

GUIDELINES FOR PREPARING A CONSERVATION PLAN FOR HERITAGE RESOURCES (CPHR)

PURPOSE

A Conservation Plan for Heritage Resources (CPHR) is a document prepared by a professional specializing in conservation of heritage resources for the purpose of describing in detail the work proposed to the heritage resource in order to ensure its longevity. The CPHR may be required on its own, or as a complementary document to a Cultural Heritage Impact Assessment (CHIA) report, depending on the approval process that the proposed work is subject to, when the recommendation is to conserve the heritage resource.

REQUIRED INFORMATION FOR A COMPLETE CPHR

In the case of built heritage resources, a CPHR will include a statement of significance and identification of character-defining elements of the heritage resource, a building condition assessment, and intervention solutions.

1. The CPHR must be prepared by a **qualified heritage specialist**. Refer to the Canadian Association of Heritage Professionals (CAHP) which lists members by their specialization (<http://www.caphc.ca>).
2. The **statement of significance and identification of character** defining elements sections will be based on the CHIA report submitted for the subject property prior to the Cultural Heritage Conservation Plan. The statement of significance and identification of character is necessary to be included as it will guide the intervention solutions.
3. The **building condition assessment** information will include, but is not limited to, a detailed photographic survey, description and diagnosis of the existing conditions. The character defining element condition assessments are to be included and described.
4. The **intervention solutions** will include a description of the conservation principles applied, detailed architectural drawings, material specifications, list of material samples and mock-ups to be submitted for review and approval and include a schedule of work. Please also refer to Heritage Resources in the Land Use Planning Process Infosheet, prepared by the Government of Ontario, Ministry of Tourism, Culture, and Sport.

GOOD HERITAGE CONSERVATION PRACTICE

The CPHR shall be conducted and based on good heritage conservation practice as per international, federal, provincial, and municipal statutes and guidelines. This includes (but is not limited to):

- [Venice Charter 1964](#)
- [Appleton Charter 1983](#)
- [Burra Charter 1999](#)
- [ICOMOS Charter 2003](#)
- [UNESCO's Recommendation on the Historic Urban Landscape 2011](#)
- [Park Canada's Standards and Guidelines for the Conservation of Historic Places in Canada 2nd Edition](#)
- [Ministry of Tourism, Culture and Sport's Ontario Heritage Toolkit - Heritage Property Evaluation section](#)
- [Ministry of Tourism, Culture and Sport's Eight Guiding Principles in the Conservation of Built Heritage Properties 2007](#)
- [Applicable Heritage Conservation District Guidelines](#)

CHPR AND THE DEVELOPMENT AND/OR BUILDING PERMIT APPLICATION PROCESS

A complete CPHR is comprised of the information listed below. The information included in a CPHR may be submitted in two parts (Stage 1 and then Stage 2) or as one document. The CPHR is separated into stages to align the application approval process with the stages of the design development during the Site Development application; otherwise it can be submitted as one document for a Building Permit application.

In either case, the approval of a final Heritage Permit for the complete CPHR (Stage 1 and Stage 2) is a prerequisite prior to applying for a building permit to the Building Standards Department.

For conservation work that requires a **Site Development Application**, the Stage 1 submission requirements (described later) are mandatory parts of a complete application for a Site Development Application to the Development Planning Department. The Stage 2 submission requirements (described later) are required at the Building Permit application submission stage.

For conservation work that requires a **Building Permit only** (i.e. no Site Development Application), all the information is required in one report (Stage 1 and Stage 2 requirements) including a set of comprehensive construction permit drawings, prior to the submittal of the application to the Building Standards Department for review and approval of a Building Permit.

HERITAGE CONSERVATION WORK SUBJECT TO HERITAGE PERMIT ONLY

In the event that the scope of the proposed conservation work to a heritage resource is at a scale not requiring Site Development Approval or a Building Permit approval – such as brick cleaning and repointing, or other similar work as described in Heritage Conservation District Plans – a letter from the owner (or the hired contractor) describing the scope of work, methodology, materials and product specifications involved would be considered sufficient to submit to Cultural Heritage staff for review and approval.

The owner/applicant is advised to contact Cultural Heritage staff prior to submission of any permit application to the City in order to assess, obtain guidance and information on what submission material will be required for review depending on the scope of work proposed.

SUBMITTAL REQUIREMENTS FOR EACH STAGE

Stage 1 – Site Development Application

The following constitutes the requirements of a Stage 1 CPHR. Additional information may be required by Cultural Heritage staff based on their initial review of the Stage 1 CPHR.

1. The CPHR must be prepared by a **qualified heritage specialist**. Refer to the Canadian Association of Heritage Professionals (CAHP) which lists members by their specialization (<http://www.caphc.ca>).
2. Applicant and owner **contact information**.
3. A **description of the property**, both built form and landscape features, including photos of the existing built heritage resource.
4. Reference to **applicable documents for Good Conservation Principles** Practice and how the proposed conservation work meets these principles.
5. General **criteria for hiring qualified specialists** and trade that will perform the work.
6. Discuss who will undertake the **conservation work review** once the work is completed.
7. **Relationship of content with related CHIA** and any other applicable municipal documents (i.e. Heritage Conservation District Plan or Part IV designating by-law).
8. Discuss the **conservation scope and approach**: detail all conservation work to be undertaken, including detailed and labelled drawings, to be included in appendices.
9. Detailed **moving plan** for the built heritage resources, including relocation plan, if applicable.

10. Provide a **conservation cost estimate**.
11. **Schedule of work**, including list of recommended phases for work completion.
12. **List of information to be provided at Building Permit Stage**, if applicable.
13. Appendices:
 - a. Existing condition elevations (measured, min. 1:100 scale or larger)
 - b. Proposed conservation elevations (measured, 1:100 scale or larger)
 - c. Any additional photos

Stage 2 – Building Permit Application

The following constitutes the requirements of a Stage 2 CPHR. Additional information may be required by Cultural Heritage staff based on their initial review of the Stage 2 CPHR.

1. Proposed **set of construction document drawings**, reflecting and coordinated with the Stage 1 material, including:
 - a. Site plan drawing (min. 1:200 or larger).
 - b. Typical notes (annotations) - these are crucial since they largely explain the details and conservation approach of the work to be carried out.
 - c. Plans (including roof plan, min. 1:50 scale).
 - d. Sections (1:50 scale or larger).
 - e. Elevations (noting areas of conservation work and annotated accordingly, min. 1:50 scale)
 - f. Construction Details describing interventions noting materials and describing work (min. at 1:20 scale or as appropriate to clearly discern the construction detail).
 - g. Window Schedule and Corresponding Details (the details start to describe the quality of work).
2. **Updated construction schedule** and confirmation of mock-up review schedule.
3. **Material specifications and samples**.