritage resources and reduce the need for monitoring and enforcement. Two recommendations are made:

- Make a copy of the HCD Plan available (e.g. website) to new and existing HCD property owner and/or potential buyer, to make them aware of the HCD guidelines.
- Host regular training sessions for property owners, HCD stakeholders and interested parties. These events could:
 - inform interested parties on the merits and process of conducting an HCD study;
 - assist participants with the ongoing management of HCDs and heritage resources;
 - provide basic information and background materials on how to complete conservation projects and property alterations in accordance with HCD guidelines; and
 - if inclusive of different HCDs, can help participants network and share their respective knowledge.

a) action required: Develop and provide an information and operations package to each new property owner within an HCD.

b) action required: Educate property owners through regularly scheduled training sessions and information sheets, including conservation principles and skills.

Another important aspect of ensuring the long-term integrity of HCDs is the ongoing monitoring of new construction, demolitions and alternations. A strong link between the Toronto Building Division and Heritage Preservation Services is needed to provide building inspectors with the tools to conduct site inspections to ensure that property alterations are in accordance with specific HCD guidelines and easement requirements.

Nevertheless, in some cases heritage expertise will be required to understand the subtleties and trade-offs of heritage conservation. HPS should require the original heritage consultant (of the HIA2 and/or Conservation Plan) to follow through in the monitoring process, at the expense of the developer/owner.

c) action required: Ensure the Toronto Building Division is provided with the

appropriate knowledge and information to conduct site inspections.

d) action required: Require the original heritage consultant to monitor conservation work, at the expense of the developer/owner.

Furthermore, it is recognized that enforcement of HCD guidelines is both critical and difficult to manage.

Investigation Services of the Municipal Licensing and Standards Division (MLS) enforces provisions of the Toronto Municipal Code, among other things: to ensure properties are maintained at standards that stall the decay of neighborhoods and increase the quality of life in the City; and to ensure that specific safety concerns and emergencies within the authority of the Municipal Code are addressed in a timely manner.

It is imperative to enforce property standards for, and require the maintenance of, heritage resources (private and public). This will not only assist conservation but also prevent situations such as ‘block-busting’ in heritage properties. Enhancing the ability of the City to enforce conservation policy will cultivate an important incentive for compliance.

e) action required: Enforce property maintenance standards where required through the operations of MLS, fines and court.

3.2.2. Strategy: Improve the guidelines for conservation projects.

Certain heritage restoration and conservation projects require specialized skills and materials as well as a solid foundational understanding of what constitutes ‘appropriate’ work. “*The Parks Canada Standards and Guidelines for the Conservation of Historic Places in Canada*” have been developed for this very purpose. Employing the guidelines will be an important first step in ensuring proper restoration and conservation. A second step should be to review the effectiveness and suitability of these guidelines to the Toronto context as applied over a period of time, and edit or expand them where necessary. Not all sections or language will be consistent with municipal and/or provincial policy.

Also essential is increasing the knowledge of these standards among property owners, building inspectors, architects, and participating crafts and trades.

a) action required: Adopt the “*Parks Canada Standards and Guidelines for the Conservation of Historic Places in Canada*” as recommendations and make them widely available.

b) action required: Begin using and testing the Standards and Guidelines through

the evaluation of applications and the creation of Conservation Plans.

3.2.3. Strategy: Develop a strategy to manage signage on heritage properties.

Guidelines for managing the impact of change are typically created at the time of designating a property or district. However, in some cases, guidelines were not developed for dealing with signage given that conditions at the time may not have required them. Today, a trend to convert heritage properties to commercial uses (which results in signage being introduced where none existed prior), as well as the increase in number of commercial signage, third party signage, and advertising, requires a concerted strategy.

A strategy, an approach and guidelines for signage on heritage properties should be developed to guide property owners, BIAs, commercial tenants and City staff. The guidelines should also assist the efforts of parallel initiatives such as the Façade Improvement Program, Avenue Studies and Main Street projects, as they deal with heritage resources.

The resulting document should provide guidance for heritage properties and HCDs that do not already include an approach specific to signage and advertising with their designation, including: buildings, structures as well as public spaces, parks and landscapes. It should also provide a framework for evaluating heritage attributes related to signage and advertising in new designations, and to develop the corresponding guidelines.

a) action required: [Develop a strategy, approach and guidelines for signage and advertising on heritage properties.](#)

3.2.4. Strategy: Provide links and seek synergies with other concurrent City initiatives.

As heritage is recognized as an integral part of an effective planning system, conservation must be increasingly woven into all concurrent planning initiatives. The City undertakes a broad range of studies and plans, all of which have the potential to support conservation efforts. Some of these include, but are not limited to, initiatives such as the OP, Zoning By-laws, Avenue Studies, TTC, Creative City, Culture Plan, Façade Improvement Programs, Mainstreets, and others.

One initial opportunity to manage this relationship is by exploring a connection between the Archaeological Impact Statement and the proposed Heritage Impact Assessment. For example, HPS can use the information gained through

archaeological research to help identify properties and areas of the city with the potential to contain heritage resources. This has been included as part of the additional indicators for listing properties and identifying potential HCD study areas, under the premise that the period of settlement, construction and/or development suggests a potential cultural heritage value.

a) action required: [Formalize a link with the Archaeological Plan through the mapping and listing of HCD study areas and the Heritage Impact Assessment process.](#)

b) action required: [Ensure other planning initiatives have regard for heritage \(e.g. Secondary Plans, Community Area Design Guidelines and Avenue Studies\).](#)

3.3. Objective: Lead by example.

3.3.1. Strategy: Excel at heritage conservation and celebrate City-owned heritage.

The City possesses many significant heritage resources and must be a good steward of its heritage resources if it is to expect similar behaviour from the private sector. Currently, an audit of City owned heritage properties is underway. This is an important step that also requires the participation of Facilities and Real Estate, Design and Construction.

The City has an opportunity, through the management of its heritage properties to function as a catalyst for private sector conservation in areas of Toronto that require further revitalization. Investing, for example, in the conservation of a significant building will inspire confidence in neighbouring properties.

The City has a particular obligation with landscapes, given that most significant open spaces are held in public hands, including: parks, plazas and streetscapes. And given that landscapes constitute an integral part of districts, the City must lead by example, investing in public properties to encourage the corresponding private investments.

a) action required: [Continue audits of City owned heritage properties and preparation of the corresponding budgets and Conservation Plans.](#)

PRACTICAL PRESERVATION PORCHES

INTRODUCTION

A porch is a covered space sheltering the entrance, and is known for a pedimented roof supported on columns. It may project from ground level.


A veranda is an open porch, large enough for a sitting area. The porch is one of the most noticeable parts of a house. It is weather from all sides, and often enclosed, which can lead to heat that can diminish the historical style of the building.

Repair and maintain original porches or, if missing, rebuild original or a period design.


If the porch is a much later addition, and does not harmonize architecturally, remove it, and build a porch that is an authentic addition.

PORCH STYLES

The porch complements the style of the house. It is important to get the continuity of the style.



GOthic Revival 1840-1870 **ITA**



PRACTICAL PRESERVATION WOOD

INTRODUCTION

PRACTICAL PRESERVATION ARCHITECTURAL STYLES

This Practical Preservation has been developed to assist you in identifying the architecture of your building as well as other features found throughout Saint John. Understanding the style of your heritage building and its unique characteristics, you will be able to sensitively rehabilitate, develop a maintenance program, and carry out regular maintenance in ways that retain its uniqueness and value.

Style is a method of classifying or identifying those common characteristics of architecture. Style is not unique to architecture - it affects most things from the clothes we wear to the cars we drive. Styles of hats, for example, would be cowboy hat, top hat, fedora, etc. Styles of cars would be Ford, sedan, limousine, etc.

The architectural style of a building reflects the social, economic, and technological climate at the period the building was constructed. For example, with the invention of the automobile, shortly after 1885 (the Revolution), buildings became more richly detailed (gingerbread) and appealing. Building facades became simpler in the Moderne style which followed the 1929 stock market crash. Technological advancements and pressures made new types of buildings possible, while at the same time contributing to the loss of historic structures. As people strive to keep with the latest "fashionable" style, restoration, cultural background, building skills and materials used also affect architectural styles.

PRESERVATION PROGRAMS

The preparation of a Preservation Program identifies and retains the buildings while accommodating their long and useful life. The conservation of existing is essential for preserving your heritage.

PRESERVATION PHILOSOPHY

Saint John is notable for our historic buildings which help define the spirit of the city. Preservation programs provide complete work that preserves the architectural and historic buildings of Saint John providing a framework for building on it.

Preservation planning must be done for the building. Preservation guidelines:

- Work on a building show its character.
- If a building frame remains, consider reconstruction or alter and are out of the building.
- If a building frame requires matching materials, appropriate character of the building.

PRACTICAL PRESERVATION MASONRY

INTRODUCTION


Saint John has a rich variety of masonry buildings that form the character of our city. Individually, many of them are excellent examples of a particular style of architecture.

The historic value of any building is a product of its history, its architecture, and its contribution to the character of its neighborhood.

Preserve the original historic fabric. Repair, rather than replace deteriorated architectural features. When replacement is necessary, match the original appearance of existing masonry as closely as possible.

Do not restore or alter original material or decorative architectural features.

Remove buildings or portions of them only when social advances require it.




APPLICATION FOR A CERTIFICATE OF APPROPRIATENESS

Are you planning to work on your Heritage Building? The steps outlined in the following chart will make it easy!

- Contact the Heritage Development Office (508-2865)
- Pick up free helpful information on preserving your heritage building along with this application form for a Certificate of Appropriateness. Arrange a time to meet with the Heritage Development Office to talk about your project in detail.
- Read and complete the application form. Make sure you have the necessary information completed in order to make a submission for your Certificate of Appropriateness: Plans & Drawings, Preservation Program, Building Permit, etc. Single or contractor sheets are available and the Heritage Development Office for details.
- Once agreement on the nature and scope of your project has been reached, the Heritage Development Office will prepare a report to the Preservation Review Board. Your information will be included in the report.
- The Board meets every 2 weeks. If you have provided all the necessary information, the Board will either approve or deny a Certificate of Appropriateness. Your goals will be considered at the same time. The meetings are open and the public is invited to attend.
- If your application is approved, your Certificate of Appropriateness and Building Permit, if required, will be returned by the Building Department.
- After a 15 day appeal period, you can carry out your project. Make sure you keep your receipts to submit for your grant.

HERITAGE PLANNING
Community Planning



Committee on Historic Preservation
Association of Historic Sites & Buildings
American Revolution for State & Local History

APPLICATION FOR CERTIFICATE OF APPROPRIATENESS

BUILDING ON THE PAST - DEVELOPING FOR THE FUTURE

Saint John, New Brunswick has developed succinct, user-friendly pamphlets to engage the public on different heritage matters, including: heritage permits, the application process, restoration techniques, and heritage guidelines.

right - City of Saint John, Community Planning Department, brochures.

4. Goal: Generate Awareness

Rationale: Heritage conservation hinges on a wide range of participants. From individual property owners to the neighbours of a district, from City staff to elected officials, from community groups to heritage experts, from large developers to small renovators, from the construction industry to trades and craft workers, from residents to visitors, from architects to landscape architects, planners and urban designers – a full spectrum of people who interact with the city and make everyday decisions about its evolution. The extent and quality of conservation can only grow as Toronto’s inhabitants become increasingly aware of the city’s heritage resources, the value of heritage management and the tools and skills for conservation.

The City of Victoria is a good example where strong public awareness has resulted in successful conservation. In the words of a stakeholder interviewed for their 2002 Heritage Strategic Plan, *“It is no longer necessary to convince people that heritage is a good thing. There is close to 100 per cent buy-in”*.

Current Condition: Responsibility for heritage awareness is spread across a number of City Divisions and Heritage Toronto. Within the broader community, there are many groups that have assumed responsibility for raising heritage awareness around defined districts or issue areas. The dispersal of activities that emerged following the amalgamation of the City in 1997 has resulted in some heritage groups, at times, working at cross purposes.

While certain programs, such as Doors Open Toronto, are very successful, there is a marked lack of educational resources (human and physical, such as books and information materials) for the general public, or for promoting heritage in school curriculum and teaching the principles and practice of conservation at the university-level in architecture and planning programs, and through hands-on college training.

In general, beyond a small yet actively engaged heritage community, heritage management is frequently misunderstood and undervalued.

Response: The value of heritage management and conservation in Toronto needs to be documented and publicized. This message must be understood by all stakeholders: politicians, the development industry, property owners, and most importantly, the general public. Education about heritage conservation can take many forms: it can be directed in school curricula, public events, the internet and print resources, exhibitions, awards, lectures and workshops.

Awareness should be considered a shared responsibility and should be undertaken by a variety of heritage organizations. This Plan identifies the strategies that Heritage Preservation Services can undertake, but also identifies a set of

additional strategies that are significant and should be undertaken by a body such as Heritage Toronto (subject to a revised Structure for Heritage Management).

4.1. Objective: Position heritage conservation as an important part of a liveable, sustainable, and contemporary city.

A key aspect of increasing the interest for conservation, and consequently the awareness regarding the process and value, is to generate explicit links to other city building objectives (that are prominent on the public agenda) such as, but not limited to: a sustainable environment, economic development, and the quality of life in urban spaces. For example, by studying and disseminating information regarding the percentage of building remnants in landfills, an argument can be made for the positive environmental impact of heritage conservation.

4.1.1. Strategy: Increase awareness on City Council about the value of conservation.

Recognizing that heritage management is a shared responsibility, it is critical that politicians on Community Councils and City Council be aware in all of their decisions and approvals of the value of heritage management and that they fully respect the integrity and significance of heritage in the city. This sense of responsibility must also extend to the staff of all City departments and public agencies.

City Council in particular has a crucial role to play. Some of the most important decisions end up on Council floor, including, but not limited to: listing and designating properties and districts; public expenditures and grants for conservation; the approval of developments that affect heritage resources; and the conservation of the City’s own heritage properties. Furthermore, given Toronto’s ward system, it is often a single councillor who resolves key decisions within ward boundaries. For all of these, and more, it is critical that councillors are well aware of the value of heritage management (short and long term) and are able to consider the implication for heritage in all their decisions.

One strategy to achieve this, in addition to regular information sessions, is to promote heritage advocates among City Councillors.

a) action required: [Hold regular information sessions with Council and promote heritage advocates among City Councillors.](#)

4.1.2. Strategy: Develop and publicize information materials.

Assisting the public to make informed decisions on upgrades to private property and interventions which may result in more sensitive improvements, renovations and restorations. This information should be conveyed through the City’s website and through a full catalogue of information sheets (already under way).



There are several good precedents in Toronto of public events and campaigns that have made a significant contribution to raising awareness about the city's heritage resources, such as Doors Open and the Festival of Architecture and Design (fAd).

top left - Doors Open, (Source: Doors Open Toronto, Toronto Culture)

top right - Heritage Toronto Walks Ashbridge Estate (Source: Heritage Toronto)

bottom left - Cambell House, Doors Open, (Source: Doors Open Toronto, Toronto Culture)



a) action required: Continue to create and/or adapt information sheets for conservation standards and processes.

4.2. Objective: Encourage heritage conservation in all projects, where heritage resources exist.

4.2.1. Strategy: Promote the understanding that heritage conservation can provide economic benefits.

“The existence of dynamic, risk-taking and creative investors, with a passion for beautiful older buildings, is probably the most important single element in the heritage development industry” (Shiple et al, 2006). This is the conclusion reached by the Heritage Resource Centre’s research on the economics of heritage conservation in Ontario.

