

HERITAGE PRESERVATION AND CONSERVATION PROCEDURES FOR LOCAL GOVERNMENTS

ICURR LITERATURE SUMMARY NO. 5 November 1998

Prepared by Belinda Morale
Research Assistant, ICURR

BACKGROUND

“Heritage really means no more than anything that is inherited, and conservation suggests a rather free treatment of the relics of the past.” (A.J. Diamond Associates, 1976)

Canadian communities are shaped by their understanding of the past and physical surroundings of everyday life. Maintaining a sense of the past creates a sense of community insight to history and culture. In essence, they are giving themselves a sense of identity. Built evidence of the past, and areas with archaeological or natural interest provide each Canadian municipality with a unique identity. It gives character and distinct appearance to villages, towns and countryside, while enhancing and sustaining the local scene, sense of place, and the quality of life.

Heritage conservation and preservation procedures are tools that allow municipalities to retain heritage buildings, street scapes, natural open space environments, structures, and artefacts. It can also provide for the maintenance of traditions that are more social or historical (non tangible). The conservation and preservation of these non-renewable resources invariably enhance stability, education, tourism, recreation, economic viability, civic pride and property values within some Canadian communities. It further creates a solid foundation for planning the future.

Canadian municipalities have many challenges to overcome. They must incorporate a non challenged preservation and conservation procedure. No one municipality has yet invented the “perfect” solution, but many have overcome certain barriers. It is important that municipalities share information and strategies in an effort to learn from the mistakes of others. The public at large must also take an active role. With publics supporting the heritage conservation and preservation movement, they can lobby local governments to implement more rigid heritage legislation. Furthermore, it should be noted that the onus of stricter legislation does not solely fall on the municipality. In Canada, most heritage legislation is enforced by the local government, but created by the provincial government. The federal government plays an insignificant role in the process.

The articles reviewed illustrate the many faces of heritage preservation. Heritage preservation means many different things to many different people. Nonetheless, heritage preservation leads to the reinvigoration of once prominent structures, revitalizing them to be useful for today’s society.

ORGANIZATION

This document gives a brief synopsis of existing resources on heritage practices for local governments. The full texts of these documents are available through the ICURR library collection. In selecting publications for inclusion in this document, the following criteria were considered: heritage policy and programs; heritage tax incentives; stewardship; and rehabilitation of heritage buildings. Entries have been divided based on the aforementioned criteria, and have been placed in chronological order under each subheading. This document includes issues relating to the natural environment, private stewardship, government policies, programs and incentives, new usages for heritage structures, accessibility issues relating to heritage properties and the economic feasibility of heritage preservation projects. While this review of heritage preservation and conservation practices is wide ranging, it is by no means exhaustive.

ICURR LITERATURE SUMMARIES

ICURR Literature Summaries is an information service provided by ICURR. The intent of these summaries is to provide an overview of key resources available through ICURR on topics of interest and relevance to Canadian Municipalities.

© 1998 by the Intergovernmental Committee on Urban and Regional Research (ICURR). No part of this document may be reproduced without permission of the copyright owner.

OTHER ICURR LITERATURE SUMMARIES

- June 1998 *A Selection of Alternative Guidelines and Practices for Municipal Planning and Development*
July 1998 *Healthy Cities/Communities*
July 1998 *Performance Measurement and Program Delivery*
August 1998 *Remediation and Redevelopment of Former Industrial Sites*

TABLE OF CONTENTS

Policy and Programs	4
The Municipality of Halifax. October 25, 1983. County Heritage Properties Evaluation System (13 pages, ICURR Doc. HG011, English)	4
City of Regina. February 5, 1985. A Public Participation Program for the Development of Incentives for Heritage Preservation (14 pages, ICURR Doc. HG177, English)	5
The Calgary Planning Commission. March 2, 1987. Re: Implementation of the Core Area Policy Brief: Density Transfer for Heritage Preservation. (20 pages, ICURR Doc. BG035, English)	6
City of Vancouver Planning Department. October 6, 1997. Heritage Policies and Guidelines. (4 pages, ICURR Doc. HG 003, English)	6
Stewardship.....	7
Natural Heritage League. March, 1988. Protecting Ontario's Natural Heritage Through Private Stewardship - ICURR Doc. (18 pages, ICURR Doc. RC041, English)	7
Van Patters, M. and S. Hilts. 1990. <i>Natural Heritage Protection: Voluntary Stewardship Or Planning Control?</i> Plan Canada, 30:5. Ottawa. (5 pages, ICURR Doc EH402, English)	8

Tax Incentives	9
Walter, J. Jackson. 1986. <i>Historic Rehabilitation Tax Incentives: Stimulating Economic Development While Preserving America's Heritage</i> . Government Finance Review, Vol. 2, No. 1. (8 pages, ICURR Doc. HH161, English)	9
Gleye, Paul H. <i>With Heritage So Fragile: A Critique of the Tax Credit Program for Historic Building Rehabilitation</i> . 1988. American Planning Association Journal: Chicago. (7 pages, ICURR Doc. BC003, English)	9
Conversions	10
A.J. Diamond Associates. 1976. <i>The Conversion of Industrial Buildings, Feasibility and Practice</i> . (96 pages, Bibliography, ICURR Doc. BH095, English)	10
City of Ottawa. July 18, 1986. <i>Condominium Conversion for Buildings of Heritage Value</i> . (7 pages, ICURR Doc. HF012, English)	11
Smith, Helen. 1987. <i>Paving Paradise: How We Use Our Empty Churches</i> . Canadian Heritage Magazine. (10 pages, ICURR Doc. BH003, English)	12
Lester, John. 1987. <i>Accessing the Past</i> . Canadian Heritage. (5 pages, ICURR Doc. BH055, English)	13



ICURR Intergovernmental Committee on Urban and Regional Research
 Comité intergouvernemental de recherches urbaines et régionales **CIRUR**

The Municipality of Halifax. October 25, 1983. County Heritage Properties Evaluation System (13 pages, ICURR Doc. HG011, English)

Purpose

To assist local governments or their special purpose bodies interested in preparing a heritage evaluation method.

