



STAFF REPORT ACTION REQUIRED

Draft Policies and Terms of Reference for Designating Heritage Conservation Districts in Toronto

Date:	July 16, 2010
To:	Toronto Preservation Board Planning and Growth Management Committee
From:	Chief Planner and Executive Director, City Planning Division
Wards:	All
Reference Number:	pg10050

SUMMARY

This report provides a background on the draft document Policies and Terms of Reference for Designating Heritage Conservation Districts (HCDs) in Toronto (policies and terms of reference), and recommends that City Council direct staff to continue consultation on the draft with the public and relevant stakeholders over the fall.

The draft document proposes a series of policies for undertaking the designation of an HCD, policies required in every HCD plan and a comprehensive terms of reference that reflect a new minimum standard for research, evaluation, planning and community consultation for all new HCDs.

The policies and terms of reference in the attached document provide clear and consistent policies and guidelines for completing the process of studying and planning an HCD. They set out the minimum standard requirements for the study and designation of HCDs in Toronto and were completed in consultation with existing HCD advisory boards, heritage professionals, City staff and community stakeholders.

RECOMMENDATIONS

The Chief Planner and Executive Director, City Planning Division recommends that:

1. Council direct staff to report back to Toronto City Council with a completed Policies and Terms of Reference and for Designating HCDs in Toronto after scheduling community consultations for interested parties, and the public at large, to obtain their comments and feedback regarding the draft document.

Financial Impact

There are no financial implications resulting from the adoption of this report. However, the new policies and terms of reference that are the subject of this report will create opportunities for the designation and management of new HCDs. Each new HCD dramatically increases the number of properties on the City of Toronto Inventory of Heritage Properties, but with no commensurate increase in staff to process applications for those newly designated properties.

Heritage Preservation Services (HPS) staff are required to review all building permits, Committee of Adjustment, Rezoning and Official Plan amendment applications for designated properties within legislated timeframes. Current staff resources of HPS will not be sufficient to meet legislative timelines for applications when new HCDs are designated and added to the inventory.

ISSUE BACKGROUND

Heritage Conservation Districts (HCDs) have been an important part of the recognition and protection of Toronto's heritage for over twenty years. Their popularity as a tool in protecting historic neighbourhoods has increased dramatically over the past ten years, in particular. Now with increased powers for HCDs under the Ontario Heritage Act (OHA), HCDs are more in demand than ever.

Thus far, Toronto's approach to HCDs has been one of recognizing important neighbourhoods and experimenting with various heritage planning methodologies to protect and manage those areas. Until 2005, HCDs were designated by bylaw under Part V of the OHA and an optional plan for the district was adopted only as a guideline. Every HCD in Toronto has a district plan and guidelines, but few plans have been adopted by bylaw (none completed prior to 2005 are adopted by bylaw), which weakens the ability of the City to enforce the contents of the HCD Plan.

In 2005, the Ontario provincial government substantially amended the Ontario Heritage Act to increase the powers of protection related to Part V (the part used to designate HCDs), as well as other parts of the Act. Amongst the changes to the Act was the requirement for all HCDs to have a District Plan and for those plans to be adopted by bylaw. Where the HCD Plan adopted by bylaw is in conflict with other municipal bylaws, the HCD Plan will prevail to the extent of the conflict – including zoning bylaws.

Although the province of Ontario provided increased powers to municipalities to protect HCDs, the City of Toronto's approach to undertaking plans did not substantially change. In addition, the City has never had consistent and comprehensive terms of reference for HCD plans adopted by City Council, resulting in differing methodologies and approaches to designating HCDs.

COMMENTS

Need For New Policy and Terms of Reference

Since the changes to the Ontario Heritage Act in 2005 the City of Toronto has not set out any comprehensive requirements for undertaking the study and designation of HCDs, beyond the minimum requirements of the OHA. Toronto's HCDs have been completed using varying methodologies and assumptions over the years, which have created confusion about what HCDs are for and how they work.

The new policy and terms of reference seek to provide understanding, clarity and consistency to the process of studying and designating HCDs, while ensuring a high standard of heritage conservation. Policies for the documentation, evaluation and management will create a common expectation and approach to all future HCDs.

The policies and terms of reference will also provide clarity to heritage professionals who undertake the study and planning of HCDs. Consistent expectations for process, content and mandatory policies will ensure that the scope and breadth of the undertaking is understood by all parties and will help to avoid conflicts over the creation of HCD plans.

The new policies will also ensure that a consistently high level of conservation is applied to all districts. In recent years, some neighbourhoods who wish to control development have expressed their desire for HCD designation. The policies included in the document make clear the expectation for conservation and the retention of buildings and resources that contribute to the significance and character of the district. Additionally, a set of criteria for the determination of which areas qualify as HCDs has been created to ensure that the strong protection of the OHA is applied meaningfully and where it will be the most effective and appropriate.

Additionally, a number of HCD plans in Ontario have come under the scrutiny of the Ontario Municipal Board during high profile Board hearings – most notably Port Dalhousie. Widespread concern from within the heritage community about the strength and effectiveness of HCD plans has been a major consideration and driver in the creation of this policy and terms of reference. In response, the Ontario Ministry of Culture issued guidelines to Ontario municipalities to help strengthen HCD plans. Those recommendations have been taken into account in the new policies and terms of reference attached to this report.

Background Research

In researching best practices for heritage districts, staff of Heritage Preservation Services reviewed all current HCD plans as well as some others from Ontario. Comparable documents and policies from Pennsylvania, New York, New Mexico, California, Alberta, England, Ireland, Australia and others were examined for their content, methodologies and policies.

Although the requirements and content of various heritage district and main street plans varied widely, high quality conservation, design and stewardship was common amongst all of them. Additionally, community consultation and involvement was a recurring theme. In every instance, plans were largely reliant upon local legislation to guide the expectations of conservation. The expectation for the retention and conservation of the buildings and features within districts was universal amongst international examples consulted.

This policy also borrows heavily from the *Ontario Heritage Toolkit: Heritage Conservation Districts* and aims to build upon its guidance and recommendations.

Consultation to Date

Consultation was undertaken with a number of groups to ascertain what the issues and impressions of current HCDs are, particularly regarding their effectiveness, enforcement and process. A series of meetings were undertaken where a situation analysis was conducted, the results of which were key in the formation of the policies and terms of reference. The following groups were consulted for their opinions:

- HCD Advisory Committees
- Community Preservation Panels
- Toronto Preservation Board members
- Professional Heritage Consultants who have previously worked on an HCD
- City Planning HCD working group
- Heritage Preservation Services staff
- Urban Design staff

Response to Stakeholder Feedback

Stakeholder feedback was compiled and categorized so that key issues, concerns and recommendations could be acted upon. Some of the key feedback included concern about the strength and enforceability of HCD plans and their policies, the importance of community involvement and leadership, the need for more participation from HPS staff and the flexibility and responsiveness of plans to address the unique and special characteristics of individual HCDs.

