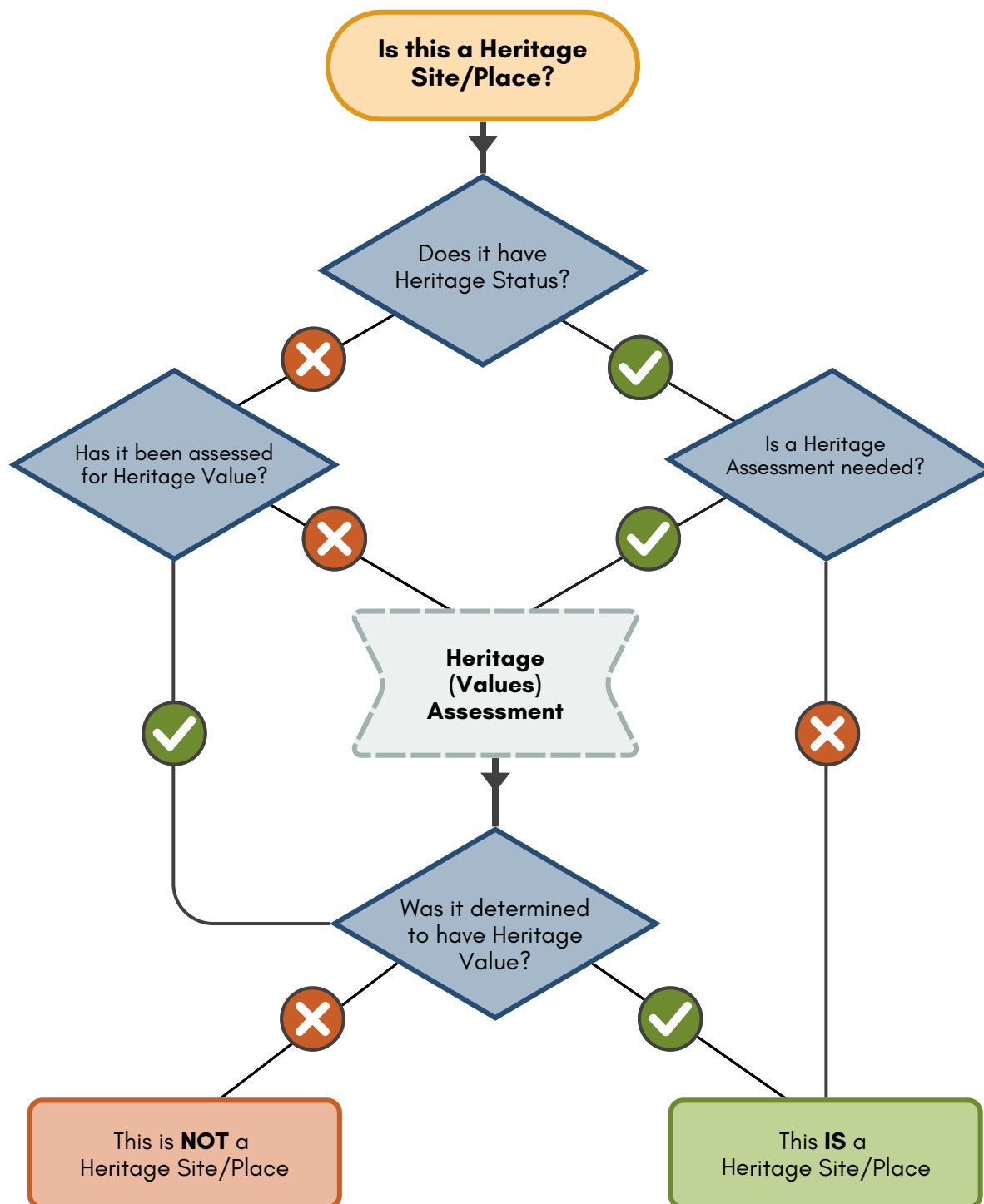


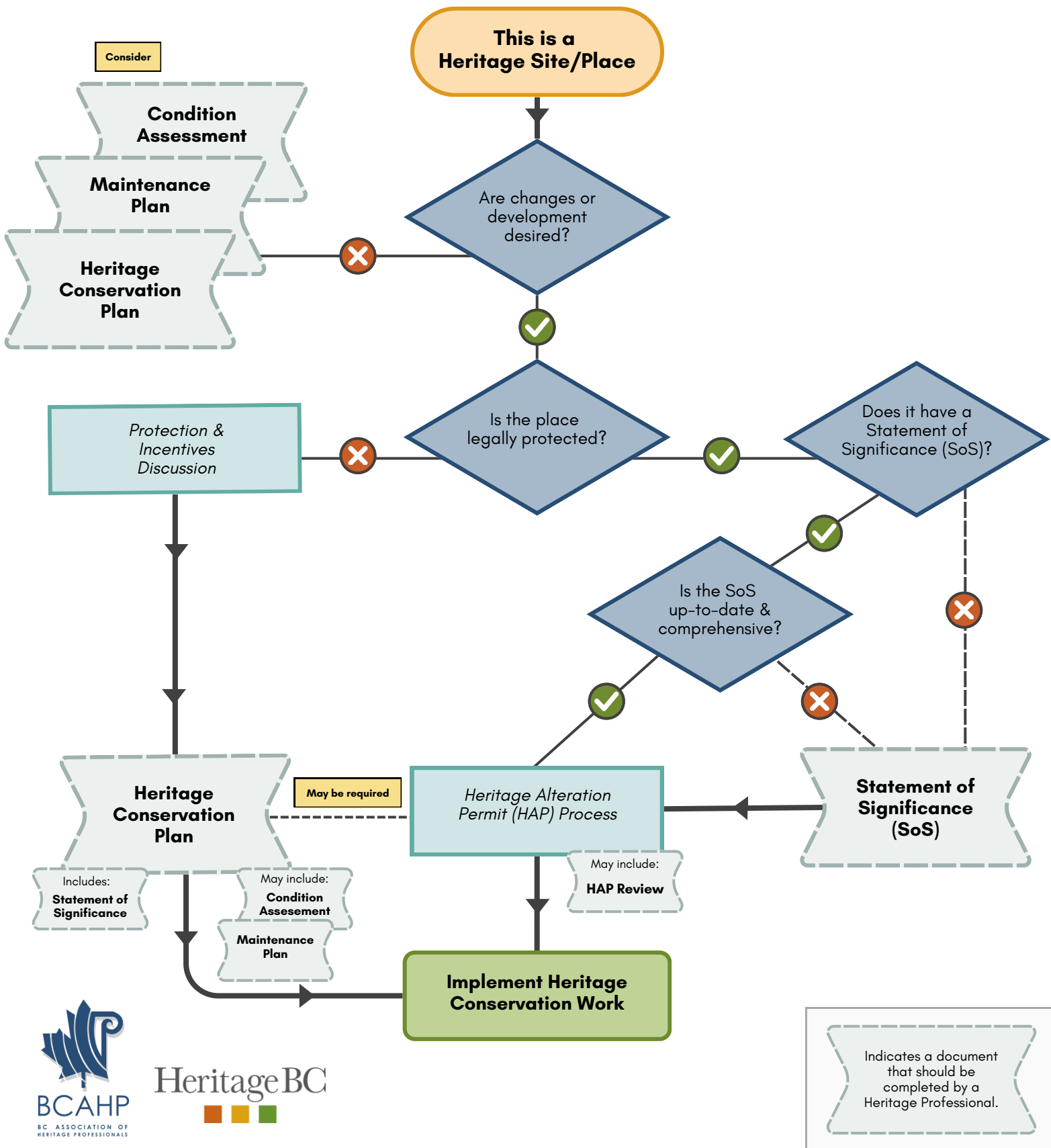
Heritage Conservation Services Flowchart 1

The following flowchart is intended to determine if a site/place should be considered a heritage place (or whether it is already considered heritage).