Key Definitions

Educational value is defined as structures that must be preserved in order to allow Canadians to trace the progress of our nation; once buildings are destroyed, we are deprived of this experience. Scale refers to the heritage conservation contributing to “the maintenance of an interesting, liveable and varied urban environment.” Irreplaceability means the decisions to destroy, demolish or insensitively alter a heritage building can be damaging and cannot be replaced.

Summary

This paper discusses an evaluation system which was recommended in Halifax in 1983. The policy this system is based on reads as follows: “The County shall seek the preservation, rehabilitation, and/or restoration of those areas, sites, structures, and/or conditions which impart to the County a sense of its heritage, particularly those which are relevant to important occasions, areas, or personages in the history of the County, the Province, or the nation, or which are deemed to be architecturally significant.” The paper details the value of a country's heritage and discusses three main themes: educational value, scale, and irreplaceability

The paper outlines recommendations with respect to heritage conservation including: a list of heritage resources to be devised and notice to designate to be served; owners are given 30 days to object; public hearings are to be held; the council designates and gives plaque at their expense; the county should encourage federal and provincial governments to participate and that a list of designated buildings is to be forwarded to the building inspection division.

The next section discusses evaluation categories, criteria and ratings. It outlines what a heritage building is, including some basic criteria such as age, and architectural merit. It outlines some priority criteria such as the relationship to the surrounding area. A scoring mechanism which includes justification and comment is provided.

The same steps are repeated in the next two sections. However, these sections focus on heritage sites and heritage conservation areas respectively. Again, it outlines basic and priority criteria, and a scoring mechanism with justification and comments.

Key Findings, Conclusion and Recommendations

When a municipality wishes to preserve a sense of heritage, it is important for them to undertake an evaluation study and implement a process in which to formally conserve significant areas, sites or structures. This is especially important because “heritage resources provide a three-dimensional educational experience.” It is recommended that every municipality implement a heritage conservation scheme in an effort to preserve history and culture for generations to come.

City of Regina. February 5, 1985. A Public Participation Program for the Development of Incentives for Heritage Preservation (14 pages, ICURR Doc. HG177, English)

Purpose

This paper can be used as a tool for those federal, provincial and local governments who want to implement a public participation program, while incorporating incentives for heritage preservation.

Key Definition(s)

Transfer of Development Potential is another name for density transfer or transfer of development rights, thus allowing for the transfer or sale of excess development rights to another site.

Summary

This paper deals with the development of incentive mechanisms to encourage heritage preservation in Regina, Saskatchewan. It begins by describing possible alternative incentives which any level of government can implement. The paper concludes by presenting a brief delivered by a development company. This brief outlines possible incentives which could be used by municipalities, provincial and federal government.

Key Findings, Conclusions and Recommendations

Some of the possible mechanisms used for preservation incentive included in this report are:

1. Plaques - useful to maintain awareness.
2. Public Awareness - includes awards, brochures, cultural and educational programs, etcetera.
3. Demonstration Projects - how to properly go about conserving a heritage building.
4. Public Works - the City should provide amenities such as special lighting or landscaping to increase the viability of heritage conservation.
5. Design Options - guidelines to assist new development or infill housing.
6. The owner donates the facade of a building and is allowed to redevelop the back.
7. The Municipality should ask for alternative standards which would be more sympathetic to heritage conservation.
8. The Municipality should “encourage the reuse of publicly owned spaces for public purposes.”
9. The Municipality should implement bonusing by-laws.
10. The Municipality should allow for the transfer of development rights.
11. Taxes should remain at the level they were before any improvements were made.
12. Tax abatement can be used as an incentive “for the protection of heritage property be the private sector.”
13. Cash, equities or a line of credit can be used by the non-profit sector for the sole purpose of restoring historic structures.
14. The Municipality should provide low interest loans for the purpose of restoration.
15. “The City would insure private financing for the purposes of purchasing and revitalizing significant heritage property by guaranteeing the mortgage.”
16. The City should purchase the property only if it is significant.
17. The City can purchase facade easements.
18. The City can purchase property and resell with restrictive covenants.
19. There should be some Federal tax relief mechanisms.

The Calgary Planning Commission. March 2, 1987. Re: Implementation of the Core Area Policy Brief: Density Transfer for Heritage Preservation. (20 pages, ICURR Doc. BG035, English)

Purpose

This paper is useful for those local councils and planning staff wishing to implement policy measure to preserve, restore, rehabilitate and maintain heritage sites.

Key Definition(s)

Density transfers allow property owners to transfer (or sell) excess development potential to another site.

Summary

The report outlines properties eligible for density transfer. This report goes to great lengths to provide many alternatives on the issue of the amount of density that may be transferred. It takes into account the upper ceiling of density potential available on the heritage site minus the existing heritage building area. It outlines the potential consequences and makes recommendations.

The paper discusses several implementation techniques. The alternatives described include: registration of caveats or restrictive covenants; municipal and provincial heritage designation process; municipal planning processes with respect to land use amendments, and maintenance and private transfers through agreements registered against properties with no municipal designation.