The policies and terms of reference respond to stakeholder feedback by requiring clear and consistent objectives for each district, clear required policies for all HCDs, district specific policies and guidelines to maintain flexibility regarding the unique character of

each district, and by entrenching a strong role for community stakeholders in the terms of reference.

Also in response to stakeholder feedback is an increase in the opportunities for public feedback, deputation and participation. The terms of reference suggests at least one community consultation meeting at each stage of the process of creating an HCD, for a total of three, as well as six opportunities for deputation and three council decisions.

Increased analysis and documentation

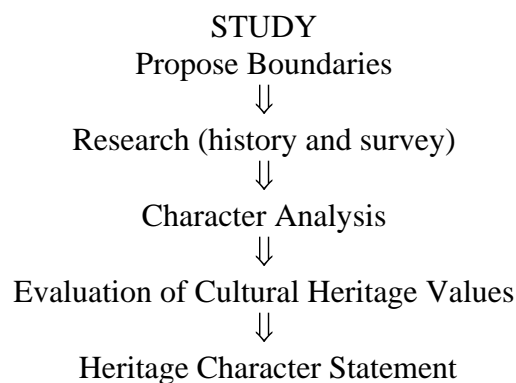
In response to various OMB decisions, and advice from ministry staff, as well as concerns from community stakeholders, the analysis of the district has been increased as a way of building a thorough and meaningful understanding of the character, significance, resources and landscape of a proposed district. The increased analysis includes a new set of criteria for the determination of cultural heritage value and integrity of HCDs, detailed further in this report.

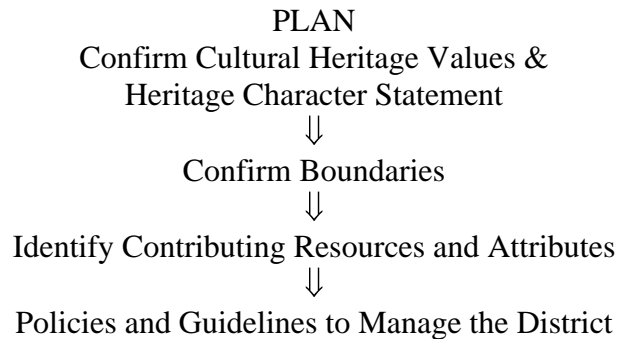
All analysis and conclusions about the cultural heritage value and character of an HCD will be documented within an HCD study. Policies and guidelines specific to the district will be developed in response to the analysis and conclusion about the significance and character of the district.

Using the Terms of Reference

The policies and terms of reference are structured to lead a community and consultant through a step by step process for undertaking the study and designation of an HCD, with the assistance and advice of City staff. The core policy requirements for undertaking an HCD and those that are required for all HCD plans set the stage for the study and designation of an HCD. These are followed by a detailed terms of reference.

The terms of reference outline all the steps to be taken in studying and planning for an HCD. Although the terms of reference is laid out sequentially, it is important that it be regarded and read in its entirety - the findings of some later sections may prove to inform earlier ones as the study and plan are undertaken. The requirements for the study and plan generally build upon each other as follows:





New Evaluation Criteria

One of the major components of the policy and terms of reference is the introduction of new criteria for determining the cultural heritage values of the district. Ontario Regulation (O-Reg) 9/06, made under the Ontario Heritage Act, and prescribed for determining the cultural heritage values of individually designated properties, is the foundation for new HCD criteria.

The HCD criteria modify and expand upon O-Reg 9/06 by adding separate criteria related to social and community value, and natural and scientific value. Although these are alluded to in O-Reg 9/06, the new criteria draws out those values because of the particularly important contribution they can make to understanding the nature, form and significance of an HCD.

The HCD criteria also introduce new integrity criteria, which are intended to ensure that a district retains enough of its authentic and original material associated with its values, to communicate its significance effectively. They also seek to ensure that there is a visual coherence of the cultural heritage values – meaning that there is a strong and over-riding sense of time and place that reinforces the cultural heritage values of the district.

Next Steps

Over the fall more consultation will take place with various stakeholders and interested parties based on the draft document attached to this report. Feedback will be used to refine and confirm the assumptions of the Policies and Terms of Reference for

Designating HCDs in Toronto. Staff will also illustrate the policies with appropriate images from existing HCDs in order to make them more user friendly. It is anticipated that staff will report back with a finalized document in early 2011.

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SIGNATURE

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ATTACHMENTS

1. Draft Policies and Terms of Reference for Designating HCDs in Toronto
2. Ministry of Culture Ontario Heritage Toolkit: Heritage Conservation Districts

**FINAL DRAFT for Public Consultation
City of Toronto Policies and Terms of Reference for
Designating Heritage Conservation Districts**

City Planning Division
City of Toronto
Heritage Preservation Services
Policy and Research Section

July 12, 2010

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Section 1: Introduction

A Heritage Conservation District (HCD) is a defined area that is important to the history and character of the City. Within an HCD the properties, structures, landscape, streetscape, plantings, and other features of the district contribute to an identified set of cultural heritage values that may include significant events, designs, individuals, developments, and themes. An HCD may contain multiple properties, landowners, resource types and cultural heritage values. They can be found in residential neighbourhoods, commercial areas, main streets, institutional and industrial campuses and natural areas.

An HCD in Ontario is protected under Part V of the Ontario Heritage Act, a powerful piece of legislation that affords City Council the ability to meaningfully protect and manage the historic values, character and features of a district and its resources over time. Every HCD is unique and may require special policies or guidance to ensure its conservation over time. Therefore, each district plan is also unique and ensures a consistently high standard of heritage conservation across the City. Under that legislation, a district is required to be studied and to have a plan prepared for its ongoing management.

The policies and terms of reference in the document provide clear and consistent policies and guidelines for completing the process of studying and planning an HCD. They set out the minimum standard requirements for the study and designation of HCDs in Toronto and were completed in consultation with existing HCD advisory boards, heritage professionals, City staff and community stakeholders.

Intent

These policies and terms of reference address changes to the Ontario Heritage Act in 2005 that created new requirements for heritage conservation districts and are in response to feedback from the community about existing HCD Plans. Existing HCD Plans have differing methodologies for the determination of what properties should be subject to demolition control and conservation and these wide ranging plans have, on occasion, not met the expectations of communities in dealing with development within their HCDs.

The policies and terms of reference in this document will create a common minimum standard and process for the study and designation of all future HCDs and will ensure that each has clear objectives, strong policies and a high standard of conservation.

Other Policies and Documents

These policies and terms of reference are written to complement and expand upon the direction of the *Ontario Heritage Act*, *The City of Toronto Official Plan*, *the Provincial Policy Statement*, *the Standards and Guidelines for the Conservation of Historic Places in Canada* and the *Ontario Heritage Toolkit – Heritage Conservation Districts* (Toolkit). The Toolkit is a guidance document of the Ministry of Culture that has greatly informed

this document and should be regarded as complementary to it. It is referred to from time to time where it adds clarity or understanding to stated requirements. In the case of a conflict between the requirements of this document and the Toolkit, this document shall prevail to the extent of the conflict.