For property owners and private developers, the most convincing argument will often be the precedents established by others. To that effect, it will be useful to maintain a portfolio (e.g. on the website) of the best conservation practices from the Toronto and Canadian context to introduce developers to high quality restoration and conservation projects, including a cost analysis (see Shiple et al, 2006). This portfolio should emphasise the financial viability of conservation as well as methods to yield returns on heritage investment. The cost analysis component is important to help potential investors understand the long term value, and help them identify ways of achieving their conservation goals.

a) action required: Maintain a portfolio of the best conservation practices.

4.2.2. Strategy: Engage the private sector in heritage conservation.

Currently, investment in conservation by the private sector is inhibited in part by: a) limited financial incentives for conservation provided by the public sector; and b) the initial investment costs (real or perceived) required for a conservation project. One section of this Plan is dedicated in part to identifying financial tools that can make conservation more attractive to the public sector. This section seeks to draw attention on the need to identify means by which the private sector may value restoration and adaptive re-use from a variety of perspectives, including market value, commercial value, construction value, cultural value and environmental value.

One strategy is to identify and support champions for conservation from within the private sector. Often private sector investors will relate more closely with one of their own. Private sector champions (individuals and/or bodies) will also be able to demonstrate that conservation has value, from the perspective of private investment. Part of this strategy entails supporting and publicizing local initiatives. By working closely with individuals and associations that are engaged in conservation and awareness, the network of sympathetic people will continue to grow.

a) action required: Identify and support champions for conservation (individuals and/or associations) from within the private sector.

4.3. Objective: Ensure heritage awareness grows throughout the city.

4.3.1. Strategy: Extend efforts to those areas of the city that are under-represented.

Through consultation conducted for this Plan many stakeholders recognized that areas outside downtown, undeservedly tend not to have the same level of scrutiny from the public on heritage matters. This, in part, is due to: the different histories of heritage management in the different urban centres pre-amalgamation; the particular culture and interest of the officials that represent these areas; and the erroneous perception that heritage resources are limited to historic downtowns, of which downtown Toronto is the most notable.

The tools, criteria, and indicators for identifying heritage resources (presented in the Framework section) are the same for all areas of the City. Throughout the different tasks related to the preparation of an inventory and the evaluation of heritage resources, as well as through the raising of awareness on conservation matters, it is critical to consider areas of the city that are under represented in the City’s Inventory. Identifying heritage resources everywhere they exist will help raise awareness about them, and that in turn will help with their conservation and with the identification of further heritage resources.

Following the creation of a list of areas for HCD studies, some areas outside downtown may be prioritized, with the objective of raising awareness.

An additional strategy to increase awareness of heritage resources in areas whose heritage has not received significant attention is to actively engage the volunteer sector of these areas.

a) action required: Pursue new HCD studies in under represented areas.

b) action required: Nurture Community Panels and volunteer efforts in under represented areas.

c) action required: Foster local heritage awareness groups and assist in providing them with the knowledge base about their local heritage and about conservation (e.g.lecturers or instructors).

4.3.2. Strategy: Celebrate and publicize conservation successes.

A significant component of increasing awareness is celebrating and publicizing success stories. In addition to maintaining a portfolio of the best conservation

practices (recommended earlier), awards tend to draw public attention on worthwhile projects. They are also an incentive to investors, developers, designers and other consultants to raise the bar. The City of Toronto, alongside several of the professional organizations, currently supports a wide range of Award programs. Continuing and enhancing this support will help build a culture of excellent conservation.

a) action required: Promote Heritage Conservation and related awards.

4.4. Objective: Generate Awareness through partners outside HPS

Previous strategies, presented under the goal of generating awareness, were oriented to the activities of Heritage Preservation Services. Generating awareness, however, is a goal that should also be pursued by other heritage related organizations and other members of the heritage community. Heritage Toronto, specifically, has as part of its stated responsibilities to “promote and educate the public regarding heritage issues”. Albeit, the role and function of Heritage Toronto may change when a new structure for heritage management is developed and implemented. As well, other bodies may also assume a role promoting an understanding and appreciation of the value of Heritage.

The following strategies (under this goal) should be undertaken by a body such as Heritage Toronto:

4.4.1. Strategy: Promote public awareness of heritage resources and the value of conservation in all City initiatives.

The City is currently engaged in several high-profile campaigns, which have the potential – if linked – to increase the profile of heritage conservation as an essential public initiative. Some of these include ventures around archaeology planning, architecture and sustainability, and have resulted in successful programming, such as walking tours, awards, and festivals.

Similar initiatives exist at different levels of government. At the Federal level, the Department of Canadian Heritage manages heritage policies and programs, including the “*Canadian Heritage Information Network*”, the “*Virtual Museum of Canada*” and the “*Canadian Conservation Institute*”, which promote awareness, appreciation and protection of Canada’s heritage.

a) action required: Explore links between heritage goals and other City Initiatives including Walking Tours, Design Awards, Green Awards, the Festival of Architecture and Design, Luminato and Doors Open Toronto.

4.4.2. Strategy: Educate the public about conservation and about

Toronto’s heritage.

Education is a provincial mandate. The City does not have a say over the content of school curriculum. However, the City can advocate for such things as an increased exposure to conservation matters to be included in the school curriculum. Advocating this initiative may also be a valuable role for the volunteer sector and for Heritage Toronto.

In addition to the general education of schoolchildren, high-quality conservation and restoration work depends on trades people who possess the required skills. The City and the volunteer sector may be able to advocate for such training to be included in colleges, schools, and training sessions offered by unions and other such organizations.

- a) action required: Advocate for curriculum resources and programs to bring heritage education and a focus on conservation to schools.
- b) action required: Advocate for curriculum resources and programs to include technical restoration skills as part of professional and trade education.

One of the stakeholders responsible for coordinating training on behalf of a trade union, clearly outlined that trades people will only locate in the Toronto area if there is a recognized market for their skills. One way the City of Toronto can help is by assisting potential employers to connect with skilled trades people, and correspondingly, by disseminating information about potential employment opportunities at schools, colleges, and other venues.

- c) action required: Advocate for the creation of links between employers and skilled trades’ people, starting from the school level.

The City can also operate directly with community groups and agencies, developing mechanisms that involve residents in creating awareness such as by setting up commemorative programs associated with their local heritage resources (e.g. plaques, festivals, newspapers, publications, events, and tourist circuits).

The plaque and historical marker program run by Heritage Toronto, for example, has operated successfully for a number of years and has become an instrumental mechanism for the general public to identify properties with a recognized heritage value.

- d) action required: Encourage and expand existing community based initiatives and other initiatives such as Heritage Toronto’s plaque and historical marker program.

5. Goal: Appropriately Fund Conservation

Rationale: Appropriate funding for heritage management will ensure that the public sector can perform to the best of its ability, and that effective financial incentives are created for the private sector. Advocating for appropriate funding will not be an easy task – it will require strategic interventions and a fundamental reconsideration of priorities at the City of Toronto City Council level. Appropriate funding may also mean reshaping how incentives are distributed in addition to determining how much.

The City of Victoria, for example, has been careful to correlate public expenditures on conservation and the corresponding return on investment. As a result, they have been able to clearly demonstrate the economic value for both the public and private sectors and build an investment case for public spending.

Current Conditions: Inadequate funding and under staffing are creating a compromised environment for the management of heritage resources and for the practice of conservation. This in turn serves to generate misunderstandings about the effectiveness of conservation and its value to the future of this City. For the public sector side it will become increasingly challenging for staff to meet their professional obligations for defensible due diligence in a context where they are significantly under resourced and therefore unable to undertake the research required to understand an increasing number of identified heritage resources. For the private sector it is essential to make conservation financially viable and attractive. Only when the financial benefits are well understood and able to offset the risks (real or perceived) will conservation become more widespread.

Response: A renewed funding structure should address staffing needs and allow for continued professional development (at all levels of the management structure). An increase in financial resources should provide City staff with the ability to initiate new heritage management and conservation programs and to assist the private sector to leverage monies for high quality conservation projects.

This section is structured around 3 key objectives, intended to:

- continue to ensure City staff are able to fulfil their mandate with professional integrity;
- assist the private sector to avail itself of financial incentives; and
- nurture the economic self-sufficiency of managing heritage resources.

5.1. Objective: Ensure City staff have the resources necessary to fulfill the objectives of the Management Plan.

5.1.1. Strategy: Match HPS workload with the number HPS staff.

Several of the recommendations set forth in this Plan may result in an increased workload for HPS staff. To ensure that the quality and integrity of their work is sustained, the number of staff with architectural and technical expertise may need to be adjusted. An increase in staff resources will assist HPS to meet its mandate and limit the number of reactive measures taken to ensure that heritage under immediate threat is conserved. New staff will increase the ability of HPS to monitor the maintenance of designated properties, administer funding programs, and facilitate the continued production of well-researched, scholarly reports.

- a) action required: Consider increasing the number of qualified HPS staff, when implementing the recommendations of this Plan.

5.1.2. Strategy: Ensure that staff at HPS are valued.

The role, position and pay structure of HPS within the City's bureaucratic structure corresponds to a period when HPS was related to the Culture Department. Today, HPS resides within Planning and the structure of staff positions should be revised accordingly. HPS Staff are currently positioned on a lower pay structure than similar positions within the Planning Division, and this acts as a disincentive to attract and retain staff.

The structure of staff positions within HPS should be considered as part of the detailed review of the Heritage Management structure, during subsequent phases of the Heritage Management Plan.

- a) action required: Re-evaluate the position of HPS within the overall bureaucratic structure.

5.1.3. Strategy: Continually enhance the heritage expertise of City staff.

As with any position that requires knowledge and expertise, continued education and professional development is integral to sustain the quality of work. HPS staff need time and support for ongoing professional development, to be up-

to-date on current heritage practices, issues and debates that are occurring in Toronto and beyond.

This practice must extend to other City staff. Heritage issues cut horizontally across city divisions. Ensuring that City staff in all relevant divisions have a sense of the value of heritage and understand the principles of conservation will result in more effective conservation.

- a) action required: Continue to maintain and improve the professional development of existing HPS staff, through continued education and scholarly exchange.
- b) action required: Provide inter-departmental sessions to enhance the heritage expertise of City staff from Toronto Buildings, City Planning and other related divisions.

5.1.4. Strategy: Ensure funds are available for the study and management of HCDs.

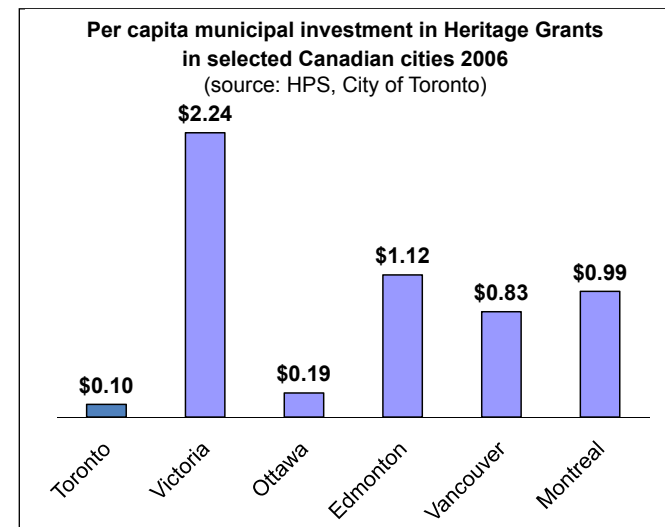
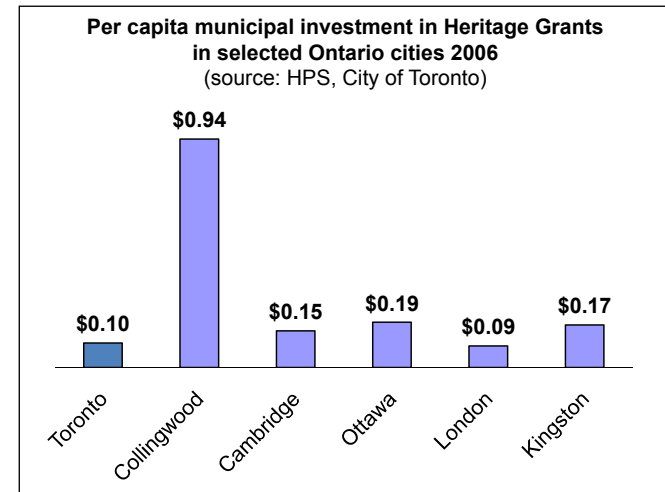
Given that HCD studies are identified in this Plan as a strategic mechanism to study, identify, designate, and conserve a large number of heritage properties, it is important to ensure that the necessary funds are available to conduct the studies, and manage districts. Several recent HCD studies were funded through Section 37. Should this source of funding cease or not be sufficient, new sources of funding must be identified and secured.

- a) action required: Allocate funds for the study and management of HCDs.

5.2. Objective: Assist the private sector to avail itself of financial incentives.

A study conducted by the Heritage Resource Centre (Shiple et al., 2006) reviews a range of conservation projects in Ontario to understand their economic impact and concludes that on average: a) adapting a heritage building for new use is only slightly more expensive than constructing a new building; and b) the rate of return on investment in heritage buildings is higher than on new buildings. These are significant conclusions, since they help mitigate a concern from the development community that investing in conservation may not be financially worthwhile.

The study (Shiple et al, 2006) also recognizes that municipalities have much to gain



In a comparative survey of cities across Ontario and Canada, Toronto ranks low on its public investment on Heritage Grants on a per capita basis. The study was conducted by HPS at the City. This statistic – when compared with studies that suggest that investing in conservation provides notable economic returns to municipalities – suggests that Toronto is missing out on a significant opportunity.

from heritage conservation, directly (e.g. increased property taxes) and indirectly (e.g. tourism). As such, the City must function as a partner, enabling private sector conservation by creating a clear and consistent process, and by assisting developers and property owners to access capital (financial and intellectual).

A number of heritage related programs are funded and administered by the Government of Canada. Several of these are geared towards awareness, capacity building, and community involvement, in addition to the conservation of significant public spaces. A description of the different programs can be found on The Department of Canadian Heritage website: http://www.pch.gc.ca/progs/ph/prog_e.cfm.

The Province of Ontario also manages a series of heritage related programs through the Ontario Heritage Trust. These include many resources for the general public to become aware and involved in heritage related initiatives. An updated list can be found at: http://www.heritagefdn.on.ca/userfiles/HTML/nts_1_23_1.html.

Currently there are limited municipal incentives available to property owners for conservation projects. This number is not expected to grow significantly in the near future. Therefore, the best approach will be to:

- make the best use of municipal financial incentives and mechanisms, currently available;
- identify alternative mechanisms, available to the private sector, that can foster conservation; and
- leverage these funds to gain further resources.

Some of the existing municipal mechanisms include the Heritage Grant Program, the Façade Improvement Program and Tax Increment Financing.

5.2.1. Strategy: Enhance the Heritage Grant Program.

The Heritage Grant Program has nearly expended its current fund. The future of the Heritage Grant Program depends on securing additional funds. HPS has prepared a detailed report that documents the history of the Heritage Grant Program, outlining the recent decision to invest the base capital of the fund (established by the Province and the City in 1986) in heritage grants.

The direct economic benefits of the Heritage Grant Program are also well documented by HPS, concluding that: 1) for every \$1 the City provides to property owners in Heritage Grants it is estimated that the owner will spend

\$8.49; and 2) the increase in property value results in increased property tax assessment, which typically repays the Heritage Grant in less than 1 year. (Note that the increase of the property tax assessment can be a disincentive to property owners. See 5.2.7.) To this we must also add the indirect economic benefits, such as the increase in property value of surrounding properties.

Currently, there are 6,000 properties on the Inventory that meet the criteria for designation and may apply for a Heritage Grant. This number is expected to grow significantly.