Key Findings, Conclusions and Recommendations

The recommendation this paper makes is an “as-of-right” density transfer program. In some detail, it outlines criteria to identify which properties would be eligible for density transfers, some of which are:

1. those buildings identified by the municipal heritage evaluation process;
2. density transfers are allowed to occur only in the same land use district as the heritage building;
3. density transfers should be a private transaction between a willing buyer and seller of development rights;
4. an alternative method involves monies being placed in an earmarked fund be set-up to allow developers who wish a higher density to pay directly into a heritage preservation fund at a set rate per unit.

City of Vancouver Planning Department. October 6, 1997. Heritage Policies and Guidelines. (4 pages, ICURR Doc. HG 003, English)

Purpose

This report will assist local council and planning departments who wish to develop policies for heritage designation, and preservation.

Key Definition(s)

Vancouver Heritage Inventory is a list of heritage resources, such as buildings, landscaped resources, streetscapes and archaeological sites, which are, wherever possible to be preserved. *Transfer of Density Policy* allows developers to gain density bonuses or transfer density rights for retaining features of a heritage building.

Summary

This paper is a series of extracts from reports on Vancouver's Heritage Management Plan. They constitute Vancouver's Heritage Policies and Guidelines.

Key Findings, Conclusions and Recommendations

There are three main policies which guide Vancouver's Heritage preservation:

1. Policy on Heritage Designation - the long term goal is to protect heritage properties through Heritage designation; in order to achieve certain bonuses, legal designation is required; and if the City initiates designation, they must address the question of compensation to the landowner.
2. Development Permit Guidelines - special attention must be given to properties listed on the Vancouver Heritage Inventory list before any permits are issued and zoning by-laws may be relaxed to allow up to 10% more of gross floor space if it means that the development will include conservation of a heritage building.
3. Bonus for Heritage Preservation - a detailed procedure for the application of heritage density bonusing is presented, including methods to calculate bonus floor space, and an equation to calculate market value.

STEWARDSHIP

Natural Heritage League. March, 1988. Protecting Ontario's Natural Heritage Through Private Stewardship - ICURR Doc. (18 pages, ICURR Doc. RC041, English)

Purpose

To assist government agencies and non-governmental conservation organizations seeking to promote the public awareness of heritage preservation and management.

Key Definition(s)

Aesthetic Appeal refers to natural areas which provide landowners of natural heritage the opportunity for quiet relaxation. Habitats for Wildlife are those parts of natural heritage which are home to many non-domesticated species. Hydrological Benefits include regulating water levels. On Going Source of Economic Products refers to profits made from the natural heritage site - such as lumbering or cash cropping - with proper management. Benchmark for Research refers to the provision of much of the resources needed for scientific use.

Summary

This paper, distributed by the Natural Heritage League, aims “to encourage landowners of natural heritage sites of Ontario to protect natural heritage features through private stewardship.” The paper begins by describing, in some depth, natural heritage features found in Ontario. It then provides an explanation and reasoning as to why natural heritage is important.

Key Findings, Conclusions and Recommendations

The most significant part of this paper is the final section entitled What Can the Landowner Do? Essentially, there are two main choices a landowner has: (1) retain the property or (2) dispose of the property. The paper fully explains each of these choices. In brief, if the landowner chooses to retain the property, she or he has six options including: further information, natural heritage stewardship award, conservation land tax reduction, management agreement, conservation easement, and lease.

If the landowner wishes to dispose of the property, she or he can either sell or donate it. The selling options include: outright, life estate, restrictive covenants, sale back, first right of refusal, instalment sale, and part donation - part sale. The donation options include: outright, life estate, by device, restrictive covenants, part donation - part sale.

This paper provides “a number of beneficial options” to the landowner. It encourages the landowner to delve in private stewardship and to seek advice or assistance when necessary.

Van Patters, M. and S. Hilts. 1990. *Natural Heritage Protection: Voluntary Stewardship Or Planning Control?* Plan Canada, 30:5. Ottawa. (5 pages, ICURR Doc EH402, English)

Purpose

To assist planners and the public at large determine whose responsibility it is to protect natural heritage. It can aid public officials in implementing a voluntary stewardship strategy.

Key Definition(s)

Policy Context in the report refers to where the private landowner is exposed to relevant legislation concerning their property. Biophysical Information is an explanation of why the site is important. Landowner Information is a collection of the correct names, addresses, etcetera of each landowner is prepared.

Summary

This paper concentrates on protecting Southern Ontario Carolinian Zone and the Niagara Escarpment by using voluntary stewardship as a means to planning controls. Voluntary stewardship occurs when private landowners take their own initiatives to protect natural heritage properties.

This paper discusses a Natural Heritage Stewardship Program which existed in Ontario. It discusses how the program came to be and how it was implemented. It discusses the process from identification, to indirect and direct contact, to follow-up procedures. It includes incentive mechanisms for voluntary participation.

Key Findings, Conclusions and Recommendations

The main thrust behind voluntary stewardship is that it works in a positive and proactive manner. The idea of such a program is to educate the private landowner, build community support to protect the natural heritage areas, and alternately implement planning controls. Once the private landowner is aware and on the proactive side, they will be more accepting and willing to participate.

Essentially, there are seven “Stewardship Enhancement Techniques” including: education, verbal stewardship agreement, written stewardship agreement, management agreement, lease, conservation easement, purchase with saleback. The idea is to “match up with a range of landowner interest and commitment.” The long-term idea is to move up the hierarchy, thus increasing the commitment of protecting natural heritage.

Walter, J. Jackson. 1986. *Historic Rehabilitation Tax Incentives: Stimulating Economic Development While Preserving America's Heritage*. Government Finance Review, Vol. 2, No. 1. (8 pages, ICURR Doc. HH161, English)

Purpose

To assist preservation groups, developers, planners and government officials who wish to make heritage preservation part of the mainstream of public concern through tax incentives and growth management legislation.