Community Involvement

The creation of an HCD is usually a community driven process. Community groups are encouraged to nominate areas for consideration through the application process. If an application is successful the community group will be an important leader by contributing to research, information gathering, hiring a consultant to undertake the study and plan of the district and by forming a community advisory panel for the ongoing management of the district. The leadership and cooperation of these groups will continue to be critical to the short and long term success of HCDs in Toronto.

The community will also be expected to raise funds to pay for the study and plan for the district. The City does not currently fund HCD studies or plans, although in some areas, Section 37 funding (Under the Planning Act) may be available. Partnering with other local and/or historical organizations to undertake fundraising initiatives and raise awareness is also a good idea.

Applicability

These policies and terms of reference shall be in effect as of the date of their adoption and shall apply to all districts studied and designated after that date. They do not apply to districts designated prior to their adoption. When a district plan is formally revised or amended it is required to be brought into conformity with these requirements.

Interdisciplinary Response

The study and designation of an HCD is a collaborative process, requiring the input and participation of the applicant, community groups, property owners, professional consultants, and City staff. Clearly defined and mutually accepted objectives ensure the process will be a positive one.

When an application is determined by City staff to merit study as a potential HCD a Heritage Preservation Services (HPS) staff person will be the lead contact at the City of Toronto. An assigned staff person will work directly with the community group leading the study and plan and will also assemble appropriate representatives from Community Planning and Urban Design (and other appropriate staff members) to assist in the creation and review of the district plan.

Section 2: Policies for Undertaking the Study and Designation of an HCD

The policies for undertaking the study and designation of an HCD are mandatory. They ensure that all heritage conservation districts meet a common minimum standard of consideration and evaluation. Detailed information related to these policies can be found in the attached terms of reference following this section. The policies are as follows:

- An applicant (any person, organization or corporation wishing to see an area designated as an HCD) must retain a qualified professional heritage consultant to prepare the study and plan for the district (as described in the terms of reference) who is a member of the Canadian Association of Heritage Professionals and has demonstrated experience in preparing successful Heritage Conservation District Studies and Plans.
- All applicants must send quarterly progress reports to the designated contact in Heritage Preservation Services once an authority to study has been granted, and until the designation is complete. Failure to do so may result in staff recommending to City Council that the authority to study be removed.
- From time to time, the City may nominate an area for consideration as an HCD and lead the study and designation of an HCD. Whenever this occurs, all of the area study, district plan and consultation requirements found in the terms of reference will apply. Application guidelines and progress reports will be waived for staff.
- All proposed HCDs must qualify for designation under Part V of the Ontario Heritage Act and must have demonstrated cultural heritage values using the criteria included in the attachments to this document.
- At least three community consultation meetings shall be undertaken with at least one meeting being held in each of the three phases outlined in the terms of reference.
- Heritage Preservation Services shall not undertake any polling of the residents or owners within the proposed district to determine if designation is appropriate or warranted. City staff will present a professional opinion regarding the eligibility of the proposed district for designation. Community feedback and correspondence regarding the designation will be collected and relayed to City Council within the context of a staff report.
- No policies or guidelines of an HCD plan shall compromise the intent or direction of section 3.1.5 of the *City of Toronto Official Plan* or the *Standards and Guidelines for the Conservation of Historic Places in Canada*, unless they result in a higher standard of conservation.

- Proposed HCDs must satisfy all of the requirements of the terms of reference for the completion of an application, study and plan found in this document, prior to the designation of any district. These terms of reference are divided into three distinct parts and include information on the process. Where required they are accompanied by detailed descriptions.

Section 3: Policies Required in an HCD Plan

- Contributing heritage resources shall be conserved consistent with the *Standards and Guidelines for the Conservation of Historic Places in Canada* and any additional policies, standards or guidelines detailed in the district plan and shall be kept in good repair in the long term so that they maintain their relationship to their surroundings while strengthening the integrity of the district.
- Contributing heritage resources within an HCD shall not be demolished so that the integrity of the history, character, attributes and cultural heritage value of all contributing resources in the district are protected.
- All public works which damage roadways, sidewalks and public boulevards shall be remedied and returned to original condition immediately upon completion of necessary work. Temporary patches, fills and other non-permanent repairs are not permitted. Upon completion of required work, utilities and public works shall not leave broken, cut or damaged sidewalks and roadways with temporary patches or repairs that blight the streetscape for unacceptably long periods of time.
- Any changes to the district shall respect and reinforce the history, character or cultural heritage values and attributes of the district. Infill and alteration shall not diminish or detract from the character, history and cultural heritage values of the district.
- Re-creation of historic structures and styles within the district shall not be permitted without thorough supporting historical documentation and historical styles and forms shall not be applied where they did not previously exist.
- Where a property within the district is also designated under Part IV of the Ontario Heritage Act, the designating bylaw for that property shall prevail to the extent that any conflict exists between the designating bylaw and the HCD plan and bylaw.

Section 4: Terms of Reference for Undertaking an Application, Study and Plan

1. Application Phase

The objective of this phase is to establish a working relationship with the applicant or representative for the applicant, and City Staff. The applicant will gather and present information about the area for which a district is being proposed. This phase will allow staff to review applications and to determine if an area warrants further investigation as a potential heritage conservation district.

Availability of funds to complete a study will also be confirmed and successful applications will be recommended to City Council for authority to formally study the area as a potential HCD. An application can be submitted by any person, organization or corporation wishing to see an area designated as an HCD and who has the capacity to retain and assist a heritage consultant to study the proposed district and prepare a district plan.

1.1 Submission of application forms

- A community group, individual or corporation capable of organizing and funding the study, designation and plan of a potential Heritage Conservation District can submit an application form and package.
- Completed application form and package must be submitted (See section 5 for application procedures).
- Applications shall be submitted to the Senior Preservation Coordinator, Heritage Preservation Services.

1.2 Staff Preliminary Review

- Staff will review the application for completeness to determine if the area should be studied for potential as a Heritage Conservation District.
- Staff will only approve for further study those areas that show potential for designation as an HCD (For guidance on understanding if an area has potential as an HCD, please see the *Ontario Heritage Toolkit: Heritage Conservation Districts*, pages 9-10).
- Staff will review the study area boundaries proposed within the application and may apply changes to those boundaries if necessary and in consultation with the applicant, prior to seeking City Council authorization to study the area.
- The applicant is required to confirm the availability of funds detailed in the application in order to proceed with a study of the proposed district. Where funds are not available, staff may recommend to City Council that

authorization to study the district be postponed until such time as sufficient funds for a study are available.