Replenishing and increasing the Heritage Grant Program fund is a clear priority – as a proven, successful mechanism for the City to invest in, and profit from, conservation. Determining the appropriate level of funding should emerge from a long term budget strategy, which encompasses other City investments, such as a fund dedicated to studying and managing HCDs.

a) action required: [Increase funding of the Heritage Grant Program to appropriate levels.](#)

5.2.2. Strategy: Combine heritage grants with the Façade Improvement Program.

Currently there is no formal link between the Façade Improvement Program and HPS, except for applications pertaining to buildings that are on the Inventory. In many cases, façade improvements have resulted in the destruction of heritage façades when the subject property is not yet on the Inventory. To ensure that alterations to heritage façades that have not yet been identified are conserved, there should be a stronger link between HPS and the Façade Improvement Program.

b) action required: [In order to strengthen the Inventory, require that all applications of the Façade Improvement Program be reviewed and approved by HPS, through a Heritage Impact Assessment. Target grants in districts on the list of HCD study areas.](#)

5.2.3. Strategy: Combine heritage grants with other types of grants.

Opportunities should be explored where grant programs and financial incentives offered by the City for different objectives can be tied into conservation efforts by:

- including a heritage component in grant programs that do not specifically cover the conservation and promotion of heritage; and

The Distillery District is an often cited example of a heritage conservation project, which included the adaptive re-use of industrial buildings and has become the trigger for the redevelopment of an entire neighbourhood, and a successful venture for the private developers involved. Documenting and publicizing these success stories will help other investors and stakeholders understand the value of conservation.



top left - Distillery District, Toronto

top right - The Roundhouse, Steam Whistle Brewery, Toronto



bottom left - Bloor West Village, the adaptive re-use of an old cinema as a bookstore, Toronto

bottom right - Gladstone Hotel, Queen Street West, Toronto



- favour applicants that consider heritage through joint applications.

For example, incentives that support environmental initiatives or affordable housing can favour projects that include a component of heritage conservation.

- a) action required: Include heritage as a consideration for other City grants and programs.

5.2.4. Strategy: Implement Tax Increment Financing (TIF).

TIF is a financial tool that is currently available, but has not been used or tested in Toronto for heritage conservation. TIFs may be especially useful when considering ways to fund HCDs. The boundaries of a heritage conservation district provides a natural boundary for TIFs in that they are already defined and approved as an area with special identity.

The merits of using TIFs in conjunction with other financial tools available such as the Brownfield Financial Tax Incentive Program (BFTIP), should also be explored and tested. (see “*Tax Increment Financing: Developing a Model for Ontario*”, Discussion Paper by the Ontario Ministry of Finance, Sept. 2005.)

The City of Chicago, for example, has over 130 TIF Districts, many of which overlap with designated landmark districts or encompass designated landmark buildings.

- a) action required: Create a pilot TIF district based on a HCD.

5.2.5. Strategy: Assist property owners and private developers to leverage funds for use in conservation and adaptive re-use projects.

There are different ways in which property owners may be able to leverage relatively small amounts of money to access larger funds. HPS, the Finance Division, and the City must be creative and continue to work with property owners and developers to identify opportunities, tailored for each circumstance.

One area for exploration is the need for investors to access loans. Here, the opportunity is to direct the public capital offered for conservation as part of the guarantee for securing a loan. The ability, for example, to direct a rebate to a lender may be more valuable to property owners than the initial allowance (e.g. a tax rebate). Using a rebate as a revenue stream on a loan will allow property owners to leverage more funds, since it may encourage lenders to give

the private sector access to more financing options. This is an idea that requires further exploration and the involvement of the City’s Finance Division.

- a) action required: Engage the City Finance Division and financial advisors to consider mechanisms through which property owners can obtain loans for heritage conservation. Consider offering the tax reduction as a rebate assignable to financial lenders on heritage projects.

5.2.6. Strategy: Identify and implement mechanisms to offset the risk to owners of heritage properties.

Currently, insurance companies are reluctant to insure older structures due to actual or perceived liability. This acts as a disincentive and as an additional cost to conservation. While the City is not responsible for setting insurance premiums, it may:

- alongside other partners in the heritage community help inform insurance companies of the merits of conservation towards stabilizing and increasing the life of structures;
- provide some level of assurance, by directing conservation funds towards certain potential claims, such as the restoration of a façade.

- a) action required: Engage insurance companies to identify mechanisms that will encourage them to insure heritage resources.

5.2.7. Strategy: Consider a separate tax system for heritage properties.

A common constraint identified by stakeholders is the increase in property taxes that often follow significant conservation work. Restoration of The Carlu, for example, resulted in a significant increase to the property tax assessment. This can often act as a disincentive to conservation, and may reduce the benefit of municipal investments such as the Heritage Grant Program.

Subsequent phases of the Heritage Management Plan should engage Finance to identify options and mechanisms in how property taxes are collected and how property tax assessments are conducted, that can offset or defer the cost of conservation.

- a) action required: Engage Finance to evaluate how property tax collection and assessments can support conservation.

5.2.8. Strategy: Consider different packages of incentives for

large developers and small scaled property owners.

The needs and incentives for conservation will vary between different scales of development. For example, a tax relief may be more attractive to a small property owner, where density bonusing may be more attractive to a large scale developer. Different programs should be developed considering each scale in regard to: funding mechanisms, education, and the sharing of heritage expertise.

- a) action required: Ensure that conservation incentives geared towards the private sector are inclusive of different scales of development.

5.3 Objective: Nurture the economic self-sufficiency of managing heritage conservation.

Opportunities must be explored for implementing the recommendations of this Plan in a way that makes them self-financing. Programs, permits, assessments, and research should be linked, to the extent possible, to a source of revenue (public or private). In this way, new management measures will increasingly be self-financing and their implementation will be enabled.

5.3.1. Strategy: Implement user fees for services.

Introducing fees for specific services in one way to ensure that new programs (recommended in this Plan) minimize the expenditure of additional HPS funds. For example, an application fee can be instituted with the Heritage Impact Assessment – much like a building permit, the cost of providing assessments and reviewing applications can be directed towards the applicant.

- a) action required: Consider introducing a fee for the Heritage Impact Assessment Phase 1.

Certain costs of managing HCDs may be levied from the HCD itself, increasing their viability and the effectiveness of conservation. Similar to how a BIA levies contributions from its members to cover operating costs and initiatives, an HCD may generate an operating budget from its membership.

- b) action required: Evaluate and implement a pilot project for the collection of a percentage of property taxes in HCDs to be utilized for the ongoing maintenance of the HCD.

5.3.2. Strategy: Consider introducing a system of fines.

Generally, conservation tools built around incentives are more desirable than penalties. However, a system of fines and other forms of penalties may help strengthen heritage related policies and agreements. A system of fines should not be introduced as a mechanism to levy funds, but rather as an incentive for conservation.

The City of Chicago has instituted a system of fines as part of the Landmarks Ordinance for failure to perform any act required by the ordinance or for performance of the act prohibited by the ordinance. These may include but are not limited to, failure to maintain landmark buildings or unauthorized alteration or demolition of landmarks.

- a) action required: Determine the practicality of introducing a system of penalties, and the most effective structure of fines for each heritage conservation program.



Summerhill Station (Source: Goldsmith Borgal)

10 priorities – Establishing a course of action

The list of priorities presented here is drawn from the Framework and Strategy for Heritage Management and the corresponding recommendations for action. Priorities are laid out on two horizons, Stage A and Stage B.

Stage A includes all actions required to begin implementing the Heritage Management Plan Phase 1. Stage B includes all actions that require (and follow) the implementation of Stage A. They are laid out as follows:

Stage A – 5 steps

- A1 Carry out subsequent phases of the Heritage Management Plan.
- A2 Adopt enabling legislation.
- A3 Focus on the Inventory.
- A4 Encourage participation from the private sector and the general public.
- A5 Further develop alternative sources of funding.

Stage B – 5 steps

- B1 Increase access to incentives.
- B2 Conduct studies for listing and designating.
- B3 Focus on the stewardship and conservation of properties and districts on the Inventory.
- B4 Lead by example.
- B5 Continue to encourage participation from the private sector and the general public.

Each step includes a series of required actions (identified with the reference number, which is related to their location within the Plan). Actions have been divided between ‘priority actions’ and ‘other required actions’, as follows:

- ‘Priority actions’ are those that enable further actions.
- ‘Other required actions’ are those that are necessary to achieve the goals of the Heritage Management Plan, but their completion is generally not a requisite for the sequencing of other actions.

Stage A – 5 steps

A1 Carry out subsequent phases of the Heritage Management Plan.

Some components of the Heritage Management Plan Phase 1 require further development and additional consultation. These include exploring the viability and details of different strategies, initiating the mapping and inventorying of different areas of the city and most noticeably, revising the organizational structure for Heritage Management.

Revising the structure for heritage management is a key priority, and entails evaluating and re-defining the role, function and relationship of all bodies (above and beyond HPS) engaged in heritage management and decision making. This task should be conducted through an open and participatory process that includes all key stakeholders.

Priority Actions:

- 1.2 Develop the requirements for the HIA including a standardized form for HIA1; develop a system for mapping the results of HIAs across the city; and develop a strategy and timeline for the implementation of the HIAs.
- 1.4 Apply the indicators to identifying potential heritage value across the city to map potential HCD study areas. With districts that are listed for HCD studies, City staff may consider listing all properties.
- 2.1 Study and consider specific changes to the organizational structure based on issues identified through Phase 1.
 - 3.1.2 Create a standardized approach to documenting and evaluating HCDs to ensure the studies and designations are consistent.
 - 3.1.3 Create an inventory of cultural heritage landscapes.
 - 5.3.1 Consider introducing a fee for the Heritage Impact Assessment Phase 1.

Other Required Actions:

- 3.1.2 Create and publish an information package that illustrates the process and guidelines for the study and designation of an HCD.
- 3.1.4 Develop measures and guidelines for the conservation of trees and stands of trees.
- 3.2.3 Develop a strategy, approach and guidelines for signage and advertising on heritage properties.
- 4.1.2 Continue to create and/or adapt information sheets for conservation standards and processes.
- 5.1.2 Re-evaluate the position of HPS within the overall bureaucratic structure.
- 5.2.5 Engage the City Finance Division and financial advisors to consider mechanisms through which property owners can obtain loans for heritage conservation. Consider offering the tax reduction as a rebate assignable to financial lenders on heritage projects.
- 5.2.7 Engage Finance to evaluate how property tax collection and assessments can support conservation.

A2 Adopt enabling legislation.

Adopting this Plan and the proper policy tools for heritage management is a critical first step. Much of these are already in place, such as the new Heritage Act, and provide an excellent framework for heritage management. A few others will help support and enhance this framework, and include:

- the principles for heritage management presented in this Plan;
- the additional ‘indicators’ proposed in this Plan, and:
- “*Parks Canada’s Standards and Guidelines for the Conservation of Historic Places in Canada*”.

Priority Actions:

Sect.B Adopt the principles for Heritage Management.

- 1.1. Adopt the additional indicators, and employ them for Heritage Impact Assessments, and for the identification of HCD study areas.

Other Required Actions:

- 3.2.2 Adopt the “*Parks Canada Standards and Guidelines for the Conservation of Historic Places in Canada*” as recommendations and make them widely available.
- 3.2.2 Begin using and testing the Standards and Guidelines through the evaluation of applications and the creation of Conservation Plans.

A3 Focus on the Inventory.

A key issue identified through this Plan is the need to significantly increase our understanding of heritage resources across the city. The best mechanism to do this is by conducting the necessary studies required to include properties and districts on the Inventory.

Strategically, focusing on HCD studies will enable the evaluation of a greater number of heritage properties, than looking at each one individually. HCDs will also oblige the study of landscapes and natural features, which are currently noticeably underrepresented on the Inventory.

In addition to employing the existing mechanisms for identifying heritage resources, this Plan sets forth new mechanisms for achieving this objective. These require further development through their implementation, and include:

- Implement a Heritage Impact Assessment (HIA) process in two phases. This is a critical measure to ensure all properties facing interventions are properly evaluated, especially as the Inventory continues to be updated.
- Maintain a list of HCD study areas. This is an important first step in mapping out areas of the city with potential heritage value. It sets the stage for systematically undertaking a series of HCD studies over the next several years.
- Prepare an inventory of natural features and cultural heritage landscapes. The policy tools for listing and designating natural features and cultural heritage landscapes are the same as for other heritage resources, however, preparing a methodical listing of these resources can help give them much needed attention.
- Adopt and employ new indicators for identifying properties and districts with potential cultural heritage value. It is important to note that these additional indicators are not intended to be used for determining heritage value, but rather as an early detection system that can identify conditions that require further research. These new indicators will be most helpful when: a) creating the HIA Phase 1; and when assessing areas of the city that should be considered for HCDs.

Priority Actions:

- 3.1.2 Focus efforts towards the creation of new HCDs identified on the list of HCD study areas that have either: a) strong community support; or b) significant value to the city.
- 3.1.2 Encourage Community Panels, ratepayers, residents and business improvement associations to consider listing their areas for HCD studies.

Other Required Actions:

- 3.1.1 Study significant structures of the 20th Century for new listings and designations.
- 3.2.4 Formalize a link with the Archaeological Plan through the mapping and listing of HCD study areas and the Heritage Impact Assessment process.
- 3.2.4 Ensure other planning initiatives have regard for heritage (e.g. Secondary Plans, Community Area Design Guidelines and Avenue Studies).
- 5.2.2 Require that all applications of the Façade Improvement Program be reviewed and approved by HPS, through a Heritage Impact Assessment. Target grants in districts on the list of HCD study areas.

A4 Encourage participation from the private sector and the general public.

Successful heritage management relies on the active involvement of the public, residents, property owners and developers. First steps to further this idea include:

- Continue to engage communities, volunteers and heritage enthusiasts by focusing their efforts around HCD studies. Not only are HCD studies an effective mechanism to identify large numbers of heritage resources, but they also represent an effective mechanism to engage and inform a larger number of people.
- Prepare information materials, about the different policies and processes for heritage management (including HCDs), as well as guidelines for interventions in heritage properties.
- Enable private sector participation and investment by engaging property owners and developers, enhancing the tools at their disposal and the profile of successful conservation projects. This is a strategy that will develop and build overtime, but it is one that can begin immediately through strategies such as identifying and supporting champions.

Priority Actions:

- 3.1.5 Create cross-departmental mechanisms to be aware of requirements for heritage easements and specifically charge and train staff in this role.

Other Required Actions:

- 3.1.6 Continue to update and manage a comprehensive website. Expand usability, accessibility, depth of information and links to heritage partners.
- 3.1.6 Continue to ensure the Inventory file in Public Libraries and City Archives is kept up to date.
- 3.2.1 Develop and provide an information and operations package to each new property owner within an HCD.

A5 Further develop alternative sources of funding.

This Plan acknowledges that much of the onus of conservation relies on the active participation of the private sector, and that their participation will only increase if the economics of conservation work. The Plan proposes several strategies that have the potential to increase the interest of conservation by property owners, residents and developers, such as: combining heritage grants and other municipal grants; creating a pilot Tax Increment Financing (TIF) district based on a HCD; and engaging the financial sector to identify mechanisms to leverage financial resources and mitigate the risks of conservation.

Priority Actions:

- 5.1.4 Allocate funds for the study and management of HCDs.
- 5.2.3 Include heritage as a consideration for other City grants and programs.

Other Required Actions:

- 5.2.4 Create a pilot TIF district based on a HCD.
- 5.3.1 Evaluate and implement a pilot project for the collection of a percentage of property taxes in HCDs to be utilized for the ongoing maintenance of the HCD.