Heritage Conservation Services Flowchart 2

The following flowchart outlines the process for determining what to do with a heritage site/place and where a Heritage Professional can provide support.



Heritage Conservation Services

Below is additional details and definitions to provide further context to the **Heritage Conservation Services: Flowchart 1**.

Is this a Heritage Site/Place?

A preliminary inquiry with your jurisdiction might be where you begin in order to determine whether a place is considered (or has the potential to be considered) heritage. Based on the jurisdiction's heritage policies and guidance, they may be able to answer this question straight off, or, they may suggest that there needs to be exploratory conversation and research. Ideally, this could be with a heritage professional (often over the phone or via e-mail). Heritage Professionals have the title CAHP after their names, as they are professional members of the Canadian Association of Heritage Professionals. They conduct heritage assessments and other research to determine if a place should be considered heritage or not.

Does it have Heritage Status?

Depending on your jurisdiction, heritage status might come from the place being "Designated" (protected by a heritage designation bylaw) and/or being listed on a Heritage Inventory, a Heritage Register, a Heritage Schedule, among others. Not having heritage status or listed in one of the above ways does not mean it is not a heritage place.

Is a Heritage Assessment needed?

Certain jurisdictions will require a **Heritage Assessment** (also known as a Heritage Values Assessment) before a development or a demolition inquiry can be made. Often, this is to help planning staff to determine if this might be a heritage place previously gone unnoticed. Other jurisdictions might be confident in skipping the heritage assessment step and determining whether the place is or isn't heritage based on their own records or understanding. Answering the question "is this or isn't this a heritage place" might be important for your jurisdiction before they are willing to make a decision about allowing it to be demolished or significantly altered for example.

Heritage (Values) Assessment

A **Heritage (Values) Assessment** is a document that analyzes the heritage value of a place to answer the question: "Is this a heritage place and is it eligible for heritage status?". Knowing the answer to these questions helps to inform decision-making. A Heritage Assessment analyzes both the tangible and intangible elements of the place, when applicable. Some jurisdictions have their own templates or criteria for Heritage Assessments. They are typically written by a Professional Member of the Canadian Association of Heritage Professionals (CAHP) and include detailed research resources and a bibliography.

Please note that a Heritage Assessment will be reviewed by your jurisdiction staff and may also be forwarded to a heritage advisory body, such as a Community Heritage Commission/Heritage Advisory Panel, for critique and feedback.

Heritage Conservation Services

This **IS** a
Heritage Site/Place

If it is not already, consider formalizing the place's heritage status. This is typically done by listing it on a Heritage Register (or creating one if none exist in your community) or adding it to another existing heritage list, such as a Heritage Inventory. Different jurisdictions have different processes for accepting nominations or approving additions to their heritage lists. Heritage status can also be achieved through a Conservation Covenant, a Heritage Designation bylaw, a Heritage Revitalization Agreement - all of which provide legal protection of the place. It could also be added to a Schedule of protected properties in a Heritage Conservation Area if located in one. For more information on Heritage Registers, see Heritage BC's *Community Heritage Register Resource Guide*. For more information on the various legal protection tools see Heritage BC's *Heritage Conservation Tools: Resource Guides*.

Heritage Conservation Services

Below is additional details and definitions to provide further context to the **Heritage Conservation Services: Flowchart 2**.

**This is a
Heritage Site/Place**

If it is not already, consider formalizing the place's heritage status. This is typically done by listing it on a Heritage Register (or creating one if none exist in your community) or adding it to another existing heritage list, such as a Heritage Inventory. Different jurisdictions have different processes for accepting nominations or approving additions to their heritage lists. Heritage status can also be achieved through a Conservation Covenant, a Heritage Designation bylaw, a Heritage Revitalization Agreement - all of which provide legal protection of the place. It could also be added to a Schedule of protected properties in a Heritage Conservation Area if located in one. For more information on Heritage Registers, see Heritage BC's *Community Heritage Register Resource Guide*. For more information on the various legal protection tools see Heritage BC's *Heritage Conservation Tools: Resource Guides*.