1.3 Community Consultation Meeting to discuss application

- Staff will post a notice of a community consultation meeting on the City of Toronto website, and by mail to all properties and owners (according to current MPAC ownership records) within the proposed district boundary, at least 20 days prior to the community meeting. The meeting notice must announce that an application for an HCD has been made and that feedback will be sought regarding local support and concerns.
- The community consultation meeting should be hosted within the district (i.e. local school or library) or as close to the district as possible.
- Staff will be available at the meeting to explain what an HCD is and to answer any questions from the community. Public feedback regarding the application will be accepted for 14 days after the meeting by mail, email and fax and should be directed to the Senior Preservation Coordinator. Online or social media tools are acceptable for feedback only where they are initiated and maintained by the City.

1.4 Report to City Council Seeking Authorization to Study

- When a district shows merit for designation and feedback from the community has been gathered, a report to City Council will be prepared by City staff recommending that City Council authorize the area for study as a heritage conservation district in conformity with the requirements of these terms of reference.

2. Study Phase

The study phase occurs once City Council has authorized the area to be studied as a potential HCD. At this stage the proposed district is referred to as a “Study Area.” The objective of the study phase is to analyze the study area in detail in order to understand its content, structure, history, character and cultural heritage values.

Consultation with the community is required and should inform the contents of the study. The study must provide a clear understanding of the form, nature and significance of the proposed district and will determine if it possesses cultural heritage value and definable character sufficient to warrant designation. The study must make clear what the characteristics and values of the district are and how they were determined.

2.1 History

- A general history of the settlement, evolution of the landscape, and the development of the area shall be compiled for the study that includes an analysis of social, political and cultural events and associations relevant to the development of the area.
- The history of the area should be illustrated with historical photographs and mapping and a comprehensive thematic timeline of the area from pre-history to present shall be compiled in chronological order.
- A comprehensive bibliography of all historical resources used in the compilation of the history shall be included in an appendix of the study.

2.2 Study Area Survey

- A survey of all the major built, spatial and landscape features of the study area shall be undertaken that documents the history, existing stylistic features, built and landscape elements including topography, streetscape, parks, open spaces, and each individual structure or major feature in the study area consistent with the guidelines found in Section 5.
- The built form survey may be completed by community volunteers but must be reviewed by a qualified heritage consultant to verify the accuracy and consistency of each record.

2.3 Character Analysis: Thematic Groups and Typologies

- An analysis of the area's various historical themes and design typologies shall be undertaken that groups and categorizes the built form, public realm, landscape and streetscape features of the study area and describes them in detail (See Section 6 for guidance on completing the character analysis).
- Each identified thematic group or building type shall be analyzed individually and within its context so that its relationship to the area is understood and shall be described and illustrated in detail with district specific photographic examples from within the study area.

2.4 Community Consultation Meeting

- A community Consultation meeting will be organized by City staff to inform area stakeholders about the study phase.
- The public meeting will be hosted within the study area (i.e. local school or library) or as close to the district as possible and notice will be sent out at least 20 days prior to the public meeting to all properties within the proposed boundary. The notice shall announce that the area is being studied for its potential as a heritage conservation district and that the meeting is an opportunity to provide and receive information about the significance of the area.
- The heritage consultant is required to present samples of the Study Area Survey and all the resource typologies at the public meeting.
- Public feedback will be welcomed for 14 days after the meeting by mail, email and fax directed to the Senior Co-ordinator, Heritage Preservation Services. Online or social media tools are acceptable for feedback only where they are initiated and maintained by City staff.

2.5 Evaluation of Significance and the Statement of Cultural Heritage Value

- The area shall be evaluated using the criteria detailed in Section 7 of this document to demonstrate whether the study area does, or does not possess sufficient cultural heritage value and significance to warrant designation under Part V of the Ontario Heritage Act.
- The evaluation of cultural heritage value and significance shall comprehensively analyze all aspects of the study area, including its history, existing listings and designations under Part IV of the Ontario Heritage Act, the results of the study area survey and the character analysis.
- A statement of cultural heritage value that is based on the evaluation and analysis will be created to reflect the cultural heritage values and significance of the entire study area and shall not exceed 4000 characters in length.

2.6 Character Statement

- A summary of the findings of the Character Analysis that reflects the physical nature and cultural heritage values of the study area shall be undertaken to determine what features and architectural types define its character.

- A statement of character shall provide a conclusive and concise summary of the outcomes of the character analysis for the area and shall not exceed 4000 characters in length.

2.7 Period of Significance

- A period of significance or multiple periods of significance relating to the cultural heritage values and character of the area shall be analyzed and identified in the study.
- The period(s) of significance should relate to a period in the history of the area that is still visible in the physical features of the study area. The proposed conservation approach for the study area should be informed by the period(s) of significance identified in this part of the study.

2.8 Boundaries

- The study area boundaries proposed in the application phase shall be assessed in response to the stated cultural heritage values and character of the district (For guidance on determining boundaries see the *Ontario Heritage Toolkit: Heritage Conservation District*, pages 24-26).
- The final boundaries, including any changes from the originally proposed study area boundaries, shall be analyzed and described so that they are readily understood and located.
- The final study area boundaries should encompass the full extent of the character and significance of an area. They should not be limited to a singular block or street, unless that block or street represents the full extent of the district's character and significance.
- A map detailing the exact location of the boundaries shall be included in the plan.
- If properties are excluded or added during this phase, City staff shall send notification of this change by regular mail to the affected property owners.

2.9 Archaeology

- Archaeologically Sensitive Areas (ASAs) and areas of archaeological potential that exist within the boundaries of the proposed HCD shall be mapped and described in the study, where this information is available from City staff or its agents.
 - o A fee may be charged for this information as required.

- The study shall identify any special recommendations or requirements for archaeological concerns in the study area that should be contained within the plan, including options for mitigation and interpretation.
- The study must refer to the “Archaeological Management Plan” for standard policies and procedures for archaeology.

2.10 Objectives for the HCD Plan

- The primary objective for every Heritage Conservation District designation and plan shall be the highest possible standard of protection, and conservation and management of the cultural heritage values, character, attributes, features and contributing resources as identified in the area study and district plan, consistent with the *Standards and Guidelines for the Conservation of Historic Places in Canada*.
- Additional objectives informed by the area study for the conservation of the district must be proposed prior to the designation of the district so that the intent of the district plan and designation are clearly understood.
- Special or unique conservation concerns for the conservation of the district should be addressed in the objectives for the district and may also examine other opportunities such as interpretation, commemoration, promotion, beautification, education and community building activities. Where multiple objectives are recommended they shall not conflict with one another.
- The study may pose various options for exploration in this phase, however final clear objectives must be adopted in the district plan.

2.11 Analysis of Official Plan and Current Zoning Provisions

- The Official Plan and any secondary plans or avenue studies, current zoning bylaws, urban design guidelines and any additional bylaw or policy affecting the study area shall each be analyzed in detail and any potential conflict with the objectives for the conservation of the district must be identified and analyzed within the study.
- The analysis of the documents described above shall include the consideration of height, density, materials, massing, angular plane requirements, shadow, design guidelines, landscape, performance standards, setback, use, scale, allowances or conditions that may affect the cultural heritage values and character of the district.

