

Terms of Reference**Heritage Conservation Management Plan****Description**

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

Why do we need this?

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

When do we need this?

Whether this study is required will be decided during the heritage permit pre-consultation process. If it is determined that this study is applicable, the study terms may vary depending on the nature of the proposal.

Requirements

A Heritage Conservation Management Plan shall include the following:

1. Introduction

- Provide an executive summary of the scope of the project
- Background information to document the historical and development history of the property
- Identify the property owner and stakeholders and the current and proposed use of the property

2. Project Description**A) Property Description:**

- Identify the location, municipal address and provide an appropriate location map
- Document the existing conditions, including recent high quality photograph documentation, measured drawings, a site plan, a survey or other document identifying topography, landscaping or other on-site features
 - Landscape inventory includes a site plan, protected views and vistas recognized within the designation By-law to and from the property, water features, tree location and species, landforms, geological formations, fences, walls, berms, pathways, or any other landscape features
- Identify adjacent heritage properties, designated under the Ontario Heritage Act and listed on the Municipal Heritage Register
- Identify neighbouring properties, including any built form or features, required to illustrate the context of the subject property
- Summarize the history of the property outlining its development over time within a time frame context
- Document land ownership from the original Crown Grant and subsequent records from the Land Registry Office

B) Significance:

- Set out the statement of cultural heritage value or interest
- Identify the cultural heritage attributes and values of the property, including structures and landscape features
- Identify any recognized significance, such as a heritage designation by-law, historic plaque, etc.

C) Planning and Policy Status:

- Provide details of the current land use and related Official Plan policies and Zoning
- Identify any regulatory requirements (e.g. heritage designation, flood plain requirements, etc.)

3. Project Objectives

- Outline what is to be achieved by this project
- Provide short-term and long-term goals and objectives
- Propose solutions for conservation of the property's heritage attributes
- Provide the conservation policies to be used in this project (i.e. what conservation principles will be used to ensure long-term conservation, maintenance, monitoring, and sustainable use of the property)

4. Statement of Heritage Intent

- Explain the reasoning and considerations behind the choice of conservation treatments
- Statement as to why one time period of restoration over another was selected, the rationale for new interventions, background resources used such as principles and conventions of heritage conservation
- 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

5. Condition Assessment of the Cultural Heritage Resource(s)

- Condition report of the cultural heritage resource(s) and specific attributes, identifying any deficiencies or concerns
- Detailed recommendations to mediate and prevent further deterioration
- Direction as to use or change in use and how that relates to conserving the heritage attributes
- Outline opportunities and constraints with relation to all aspects of the project (i.e. budget, planning issues, public access, long-term needs)
- Recommendations for conservation treatments that reference the framework provided in Parks Canada's *Standards and Guidelines for the Conservation of Historic Places In Canada*

6. Building System and Legal Considerations

- Explain the building and site use during construction and post-construction, from a practical and logistical perspective, and confirm that the intended uses are legally permitted. If all or a portion of a cultural heritage resource on the property is relocated during construction, the Heritage Conservation Management Plan must detail the proposed relocation, including a pre- and post-relocation condition assessment and any intended mitigation measures to ensure the resource is conserved and enhanced during the relocation process and returned to the site.

- 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)
 - Trees, shrubs, other plantings,
 - Archaeological concerns and mitigation
 - Structural elements (e.g. foundation, load bearing)
 - Building Envelope (roof, wall cladding, window type)
 - Ontario Building Code
 - Accessibility
 - Mechanical, Plumbing, Electrical
 - Finishes and Hardware
 - Fire Safety and Suppression
 - Environmental Considerations
 - Lighting
 - Signage and Wayfinding
 - Security
 - Legal Considerations (e.g. easements, encroachments, leasing, etc.)
- If necessary, the building systems may be addressed in an Appendix

7. Work Plan

- Timeline of overall project, highlighting chronological benchmarks to meet goals and objectives
- Statement as to specialized trades or skills that will be required to complete the work
- Proposed budget to meet and sustain the goals and timeline
- Long term and short-term maintenance schedule
- Monitoring schedule, including the monitoring process and the people responsible for monitoring

8. Qualifications

- Heritage Conservation Management Plans must be prepared by a qualified professional such as a heritage planner, architect and/or landscape architect, licensed to practice in the Province of Ontario and specializing in the subject of heritage restoration and the work being proposed. They should be a member of the Canadian Association of Heritage Professionals (CAHP).
- Conservation Plans are usually a multidiscipline exercise whereby all consultants on the project must demonstrate accredited professionalism, experience and knowledge in their chosen field of expertise

9. Additional Information

- Bibliography of all documentation resources
- List of consultants and other professionals related to the project

10. Additional Reports that may be required:

- Archaeological report
- Arborist's report
- Structural engineering report
- Any other report that Town staff may require to assess the project

11. Approval Authority

- The Town of Grimsby will be the approval authority for a Heritage Conservation Management Plan

Contact Information:

Inquiries regarding the submission and requirements of a **Heritage Conservation Management Plan** should be addressed to Heritage Planning, Town of Grimsby.

Email: heritageplanning@grimsby.ca