Is the place
legally protected?

A **Conservation Covenant**, a **Heritage Conservation Area (HCA) bylaw**, a **Heritage Designation bylaw** and a **Heritage Revitalization Agreement (HRA)** are the four ways that heritage places can be legally protected and in return, property owners can be compensated with development relaxations and perks. For more information, see Heritage BC's *Covenant Resource Guide*, their *HCA Resource Guide*, their *Heritage Designation Resource Guide* and/or their *HRA Resource Guide*.

**Condition
Assessment**

A **Condition Assessment** is a document that describes the physical condition of a historic place, based on an understanding of construction techniques and materials through time. This report helps to determine what conservation treatment might be applied to each element and may, in some cases, also include recommendations and options for interventions. If a project requires a Heritage Conservation Plan (see HCP), the Condition Assessment can be integrated into that document. However, in some cases, it can be helpful as a stand-alone document to determine scope and feasibility of work before deciding on a conservation approach. It is typically written by a Professional Engineer or another building specialist (such as an Architect or Building Contractor/Inspector), ideally with a specialization in heritage conservation and/or a Professional Member of the Canadian Association of Heritage Professionals (CAHP). This document may also be referred to as a **Condition Report** or a **Condition Survey**.

**Maintenance
Plan**

A **Maintenance Plan** is a document that outlines the short-term and longer-term strategies for the upkeep of a heritage place. It may include aspects such as overall guidelines and principles to follow, scheduled inspections, required permits, routine and cyclical cleaning, principles of repairing and replacing material that has been compromised and the keeping of an information file for current and future owners. It is often part of a **Heritage Conservation Plan**, but it can also be a stand-alone document. It is typically written by a Professional Member of the Canadian Association of Heritage Professionals (CAHP).

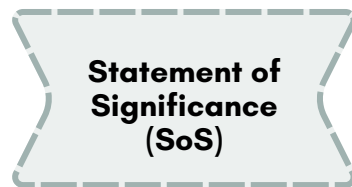
Heritage Conservation Services



A **Heritage Conservation Plan (HCP)** is a substantial document that sets out what is significant about a heritage place and how its heritage value(s) and character-defining elements will be conserved. Following the *Standards and Guidelines for the Conservation of Historic Places in Canada*, it defines the strategy for conservation interventions as applied to each aspect of the historic place (i.e. preservation, restoration or rehabilitation), with recommendations for its on-going/future use and its maintenance as well. An HCP is informed by the heritage place's Statement of Significance and, depending on the circumstances, can also include a Condition Assessment and/or a Maintenance Plan. It is typically written by a Professional Member of the Canadian Association of Heritage Professionals (CAHP) and includes detailed research resources and a bibliography. It may also be known simply as a **Conservation Plan** or a **Conservation Management Plan**.



In exchange for non-financial incentives (such as development relaxations, perks, variances, including varying use and allowing additional density) a property owner may be inclined to apply legal protection on the heritage property using a **Heritage Revitalization Agreement**, a **Heritage Covenant** or a **Heritage Designation bylaw**. For more information, see Heritage BC's *HRA Resource Guide*. Additionally, some jurisdictions offer cash grants for the repair and maintenance of listed heritage properties and some require legal protection in return for these grants.