- Recommendations for potential amendments to the documents described above shall be included so as to remove any conflict they may have with the HCD plan and its conservation objectives.

2.12 Report to City Council

- Once all of the requirements of the terms of reference have been completed to the satisfaction of the Manager of Heritage Preservation Services, City staff will prepare a report for City Council that summarizes the findings of the district study with the following recommendations, as applicable:
 - o That City Council receive the Heritage Conservation District Study and direct City staff to work with the applicants to complete the designation(s) and plan(s) for a heritage conservation district for all or part of the area identified in the study, or
 - o That City Council receive the Heritage Conservation District Study and direct City staff to close the file for this area without designation as a heritage conservation district, or
 - o Any other recommendation as deemed necessary by City staff.

3. District Plan Phase

A bylaw designating an HCD must also adopt an HCD Plan for the District. The objective of this phase is to create a thorough district plan that states the objectives of designating the district and directs change and development within the district. It describes the formal characteristics of the district that contribute to its significance, cultural heritage values and character.

Heritage attributes include contributing structures, landscape features, spatial organizations, sites and other features that must be identified. District specific policies and guidelines are developed to conserve those attributes. Detailed policies and guidelines will also address landscape, archaeology, parks, public spaces, streetscape and the public realm to ensure that the character and cultural heritage values of the district are conserved and reinforced in the long term.

3.1 Statement of Significance

- The statement of cultural heritage value from the study phase shall be finalized in the district plan with any necessary modifications or amendments.

3.2 Character Statement

- The character statement from the study phase shall be finalized in the district plan with any necessary modifications or amendments.

3.3 Statement of Objectives

- A clear and concise final statement of objectives for the district shall be included in the District Plan and shall be informed by the cultural heritage values and character of the district and the findings of the area study.
- The primary objective for every Heritage Conservation District designation and plan shall be the highest possible quality of protection, and conservation and management of the cultural heritage values, character, attributes features and contributing resources as identified in the area study and district plan, consistent with the *Standards and Guidelines for the Conservation of Historic Places in Canada*.
- The statement of objectives must relate to the long-term conservation of the district, its current and anticipated future condition, a vision for the evolution of the district, and the desired outcomes for the designation of the district.
- Special or unique conservation concerns for the conservation of the district should be addressed in the objectives for the district and may also examine other opportunities such as interpretation, commemoration, promotion, beautification, education and community building activities. Where multiple objectives exist they shall not conflict with one another.
- The statement of objectives must relate to and give force to the policies and guidelines detailed in the plan.

3.4 District Plan Boundaries

- The boundaries of the HCD shall be finalized in the district plan so as to indicate what geographic area is subject to the policies and guidelines of the plan.
- If the boundaries for the plan differ from the boundaries in the study, the reason for the difference shall be analyzed and stated within the plan.
- District Plan boundaries that do not reflect the entirety of the boundaries identified in the study area may be established to allow for phased district plans that will ensure manageable plan areas.

- If it is necessary that the plan boundaries be extended beyond the boundaries identified in the study, all additional properties shall be surveyed, analyzed and evaluated consistent with requirements of the study phase, with the resulting documentation included as an appendix to the plan and appropriate notice shall be given to the owners of the affected properties.

3.5 District Attributes

- The district plan shall include a detailed list of attributes of the district and other features key to conserving the character and significance of the district as informed by the area study. (For guidance on identifying district attributes please see the *Ontario Heritage Toolkit: Heritage Conservation Districts* pages 21-23.)
- District attributes include contributing resources, listed and designated properties under Part IV of the OHA and archaeological resources (as detailed below).
- District attributes should also include the key physical, spatial and material attributes of the resources within the district including natural heritage, residential, commercial, institutional, industrial, and archaeology, etc.

3.6 Contributing Resources

- A list of all properties, and features within the district that are deemed to contribute to the cultural heritage value and character of the district shall be included in the plan. Each contributing resource must be individually identified by municipal address and identified on a map of the district and submitted in a database table with individual fields for street and street number.
- A list of all properties within the district that do not contribute to the cultural heritage values and character of the district shall be included in the plan. Each non-contributing property must be individually identified by municipal address and identified on a map of the district and submitted in a database table with individual fields for street and street number.
- Properties within the district shall not be ranked, prioritized or categorized for the amount or degree of their contribution, or lack thereof, to the district.
- A statement of contribution shall be prepared for each property deemed to contribute to the district. Statements of contribution which apply to multiple properties may be used. The statement of contribution shall

analyze and describe how the property contributes to the cultural heritage values and character of the district.

3.7 Archaeologically Sensitive Areas (ASAs)

- Where ASAs or areas of archaeological potential exist, the plan shall contain policies and procedures for identification, protection and documentation of those sites consistent with the Archaeological Master Plan (See Section 8).
- The plan should include any special recommendations or requirements for archaeological consideration within the district that may have been suggested in the area study.
- Mitigation and interpretation strategies for identified archaeological sites or resources within the district shall be detailed in the HCD plan.
- The study must refer to the “Archaeological Management Plan” for standard policies and procedures for archaeology.

3.8 Current Zoning and Official Plan (OP) Provisions

- Required changes to the zoning or OP provisions and other policies or bylaws affecting the area, as identified in the area study, must be comprehensively analyzed and addressed in the plan.
- Specific changes to the zoning, OP and other bylaws shall be analyzed with specific regard to the statements of cultural heritage value, character and objectives for the district.

3.9 District Conservation Policies and Guidelines

- “Standard HCD Policies for Heritage Conservation Districts” detailed in Section 3 of this document must be included in every district plan to ensure consistency in the conservation of the district.
- Definitive and clear policies for the conservation of contributing properties and resources within the district shall be included in the district plan.
- Conservation policies shall not conflict with the *Standards and Guidelines for the conservation of Historic Places in Canada* and shall reflect a high standard of conservation.
- Conservation policies and guidelines should be illustrated wherever possible.

- Guidelines specific to the conservation of attributes of the district shall be included in the district plan and should consider the following, where they apply:
 - o Relationship to surrounding context and structures
 - o Layout and organization
 - o Landscape features and plantings
 - o Roofs and roof elements
 - o Storefronts and signage
 - o Porches, decks and balconies
 - o Foundations
 - o Siding, trim and architectural details
 - o Material finishes
 - o Fenestration, windows, doors and related elements
 - o Fences
 - o Plan and layout of streets, laneways, pedestrian paths, sidewalks

- Additional policies for the district may be included to add control or direction for specific or unique properties, properties designated under Part IV of the OHA and opportunities for the revitalization of the district as determined by the community, consultant and City staff.

- Additional policies shall not conflict with “Standard HCD Policies for Heritage Conservation Districts” referred to in section 3.9.1 of this document or the *Standards and Guidelines for the Conservation of Historic Places in Canada*.