Stage B – 5 steps

B1 Increase access to incentives.

Over the course of the first few years of implementing the Plan, new sources to fund the management and conservation of heritage resources need to be identified, secured and leveraged for both the public and private sectors. Additional funds will increase the scale of the initial investment, and exponentially increase the value of engaging in conservation initiatives.

Priority Actions:

- 5.1.1 Consider increasing the number of qualified HPS staff, when implementing the recommendations of this Plan.
- 5.2.1 Increase funding of the Heritage Grant Program to appropriate levels.
- 5.2.8 Ensure that conservation incentives geared towards the private sector are inclusive of different scales of development.

Other Required Actions:

- 5.2.6 Engage insurance companies to identify mechanisms that will encourage them to insure heritage resources.
- 5.3.2 Determine the practicality of introducing a system of penalties, and the most effective structure of fines for each heritage conservation program.

B2 Conduct studies for listing and designating.

Several of the previous strategies will help identify properties and districts that should be studied for listings and designations. For example, the Heritage Impact Assessments will result in properties being recommended for listing and/or designation. The listing of HCD study areas will entail a systematic study of districts (5-10 HCD studies per year is the recent norm). And the evaluation of natural features, cultural heritage landscapes, stands of trees, and thematic studies will also yield a number of properties that should be studied for inclusion on the Inventory.

Priority Actions:

- 3.1.1 Undertake the necessary studies for listing and designation of structures that are identified as significant heritage resources through the HIA.

Other Required Actions:

- 3.1.1 Review and update listed and designated structures’ documentation and By-laws and reasons for designation to be in keeping with changes to the Heritage Act.
- 3.1.3 Conduct the necessary documentation and evaluation of natural features and cultural heritage landscapes that may be listed and/or designated under Part IV or Part V of the Ontario Heritage Act.
- 3.1.4 Include historic trees and stands of trees as part of the Inventory.
- 4.3.1 Pursue new HCD studies in under represented areas.

B3 Focus on the stewardship and conservation of properties and districts on the Inventory.

As the Inventory expands, it is critical to focus energy on the actual conservation of heritage resources. The designation of HCDs, for example, will result in a significant number of properties added to the Inventory. These properties will require attention, supervision and ongoing interaction with HCD property owners and stakeholders. If HCDs are not attended, they will lose credibility as an effective tool for conserving heritage value.

Priority Actions:

- 1.2 Continue to require a Conservation Plan with applications for alternation in properties with identified heritage attributes.
- 3.2.1 Require the original heritage consultant to monitor conservation work, at the expense of the developer/owner.

Other Required Actions:

- 3.1.1 Consider forwarding designation to the Canadian Register of Historic Places.
- 5.1.3 Continue to maintain and improve the professional development of existing HPS staff, through continued education and scholarly exchange.
- 5.1.3 Provide inter-departmental sessions to enhance the heritage expertise of City staff from Toronto Buildings, City Planning and other related divisions.

B4 Lead by example.

The City has an obligation and an opportunity to provide leadership, setting a high standard for heritage management, stewardship, and conservation, by focusing on City owned properties. These should become beacons for proper conservation, and function as catalysts, inspiring private sector involvement.

Cultural Heritage Landscapes, in particular, are often held by a government body. The proper conservation of parks, plazas, streetscapes and other landscapes is integral to the cohesion of HCDs and can help sustain private sector confidence and interest.

Investing in City owned properties should be seen not only as the responsible thing to do, but also as a key step in heritage management, triggering the further involvement of property owners, the private sector and the general public.

Priority Actions:

- 3.3.1 Continue audits of City owned heritage properties and preparation of the corresponding budgets and Conservation Plans.

Other Required Actions:

- 3.2.1 Ensure the Toronto Building Division is provided with the appropriate knowledge and information to conduct site inspections.
- 4.1.1 Create a permanent Heritage Advocate position on Council.

B5 Continue to encourage participation from the private sector and the general public.

Increasing private sector involvement and public awareness will always be a priority. In subsequent phases of heritage management additional strategies should be engaged, such as regularly scheduled workshops, training sessions and the dissemination of conservation materials, precedents, and guidelines for interventions in heritage resources.

Priority Actions:

- 3.2.1 Enforce property maintenance standards where required through the operations of MLS, fines and court.

Other Required Actions:

- 3.2.1 Educate property owners through regularly scheduled training sessions and information sheets, including conservation principles and skills.
- 4.2.1 Maintain a portfolio of the best conservation practices.
- 4.2.2 Identify and support champions for conservation (individuals and/or associations) from within the private sector.
- 4.3.1 Nurture Community Panels and volunteer efforts in under represented areas.
- 4.3.1 Foster local heritage awareness groups and assist in providing them with the knowledge base about their local heritage and about conservation (e.g. lecturers or instructors).
- 4.3.2 Promote Heritage Conservation and related awards.

Other actions required for heritage partners outside HPS:

- 4.4.1 Explore links between heritage goals and other City Initiatives including Walking Tours, Design Awards, Green Awards, the Festival of Architecture and Design, Luminato and Doors Open Toronto
- 4.4.2 Advocate for curriculum resources and programs to bring heritage education and a focus on conservation to schools.
- 4.4.2 Advocate for curriculum resources and programs to include technical restoration skills as part of professional and trade education.
- 4.4.2 Advocate for the creation of links between employers and skilled trades' people, starting from the school level.
- 4.4.2 Encourage and expand existing community based initiatives and other initiatives such as Heritage Toronto's plaque and historical marker program.

Heritage Management Plan Review

Coordination and cooperation

Coordination and monitoring of the Heritage Management Plan is entrusted to Heritage Preservation Services at the City of Toronto. However, it also requires a concerted effort from City Council and of all City departments.

Implementing the Plan also hinges on the active involvement of other governmental and non-governmental agencies, advisory bodies, heritage-related organizations, property owners, residents and the public at large, participating in a structure that fosters interaction and interdisciplinary work.

Evaluating and achieving objectives

Qualitative and quantitative performance indicators should be identified and established during the start-up phase of each initiative. Evaluation is an ongoing process, and may give rise to additional recommendations.

An annual review

Implementation of the Heritage Management Plan should be evaluated on an annual basis by HPS in collaboration with other City departments, by reviewing the 'actions required' and assessing the success in achieving each goal and objective. The annual review should also be an opportunity to refine ongoing strategies and identify new strategies and actions.

The annual review should be conducted in time to identify new priorities that may be included as part of the City's annual budget cycle.

Continual review

The review of heritage management should also be tied with the larger cycles of City planning, and most specifically with the regular reviews of the Official Plan (required to occur every 5 years).



Mural of the Town of York in 1793, located within Saint Lawrence Market, on the façade of the first City Hall.



Great Hall, Union Station

SECTION C
Appendix



appendix **1**
Background





top - National Ballet School,
Toronto (Source:
Goldsmith Borgal)



right - National Ballet School,
Toronto (Source:
Goldsmith Borgal)

Background

The Heritage Management Plan was commissioned by the City of Toronto, Heritage Preservation Services, in 2006.

This study was undertaken and authored by Office for Urbanism as the lead firm in association with Goldsmith Borgal and Company Architects Ltd, and benefited from the expert advice of William Greer Heritage Consultant, Fournier Gersovitz Moss Architects, Herb Stovel and Anthony Tung.

Study Objective

The purpose of this study and of subsequent phases of the Heritage Management Plan is to provide Heritage Preservation Services, within the City of Toronto's Planning Division, with a framework and a strategy to manage heritage resources.

This Plan defines Heritage Management as the development and prioritizing of the City's heritage conservation objectives, the creation of an integrated framework for decision making, ensuring that decisions respect cultural heritage values, and the development of policies to strategically achieve these objectives, as enabled and directed by the Province of Ontario.

This report is phase one of a number of phased projects. The objectives identified for this phase are:

- to identify constraints and opportunities within the current system;
- to articulate the purpose of heritage, and of managing heritage resources, for the City of Toronto;
- to make recommendations for a heritage management framework, that includes:
 - methods of identifying heritage resources;
 - an approach to study and designate Heritage Conservation Districts and cultural heritage landscapes; and
 - potential policy tools.
- to create a strategy to manage heritage resources, that includes:
 - realistic goals for the City's Heritage Preservation Services department within the present context and outline the method that the City can follow to achieve those goals;

- to set priorities for heritage spending in the face of existing budget allocations and to identify which activities are under-utilized and suggest ways to maximize the use of funding;
- to identify financial incentives and mechanisms to assist these goals.





Process

The issues and analysis identified in this report were shaped through a consultation process that included interviews with stakeholders representing many local and provincial heritage associations and interests and three Advisor workshops attended by representatives from the City of Toronto, and a number of individuals representing organizations with experience in heritage management at the Provincial and local level.

The Heritage Management Plan Phase 1 was completed in three phases.

The first phase of work included research into Provincial Policy and legislative tools, as well as an analysis of precedents from municipalities in Ontario, in Canada and abroad. In that process, we sought to gain an understanding of what latitude exists within the current legislative system for change. Where is change possible and what management strategies have been successful (or not) in other municipalities? By conducting interviews with stakeholders who represented a broad spectrum of experience with heritage management, an issues list was generated that informed the rest of the process (this list is developed and presented in the “Issues and Approach” section).

The second phase of the study began with a two day Advisor Workshop. The workshop was an important milestone in the development of the Heritage Management Plan. Participants assisted in laying the foundation for an innovative and effective system of heritage management. The Workshop was a moment to think about big moves in heritage conservation and city building. It presented the opportunity to look beyond Toronto, to learn from international precedents, and build a made-in-Toronto approach, reflecting the City’s unique inventory of heritage resources. Most importantly, it was a moment to reflect upon what is treasured in Toronto and to create a framework for protecting and enhancing what is valuable about this city. The objectives of the Workshop were:

- to define a goal for heritage management in the City;
- to devise strategies to position heritage conservation as an important element of City building;
- to address the issues identified through stakeholder interviews and to provide recommendations; and
- to develop a draft framework for heritage conservation in the City of Toronto.

The goal of the third phase was to finalize the Plan and focus on generating mechanisms to achieve the goals and objectives identified in the Management Plan. For this purpose, two additional workshops were conducted, the first one focused specifically on implementation tools, and the second one focused on financial tools.

Stakeholder Interviews

The project team met with stakeholders in November 2006 to undertake preliminarily reconnaissance. The objectives of the stakeholder interviews were to:

- identify the objective of heritage management in Toronto (current and potential);
- identify constraints and opportunities in meeting this objective;
- determine how to advance heritage awareness in Toronto; and
- discuss strategies for heritage management, in the face of existing financial resources.

Stakeholders represented a diversity of groups including the Toronto Preservation Board, Heritage Toronto, Heritage Mississauga, local heritage associations, ratepayers’ associations, members of community heritage panels, the development industry, professional associations, private firms and individuals with expertise in heritage identification and management.

During the interviews, broad issues concerning heritage management were raised. They were subsequently grouped into eight issue areas: the objective of heritage management, private sector involvement and financial incentives, funding, cultural heritage landscapes, changing values, criteria for designation, and awareness.

Advisor Workshop #1

On the evening of November 27, 2006, Anthony Tung spoke at length of the tension between destruction and conservation. He presented a global developmental model that positioned Toronto as one of the world’s many fractured cities that has not been able take advantage of conservation as a means towards economic success.

Two questions guided the workshop on November 28: What is good heritage conservation management in the City of Toronto? How do we get there?

Advisor Workshop #2

A second workshop was conducted to review recommendations to date. Consultants presented participants (including several stakeholders, and HPS Staff) with specific goals, strategies and actions for heritage management for review and consideration. These were discussed and edited in group format.

Advisor Workshop #3

A third workshop was added to the work program with the objective of reviewing funding and financial mechanisms and opportunities for heritage management and conservation. This workshop was attended by a smaller group of advisors with specific expertise in finance.

History of Heritage Management in Toronto

1934 - 1998

In the City of Toronto's Centennial year, 1934, City Council expressed a desire to create a quasi-official historical society as a means of looking after Fort York and other historic concerns. The Toronto Civic Historical Committee was formally established by council in 1949. In time, the work of this committee had grown beyond its legal authority and provincial legislation was then obtained, under the City of Toronto Act 1958, to enable it to establish a Historical Board, possibly the first of its kind in Canada.

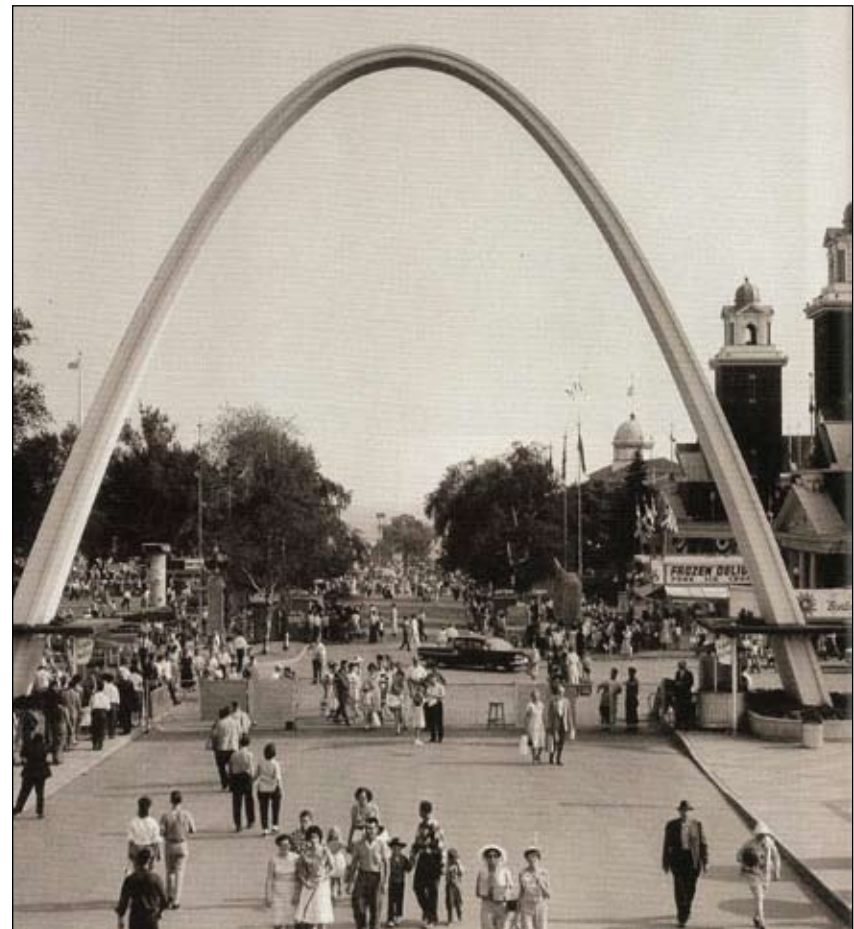
The Toronto Historical Board was first convened on July 1st, 1960, by City Council to replace the Toronto Civic Historical Committee. The Board consisted of seventeen members of which two were members of City Council.

In 1973 City Council decided to implement a policy contained in its Official Plan to encourage the preservation of the city's heritage of buildings, and structures of architectural and historical importance. The responsibilities of the Toronto Historical Board were thereby expanded to implement Section 2 of the City of Toronto Act, 1967, which then provided that the City Council could, by By-law, designate as historic sites such buildings, and the lands on which they stood, as being worthy of preservation for either architectural or historical reasons.

The establishment of a Historical Preservation Section by the Toronto Historical Board, and the employment of staff, was approved by City Council. Council subsequently adopted the first list of 500 heritage properties recommended by the Historical Board and the City's Inventory of Heritage Properties was inaugurated. A number of buildings at the same time were also designated by under the City of Toronto Act. Council also charged the Historical Board with reviewing all future applications that might affect the heritage value of those properties listed on the Inventory.