Key Definition(s)

The National Trust was created to “encourage public participation in the preservation of sites, buildings and objects of national significance or interest.” The Tax Policy persuades developers in the business community to invest in rehabilitating old buildings instead of new construction.

Summary

Tax incentives can bring market forces together to bare on our stock of old buildings. Rehabilitation of old buildings brings revitalization and new opportunities for growth to any community. This paper compares tax incentives across the United States.

Key Findings, Conclusions and Recommendations

Essentially, this paper answers six main questions:

1. How the preservation movement developed? - This paper details the evolution of this movement.
2. What is the Economic Recovery Tax Act of 1981? - The paper describes that this is a 25% tax credit for investment in historic buildings and outlines the benefits of this act.
3. What is the National Trust and Tax Policy? - The paper traces the evolution of these incentives.
4. How does the Rehabilitation Tax Incentives work? - The paper answers this question by thoroughly detailing the program.
5. How to document the use of the Rehabilitation Tax Incentives? - The paper describes how the National Trust developed a data base to analyze the impact of rehabilitation on the nation's economy.
6. What are the trends at the state level? - The paper thoroughly analyses trends at the State level and provides a matrix to compare each State's type of tax incentive.

Gleye, Paul H. *With Heritage So Fragile: A Critique of the Tax Credit Program for Historic Building Rehabilitation*. 1988. American Planning Association Journal: Chicago. (7 pages, ICURR Doc. BC003, English)

Purpose

To assist national policy makers concerning heritage policies and incentives with respect to the income tax scheme. This report is also useful for lobbyists who wish to have stronger national policies for heritage conservation, as it provides mechanisms to be incorporated into national legislation.

Key Definition(s)

Restoration refers to the replacement or new construction of a building or structure. Rehabilitation means fixing what is there to its original state - keeping with its heritage context.

Summary

This paper introduces the American tax credit program for historic building rehabilitation. The Historic Preservation Act, 1966 created a surge in heritage awareness, causing many Americans to equate “historic buildings with an identity of place, a sense of continuity, and a commitment to stability in the urban environment.” In 1976, the Tax Reform Act, 1976 encouraged preservation rather than demolition by allowing tax credits. In 1981, the federal government took it one step further and allowed for personal tax credits of which the highest was 25% for expenses incurred for rehabilitation. By 1986, the formula was decreased to allow for a tax credit of up to 10% of the expenses incurred. With less financial support available, less attention was paid to detail and thus the integrity of these buildings was compromised.

Key Findings, Conclusions and Recommendations

This paper delves into ten policy revisions and explains their merits including the followings:

1. The tax credit program should provide the greatest incentive for the least amount of intervention necessary to preserve adequately the building’s historic fabric.
2. Tax incentives should be proportionate to the historic authenticity of the restoration.
3. A provision for additional incentives for restoration of important historic features, which go beyond the strict rehabilitation guidelines should be included.
4. There should be supplemental tax credits to support rehabilitation of buildings which pose special problems for adaptive reuse.
5. All work performed on the site should receive a tax credit, even landscaping.
6. The program must encourage the intensity of use, not only the program itself.
7. There should be strict architectural guidelines which are presented in a clear and concise manner. The onus of proof of any exception must fall on the landowner.
8. The program should recognize all governmental levels of designation, and tax credit should be given accordingly.
9. There should not be a “period of elimination” thus allowing all historic periods to qualify for credits.
10. There should be an extension of tax credits to buildings that are rehabilitated but are not income producing properties.

In summary, a tax credit program is an effective generator of funds for historic building rehabilitation.

CONVERSIONS

A.J. Diamond Associates. 1976. The Conversion of Industrial Buildings, Feasibility and Practice. (96 pages, Bibliography, ICURR Doc. BH095, English)

Purpose

This paper will assist those in the development, architecture, trades (wood) planning, and interior design fields who wish to convert industrial buildings into residential use.

Key Definition(s)

Heritage as defined at the first meeting of the Board of Governors of Heritage Canada is “the work of man and of nature whose character enriches the quality of Canadian life today; work which illustrates our past or which reflect the excellence of Canadian Environment.”

Summary

The paper looks at converting industrial buildings built before the second world war to residential use. Most Canadian Cities have an old industrial sector which was once the economic backbone of the urban settlement, but are now in various states of deterioration. In an effort to repopulate downtown cores, and ease urban sprawl, the conversion of these buildings into residential units is essential - the “recycling” is not only possible, but profitable. In keeping with this theme, this paper examines the following in much detail:

1. constraints and opportunities to conversions;
2. modifications to by-laws to allow such conversions;
3. costs/savings and financing/profits compared to traditional construction; and
4. planning considerations.

Furthermore, the paper discusses how to overcome problems which may arise with regard to the building code - in particular, fire safety and thermal and moisture barriers. Many alternatives are explored. The paper goes to great lengths to show that the financial cost of converting old industrial builds is comparable to building new apartment buildings. It delves into public versus private financing.

With respect to planning considerations, this paper discusses how these conversions can alter the land-use balance. It examines residential versus an industrial infrastructure; details how market considerations play an important role in conversions; and describes by-law amendments which may be necessary to allow for these conversions. It applies the aforementioned considerations to three different scenarios: landmark structures; isolated non-conforming use; and district conversions.

Key Findings, Conclusions and Recommendations

This paper is filled with illustrations which allow the reader to develop a visual sense of what can be achieved. It delves into physical considerations by examining the pros and cons of converting buildings made with heavy timber; timber and joists; and steel columns and beams with joists, as well as considering siting and configuration. In terms of planning efficiencies, the paper states that conversions will pose some inefficiencies due to their inherent design and their original purpose/use. However, by considering each building on its own merits instead of implementing standard designs, as is done in traditional construction, these inefficiencies can be minimized.