3.10 Alteration and Infill Policies and Design Guidelines

- Definitive and clear policies relating to the alteration of contributing properties within the district shall be included in the district plan.

- Alteration policies shall be consistent with the *Standards and Guidelines for the Conservation of Historic Places in Canada* and shall reflect a high standard of conservation and should be illustrated wherever possible.

- Comprehensive and illustrated design guidelines (see *Ontario Heritage Toolkit: Heritage Conservation Districts*, pages 30-31) shall address appropriate design approaches for alterations and additions to contributing structures, district attributes and landscape features identified in the district plan, and include consideration of the following where applicable:
 - o Relationship to surrounding context and structures
 - o Landscape features and plantings
 - o Layout and organization
 - o Additional storeys and vertical additions, including compatible modern architecture

- Rear yard additions, including compatible modern architecture
 - Energy conservation retrofits and upgrades
 - Roofs and roof elements
 - Porches, decks and balconies
 - Signage and storefronts
 - Fenestration, windows and doors
 - Parking, driveways and garages
 - Front and side yard landscaping, paving and pathways
 - Accessibility
 - Exterior lighting
 - Additional guidelines as required
- Definitive and clear policies relating to alteration or infill construction on non-contributing properties within the district shall be included in the district plan, shall not conflict with the *Standards and Guidelines for the Conservation of Historic Places in Canada*, shall ensure compatible, sympathetic and distinguishable design in the district and should be illustrated wherever possible.
 - Comprehensive and illustrated guidelines (see *Ontario Heritage Toolkit: Heritage Conservation Districts*, pages 30-31) shall address appropriate design approaches to infill development for non-contributing sites, and specifically include consideration of:
 - Form, scale, massing and architectural rhythm
 - Compatibility with the district and neighbouring structures
 - Distinguishable design, including appropriate modern design
 - Height, setback, lot coverage and density
 - Roof forms and elements
 - Angular planes
 - Signage and storefronts
 - Porches, decks and balconies
 - Material finishes
 - Windows and doors, and ratio of glazing to wall
 - Fences and landscaping
 - Accessibility
 - Exterior lighting
 - Parking, driveways and garages
 - Grading and topography
 - Front and side yard landscaping, planting, paving and pathways
 - Comprehensive and illustrated guidelines shall address appropriate design and conservation approaches for cultural heritage landscape elements, streetscape and public realm, including:
 - Plan and layout of streets, laneways, and pedestrian paths
 - gateways, trails and open spaces

- Streetscape elements including sidewalks, street furniture, street lighting, sidewalk patios, street signage, paving and curb cuts
 - Public works, repairs and maintenance or right of ways.
- All the guidelines detailed in the above sections should be tailored to the specific themes and typologies identified in the district study, so that specific resource types each have clear and specific expectations and guidelines for conservation, alteration, and managed change.

3.11 Community Consultation Meeting

- A community Consultation meeting will be organized by City staff to inform area stakeholders about the contents of the district plan.
- The public meeting should be hosted within the district (i.e. local school or library) or as close to the district as possible.
- City staff will provide notice to all property owners within the proposed HCD 20 days prior to the meeting.
- The heritage consultant is required to present the content of the district plan at the consultation meeting, including its policies and guidelines and will discuss the objectives of the plan in detail.
- Public feedback will be welcomed for 14 days after the meeting by mail, email and fax directed to the Senior Preservation Coordinator, Heritage Preservation Services. Online or social media tools are acceptable for feedback only where they are initiated and maintained by City staff.

3.12 Report to City Council and Statutory Public Meeting

- Once all of the requirements for the district plan have been completed to the satisfaction of the Manager of Heritage preservation Services, City staff will prepare a report to Toronto Preservation Board, Community Council and City Council which presents the districts plan for consideration and summarizes its findings with recommendations as follows:
 - That City Council designate the area described in the district plan as a Heritage Conservation District and adopt the District Plan by bylaw under Part V of the Ontario Heritage Act, or
 - Any other recommendation as deemed necessary by City Council.
- City staff will provide notice of a public meeting held under the Ontario Heritage Act at the meeting of the appropriate Community Council at the time of their consideration of the designation of the HCD and adoption of the HCD Plan by bylaw.

3.13 Deemed Heritage Permits

- A list of deemed permits for all HCDs is included in the City of Toronto Municipal Code, section 103-22. An application to alter a designated property does not need to be submitted for undertaking the works described in that section.
- Additional deemed permits for an area may be considered in consultation with staff, the consultant and the community. Consensus must be reached on all additional deemed permits before including them in the plan.
- Specific deemed permits found in the City of Toronto Municipal Code may be excluded from a plan if consensus is reached amongst staff, the consultant and the applicant.
- Deemed permits must relate to work that is minor in nature and cannot affect the character of the district and its resources.

3.14 HCD Advisory Committee

- Once an HCD Plan has been adopted by City Council an advisory committee shall be appointed to liaise with City staff and to provide information and raise questions or concerns about specific applications with City staff and to promote awareness of the designation and district plan. Committee members shall provide direction through City staff and not directly to the applicant or their representatives.
- A terms of reference supplied by the City of Toronto shall be adopted when an advisory committee is created.
- The membership, number of members and other considerations for management of the committee may be included in the district plan.
- The content or enforceability of the plan and its contents will not be affected if an advisory committee is not formed or is dissolved.

3.15 Plan Review

- A guideline for a scheduled review of the plan and its objectives shall be recommended in the district plan and shall not be less than 5 years and not more than 15 years from the time the district is designated. The following clause must be included in the plan:
 - o “The failure to review the contents of the plan within the scheduled review guideline will in no way invalidate the plan or the ability of

City Council to refuse or allow the issuance of permits within the district under Part V of the OHA.”

Section 5: Heritage Conservation District Study Complete Application Requirements

The following application requirements are to be used by any individual or group who wish to nominate a neighbourhood or area of the city for designation as a heritage conservation district (HCD).

Complete Application Package

The applicant must complete an application form and provide as much information as possible within the application package. This formalizes your request and helps to organize the information of the individual or group making the application. The more thorough the application form and package is, the more likely it is to be reviewed quickly.

The application package must contain the following:

- A completed application form
- A general historical overview
- Photographs of the area, streetscapes and key features
- A map of the area
- Proposed preliminary boundaries
- A statement on how the study will be funded
- Letters of support and/or petitions

Incomplete Applications

Incomplete applications will be sent back to the applicant with a note relating to the application deficiencies. The applicant may address these deficiencies and resubmit their application, however applications will not be processed until they are deemed complete.

Proposed Study Boundary

After reviewing all preliminary documentary research and having conducted site visits, staff will review the proposed boundary (as provided by the applicant) and recommend changes, if deemed necessary. The review will consider:

- The history of the area
- The built form of the area
- Views into and out of the area
- Area topography

Evaluation of Applications

Staff will evaluate all complete applications from individuals or groups who have applied to have their area studied for potential HCD designation. For complete applications, staff will review the proposal package (including documentary research provided), conduct site visits and meet with community members to determine if the neighbourhood meets the necessary criteria for an HCD study.