The staff of the Preservation Section examined and photographed buildings brought to their attention by various means. They also reviewed structures or areas as directed by the Historical Board or as requested by Councillors, City departmental staff, local groups and private individuals. The results of their studies were presented to the Preservation Review Committee which would make its recommendations to the Board. The Historical Board would report to City Council and they would adopt additional lists of properties for inclusion on the Inventory of Heritage Properties.

On the passing of the Ontario Heritage Act, in 1974, which became law on March 5th, 1975, the procedures for designation became much more complex and expensive both in terms of staff time and cost. To fulfill the requirements of the Heritage Act, the Toronto Historical Board was named by City Council to perform all duties and functions of a Local Architectural Conservation Advisory Committee as authorized by the Act. The execution of these duties entailed recommendations to council for designations of structures or districts, conducting the necessary negotiations and discussions with affected owners or representatives, and cooperating with city planning and building departments regarding implementation procedures.



Dufferin Gates, annual exhibition, 1960. (Source: Mean City, 2007)

The Toronto Historical Board functioned separately from City Hall with its own staff and was organized into five main divisions: Historical Preservation, Design and Collections, Fort York, Marine Museum and Historic Houses. These divisions benefitted from the support of the Accounting, Clerical, Information and Maintenance Sections, under a Managing Director. The number of staff varied from time to time, but in the mid 1980's, there were 30 permanent, about a dozen continuous temporary, and some 50 seasonal and part time employees. Their duties included the routine operation of the five City Museum sites, the Fort York guard, traveling exhibits, school enrichment programs and a variety of special programs made available equally to all of the Metropolitan Toronto Municipalities.

The Board itself was divided into three committees: an Executive Committee; a Preservation Review Committee; and a Plaques, Publicity and Publications Committee. The Historical Board also established an Annual Awards program to recognize individuals, groups or organizations that had made important contributions to the preservation of the history and heritage of Toronto.

In 1954 the Municipality of Metropolitan Toronto was formed as a senior level of government for Toronto and the five surrounding municipalities of Etobicoke, York, East York, North York and Scarborough, however, responsibility for heritage management, in one form or other, remained with each of the lower level municipalities.

The former boroughs of Etobicoke, York, East York, North York, Scarborough, prior to amalgamation, had similar heritage management structures. The Ontario Heritage Act permitted each municipality to appoint a Local Architectural Conservation Advisory Committee that could advise the local Council on built heritage issues. In some cases, a municipal staff member was assigned to the LACAC to assist with research and administration. Some of the boroughs did develop a list of important buildings, monitored applications for demolitions and managed local Museums, but the former Toronto Historical Board, continuing to function as the Toronto LACAC, had the broadest organization of heritage management in Metropolitan Toronto.

The Municipality of Metropolitan Toronto continued to function from 1954 until 1998 when Toronto, Etobicoke, York, East York, North York and Scarborough were amalgamated into the new City of Toronto.

1998 - 2007

The Toronto Historical Board decided to adopt the name, Heritage Toronto, in 1997. It continued to deliver heritage advice and management services for Toronto until a major administrative review of all areas of municipal governance took place during the amalgamation process for the new City of Toronto. One result of the final report was the decision to separate and transfer various heritage duties and responsibilities, originally assigned by City Council to the Historical Board, to be managed in City Departments.

All matters relating to the Heritage Act, the listing of Architectural and/or Historically important buildings and structures and the staff and responsibilities of Heritage Preservation Services were transferred to the Culture Division. The management and operation of the City's Museums and Collections was also transferred to the Culture Division. A Toronto Preservation Board was appointed by Council, after Amalgamation, to carry out the duties and functions of the Local Architectural Conservation Advisory Committee formerly provided by the original historical or heritage boards.

In April 2005 the functions and staff of Heritage Preservation Services were transferred from the Culture Division to the City Planning Division.

A City Council appointed Heritage Toronto Board continued to exist, with a reduced mandate, after the amalgamation of the City of Toronto which had brought about a complete reorganization of heritage management services. These major changes in the operation of heritage management, an organizational name change and a different role for Heritage Toronto have confused many sectors of the heritage community, the development/construction/planning industry and the business community. Citizens generally have found it hard to know where to turn for direction or advice regarding emerging heritage issues.

Heritage Toronto continues to function as an independent arms-length Board with the responsibility to advise City Council on city-wide heritage issues and policies and with the help of numerous volunteers, currently organizes Heritage Toronto Walks, an Annual Awards and Lecture program, Heritage Plaques & Markers and related fundraising activities. Heritage Toronto operates with an Executive Director and its own Staff (5) and the important responsibility to promote Heritage Awareness and Public Education in the City of Toronto.

The State of Heritage Management in Toronto

In Toronto, heritage is managed at the municipal level; however, it is enabled and regulated by provincial legislation. In the current policy environment, the provincial government has delegated the powers of heritage management to municipalities.

There are three key pieces of legislation that govern heritage in this province: The Ontario Heritage Act, which regulates heritage; the Planning Act, which allows the Province to issue high level policy statements; and the City of Toronto Act (2006), which gives Toronto special powers to improve heritage management policies.

The Provincial Ministry of Culture establishes standards and guidelines for preservation. The Ministry also creates funding programs that are delivered directly, or through the Ontario Heritage Trust. In addition to establishing criteria and guidelines for historic preservation that the municipality must abide by, the Ministry also retains the power under the OHA (Section 34.7, Section 35.2) to provincially designate properties and rescind all previous municipal approvals.

Provincial policy stipulates that at the municipal level, City Council may designate buildings under Part IV (built heritage) or districts Part V (heritage conservation districts) of the Ontario Heritage Act. Recommendations for designation are made at the City of Toronto Heritage Preservation Board. This recommendation is followed by a vote on designation at Community Council (representing one of four geographical areas in the City). Next step, Council authorizes the designation. The designation is then advertised and if it not appealed, the designation stands. Property owners may appeal Council's authorization of the designation to the Conservation Review Board, which is a provincially administered adjudicative body. An application to demolish a designated property may be appealed to the Ontario Municipal Board.

Heritage resources are administered by Heritage Preservation Services (HPS), which is part of the City Planning division. HPS conducts the research for listing and designating properties, is the liaison for public inquiries, and is part of the team of City staff that reviews site plan applications when heritage resources are present.

The Federal government has a minor role in municipal heritage conservation. Parks Canada has issued a document entitled 'Standards and Guidelines for the Conservation of Historic Places in Canada' which may be adopted by other levels of government. Any regulation issued at the Federal level applies only to federal buildings.

Currently, there is no existing diagram or document that clearly outlines the organization of heritage management in Toronto. Two diagrams were generated as part of this study. The first diagram outlines the day-to-day management of heritage in Toronto detailing the regulation of alteration or demolition of heritage structures and the designation of properties and Districts. The second deals with the policy development structure.

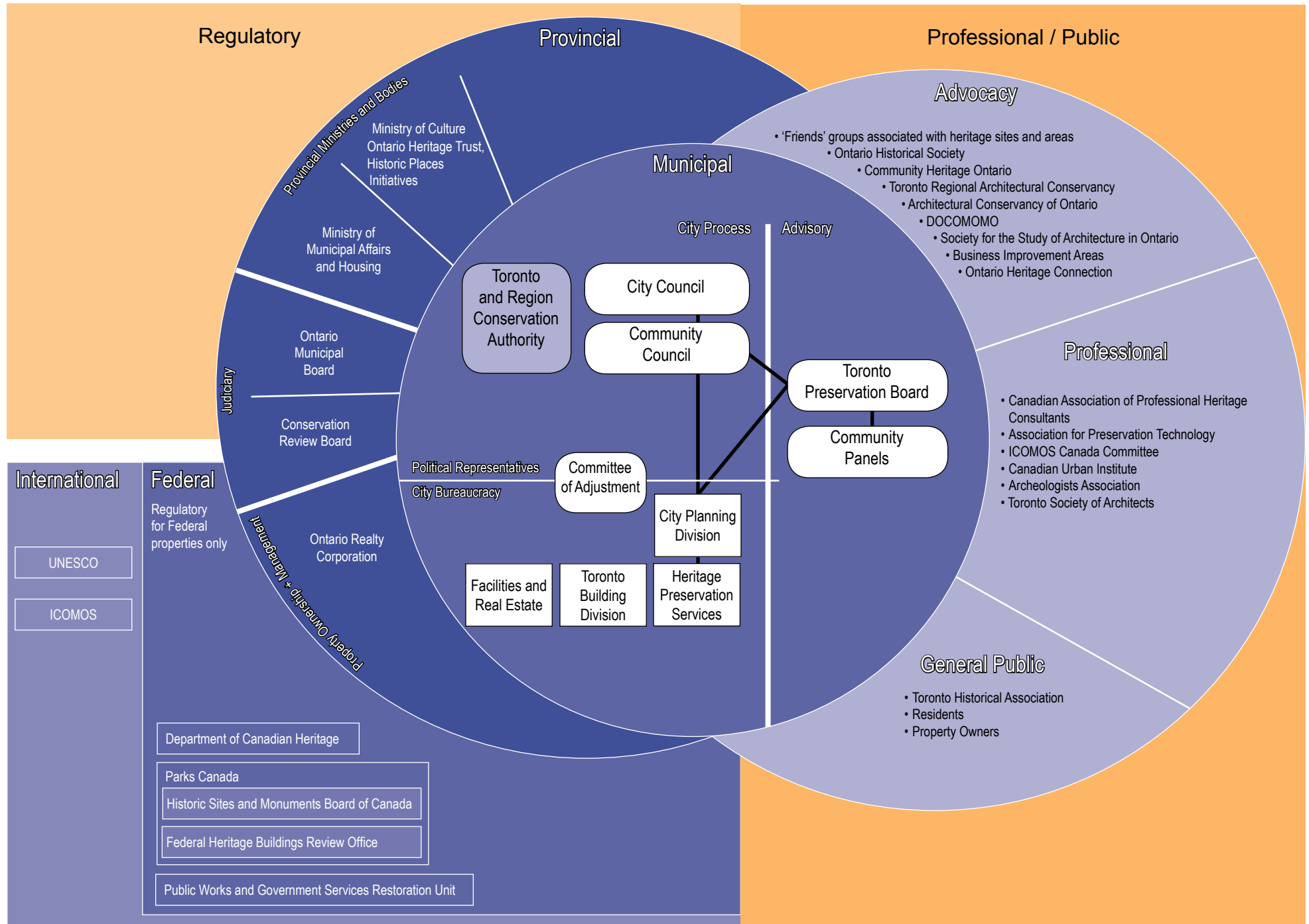
In preparing these diagrams, and in consulting about them with staff, members of the different organizations, and with other involved participants it became evident that in Toronto there is no common understanding of:

- how all the different heritage bodies relate to each other;
- the sense of importance and relevance of each body; or
- where significant decisions are made, or should be made.

This lack of clarity alone, became an indicator of the urgent need to revise the structure of heritage management and the need to consult and inform all parties involved (as well as the public at large) about a revised structure.

The following diagrams map out the organizational structure as it is currently intended to work. The following section on 'Issues and Approach' begins to identify constraints and opportunities in the process.

Management of alteration or demolition of heritage structures and the designation of properties and Districts (currently)



Management of alteration or demolition of heritage structures and the designation of properties and Districts

This diagram illustrates the current regulatory relationship between different levels of government with a focus on Toronto's municipal organization. The relationship between government, advocacy, professional groups and the general public is also listed.

International

Heritage charters at the international level do not have regulatory status outside of the international arena. The primary function of charters and agreements signed at the international level is to provide a framework and a point of reference for other levels of government to adopt, and to guide the management of internationally recognized heritage sites.

Federal

Federal standards and guidelines have regulatory control for federal properties only. Parks Canada is the primary Department that manages heritage, encompassing the Historic Sites and Monuments Board of Canada, the Federal Heritage Buildings Review Office (for federal buildings only) and the Historic Places Initiative. Other Federal Departments have a peripheral role.

In 2003, Parks Canada issued the “*Standards and Guidelines for the Preservation of Historic Places in Canada*” through the Historic Places Initiative. The Historic Places Initiative recommends that its guidelines be adopted, or serve as a model for heritage guidelines at any level of government.

Provincial

The Province of Ontario plays a significant role in the way heritage is managed at the municipal level. The Ministry of Culture and the Ministry of Municipal Affairs and Housing issue enabling legislation, which is summarized below.

Ontario Heritage Act:

The central piece of legislation governing heritage management is the Ontario Heritage Act, issued by the Ministry of Culture. This act was reformed in 2005 to give municipalities additional powers with respect to listing, designating and preventing demolitions. Key elements of

the reforms to the Act include:

- The municipality can stop demolition of designated properties. If demolition is approved, the municipality may attach conditions and terms to it; however refusal of demolitions can still be appealed to the OMB by property owners.
- Properties must meet criteria in order to be designated. The criteria is described under the Ontario Heritage Act, Regulation 9/06.
- Municipalities may set maintenance standards and requirements.
- Heritage Conservation Districts are enabled as a tool to identify and manage a collection of heritage resources.
- Municipalities can enact interim control By-laws while Heritage Conservation District studies are being undertaken.
- The Ministry of Culture itself may designate buildings allowing it to prevent demolition without relying on the municipality to do so.

Provincial Policy Statement:

Under the Planning Act, the Provincial Policy Statement sets the direction regarding matters of Provincial interest in planning and land use. Section 2.6 of the Provincial Policy Statement relates specifically to heritage conservation. It reads: “*Significant built heritage resources and significant cultural heritage landscapes shall be conserved*”. Adjacent lands are also referred to as contributing elements to the heritage context. Further, the 2005 PPS states that municipal policies ‘shall be consistent with’ the Statement.

City of Toronto Act:

The 2005 City of Toronto Act gives Toronto enhanced powers in a number of issue areas. One of the key issue areas is financing - for example, the City may now undertake Tax Increment Financing which can be used to fund heritage restoration and regeneration efforts.

The Ontario Heritage Trust is an agency of the Ontario Ministry of Culture. Created in 1967, the Trust is defined and receives its mandate from part II of the Ontario Heritage Act. The Trust holds natural and cultural property and conservation easements on behalf of the people of Ontario, delivers provincial heritage programs and advises the Minister of Culture on heritage issues including provincial designation. The core object of the Trust is to support, encourage and facilitate the conservation, protection and preservation of heritage in Ontario.

The Ministry of Municipal Affairs and Housing is responsible for Provincial Policy Statements and the enabling legislation that permits municipalities to assume certain administrative functions that relate to heritage management.

The Province also regulates heritage through the Ontario Municipal Board and the Conservation Review Board, both of which are appeal tribunals. Only the Municipal Board issues binding decisions. The Conservation Review Board issues recommendations regarding appeals under Part IV of the Ontario Heritage Act to City Council. Following a decision by City Council the By-law, under the same number, comes into force.

Provincially owned properties are managed by the Ontario Realty Corporation, many of which have heritage value.

Municipal

The chart divides the municipal system two ways: by City Process and Advisory bodies, and by Political Representatives and City Bureaucracy.

Stewardship of built heritage is undertaken by several divisions in the City, including: Facilities and Real Estate, the Building Department and City Planning in which Heritage Preservation Services is located. The management of built heritage is undertaken by Heritage Preservation Services.

Heritage Preservation Services (HPS) advises City Council on matters relating to the Ontario Heritage Act. HPS has two major divisions of responsibilities: research and development review. HPS is responsible for recommending properties for listing and designation, enacting heritage easement agreements between the City and property owners, monitoring and providing advice on alteration to heritage properties.