Although much of the discussion in this paper is dated, it gives a strong basis for warranting some policy changes with respect to conversions of industrial buildings - in accordance with today's trend of these conversion types. The reader obtains a clear understanding of all that is involved in creating housing units out of old industrial buildings, both theoretically and technically.

City of Ottawa. July 18, 1986. *Condominium Conversion for Buildings of Heritage Value.* (7 pages, ICURR Doc. HF012, English)

Purpose

To assist planning committees, physical environmental committees, policy administration committees, the non-profit housing sector, local area conservation authorities, and local public officials in condominium conversion decision-making and policy creation.

Key Definition(s)

As-of-Right refers to the landowner being able to make certain development decision without municipal clearance.

Summary

This paper is from the Community Development Department of the City of Ottawa commenting on an amendment to their *Condominium Conversion Policy*. It begins by making four recommendations with respect to condominium conversions. It then immediately delves into a background and rationale to support its recommendations. The report concludes with a “summary of input” from a list provided from involved publics. It lists comments from those parties in favour/not in favour to the amendment of this policy.

Key Findings, Conclusions and Recommendations

It is significant to note that in Ottawa at the time, rental units were not able to be converted to condominiums and thus, risked being destroyed. Thus, many heritage buildings could have been demolished if the landowner found them no longer viable as rental units. To deal with this matter, the staff at the City of Ottawa created two options: (1) To leave the condominium conversion policy as is and (2) To amend the policy to allow “as-of-right” conversions of designated heritage buildings.

Key points include:

1. Any building which is individually designated as a heritage property should be exempted from the policy.
2. A landowner can circumvent the policy by demolishing the rental building and constructing new condominiums.
3. Allowing conversions of these types acts as an incentive to maintain heritage sites.
4. The landowner must provide enough lead time to the tenant in order to find alternative housing accommodations or an option to purchase must be presented.

Smith, Helen. 1987. *Paving Paradise: How We Use Our Empty Churches*. Canadian Heritage Magazine. (10 pages, ICURR Doc. BH003, English)

Purpose

This paper will assist those in the development, architecture, planning, and interior design fields who wish to create a new use for desolated churches.

Key Definition(s)

There are no key definitions in this report.

Summary

This paper begins by describing a church which turned into a factory in a small Canadian town. It goes on to describe how many places of worship are becoming secularized and their once religious use is changing to uses such as community centres, auction halls, hairdressing salons, night clubs, restaurants, theatres, museums, and condominiums.

As a rule, when a congregation begins to decline the building the congregation once used, it is not sold on the open market. Instead, the congregation attempts to find another congregation to use it. “Unfortunately, substitute congregation can’t always be found, and heavy-handed developers may fill the vacuum with crudely-planned conversions.”

The paper discusses the “spiritual and moral” questions of church conversions as well as, the question of whether conversions are profitable. There are inherent physical problems in church conversions including problems with “ceiling windows, poor insulation and large interior spaces.” The article details

some examples of conversions across the country where they were turned into houses or theatres for the performing arts. The article further outlines how churches can be saved by selling development rights.

Key Findings, Conclusions and Recommendations

There is an argument that places of worship represent certain values in the community which are shared by everyone, even those who are of other denominations. These values are best kept if the building were turned into an art gallery where one can express and enjoy the spiritual value of music, literature and the fine arts. These spiritual values are all part of what the original use represented and employed. The argument further states that “if a compromise can’t be reached to perpetuate the original intention, at least in part, it was better taken down.”

This article does not imply that places of worship should remain so. Instead, it finds appropriate alternatives for the building which maintain its spiritual and architectural nature intact.

Lester, John. 1987. *Accessing the Past*. Canadian Heritage. (5 pages, ICURR Doc. BH055, English)

Purpose

To assist chief building officials, building inspectors, architects, developers, planners, and interior designers who wish to retrofit heritage building for the physically challenged.

Key Definition(s)

Barrier-free means that every person, in any physical condition, has unobstructed access to the interior and exterior of the building in question.

Summary

This paper discusses the rehabilitation of heritage buildings to accommodate the physically challenged. When heritage buildings were built, designing for the physically challenged was not an issue. Heritage buildings tend to have large staircases and no elevators either inside or out. To add such infrastructures when rehabilitating a heritage building would often alter its original character. A solution to this problem could be to have “portable ramps, which are tailored to fit each building.” Unfortunately, this is not a viable solution for every building, hence this paper provides some alternatives.

Key Findings, Conclusions and Recommendations

Most architects and renovators are hesitant to make a site barrier-free, because it can ruin the aesthetics of the building. When the understanding of the technical possibilities is combined with a thorough knowledge of the individual site and the people who use it, innovative barrier-free changes are created. It must be kept in mind that sometimes, non accessibility to certain parts of the building is for everyone's safety - as per the building code.

This paper continues to discuss the introduction of barrier-free construction at the national level. The problem is that the application of the building code is a provincial responsibility and its application varies among the different provinces. The paper delves into some examples related to this issue.

The main thrust of this paper is that barrier-free rehabilitation is a design problem which is overcome by innovative thinking. Thus, the paper concludes by discussing the appropriate starting point to barrier-free rehabilitation and of the pros and cons surrounding today's innovative solutions.

**HERITAGE PRESERVATION FOR LOCAL GOVERNMENTS
RECENT REPORTS AVAILABLE FROM THE ICURR LIBRARY**

BA010 ISN: 14670

TITLE- **Markham heritage estates: relocation of threatened
heritage structures to a municipally owned subdivision**

FORMAT- 4 p.

NOTES- Paper from the annual conference of the Canadian
Institute of Planners and the Corporation
professionnelle des urbanistes du Québec, held in Québec
City, July 1991.