A **Statement of Significance (SoS)** is a document that is written for a place that has been determined to have heritage value, (sometimes following the Heritage Values Assessment process, but in many cases simply based on a community's formal or informal assumptions about their historic places). It is a concise document that describes the heritage place, its heritage value(s) and identifies the character-defining elements (CDEs) that embody or reflect that heritage value and should be retained in order for that heritage value to remain. Heritage value is determined by assessing the property for aesthetic, cultural, historic, scientific, social, and/or spiritual importance or significance for past, present and future generations. An SoS is a useful document for adding a historic place to a Community Heritage Register, the BC Register of Historic Places and the Canadian Register of Historic Places (CRHP) (and is required at the provincial and federal level). It is also the starting point for Heritage Alteration Permits, Heritage Conservation Plans, Heritage Designations and Heritage Revitalization Agreements (HRAs). It is typically written by a Professional Member of the Canadian Association of Heritage Professionals (CAHP) and includes detailed research resources and a bibliography.

Heritage Conservation Services

Heritage Alteration Permit (HAP) Process

A **Heritage Alteration Permit (HAP)** allows and manages changes to protected heritage properties. A HAP application will need to be submitted and approved prior to any conservation work being done to a legally protected heritage place. Depending on the community, this can involve internal review and approval by planning staff, Community Heritage Commissions/Heritage Advisory Panels, and/or Council.

HAP Review

Some local governments will review Heritage Alteration Permits, internally, however, certain local governments may require, at their discretion, a **Heritage Alteration Permit (HAP) Review** to be conducted by an external heritage professional. This is to ensure that the proposed work is appropriate and following their relevant local heritage policies, as well as, ideally, following the Standards and Guidelines for the Conservation of Historic Places in Canada.

Implement Heritage Conservation Work

Make sure appropriate permits are obtained for the conservation work, if and where required.

Heritage Conservation Services

The following are other heritage-related deliverables that are typically written by Heritage Professionals.

Heritage Impact Assessment

A **Heritage Impact Assessment (HIA)** is a report that describes the impact and effect, both directly and indirectly, that a proposed development may have on a protected heritage place (for example, protected by a Conservation Covenant, Heritage Designation, a Heritage Revitalization Agreement or being on a Schedule in a Heritage Conservation Area). An HIA provides the local government with important decision-making information, prior to issuing approvals. It is expected to refer to any Historic Context Statements for the area (if available) and to include an accompanying Statement of Significance, along with the identification and assessment of expected impacts, including viable recommendations and conservation strategies to mitigate or avoid adverse impacts to the heritage place. Impacts are to be assessed in relation to their adherence to *The Standards and Guidelines for the Conservation of Historic Places in Canada*. It is typically written by a Professional Member of the Canadian Association of Heritage Professionals (CAHP) and includes detailed research resources and a bibliography.

Historic Context Statement

A **Historic Context Statement** is a document, based on substantial community consultation, that identifies important themes relevant to the history and development of the built environment of a place. These statements establish periods of historical significance for each of the important themes, while identifying significant features that embody and reflect the area overall. In many ways it is a similar document to a Statement of Significance, but on a larger scale. In consultation with the community, it is typically facilitated and summarized by Professional Members of the Canadian Association of Heritage Professionals (CAHP) and includes detailed research resources and a bibliography.

Interpretation Plan

An **Interpretation Plan or Program** is a document that outlines how the story and significance of a heritage place is told, providing the policies, strategies and detailed advice for interpreting the place. This can include sites being conserved, but can also be used as a commemorative tool, to celebrate and acknowledge a lost resource. It is typically written by a Heritage Professional, whether a Professional Member of the Canadian Association of Heritage Professionals (CAHP) or other individuals from the Museum sector, in consultation with the community, and includes detailed research resources and a bibliography.

Thematic Framework

A **Thematic Framework** is based on substantial community consultation and is a high-level summary of activities, events, development patterns, and social/political/cultural forces that represent an entire community. Themes can be both tangible and intangible and will represent the various communities of the area and each will have heritage values associated with them. When determining the heritage value of individual places, they should be assessed against the Thematic Framework. It is typically written by a Professional Member of the Canadian Association of Heritage Professionals (CAHP) and includes detailed research resources and a bibliography.