HPS forwards its reports and recommendations to the Toronto Preservation Board (the Board) and to City Council (through Community Council or the appropriate committee).

Stewardship of heritage resources is also undertaken more peripherally by Facilities and Real Estate which manages many of City's buildings, and is responsible for building maintenance and the management of the City's real estate portfolio. As the City is the owner of many of Toronto's heritage properties, this division has a significant role to play in maintenance and conservation.

Toronto Building is an important interface with the public. The Division reviews permit applications and issues permits under the Ontario Building Code. With respect to heritage properties and properties in heritage districts, this task has dual importance: to guarantee that buildings are safe and to ensure that alterations and construction permits are reviewed by HPS.

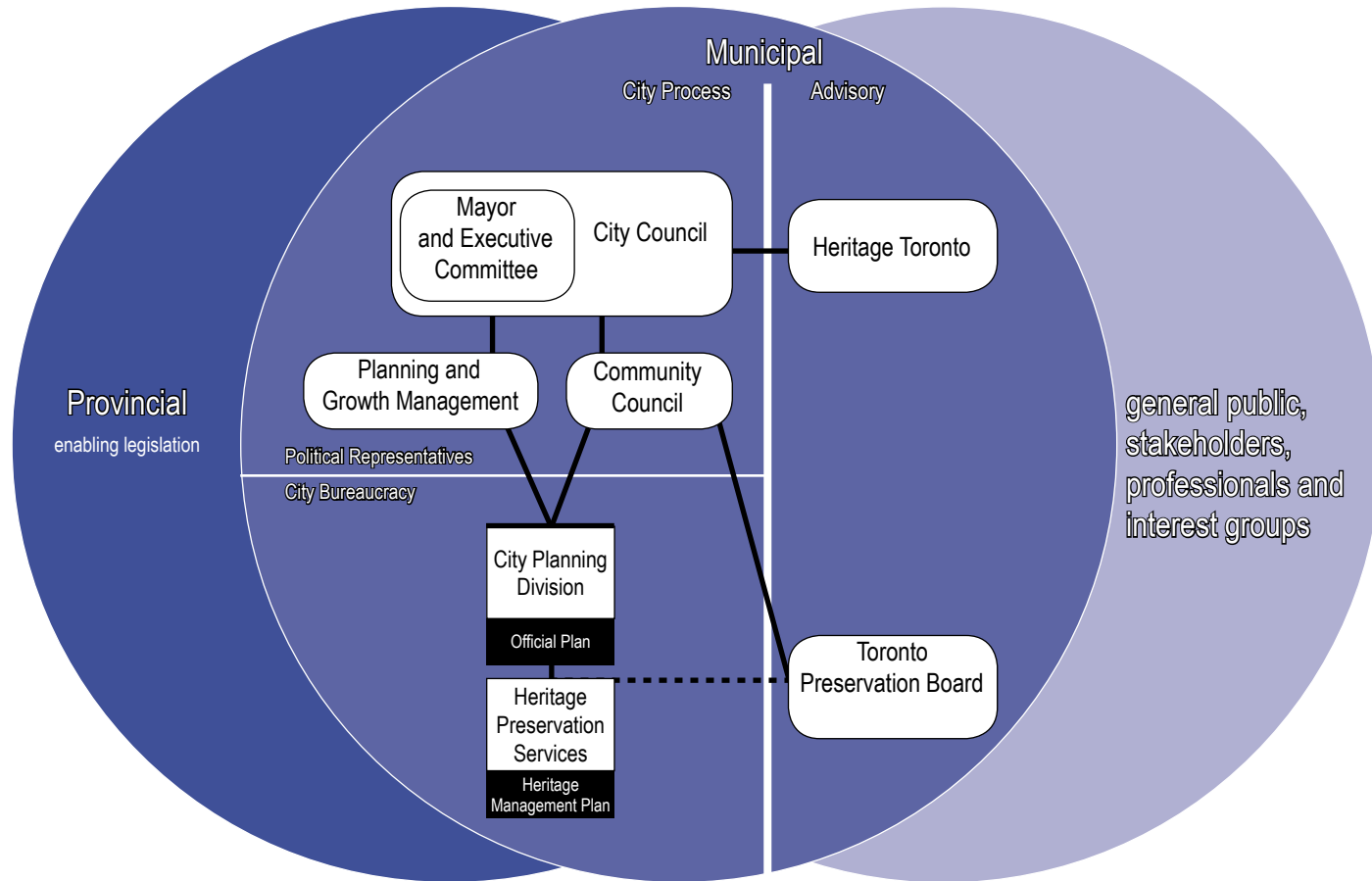
Straddling the line between the City Bureaucracy and Political Representatives is the Committee of Adjustment. This body makes decisions on small alterations to individual properties. Where the property is of historical significance, the decision of the Committee may have a heritage impact.

Under the Ontario Heritage Act, Council is the decision making body on matters pertaining to heritage. Community Council receives reports on matters pertaining to one of the geographical areas of the City and send their recommendations to Council. Matters relating to broader city-wide policy are sent to Planning and Growth Management and other committees of council for approval before being forwarded to Council. Recommendations to list and designate Heritage Properties and Heritage Conservation Districts are sent to Community Council before being approved by City Council.

At present, the Toronto Preservation Board functions as part of the City Process, fulfilling an advisory role. The Toronto Preservation Board advises Council on matters relating to Part IV and Part V of the Ontario Heritage Act. HPS Staff's recommendation on those matters may or may not be adopted by the Board. Both recommendations will be forwarded to Council for a decision. The Board is composed of five citizens appointed by Council, three Councillors and the chair of each Community Panel.

Community Panels have been established for each area represented by Community Council. The By-law that established the local Panels states that they may undertake local conservation activities and may forward initiatives to the Toronto Preservation Board for review.

Current Heritage Policy Development Structure



Heritage Policy Development Structure

The intent of this diagram is to illustrate how heritage policy is developed at the City of Toronto. The diagram is divided into three circles; the outer two circles, Provincial, and the general public, stakeholders, professionals and interest groups, exert influence on the municipal structure.

The present municipal structure is divided into City Process (which is further divided by Political Representatives and City Bureaucracy) and Advisory.

City Planning including Heritage Preservation Services is principally responsible for heritage policy.

The City's Official Plan adopted in November 2002 and approved by the OMB in July 2006 requires that a Heritage Management Plan be prepared and adopted by Council. The Official Plan, administered by the City Planning Division, sets forth policies related to heritage conservation relating to:

- listing and designating heritage properties and landscapes;
- designating Heritage Conservation Districts and adopting standards and guidelines to preserve and improve their character;
- public incentives;
- Heritage Easement Agreements;
- Heritage Impact Assessments;
- allotment of additional gross floor area for developments that include a conserved heritage building (i.e. density bonusing); and
- including heritage strategies in secondary plans created to conserve the character of stable neighbourhoods.

The 2003 Culture Plan administered by the Culture Division outlines the importance of heritage to the City. This Plan outlines Toronto's strengths and weaknesses and proposes measures to enhance the City's cultural assets.

The key recommendations of the Culture Plan as they relate to heritage include:

- creating a Heritage Management Plan;
- adopting criteria to apply to heritage resources City-wide;
- conducting a survey of heritage buildings;
- completing a minimum of one Heritage Conservation District per year to meet the Official Plan policy of conserving heritage resources and establishing districts;
- increasing the Heritage Grant Program to enhance its effectiveness as a financial incentive; and
- a City commitment to depositing the proceeds from the sale of surplus heritage buildings or cultural facilities into a Cultural Facilities Reserve Fund for the

development and repair of cultural facilities.

Heritage Preservation Services' major policy document will be the Heritage Management Plan.

In the Political Representatives sphere, Planning and Growth Management Committee and Community Council will review City staff reports. Planning and Growth Management will review reports with city-wide implications (such as this Heritage Management Plan); reports relating to specific geographical areas of Toronto are forwarded to Community Council.

City Council including the newly formed Mayor's Executive Committee make the final decision on Policies developed within the City Divisions.

Policy development at Advisory bodies is largely conducted through visioning exercises and policy recommendations.

Heritage Toronto is an important liaison between the public and the City of Toronto on heritage matters. The organization is primarily involved with public awareness, programming and fundraising.

Heritage Preservation Services forwards recommendations to the Toronto Preservation Board. Both Heritage Preservation Services and the Toronto Preservation board forward their recommendations to Community Council, City Council, and the committees of Council.

The Project Team met with stakeholders in interviews and workshop settings. Stakeholders represented a diversity of groups including the Toronto Preservation Board, Community Heritage Panels, Heritage Toronto, Heritage Mississauga, Ministry of Culture, Architectural Conservancy of Ontario, local heritage associations, ratepayers' associations, the development industry, professional associations, and private firms and individuals with expertise in heritage resource identification and management.

Broad issues concerning heritage management were raised. These included:

1 The Objective of Heritage Management

Issues:

- How is heritage value determined?
- The City needs a clear set of principles for heritage conservation. What should they be based on? What should they include?
- How can we better account for the 'effects' of conservation on the economic value of heritage properties and those that surround them?
- Heritage outside downtown must also be regarded as meaningful and relevant, how can that be achieved?
- How do we promote heritage buildings as a vibrant part of today's city and city-building?
- How do we translate the intrinsic value of heritage into a language that can be widely understood and promoted?

Approach:

Currently, there is no clear mandate for heritage conservation that is widely understood and promoted. Part of the tasks for HPS and City Council should be to 1) formally recognize the value of heritage management and conservation for Toronto and Torontonians; and 2) increase the public awareness of this value through a focused awareness campaign.

2 Decision Making

Issues:

- Currently there is a perceived break-down between the recommendations and decisions made by the different bodies in the approval process (HPS, Heritage Preservation Board, Community Council, Council, and the OMB). How can this process be clarified and become more effective?
- Councillors in Toronto are elected on a ward basis. Often important

conservation decisions are resolved by a single local councillor (with little or no heritage expertise). How can decisions be made at a point where heritage expertise and due diligence prevails? How can the prominence of conservation not be subject to the politics of individual wards?

- What is the appropriate role for the Community Panels? What should their focus be? How can the right people be attracted to the panels? Should there be term limits for members?
- How to make best use of volunteers?
- The Federal, Provincial and Municipal governments own heritage stock in the city. What strategy should be developed to proceed with designation of a Provincially or Federally owned heritage building when the jurisdiction that owns the building objects to designation?

Approach:

Provincial legislation gives the City of Toronto a level of responsibility in determining the process for heritage conservation and decision-making, including the evaluation of heritage resources, and building applications. Since amalgamation, the City of Toronto has not comprehensively evaluated and updated how heritage decisions are made, nor the role and responsibility of the different bodies involved. This needs to be done. At risk are not only the quality and efficiency of heritage conservation, but also the credibility and integrity of the system.

3 Heritage Preservation Services – City Organization

Issues:

- Where are the links to be made between different divisions and departments that manage heritage resources?
- How can HPS be further integrated within the planning division, as well as with other divisions including the building department?

Approach:

Currently, heritage conservation efforts are dispersed within City departments. While many responsibilities are concentrated in HPS, some extend to Culture, and some fall under the jurisdiction of the Building Department, and others. The prominence and responsibility of HPS, as well as its relationship with other City departments, needs to be considered and to reflect the value of heritage conservation to the City. In particular, the overlap in mandate and operations between HPS and Urban Design needs to be further explored.

4 Properties, Districts and Landscapes

Issues:

- What is the priority? Listing and designating buildings, or enacting Heritage Conservation Districts? If Heritage Conservation Districts protect more heritage resources and are a better use of staff time and resources, would a better approach be to emphasize the creation of Heritage Conservation Districts?
- How can the development process be refined so that all development applications consider heritage impacts? (e.g. a 'Heritage Impact Assessment' for all applications)
- How will the intersection of urban design and heritage be considered?
- How do we prevent the erosion of heritage plans over time and enforce adherence to guidelines, once the generation that has initiated them moves on?
- Cultural Heritage - what guidelines do we employ to allow landscapes, views and sites to evolve with the growth of a city while conserving the founding principles of the past?
- How do we define cultural heritage landscapes differently from heritage buildings and/or districts? Do we need a different set of rules?
- How is it possible to reconcile urban growth with the conservation of cultural heritage landscapes that may cover large areas of the city?
- Can we bring an 'adaptive re-use' approach to landscapes?

Approach:

The different tools available for heritage conservation enable different strategies. While designating individual properties remains a useful and viable tool, focusing energy and resources on HCD studies may allow: 1) a relatively quick assessment of valuable heritage resources; 2) an emphasis placed on the value of context for heritage conservation; and 3) a way to address cultural heritage landscapes.

The current policy framework allows landscapes to be designated for their heritage value. However, the City of Toronto to date has not designated cultural heritage landscapes. The value and effectiveness of their designation needs to be tested. As well, an evaluation of landscapes, streetscapes, parks, plazas, and other open spaces ought to be conducted and an Inventory of cultural heritage landscapes begun. Additionally, it is imperative that the objectives of conserving cultural heritage landscapes also inform the evaluation and designation of all heritage properties and HCDs.

5 Changing Values - Criteria for Designation

Issues:

- How do we define heritage values for an increasingly multicultural society?
- How do we keep the values, attributes and guidelines expressed in an HCD relevant to a changing demographic?
- Buildings and built form often reflect the values and ethos of a particular time and people. How do we ensure that current uses respect historic values?
- How and when does heritage become significant?
- How can we evaluate and manage heritage stock that is not often considered? (e.g. modern architecture)
- How do we create the indicators for choosing areas to be studied as potential Heritage Conservation Districts? (e.g. 'listing' an HCD.)
- What tools/information do City Councillors need to make good decisions about listing, designating, and the creation of heritage conservation districts?
- How can we incorporate heritage interests with an urban intensification agenda?

Approach:

Many Torontonians come from other places and/or cultures. The challenge for conservation is both identifying the long-term value of heritage resources for our City with its ever-evolving identity and identifying ways to make heritage resources valuable to new communities.

The recognized value of a particular heritage resource will evolve and increase overtime. It is important that the criteria and indicators that recognize heritage resources be easily understood. It is also important that the criteria be simple enough to be adapted to the particular circumstances of each designation, while still providing useful and defensible designations.

A particular shortcoming of some heritage conservation has been a focus on the heritage value of specific built elements or artefacts, without recognizing the contextual value. In future evaluations, context and cultural heritage landscapes must form part of all evaluations.

Another shortcoming that requires a deliberate approach, has been the lack of recognition of the heritage value of a range of buildings and open spaces, including: landscapes, modern structures and late-20th century buildings.

6 Awareness

Issues:

- How can political decision makers and the development industry understand the fundamental value of heritage in the city?
- How can groups and individuals outside of the heritage community be engaged in heritage issues and conservation?
- Making the connection with developers - how can new developments be linked with heritage embracing authenticity, avoiding trite treatments?
- How can the curriculum of universities, colleges, and academic institutions be expanded to include studies in local heritage?
- How can we broaden citizens' appreciation of heritage as more than 19th Century buildings to include built heritage from the 20th Century?

Approach:

It has been the experience of other places that if awareness is high, everything else will follow. A concerted effort to raise awareness of the value of conservation has the objective of increasing the resources, public and private, that can be focused on conservation, but ultimately of getting more people involved in conservation, and increasing the number of conservation initiatives.

7 Private Sector Involvement and Financial Incentives

Issues:

- What kind of policy mechanisms/incentives are necessary to increase the value of heritage restoration/conservation for the development industry? And the value and interest expressed by purchasers/tenants for heritage?
- What are the business formulas that can make investing in heritage more attractive?
- Tax incentives have not been widely used. Why? How can they be better employed/promoted?
- The Facade Improvement Program is administered, by and large, by Business Improvement Associations; however, without the necessary heritage education and training, façade improvement may not actually result in restoration of façades, when heritage properties are considered. How can we better use the Program to preserve the integrity of commercial heritage stock?
- How can Tax Increment Financing (TIFs) be implemented for heritage resources?