Only a district that shows potential as an HCD will be deemed to merit further study. An area may be considered to merit further study if the application demonstrates that the area displays some of the ‘Characteristics of Heritage Districts’ as outlined in the *Ontario Heritage Toolkit – Heritage Conservation Districts* (page 9). Staff may also use other resources to assist in determining the merit of an area for study, as required.

Availability of Funds

The group proposing the district is required to confirm the availability of funds to proceed with a study of the proposed district. Where funds are not available, staff may recommend that the authorization of the district study be postponed until such time as sufficient funds are available.

Notification of Application for a Heritage Conservation District Study

If an application to study an area proposed as an HCD is determined to warrant further study, a public information meeting will be held in the community. This information meeting will afford property owners an opportunity to learn what an HCD designation would mean for them.

Advisory Committee

Where one already exists, a committee may conduct informal volunteer work and facilitate dialogue among the community in order to create awareness and to raise grass root support for the proposed HCD study. The committee may also undertake fundraising to finance the proposed study and may seek interested volunteers to assist during the research study stage.

Section 6: Study Area Survey

The survey provides a description and record of every building, streetscape and landscape features in the study area. It is an essential component of the study and greatly informs other aspects of the research, in particular the analysis of typology, history and character.

Purpose of a Resource Survey

A survey is required for every study to ensure that a common baseline of information and understanding is achieved. The survey allows for informed decisions on boundary delineation and assists the heritage professional in the analysis of area history, themes, typologies, significance and character. The survey is also central to the process of determining whether an individual built resource contributes or does not contribute to a district. After designation, the survey assists preservation officers in the stewardship of the district.

Benefits of a Resource Survey

The survey of every building and streetscape and landscape within the proposed district will afford the study important information about the value of each individual building resource and will allow for a thorough understanding of the area as a whole. Staff may decide to further research individual buildings for potential designation under Part IV of the Ontario Heritage Act based on the findings of the study area survey.

Undertaking a Resource Survey

Volunteers may undertake a survey of a study area under the supervision of a heritage professional. Gaining volunteer support to undertake historic research is crucial to the success of a survey. The consultant may be required to train community volunteers in research methods and will be required to review all records completed by the volunteers. If no volunteer support is available, the consultant will have to complete the survey.

When community driven, the research conducted for the survey can help empower community volunteers, allowing them to feel involved in the process. It should also heighten community appreciation for the history and character of both individual building resources and for the area.

Required Information

It is important that any new surveys created include key data regarding the physical nature and history of every property, streetscape and major landscape feature in the study area.

The survey should outline details such as the year of the property's construction, the name of its architect/ builder, landscape architect, planner, information on any historical associations, an architectural description of its built form and materials, photographs of the street facing façades and architectural details and other relevant historical or associative information, when available.

It may not be possible to describe all structures and features in the format described above. Streetscape and landscape features such as topography, bridges, fountains, street furniture, parks, cemeteries and unique, typical or prominent plantings are aspects of a typical study area environment should also be recorded and described as thoroughly as possible in the survey form for a structure (if it is at the same address), or on its own survey form.

The length of description required for each record is dictated by the size, history and complexity of the property, streetscape or landscape feature being recorded.

Updating the Resource Survey

Each survey should be reviewed after an appropriate amount of time. As part of an HCD plan review, the survey photographs should be retaken and the building material descriptions should be analyzed in order to establish whether any changes have occurred in the intervening period since the survey was first conducted.

Resource Survey Guidance Notes and Procedures

The study area survey guidance notes have been created to help recorders (community volunteers and retained consultants) understand the basic elements and requirements of a study area survey. Every survey should contain the following information:

I Property Information

Background building information, based on the following headings, should be provided for all properties in the district:

- Address: The municipal street address for the property and the postal code must be provided.
- Neighbourhood and Ward: The locally applied neighbourhood name for the study area (if any) should be provided along with the municipal ward.
- Current Use: Determine the specific current use of the building, property or landscape. If known, outline the length of time the building has been operating in the current use. Note that this does not necessarily refer to the property's permitted use(s) as defined by the zoning by-law.

- Heritage Status: Is the property listed, designated or subject to an HEA under the Ontario Heritage Act? If so, when was the protection enacted?

II Historical Information

It is essential that a review of historic resources be undertaken in order to gain a full understanding of the potential significance of a resource. Historical research on individual properties can be conducted at the City of Toronto Archives. Historical building information, based on the following headings, should be provided for all properties in the district:

- History/Background: Discussion of heritage information and the historical context of the structure should include information on the following:
 - o Architect/ designer/ landscape architect / planner/ builder (if one)
 - o Original owners and previous owners of interest
 - o Historically significant events or people associated with the property
- Construction Date: Provide the date of construction for each building or landscape feature. If the date of construction is approximate it should be preceded by the term ‘circa.’
- Previous Use: The original and all other previous uses of the building should be documented.

III Photographic Documentation

Photographic documentation of all properties within a study area is essential to allow for appropriate understanding and stewardship of the district. A context photograph together with the resource photographs, allows the heritage development review officer and, if necessary, the enforcement officer to ascertain how the street facing façade(s) existed on the date the study was conducted.

- Photographic Requirements: Requirements for photographs of resources within the study area are as follows:
 - o at least one photograph of each elevation or face of the resource
 - o multiple contextual photographs showing the resource in its setting and landscape
 - o additional photographs as required of architectural details, to be included as an appendix sheet to the primary survey record
 - o all photographs must be taken using a high quality camera (minimum 600 dpi)
 - o photographs must clearly show the resource with adequate light and focus
 - o the photographs must be labelled with address, orientation (i.e. east elevation) and date

- all photographs must be submitted in both printed colour format and as digital files on CD

IV Recording Structures and Properties

The general description should provide an accurate record of the physical form and context of the structure or site. Where applicable the general description of the property should provide commentary based on the following headings:

- Location and Context: A building's relationship with the surrounding neighbourhood establishes its context. The location of the structure on the street should be outlined (i.e. house located on the north side of the street) with a general description of its setting provided (i.e. building is set in wooded area overlooking ravine). Some of the issues which should be addressed include:
 - Neighbourhood context – How does this structure relate to the character, scale and appearance of the surrounding neighbourhood? Is it attached to other structures? The property's relationship with its neighbouring buildings should be outlined (i.e. apartment, row house, end of row, semi-detached, detached etc).
 - Streetscape / Lot – are there sidewalks, fences, driveways, trees, lamp posts or any other features of the surrounding streetscape that help define the building's setting? How large is the lot and what is its shape/form and topography?
 - Does the landscape define the property's context (i.e. ravine, lake, hilly landscape etc)?
- Plan form and features: The plan form and characteristics of the structure should be described, e.g. 'L-shaped', 'Cruciform', 'square plan' etc.
- Extensions/alterations: Describe any extension/ alteration to the structure, landscape or feature.
- Architectural style: Classification into a specific style may be difficult, as many structures in Toronto are comprised of elements from different eras of building or have been altered throughout their existence. A number of excellent guides to Toronto's architecture may be consulted to help assign a style to a building.
- Bays and storeys: The number of bays¹ and storeys of the building, e.g., 'two-bay single-storey', or 'four-bay three-storey over basement', gives basic horizontal and vertical information about a structure. A structure built on an irregular plan form with many bays may be described as 'multiple-bay'. The

¹ The number of bays indicates the vertical division of the building. A bay may contain a door, window or a solid wall (i.e. a facade with a door and a window would be said to be 'two bay').

term "half storey" applies to accommodation in the roof space positioned above the level of the eaves.