NOTES- A heritage subdivision specially designed to accommodate
relocated heritage structures in a residential setting.
Covers the concept, building eligibility, lot
allocation, relocation, restoration, landscaping, and
concerns.

AUTHOR- HUTCHESON, Regan, Planning and Development Department,
Town of Markham, Ontario, 1991

CONTACT- HUTCHESON, Regan, Heritage Co-ordinator, Planning &
Development Dept., Town of Markham, 101 Town Centre
Blvd., Markham, ON L3R 9W3

DATE ENTERED 1992-05

CITY MARKHAM PROVINCE ONT

COUNTRY DATE LAST CHANGED 1995-12-14

REGION

KEYWORDS: historic buildings; relocation; subdivisions;
municipalities; case studies

BA024 ISN: 7589

TITLE- **City of St. John's heritage conservation regulations and
programs**

FORMAT- 9 p.

NOTES- Also discusses heritage advisory committees; heritage
area precincts.

AUTHOR- CITY OF ST. JOHN'S PLANNING DEPARTMENT, St John's,
Newfoundland, November 1990

CONTACT- MCMILLAN, Arvo, Urban Planner, City of St. John's
Planning Department, P.O. Box 908, St. John's,
Newfoundland A1C 5M2 Tel: 709-576-8380

DATE ENTERED 1991-03

CITY ST. JOHN'S PROVINCE

NFLD

COUNTRY DATE LAST CHANGED 1996-01-29

REGION

KEYWORDS: boards (commissions); grants (funds); historic buildings;
historic preservation; legal codes; municipalities;
neighbourhoods

BA071 ISN: 15548

TITLE- **Manual for municipal heritage advisory committee (LACAC) members / Manuel pour les membres des comités consultatifs locaux pour la conservation de l'architecture (CCLCA)**

FORMAT- Binder / relieur, appendices / annexes

NOTES- Outlines the roles and responsibilities, setting-up, and functions of local architectural conservation advisory committees. Chapters include district and property designation, planning and conservation, technical notes, committee records, and reference. Appendices include Ontario Heritage Act, Office Consolidation, September 1992.

Discute les rôles et responsabilités, établissement, et fonctions d'un comité consultatif local pour la conservation de l'architecture. Inclut désignation de biens, désignations de district, planification et conservation, communiqués techniques, registres des comités, et matériel de référence. Annexes incluent Loi sur le patrimoine de l'Ontario, codification administrative, septembre 1992.

AUTHOR- ONTARIO MINISTRY OF CITIZENSHIP, CULTURE AND RECREATION / MINISTÈRE DE LA CULTURE, DU TOURISME ET DES LOISIRS DE L'ONTARIO, Toronto, 1995

DATE ENTERED 1996-12-10

CITY PROVINCE ONT

COUNTRY DATE LAST CHANGED 1999-02-01

REGION

SUBJECT HEADING- PD Planning & Development / Aménagement & développement

KEYWORDS: historic preservation; handbooks; legislation; procedures; provincial governments; local governments; recommendations



BB010 ISN: 8459

TITLE- **Towards new heritage legislation for Ontario: proposals for legislation Ontario Heritage Policy Review**

FORMAT- Var. pag., diagrams, appendices

NOTES- See AMO response GH 036.

AUTHOR- ONTARIO MINISTRY OF CULTURE AND COMMUNICATIONS, Toronto, May 1990

DISP- BAEKER, Greg, Ontario Heritage Policy Review, Ontario Ministry of Culture and Communications, 77 Bloor Street West, 20th Floor, Toronto, Ontario M7A 2R9 Tel: 416-963-0775

DATE ENTERED 1991-01

CITY PROVINCE ONT

COUNTRY DATE LAST CHANGED 1991-01-21

REGION

KEYWORDS: historic preservation; legislation; municipalities; proposals; provincial governments

BG085 ISN: 7466
TITLE- **Heritage area and streetscape program**
FORMAT- 30 p., appendices, diagrams, photos
AUTHOR- CITY OF VANCOUVER PLANNING DEPARTMENT, Vancouver, BC,
 July 1990
CONTACT- Information Services, Planning Dept., City of Vancouver,
 453 West 12th Avenue, Vancouver, BC V5Y 1V4 Tel:
 604-873-7782
 DATE ENTERED 1990-12
CITY VANCOUVER PROVINCE BC
COUNTRY DATE LAST CHANGED 1990-12-12
REGION
KEYWORDS: historic preservation; municipalities; neighbourhoods;
 programs; strategies

BG101 ISN: 8240
TITLE- **Building the future: a resource guide for community
 preservation in Georgia**
 Abridged Version
FORMAT- Var. pag., diagrams
NOTES- Discusses historic districts, finance, promotion, etc.
AUTHOR- GEORGIA DEPARTMENT OF NATURAL RESOURCES, Atlanta, 1991
CONTACT- Preservation Planner, Georgia Department of Natural
 Resources, 205 Butler Street SE, Suite 1462, Atlanta, GA
 30334 Tel: 404-656-2840
 DATE ENTERED 1991-05
CITY PROVINCE
COUNTRY USA DATE LAST CHANGED 1991-05-24
REGION
KEYWORDS: guidelines; historic preservation; municipalities; plans

BG104 ISN: 8321
TITLE- **Role of local planning in the preservation of historic
 districts: case studies from Washington state**
FORMAT- 13 p., photos
 From: Small Town 21:4, January-February 1991, p. 12-24.
 "Districts" can include urban commercial centres,
 neighbourhoods, small towns, and rural cultural
 landscapes.
AUTHOR- HALL, Donna, Univeristy of Michigan, Ann Arbor,
 Michigan, 1991
 DATE ENTERED 1991-07
CITY PROVINCE
COUNTRY USA DATE LAST CHANGED 1996-01-24
REGION
KEYWORDS: case studies; historic preservation; methodology;
 municipalities; strategies; zoning

BG106 ISN: 8937

TITLE- **Local government and historic preservation**

FORMAT- 12 p.

