

# Conservation Plan for Heritage Resources

The objectives of a Conservation Plan for Heritage Resources (Conservation Plan) are to identify the cultural and historic significance of a site and to set out a plan to manage and conserve the heritage values, attributes, and integrity of that site. The conservation plan examines the long-term planning of a cultural resource and should determine how to retain its significance in any future use, alteration, repair, or development).

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## Required by Legislation

The Local Official Plan.

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## Who should prepare this plan?

A Conservation Plan must be prepared by a qualified professional such as a heritage consultant, architect, landscape architect etc. licensed to practice in the Province of Ontario and specializing in the subject of heritage resource and the work being proposed.

Conservation Plans are usually a multi-discipline exercise whereby all consultants on the project must demonstrate accredited professionalism, experience, and knowledge in their chosen field of expertise.

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## Why do we need this plan?

A Conservation Plan is required to ensure the long-term protection of heritage resources.

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## How should this plan be prepared?

A Conservation Plan should at a minimum contain:

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### Introduction

- › Address of the property
- › General site location of the subject property
- › Project name (if applicable)
- › Applicant and owner's contact information
- › Author name, title, qualifications, company name and appropriate stamp
- › Brief description of the proposed development
- › Purpose of the study
- › Location and context map.

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### Proposal Description and Context

- › A description of the proposal, development stats (such as number of units, site area) type of development proposed, height, parking areas, access points, location of amenity areas, proposed phasing
- › A description of the existing on-site conditions as well as surrounding areas, buildings, structures, roads, active transportation facilities, parks, natural areas, buildings, parking areas
- › Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards.

**How should this plan be prepared?** (continued)

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**Investigation/Evaluation****1. Description of the Resource:**

- › Detailed documentation of the resources (sketches, measured drawings and photos)
- › Description of the resource and existing character of the site, including its context and neighbourhood
- › History of the resource and its evolution over time, highlighting changes (preferably graphical)
- › Current management (activities, costs, budget, operations), ownership, responsibilities and roles of other organizations and agencies.

**2. Significance:**

- › Statement of Significance, including a list of character-defining elements
- › Include the designation bylaw, if applicable
- › Heritage status (listing, designation, easements, heritage conservation district).

**3. Planning Policy Framework:**

- › Regulatory context of the heritage resource with attention to approval processes
- › Local planning and policies (zoning and official plans)
- › Parks and Open Space.

**4. Condition of the Resource:**

- › Condition assessment of the resource/attributes with an inventory of prioritized deficiencies
- › Discussion and analysis of mechanisms of deterioration
- › A discussion of use (historic, current and proposed) as it relates to the conservation of the heritage resource.

**5. Issues:**

- › List key issues pertaining to the resource, identifying opportunities and restrictions (e.g. development, financial and capital needs, public access requirements)
- › Conservation constraints and requirements of users and owners
- › Planning issues relating to the place.

**6. Building System and Legal Considerations:**

- › Statement to explain the building and site use from a practical, logistical and legal perspective
  - › Input from structural, mechanical, electrical, planning, geotechnical, trades, and all other required fields of expertise to ensure the project is viable and sustainable
  - › Building and site system review may include:
    - › Site Work (e.g. landscaping, drainage, servicing)
    - › Archaeological concerns and mitigation
    - › Building Envelope (roof, wall cladding, window type)
    - › Accessibility
    - › Finishes and Hardware
    - › Environmental Considerations
    - › Signage and Wayfinding
    - › Legal Considerations (e.g., easements, encroachments, leasing, etc.)
    - › Trees, shrubs, other plantings
    - › Structural elements (e.g. foundation, load bearing)
    - › Ontario Building Code
    - › Mechanical, Plumbing, Electrical
    - › Fire Safety and Suppression
    - › Lighting
    - › Security
  - › If necessary, the building systems may be addressed in an Appendix.
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**How should this plan be prepared?** (continued)

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**Description of Conservation Approach****1. Aims and Goals:**

- › Overall conservation strategy with regard for the *Standards and Guidelines for the Conservation of Historic Places in Canada*;
- › Proposed remedies, interventions and implementation including rationale for selection of period of restoration and for new interventions. This should be organized and described by building elevation
- › Statement as to the recording, inventory and disposition/retention of moveable cultural heritage resources (e.g., artifacts, archival material, salvaged material) and its incorporation into the conservation project.

**2. Work Plan:**

- › Timeline to describe, in chronological order, to meet the objectives and goals
  - › Statement as to specialized trades or skills that will be required to complete the work
  - › Long-term and short-term maintenance schedule
  - › Monitoring schedule, process and identify those responsible for monitoring.
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**Recommendations**

- › Summary and conclusions of the Conservation Plan including any studies and how they support the development and any special considerations or conditions that should be imposed
  - › Any recommendations, or conclusions that should form part of the decision on the matter.
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**Drawings and Supporting Information**

The Appendices **may** include the following, as appropriate:

- › Bibliography
  - › Archaeological assessment report or Stage 1 and 2 Archaeological Assessment reports
  - › Documentation of the character-defining elements
  - › Detailed building condition report
  - › Site plan(s) (current/proposed)
  - › Architectural drawings (current/proposed)
  - › Arborist's report
  - › Other reports as needed.
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**Additional Terms**

To be identified by the local municipality where proposed development is located.

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**Study Submission Instructions**

To be identified by the local municipality where proposed development is located.

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**What other resources are there?**

[Canadian Association of Heritage Professionals \(CAHP\)](#)

Ontario Professional Planners Institute (OPPI) – [Hire an RPP](#)

[Professional Engineers of Ontario](#)

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**About these Terms of Reference**

These Terms of Reference were developed as a joint effort with participation by representatives from all York Region municipalities and the Region. The Terms of Reference are in widespread use across the Region, with local requirements added as prescribed by each municipality at the pre-consultation stage.

The need and scope for this study will be decided by a municipality during initial pre-consultation process with input from partner agencies. This pre-consultation process may include:

- Determination if this study is applicable
- Confirmation of criteria within these Terms of Reference that are appropriate for your development project
- Identification of specific technical components that need to be addressed
- Identification of detailed standards to be met

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**Notes:**

If the proposed development is revised, the study/report shall reflect the revisions by an updated report or letter from the author indicating the changes and whether or not the recommendations and conclusions are the same (Note: this is subject to the extent of the revisions).

A peer review may be required. The cost of the peer review will be borne by the applicant.

If the submitted study is incomplete, is authored by an unqualified individual or does not contain adequate analysis, the applications will be considered incomplete and returned to the applicant.