Approach:

Currently, there is little understanding and initiative from the development industry to leverage heritage to achieve their development goals. This is due, in part, to a lack of understanding of when and where heritage conservation can be beneficial to development objectives, and also due to a lack of support for conservation initiatives.

From a heritage management perspective, it is imperative to get the private sector actively involved in conservation. The City, HPS and Finance can play an active role through financial incentives, and also through public support, sharing knowledge, and increasing the awareness of the economic value of conservation.

8 Funding

Issues:

- There is limited government funding – how do we make best use of existing resources?
- How do we increase the profile of, and budget for, heritage management?
- How do we attain more funding for heritage management?
- How can funding be better leveraged by the private sector?

Approach:

Toronto invests fewer resources in heritage conservation and identification than some other municipalities, most noticeably the United States cities identified in our Precedent Study. Most cities that recognize the value of heritage conservation have invested correspondingly in maintaining a strong and well resourced staff, and have identified mechanisms to channel public resources towards supporting private conservation efforts. HPS must seek to increase the resources at its disposal, and ways to maximize the effect of these resources.



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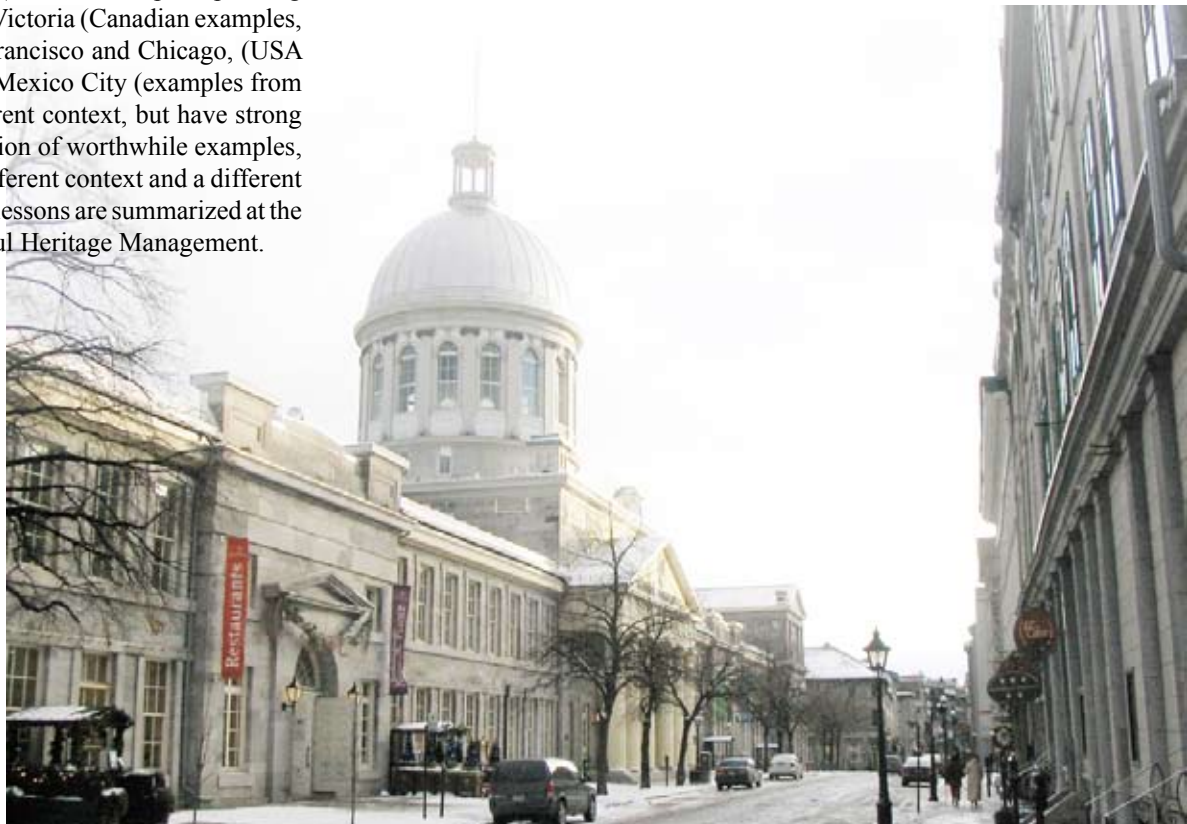
Front Street, St. Lawrence Market

Precedent Study

Part of the reconnaissance phase for this Plan was to develop a precedent analysis of heritage management in other jurisdictions across North America, and internationally. This report highlights a selection of cities that operate in both similar and radically different policy contexts so as to demonstrate the variety of approaches to heritage management. Focus areas of each precedent study were selected based upon the key challenges facing Toronto: an evaluation of a governance structure, the approach to building the inventory of heritage structures, options for financing and funding, and methods to monitor heritage resources.

The study process reviewed examples from a variety of locations, including Mississauga, Saint John, New York, and others. A precedent study was conducted to specifically look at examples that relate to Toronto in varying degrees.

The precedent study looks at the cities of Ottawa (Ontario example, operating within the same provincial context), Montreal and Victoria (Canadian examples, operating within the same federal context), San Francisco and Chicago, (USA examples of cities of similar size) Edinburgh and Mexico City (examples from Europe and North America that operate in a different context, but have strong heritage initiatives). These cities are a small selection of worthwhile examples, and were chosen because each one showcases a different context and a different strategy for heritage management. Some of the key lessons are summarized at the end, under the header: Characteristics of Successful Heritage Management.



Rue St Paul, Montreal

Built Heritage Division

Ottawa



Context:

- As a municipality in Ontario, Ottawa operates in a similar policy environment as Toronto.
- The City of Ottawa's guiding policy document for heritage is the Ottawa 2020 Arts and Heritage Plan. The Arts and Heritage Plan is based on the guiding principles that are part of the entire Ottawa 2020 strategic planning initiative. The main focus of the Arts and Heritage Plan is cultural heritage, and cultural heritage facilities.

Governance Structure:

- City Council appoints the Local Architectural Conservation Advisory Committee (LACAC). Action Reports on heritage issues are prepared by heritage staff for approval by the LACAC. Action Reports are then forwarded to the Planning and Environment Standing Committee prior to being sent to City Council. If the LACAC rejects staff's recommendation, both recommendations will be forwarded.
- Built Heritage is located in the Planning, Transit and Environment Department of the City of Ottawa and has three full time staff positions.

Inventory and Districts:

- The City of Ottawa's Inventory of Heritage Properties is included in an information database, the Municipal Application Partnership. Building permits are cross-referenced and forwarded to Built Heritage if they apply to a listed or designated building.
- Ottawa has 16 Heritage Conservation Districts, the most of any municipality in Ontario, including two downtown commercial districts - the Sparks Street-Bank Street HCD and the Byward Market HCD.

Financing and Funding Options:

- The City of Ottawa offers a Heritage Grant Program. Under the program, owners of properties designated under Part IV and Part V of the Ontario Heritage Act are eligible for a matching grant of up to \$5000 per year for approved conservation work. The annual budget for the Heritage Grant Program is determined annually by City Council.

Monitoring Heritage:

- All demolitions relating to heritage properties are reviewed by heritage staff.
- Heritage Staff does not monitor alterations to heritage buildings (such as window replacement, signage, etc.), due to insufficient staff resources. Within Heritage Conservation Districts, staff will only intervene in 'substantive alterations' as determined by each Heritage Conservation District Plan
- The City has not established an enforcement mechanism or a system of fines to enforce maintenance or alterations to heritage structures.

Lessons for Toronto:

- The City's information database that allows simple cross-referencing of heritage properties for the purposes of permit issuance and building inspections.
- Ottawa has been able to designate downtown commercial areas using incremental implementation of zoning provisions to generate buy-in from commercial property owners.

Urban Heritage Division

Montreal



Context:

- Montreal is governed by Provincial legislation that creates a legal framework for municipal and heritage actions. The Cultural Property Act enables municipalities to establish protective measures for areas and objects.
- Montreal adopted a Heritage Policy in 2005 that will re-evaluate Heritage Advisory Bodies in Montreal.

Governance Structure:

- Heritage administration is decentralized in Montreal throughout individual boroughs and their services. Certain corporate municipal departments are responsible for planning of city-wide initiatives and planning.
- Montreal has four advisory bodies:
 - Montreal Heritage Council, a 9 member advisory board, which advises City Council, the Executive Committee and borough councils on designations, demolition requests and implementation of Heritage Policies and the Master Plan.
 - Ad Hoc Architecture and Urban Planning Committee, a twelve member committee made up of one elected official and members with recognized skills in architecture, urban design and landscape architecture responsible for advising city administration on development projects.
 - Borough's Planning Advisory Committees.
 - Quebec Commission on Cultural Properties is an advisory organization to the Provincial Minister of Culture and Communications which considers requests for opinions on the restoration of heritage property, among other responsibilities.

Inventory and Districts:

- Arrondissements historiques (Historic Districts) are established and administered at the provincial level.
- The City of Montreal has two arrondissements historiques (historic districts), the Old Montreal historic district and the Mount Royal natural and historic distinct.

Finance and Funding Options:

- Montreal By-law 04-026 permits subsidies for the restoration and renovation of designated heritage buildings and buildings within the city's two historic districts and for archeological excavations. Eligible work includes restoration as well as renovation for adaptive reuse.
- The maximum subsidy is 50% (up to \$500,000) on buildings that have been vacant for four years (or occupied on ground floor only) in Old Montreal. Other subsidies vary between and 25% and 50% (up to \$250,000) for most other heritage properties in Montreal. Theatres and buildings of architectural interest are eligible for 60% (up to \$1,000,000) depending on ownership.

Monitoring Heritage

- Similar to other Canadian cities, Montreal has no monitoring system specific to heritage properties. As with alterations to regular structures, owners of heritage properties must obtain a building permit. General permit violations are enforced; however, there are no specific fines for violations that compromise the heritage value of privately owned structures.

Lessons for Toronto:

- The Montreal Heritage Policy emphasizes the role of the municipality as an exemplary owner and administrator of built heritage.
- Ownership: the Policy states that the municipality will consider opportunities for adaptive reuse of heritage structures before considering their transfer to the private sector. If considered for transfer, public consultation is mandatory as well as a heritage strategy for the future use of the building.
- Administration: Local boroughs are responsible for local heritage. To mitigate against approaches to conservation that vary widely, the Policy promotes education of built heritage in schools, and implementation of training in conservation techniques, where appropriate.

Heritage Program and Arm's Length Agencies

Victoria



Context:

- The City of Victoria has been widely recognized as a leader in Heritage Conservation and was awarded the Prince of Wales Prize by the Heritage Canada Foundation for municipal leadership in heritage conservation.
- In 2002, a Heritage Strategic Plan for the City of Victoria was prepared for the City by Commonwealth Historic Resource Management Ltd. Consultation and research conducted in the Plan development revealed consensus on the importance of heritage conservation and nearly 100 percent support for municipal conservation activities.

Governance Structure:

- Heritage is located in the Planning and Development department of the City of Victoria's municipal structure. The Heritage Program is overseen by a single heritage planner.
- The City's Heritage Advisory Committee is appointed by Council and advises Council on heritage matters. This includes, but is not limited to the ability to recommend buildings for designation, reviewing heritage alteration permit applications, and monitoring the heritage register.
- Victoria has two City-owned arm's length agencies: the Victoria Heritage Foundation, responsible for the management and disbursement of municipal funds for the restoration of residential heritage properties, and the Victoria Civic Heritage Trust, responsible for developing, administering and giving financial support to programs that preserve, promote, interpret and enhance the cultural and natural heritage resources of the City of Victoria.

Inventory and Districts:

- The City of Victoria has an online record of the Inventory of all Designated and Registered heritage properties. The Heritage Registry is a list of buildings with heritage value that have not received formal designation, but which possess significant heritage value. Alterations or demolitions to registered properties are forwarded to the Heritage Advisory Committee and Council to determine if the property warrants designation.
- For both Heritage Conservation Areas and Development Permit Areas (Secondary Plans) most exterior changes to registered heritage buildings must be approved by Council.

Financing and Funding Options:

- The municipal Heritage Program includes four programs of grants and incentives which are administered by the City-owned arm's length agencies.
- The Heritage Grant Program is funded by the City and administered by the Victoria Heritage Foundation and provides small emergency grants for the conservation of designated residential properties.
- The Building Incentive Program, administered by the Victoria Civic Heritage Trust and funded by an annual municipal capital grant provides up to 50 percent of eligible work (up to \$50,000) for rehabilitation costs of commercial or institutional buildings.
- The Tax Incentive Program for Downtown Heritage Buildings is administered by the municipal heritage planner and applies to designated commercial buildings in downtown Victoria that undertake conversion of upper floors to residential use. Owners may be exempted from property tax for up to 10 years based on the cost of seismic upgrading.
- Design Assistance Grants are administered by the Victoria Civic Heritage Trust and provide a one-time matching grant of up to \$1,000 for professional services required to complete an application for the Building Incentive Program.

Monitoring Heritage

- Under the Provincial Government Act, part 27 s. 981, an individual who demolishes or undertakes alterations to heritage properties without authorization will be subject to a fine of up to \$50,000 or two years in prison. A corporation that commits such an offence is liable for up to \$1,000,000.

Lessons for Toronto:

- The extensive support from the public over a long period of time may be the single most important factor to the success of conservation in Victoria, and is a clear indicator of the importance of raising awareness.
- The use of arm's length but accountable foundations has devolved heritage responsibilities to permit heritage decisions to be made outside of the Planning and Development department, reducing back-log at the municipal level.
- Each finance or funding program includes an economic input-output model that assists with a full analysis of the program's efficacy.

Commission on Chicago Landmarks

Chicago



Context:

- The Commission on Chicago Landmarks was created in 1968 by City Ordinance.
- The Commission's mandate is to recommend landmarks for designation. Other initiatives undertaken by the Commission include Preservation Awards, development of architectural tours for downloading from the Commission's website, an architectural style guide to Chicago, and an annotated and illustrated listing of all designated landmarks in the City

Governance Structure:

- The Commission is composed 9 members, appointed by the Mayor and City Council.
- Located within the Planning and Development Department of City Structure
- Commission Decisions are received by City Council. The Landmarks Commission makes final decisions with respect to designations. The only opportunity for Council to overturn the decisions of the Landmarks Commission is when the Commission approves a demolition – Council may overturn that ruling.

Inventory and Districts:

- Commission undertook Chicago Heritage Resources Survey between 1983-1995. The 12 year process allowed the City to survey all buildings in Chicago constructed prior to 1940 to identify architectural and historical significance. The survey resulted in the identification of over 17,000 buildings with architectural and historical significance.
- There are currently 45 Landmark Districts (Heritage Conservation Districts) in the City of Chicago. The Commission has 3 dedicated staff positions for the monitoring of Landmark Districts.

