

About The Following 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.

The requirement for this study will be decided during Phase 1 (Mandatory Consultation) of the Collaborative Application Preparation (CAP) process.

If determined that this study is applicable, the study terms may vary depending on the nature of the proposal. Discussion and confirmation as to whether all criteria outlined within these Terms of Reference are appropriate for your development project, will also take place with you and in consultation with any relevant external agencies during Phase 1.

In addition to these Terms of Reference, municipal departments and/or external agencies may require analysis of specific technical components that should be addressed in the study. Confirmation of additional technical requirements, and a checklist identifying detailed standards to be met, in turn may be provided. The extent of the checklist items will vary on the nature of the application and will be confirmed during the Phase 1 of the CAP process.

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.

Who should prepare this?

A Conservation Plan must be prepared by a qualified professional such as a heritage consultant, architect and/or landscape architect, licensed to practice in the Province of Ontario and specializing in the subject of heritage resource and the work being proposed. They should be a member of the Canadian Association of Heritage Professionals (CAHP).

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.

Why do we need this?

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

How should this be prepared?

A Conservation Plan should at a minimum contain:

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 Plan
- Location and context map

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, roads, natural areas, buildings, parking areas, landscape features such as trees, fences, berms, pathways, ponds and views and vistas.
- Concept Plan for the development including building location, parking, access, amenity areas, grading and natural features and any natural hazards.

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).

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);
 - 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 o Finishes and Hardware;
 - Fire Safety and Suppression;
 - Environmental Considerations;
 - Lighting;
 - Signage and Wayfinding;
 - Security; and
 - Legal Considerations (e.g., easements, encroachments, leasing, etc.).

 - If necessary, the building systems may be addressed in an Appendix.

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.

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.

Drawings and Supporting Information

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

- Bibliography;
- Chronological history;
- Archaeological Assessment Report or Stage 1 and 2 Archaeological Assessment Reports;
- Documentation of the character-defining elements;
- Schedule of previous reports and studies;
- Detailed building condition report;
- Site plan(s) (current/proposed);
- Architectural drawings (current/proposed);
- Arborist's Report; and
- Other reports as needed.

Study Submission Instructions

The study submission is subject to the Collaborative Application Preparation Process (CAPP) as outlined in By-law 2022-090.

The 3-stage iterative CAPP is required to be undertaken prior to the formal submission and acceptance of applications. As part of each phase, submission and fees will be applicable. Stage 2 is where documents in draft form are submitted for further collaboration and quality assessment relative to the requirements established at Stage 1. A Conservation Plan for Heritage Resources will be submitted in Phase 2 of the CAP process. All minimum requirements outlined are to be included in the application submission.

Stage 3 will complete this assessment phase of the application preparation in anticipation of the fulsome submission of the formal application(s) under the Planning Act. For more information regarding CAPP, including applicable fees, please review the documents here: [CAPP Fees](#) and [CAPP Summary and Procedures](#).

Applications should be submitted to plnsubmissions@king.ca and copied to planner assigned to your file, if applicable.

What other resources are there?

Canadian Association of Heritage Professionals (CAHP)

<https://cahp-acecp.ca/>

Ontario Professional Planners Institute (OPPI) – Hire an RPP

<https://ontarioplanners.ca/hire-an-rpp>

Professional Engineers of Ontario

<https://www.peo.on.ca/>

Notes

If the proposed development is revised, the study/report shall reflect the revisions by an updated report or letter from the author indicating changes to the recommendations and conclusions.

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.