From: Historic Preservation Forum 5:2, March/April 1991,
p. 14-25

AUTHOR- WAGNER, Richard, 1991

DATE ENTERED 1991-07

CITY PROVINCE

COUNTRY USA DATE LAST CHANGED 1996-01-24

REGION

KEYWORDS: case studies; economic impact assessment; historic
preservation; municipalities; strategies

BG109 ISN: 7671

TITLE- **Conservation and interpretation of heritage resources in
business improvement districts: interim report**

FORMAT- 17 p., tables, appendices

NOTES- Includes Heritage Initiatives Grant Program.

AUTHOR- HERITAGE RESOURCES COMMITTEE OF THE URBAN DESIGN
COMMITTEE, Saskatoon, Sask., January 1991

CONTACT- PENNER, John J., c/o Engineering Department, Urban
Design, City of Saskatoon, 222 - 3rd Avenue North,
Saskatoon, SK S7K 0J5 Tel: 306-975-2983

DATE ENTERED 1991-07

CITY SASKATOON PROVINCE

SASK

COUNTRY DATE LAST CHANGED 1991-07-30

REGION

KEYWORDS: business district improvements; downtown core; evaluation
; grants (funds); historic preservation; municipalities; programs;
strategies



BG126 ISN: 8479

TITLE- **Background study on economic measures for historic and
heritage building conservation and restoration in
Ontario**

Ontario Heritage Policy Review, Technical Paper No. 2

FORMAT- 73 p., appendices

NOTES- Discussion of incentives & financing techniques; tax,
regulatory & supportive measures; the Goyer and Gold Bar
cases; provincial, municipal & joint approaches.

AUTHOR- ONTARIO MINISTRY OF CULTURE AND COMMUNICATIONS, Toronto,
May 1990

DISP- BAEKER, Greg, Ontario Heritage Policy Review, Ministry
of Culture and Communications, 77 Bloor Street West,
20th Floor, Toronto, Ontario M7A 2R9 Tel: 416-963-0775

DATE ENTERED 1991-01

CITY PROVINCE ONT

COUNTRY DATE LAST CHANGED 1995-05-16

REGION

KEYWORDS: economic assistance; finance; historic buildings; legal

codes; renovation; taxation
BH011 ISN: 11869
TITLE- **Philadelphia's preservation incentive: the value of the
TDR**
FORMAT- 10 p., photo
From: Historic Preservation Forum 6:5, September/October
1992, p. 10-19.
NOTES- TDR = transfer of development rights.
AUTHOR- HARRIS, Donna Ann, 1992
DATE ENTERED 1993-08
CITY PROVINCE
COUNTRY USA DATE LAST CHANGED 1996-01-24
REGION
KEYWORDS: case studies; historic preservation; municipalities;
programs; strategies; transfer of development rights

CA106 ISN: 11238
TITLE- **Municipal incentive policy for the preservation of
heritage properties**
FORMAT- 6 parts, diagrams, tables, appendices, maps
NOTES- Entry includes Attachments 1-5, and CAMA Award
nomination form.
AUTHOR- CITY OF REGINA URBAN PLANNING DEPARTMENT, Regina,
Saskatchewan, July 1991
DISP- City of Regina Urban Planning Department, 9th Floor,
City Hall, 2476 Victoria Avenue, Regina, Saskatchewan
S4P 3C8 Tel: 306-777-7551 Fax: 306-525-1801
DATE ENTERED 1993-06
CITY REGINA PROVINCE SASK
COUNTRY DATE LAST CHANGED 1997-02-19
REGION
KEYWORDS: economic assistance; evaluation; finance; government
policies; historic preservation; legislation;
municipalities; programs; property taxes; provincial
governments

GB015 ISN: 11662

TITLE- **Minister's advisory committee on new heritage legislation: report**

FORMAT- 57 p., appendices, diagrams

NOTES- This report includes detailed recommendations for the content of new heritage legislation in Ontario. Many of the Committee's recommendations identify the need for the development of regulations under the statute on some very specific issues. These have been listed in Appendix B. Recommendations concerning the process for further legislative and program development are listed in Appendix A. Suggested programs that the Committee would like to see developed are listed in Appendix C.

NOTES- Also covers municipal powers, heritage designation, heritage conservation areas, movable or personal heritage property, living heritage, heritage easements, enforcement, etc.

AUTHOR- MINISTER'S ADVISORY COMMITTEE ON NEW HERITAGE LEGISLATION, Ontario Ministry of Culture and Communications, Toronto, August 1992

DATE ENTERED 1993-08

CITY PROVINCE ONT

COUNTRY DATE LAST CHANGED 1995-08-28

REGION

KEYWORDS: historic preservation; legislation; provincial governments; recommendations

GH036 ISN: 7469

TITLE- **Towards new heritage legislation for Ontario**

FORMAT- 32 p., appendix, bibl.

NOTES- See provincial government report BB 010.

AUTHOR- ASSOCIATION OF MUNICIPALITIES OF ONTARIO, Toronto, August 1990

DISP- Publications Centre, Association of Municipalities of Ontario, 100 University Avenue, Suite 805, Toronto, Ontario M5J 1V6 Price: \$10.00

DATE ENTERED 1991-01

CITY PROVINCE ONT

COUNTRY DATE LAST CHANGED 1991-01-11

REGION

KEYWORDS: historic preservation; legislation; position papers; recommendations

ME049 ISN: 17566

TITLE- **Towards the establishment of a heritage conservation district, and Heritage conservation plan**

FORMAT- 2 docs.