Financing and Funding Options:

- Economic Hardship Exception: Landmarks Commission has special consideration for owners of landmark properties for whom the denial of a building permit would result in the applicant losing all 'reasonable and beneficial use of or return from the property.' In such cases, the Commission will design a plan to relieve economic hardship which

may include, but not be limited to: 'property tax relief, loans or grants from the City of Chicago or other private sources, acquisition by purchase or eminent domain, building code modifications, changes in applicable zoning regulations, including a transfer of development rights, or relaxation of the provisions of the ordinance

Monitoring Heritage

- The Landmarks Ordinance permits the Commission to institute a system of fines to regulate alterations and demolitions to heritage structures. Penalties for unauthorized alterations or demolitions to heritage buildings range between \$500-\$1000 per offence.
- Lots with registered offences will not have building permit granted for 5 years; beyond that time frame, any building permit pertaining to the site will require public meeting.
- Within the Planning and Development Department, there are 3 dedicated staff positions for the monitoring of permit applications on Landmark (i.e. heritage) buildings. These positions are filled by individuals with architectural training who are able to assess the heritage impacts of proposed changes.
- Buildings identified in the Chicago Heritage Resources Survey as possessing architectural and historical significance are granted a delay of 90 days in permit application time under the Chicago Building Code which will permit the Landmarks Commission to consider alternatives to alteration or demolition, including designation.

Lessons for Toronto:

- City-wide survey assists Commission to locate and monitor heritage.
- Economic hardship exception prevents dereliction of heritage properties due to cost of maintenance.
- Dedicated permit monitors with expertise in heritage architecture are able to evaluate heritage impact of alterations to landmarks and districts.
- System of fines and penalties ensures that heritage landmarks are maintained.

Historic Preservation Element

San Francisco



Context:

- Heritage Preservation reports on designation are sent to the Landmarks Preservation Advisory Board. The Board plays an advisory role in heritage designation, with the Historic Preservation Element in the Planning Department leading conservation activities.

Governance Structure:

- The Landmarks Board is composed of 9 members, appointed by the Mayor.
- The Primary responsibility of the Board is to advise the Planning Department and Planning Commission on permit applications that affect landmark buildings, sites or buildings located within landmark districts. The Board has one planning advisor and one legal counsel, all reports and research are issued by the Planning Department.

Inventory and Districts:

- San Francisco has 11 Landmark Districts and uses the following criteria to evaluate potential Districts:
 - Does the proposed historic district directly address and engage the cultural and social history of San Francisco?
 - Does the proposed historic district characterize a neighbourhood or area presently under represented in the City's Landmarks and Historic Districts program?
 - Would the proposed historic district involve communities of people, such as ethnic communities, communities of interest, or cultural communities?
 - Does the proposed historic district include public spaces and common grounds?
 - Does the proposed historic district include architecturally significant buildings?

Financing and Funding Options:

- State Legislation, the Mills Act (1976), permits local governments to develop economic incentive programs for heritage properties. The Act provides for a 50 percent reduction on property taxes for qualified properties that are on either the municipal or federal register. The intent of the Mills act is to make designation more

appealing to property owners, to provide an economic incentive for conservation activities. Property tax savings is calculated using the Income Approach. The Income Approach values the property according to the capitalization of income in which the potential income from the property is divided by a pre-determined capitalization rate to arrive at a new assessment of the property value. The assessment remains in place for the duration of the contract on the property (minimum of 10 years), regardless if it changes ownership.

- Other incentive options include the Residential Rehabilitation Program (a suite of loan programs to assist owners to bring residential buildings up to code), Federal Historic Preservation Tax Incentives Program (a 20% tax credit for historic properties on the National Register), Tax Deduction for Preservation Easements, the State Historical Building Code (an alternative to the standard building code offering flexibility for historic buildings), and Transfer of Development Rights (a density transfer scheme).

Monitoring Heritage

- San Francisco has no formal protocol for monitoring the condition of privately owned historic properties. Building permits for heritage (called Certificates of Appropriateness) are issued for approved alterations to structures.
- At the City-wide level, the Building Department issues fines for any building activity not approved through the permit process, although some major violations have resulted in out of court settlements with resulting funds used to fund local heritage projects.

Lessons for Toronto:

- Application of the income approach of property evaluation for heritage structures reduces the burden of increased taxes from market value assessment once heritage structures are restored and appreciate in value.

Historic Scotland

Edinburgh



Context:

- The Old and New Towns of the City of Edinburgh was recognized as a UNESCO World Heritage Site in 1995.
- Historic Scotland, an organization reporting to the Scottish Ministers, has completed a survey identifying buildings of architectural or historic interest within each local authority.

Governance Structure:

- A Management Plan for the Old and New Towns of Edinburgh was completed in 2005. The Plan outlines how the UNESCO site is governed within the context of the local authority, acknowledging that local legislation and development plans provide the guiding framework for growth and change.
- Within the UNESCO World Heritage Site and within the rest of Edinburgh, local planning authorities are responsible for approvals of alterations or demolitions to historic structures.
- All planning consent for alterations to listed buildings must be forwarded to Historic Scotland, as the representative body of the Scottish Ministers. Historic Scotland considers whether there are special circumstances that would warrant a public local inquiry to evaluate and rule on the proposed alterations. If this is not the case, the planning authority is authorized to approve the alterations on its own.

Inventory and Districts:

- The inventory of listed buildings is maintained by Historic Scotland.
- An inventory of at-risk listed buildings is administered by the Scottish Civic Trust, funded by Historic Scotland, is used to draw attention to the potential of listed buildings for acquisition, restoration and resale.
- Planning authorities are required to identify areas of historic significance and designate them as Conservation Areas. Not all buildings in Conservation Areas are listed; however, alterations to all buildings, and new buildings, within Conservation Areas require consent from the local planning authority.

Financing and Funding Options:

- Historic Scotland offers 4 grant programs to assist with the conservation and preservation of historic sites:
- The Historic Environment Grants Programme assists with costs associated with using traditional materials or craft skills in restoration efforts.
- The Building Repair Grants Scheme covers repairs to listed buildings and is awarded competitively based on the merit of the building and urgency of work.
- Repair Grants for Places of Worship is run in partnership with the Heritage Lottery Fund and provides grants for urgent repair work to places of worship.
- The Historic Environment Regeneration Fund provides grants for area-based work and includes conservation area regeneration schemes.

Monitoring Heritage

- Unauthorized demolitions, or any alteration to listed buildings is considered a criminal offence. Property owners charged with this offence face a fine of up to £20,000, or two years in prison.
- If an unauthorized alteration is not discovered until the property is sold or has its ownership transferred, the property owner may still be prosecuted by the local authorities.
- Planning authorities have the ability to protect unlisted buildings that are considered to be of special interest that may be at risk due to development pressure or proposed alterations by issuing Building Preservation Notices. A Building Preservation Notice provides the same legal protection as statutory listing and is in effect for a period of six months while the Scottish Ministers determine whether the building should be listed.

Lessons for Toronto:

- Funding grants for Conservation Areas assist with public realm improvements or conservation of clusters of buildings and can assist with the conservation of a sense of place.
- Special inventory of buildings is a useful tool to direct public and private sector assistance to deteriorating and/or neglected heritage buildings.

Tripartite Agency Structure

Mexico City



Context:

- Mexico City is a challenging environment from a conservation perspective. It is a City replete with heritage resources representing several thousand years of history. To this day, many street patterns in Mexico City are based on the ancient Aztec trails, making this history as tangible and relevant as colonial or 20th Century heritage.

Governance Structure:

- Three public agencies govern heritage in Mexico City: the National Institute of Anthropology and History, the National Institute of Fine Arts, and the Urban and Housing Development Institute (a municipal agency).
- Urban and Housing Development Institute is the body that regulates the alteration and demolition of heritage structures; however, the research and expertise required to evaluate heritage structures is located in the National Institute of Anthropology and History and the National Institute of Fine arts that deal with pre-20th Century and 20th Century history respectively.
- Elected officials are not responsible for decisions on heritage structures.

Inventory and Districts:

- Each agency compiles an inventory of its heritage structures on an ongoing basis. All information is stored in Geographic Information Systems database that is cross-referenced.
- District designation is focus for Mexico City, particularly in the historic centre and the colonial town centres (which are now incorporated into the metropolitan area).
- At the district level, there are ongoing efforts to protect the historic street pattern and open spaces, many of which date back to the pre-colonial era and include significant landscapes and natural features.

Financing and Funding Options:

- The Historic Downtown Foundation (a separate organization devoted to the historic core of the City) offers financial incentives to develop new commercial and residential projects in the City, employing techniques of adaptive re-use.

- Mexico City also has a system of Density Transfer wherein an owner of a heritage building who wishes to develop that site may have the rights to develop transferred to another district in order to compensate for the mandatory retention of the heritage structure.

Monitoring Heritage

- Mexico City has a monitoring system based on building permits; however, at present the Urban and Housing Development Institute does not possess the staff resources to monitor all alterations to heritage structures.

Lessons for Toronto:

- Separating the functions of researching heritage from the administration of heritage resources has allowed Mexico City to engage in in-depth research into local heritage (built, cultural, sociological, and archaeological); however the challenge remains to fully integrate the three organizations to ensure that the initiatives undertaken by each are in alignment.
- The focus on heritage districts has allowed (as it has in Montreal and other cities) for the conservation of unique heritage attributes such as street patterns, prominent views, traditional pilgrimage routes, and an interconnected system of public spaces.

Characteristics of Successful Heritage Management

Based on consultation with stakeholders during the Advisor Workshop and research into heritage management precedents (summarized in the previous section), this report is informed by the notion that successful heritage management is based on key components:

- **A broad appreciation for the value of heritage beyond the particular interests of heritage advocates and professionals.**

Much of the research and literature that focuses on the success of heritage conservation draws attention to the need, and the value, of an engaged public. It is often when residents, property owners, developers, and visitors embrace the value of heritage and make it prominent in city-building initiatives, that conservation flourishes. Based on this premise, heritage organizations such as UNESCO and ICOMOS have concentrated many of their initiatives on raising public awareness (Swedish International Development Agency, 2006).

- **Laws that prevent exemptions to conservation decisions being granted outside the realm of heritage expertise.**

In the extensive precedents reviewed by Anthony Tung, as well as the additional precedents reviewed in this Plan, it has become obvious that the key to successful conservation is the strength of decisions and recommendations made by the senior heritage authority. When these recommendations are ignored, or somehow undermined, conservation fails. In Beijing, for example, despite conservation guidelines and standards applying to the Forbidden City, a provision in the legislation allowing the final decision on permits relating to heritage structures to be made by the local political representative has resulted in the loss of hundreds of historic structures (Tung, 2001).

Integral to this is the weight given to heritage policies in relation to other policies. Currently, in Ontario an HCD overrides other planning instruments such as zoning and official plans.

- **The independence and professional integrity of heritage recommendations.**

In most successful precedents, a combination of City staff and Heritage Boards are a centre for heritage knowledge and provide the ability to make recommendations with due diligence and expertise. Heritage boards thrive in environments in which they function at arm's length from the municipality's decision-making process. In the analysis of precedents it was found that

where Heritage Boards or Commissions whose members represent expertise in architecture, archaeology, local history, landscape architecture and planning, and work directly with well resourced staff members, recommendations are less likely to be overturned at City Council or by the courts. Chicago and New York City provide examples of this structure.

- **A properly resourced Heritage Staff, with the ability to undertake conservation efforts, including the research required to create proper and defensible designation reports.**

Across North America, there are examples of innovative conservation projects initiated by a heritage staff that is properly resourced. In San Francisco, a 'Policy for the Recent Past' has been developed which will allow staff to locate, evaluate and inventory buildings from the past 50 years to determine which should be added to the city's inventory. This initiative alone has an allocation of 5 full-time staff per year. New York City's Landmarks Preservation Commission has a research staff of 60, all possessing degrees in architecture or urban design who are able to operate and administer several programs in addition to the monitoring of landmark properties and districts. In Montreal, a series of workshops for property owners has been created to teach restoration techniques.

- **An emphasis on Heritage Conservation Districts that ensures that the continuity and contextual meaning of heritage is preserved.**

Different cities have opted to focus on heritage districts as a mechanism to a) identify a large number of heritage resources at once; b) to include heritage attributes that go beyond individual properties and include their context; and c) to focus attention on the sense of place, and the identity of the city. As a result, they have been able to identify and conserve the character of neighbourhoods, streets, and significant districts. The City of Ottawa has the most heritage conservation districts of any municipality in Ontario. The focus on preserving contextual heritage led to the designation of an entire municipality, the former village of Rockcliffè Park (with 700 properties), which was amalgamated with the City of Ottawa in 2000. New York City's Landmarks Preservation Commission has focused on the creation of Districts to bring stability to areas with a concentration of heritage resources and to maintain the character and fabric of those areas.

appendix **2**



Glossary of Terms

Adjacent lands:	as those lands contiguous to a protected heritage property or as otherwise defined in the municipal Official Plan (OPPS).		elements or parts. Examples may include, but are not limited to heritage conservation districts designated under the Ontario Heritage Act; and villages, parks, gardens, battlefields, main streets and neighbourhoods, cemeteries, trail ways and industrial complexes of cultural heritage value.” (OPPS)
Archaeological resources:	artifacts, archaeological sites and marine sites. The identification and evaluation of such resources are based upon archaeological fieldwork undertaken in accordance with the Ontario Heritage Act (OPPS).	Heritage Attributes	“In relation to real property, and to the buildings and structures on the real property, the attributes of the property, buildings and structures that contribute to their cultural heritage value or interest.” (OHA)
Built Heritage	“One or more significant buildings, structures, monuments, installations or remains associated with architectural, cultural, social, political, economic or military history...” (OPPS)		
Character-defining elements:	the materials, forms, location, spatial configurations, uses and cultural associations or meanings that contribute to the heritage value of a historic place, which must be retained in order to preserve its heritage value (OHT).	Heritage Management	The development and prioritizing of the City’s heritage conservation objectives, the creation of an integrated framework for decision making, ensuring that decisions respect cultural heritage values, and the development of policies to strategically achieve these objectives, as enabled and directed by the Province of Ontario.
Conservation	“The identification, protection, use and/or management of cultural heritage and archaeological resources in such a way that their heritage values, attributes and integrity are retained. This may be addressed through a conservation plan or heritage impact assessment.” (OPPS) Reconstruction or reconstitution of a disappeared cultural resource is not considered conservation (S & G) and is therefore not addressed in this document.	Heritage Resources	The Ontario Heritage Policy Review (1990) defines heritage as “All that society values and that survives as the living context – both natural and human – from which we derive our sustenance, coherence and meaning in our individual and collective lives.”
Cultural Heritage Landscapes	“A defined geographical area of heritage significance which has been modified by human activities and is valued by a community. It involves a grouping(s) of individual heritage features such as structures, spaces, archaeological sites and natural elements, which together form a significant type of heritage form, distinctive from that of its constituent		This is a very broad definition. This Plan does not purport to focus on issues of the entire heritage field. For the purposes of this document, the term heritage resources refers to built heritage and cultural heritage landscapes (see definitions below). Archeological heritage is included in the Ontario definition; however, it is not addressed directly in this Heritage Management Plan, due to the complementary and concurrent development of the Archeological Master Plan, which

	includes a Management Strategy.
Historical association:	a building, structure, or property may have been associated with the life of a historic person or group, or have played some role in an important historical event or episode (OHT).
Intangible Heritage:	heritage includes intangible or non-material resources like traditions, ceremonies, attitudes, beliefs, family histories, stories, dances, games, names and language. These are at the heart of cultural heritage and reflect our individual and collective identity and our diversity as Ontarians (SOH).
Integrity:	a building, or structure, together with its site, should retain a large part of its integrity – its relation to its earlier state(s) – in the maintenance of its original or early materials and craftsmanship (OHT).
Intervention:	any action, other than demolition or destruction, that results in a physical change to an element of a historic place (S & G).
Inventory of Heritage Properties:	designated heritage resources listed by the City of Toronto (HSNOP).
Maintenance:	routine, cyclical, non-destructive actions necessary to slow the deterioration of a 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 (S & G)
Property:	real property and includes all buildings and structures thereon (OHA).

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- (OHT) Ontario Heritage Toolkit. Ministry of Culture. 2006.
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