NOTES- Submission for the 1998 CIP Awards for Planning Excellence.

NOTES- Provides a framework for making decisions that will protect, conserve and enhance the Collins Heritage District of Yarmouth, NS.. Discusses architectural styles, plan administration, certificate of appropriateness, and historical context.

NOTES- Includes District Bylaw.

AUTHOR- TOWN OF YARMOUTH and NOVA SCOTIA DEPARTMENT OF HOUSING AND MUNICIPAL AFFAIRS, Heritage Section, Yarmouth, Nova Scotia, 1996-1997

DATE ENTERED 1999-01-25

CITY YARMOUTH PROVINCE NS

COUNTRY DATE LAST CHANGED 1999-02-01

REGION

SUBJECT HEADING- PD Planning & Development / Aménagement & développement

KEYWORDS: historic preservation; parks (gardens); inventories; policies; municipal bylaws

MH077 ISN: 15193

TITLE- **Historic resource management program**

FORMAT- Var. pag., diagrams, photos

NOTES- The cornerstones of the Historic Resource Management Program are: the Register of Historic Resources in Edmonton and the Historic Resource Management Plan. The Register is a list of buildings and structures designated as a municipal historic resource by City Council. The Historic Resource Management Plan contains the mission, goals and priorities of the program and identifies heritage related processes. The entry also includes City of Edmonton policy and procedure documents to encourage the designation and rehabilitation of municipal historic resources.

AUTHOR- CITY OF EDMONTON, Planning and Development Department, Edmonton, 1995

DATE ENTERED 1996-08-27

CITY EDMONTON PROVINCE ALTA

COUNTRY DATE LAST CHANGED 1996-08-29

REGION

KEYWORDS: historic preservation; plans; handbooks; policies; data ; information systems

PAS450 ISN: 16262

TITLE- **Preparing a historic preservation plan**

PAS Report No. 450

FORMAT- 58 p., tables, photos, appendices

NOTES- This report identifies the major reasons why a community should have a preservation plan and the major components it should contain. Some of the components discussed include: statement of goals, historic resources survey, the legal basis for preservation, coordination with zoning and growth management, public sector responsibilities and incentives. Chapter 3 presents 9 short case studies from American municipalities showing how preservation plans were prepared and implemented.

NOTES- See Appendix A for a state by state listing of growth management, comprehensive planning and historic preservation legislation and Appendices C through G for excerpts from municipal preservation plans.

AUTHOR- WHITE, Bradford J. and RODDEWIG, Richard J., American Planning Association (and National Trust for Historic Preservation), Chicago, IL, March 1994

DATE ENTERED 1997-07-15

CITY PROVINCE

COUNTRY USA

DATE LAST CHANGED 1997-09-24

REGION

KEYWORDS: historic preservation; plans; legislation; state governments; guidelines; case studies

UG169 ISN: 14214

TITLE- **Nouvelle approche de planification urbaine appliquée: dix ans de réflexion et de pratique**

FORMAT- 1 pochette (7 documents)

NOTES- Contenu: 1. La SIMPA, un outil de développement économique; 2. Problématique complexe; 3. Le Projet Vieux-Montréal; 4. Articles de La Presse (Montréal); 5. Le Bon-Pasteur reconverti (1847 - 1987); 6. Rapport annuel 1990; 7. Perspectives de développement.

AUTHOR- SOCIÉTÉ IMMOBILIÈRE DU PATRIMOINE ARCHITECTURAL DE MONTRÉAL, Montréal, QC, avril 1992

DATE ENTERED 1995-06-21

CITY MONTRÉAL PROVINCE

QUÉBEC

COUNTRY

DATE LAST CHANGED 1995-09-01

REGION

KEYWORDS: historic preservation; urban planning; municipalities; economic development; associations; case studies

UH326 ISN: 16718

TITLE- **Design review in historic districts**
Historic preservation information booklet

FORMAT- 16 p., bibl.

NOTES- Discusses legal foundation for preservation-oriented design review; what constitutes a historic preservation ordinance; historic resources surveys; identifying character-defining elements; alteration & demolition issues; administering the design review process; tips for successful guidelines; 3 U.S. case studies.

AUTHOR- COX, Rachel S., National Trust for Historic Preservation, Washington, DC, 1994

DATE ENTERED 1997-10-21

CITY PROVINCE

COUNTRY USA DATE LAST CHANGED 1998-04-28

REGION

SUBJECT HEADING- PD Planning & Development / Aménagement & développement

KEYWORDS: historic preservation; guidelines; municipal bylaws;
case studies

UI211 ISN: 17546

TITLE- **Advances in adaptive reuse and heritage preservation: a**
case study of Kaufman Footwear 410 King Street West,
Kitchener

FORMAT- Var. pag., diagrams, tables, maps, photos, appendices

NOTES- Submission for the 1998 CIP Awards for Planning Excellence. Recipient of the OPPI Provincial Outstanding Planning Award in the Innovation/New Directions category.

NOTES- Describes the location of the Kaufman property and building orientation / massing. Provides an historical analysis. Discusses company land use and design objectives, official plan policies, and zoning. Appendices include planning and design analysis; warehouse district zone by-law excerpt; adaptive reuse and heritage designation.

AUTHOR- MACNAUGHTON HERMSEN BRITTON CLARKSON PLANNING LIMITED,
Kitchener, Ontario, April 1997

DATE ENTERED 1999-01-06

CITY KITCHENER PROVINCE ONT

COUNTRY DATE LAST CHANGED 1999-02-01

REGION

SUBJECT HEADING- UR Urban / Questions urbaines

KEYWORDS: recycled buildings; historic preservation; renovation;
case studies; legal codes