- Description of building features, materials and site: A written description of the property's street-facing building elements is required to accompany the resource images. This is necessary as it is not always possible to discern the material composition of a building's street-facing façade(s) from a photograph. The written description of the external built fabric removes any ambiguity regarding the materials at the time of the survey.

This section should provide information relative to the material make-up of all individual features on street-facing facades based on the following headings:

- Site Characteristics: Provide a brief description of what exists on the remainder of the site (i.e. landscaped front garden with paved driveway). Spatial relationships between structures and landscape should also be examined.
- Roof: Provide a description of the roof form (i.e. pitched roof/ flat roof/ lean-to roof etc), the roof covering (i.e. natural slate/ asphalt/ shingles etc) and related roof elements.
- Exterior Cladding: Provide descriptive details of the walls and related elements i.e. walls have a red brick finish.
- Fenestration, Windows and Door: Provide descriptive details of external windows and door openings. This information should include detail of the shape of the opening (i.e. round-headed/ square-headed etc); material of sills (i.e. concrete/ granite/ limestone etc); and description of fittings (i.e. timber sash windows/ timber framed door with plain glass upper panels).
- Additional Buildings: Provide a description of additional building(s) that follows the format of the description for the main building on site.

V Recording Streetscapes and Landscapes

The streetscape should be recorded in blocks (i.e. a predetermined stretch of street between two intersections) with a general context photograph provided. Major landscape features such as parks, cemeteries and golf courses should be recorded as individual units where possible, with a written description and general context photograph(s) provided. Specific photographs of individual streetscape and landscape features should be provided in an appendix sheet if necessary.

- Typical streetscape features which should be recorded include:
 - form and material sidewalks and streets, including paving, rough dimensions and relationship to other streetscape features

- street furniture such as street lighting, garbage bins, sidewalk benches, public art, water features, fire hydrants, hydro poles, manhole coverings etc
 - street trees, hedges and other green space features
 - historic advertising, ghost signs, etc.
 - views to and from the area
- Typical landscape features which should be recorded include:
 - public parks, sports fields, tennis courts, ravines etc.
 - topography, grading and open spaces
 - monuments, statuary, water features and fountains
 - gardens, front and side yards
 - woodlots and natural areas
 - views to and from the area

VI Additional Information

- Additional Information: The recorder should add any additional information he/she might consider pertinent to the survey.
- Sources: Provide information for all sources consulted for completion of the survey (i.e. books, maps, photographs and archival records etc).
- Date, Name and Signature of Recorder: It is very important that the recorder notes the date the survey was conducted on the form and provides their signature. The record cannot be considered complete unless a signature has been provided.
- Review of Recorded Surveys: A heritage professional must review and correct (if necessary) all survey records completed by recorders before presenting the final survey to staff.
- Survey Form: All information should be recorded on a single form. Extra photographs may be provided in appendices and electronically, if necessary.

VII Completion of Survey

Staff will review all surveys based on the requirements outlined in this policy and will return for revision surveys that have not fulfilled those requirements. The study area survey must be made available to staff for review upon its completion as part of the HCD study phase. Heritage Preservation Services must receive both a digital and hard copy of the final document. Upon district designation the survey will be made available on the City of Toronto's website as a public document.

Section 7: Character Analysis of the Study Area –Themes and Typologies

A character analysis of an HCD study area is an important step in thoroughly understanding its potential significance. It consists of analyzing and grouping the resources of the study area according to themes and types. By understanding the interrelationship of themes, types and context within the study area a comprehensive and considerate analysis of character, attributes and significant features can be made.

The character analysis relies heavily on the findings of both the historical background research and the survey of the study area. Changes in landscape, development patterns and the evolution of the study area in general should inform the analysis and will form the basis of various themes and typologies. In all cases the identified themes and typologies require mapping to reveal their prevalence, geographic relationships and influence on topography and layout of the district. Each grouping should be mapped, which may reveal properties that belong to more than one theme or type.

The themes and typologies will be important for the evaluation of the area's cultural heritage values and will eventually inform the objectives, policies and guidelines for the management of the district.

Thematic Groupings

Themes emerge from an analysis of historic trends and associations in a study area and are vital in understanding its evolution over time and the influences on that evolution. Themes are not necessarily evaluative of significance, but rather documentary. Once the themes are identified, their significance can be determined through the application of criteria for the determination of cultural heritage value, detailed in Section 8 of this document. The thematic groups will indicate how the built form, landscape and other features relate to historical events, individuals, groups and practices in the study area.

Emergent themes need to have grounding in the resources of the study area. Some themes may have few resources related to them, while others may have many. It is not the number of resources related to a theme that is important, but rather the quality of documentation, relationship and analysis that will later reveal its significance. The primary themes must be thoroughly described and illustrated using examples from within the study area.

Possible thematic groupings may include, but are not limited to:

- pre-contact events, uses and associations
- first nations history, uses and association
- settlement groups and patterns
- agriculture
- transportation
- trade routes, trail ways and water ways
- major events
- notable individuals

- development patterns and history
- use (i.e. commercial, residential, institutional, industrial, mixed use, etc.)
- places of faith/worship/remembrance

District Typologies

The configuration and nature of a study area can be identified as one of four types of potential HCD. By identifying the typology at a district level broad themes in the development and growth of the area can be understood as well as the architectural and landscape forms and styles located within it. For more information on district typology see *The Ontario Heritage Toolkit: Heritage Conservation Districts*, pages 10-11.

- designed district
- evolved static (relict) district
- evolved dynamic (evolving) district
- associative district

Street and Landscape Typologies

Identifying the design and forms of streets and layout in the district helps to understand the planning rationale and evolution of the district and allows for suitable policies and guidelines to be developed that will ensure the protection and management of the ‘bones’ of the district. Street typologies may include:

- use, such as residential, commercial, etc
- ceremonial, neighbourhood, arterial, laneway, etc.
- street width/dimensions
- land use
- form, such as grid, winding, etc.
- paving and sidewalks
- street furniture, signage, lighting, etc.

Architectural and Landscape Typologies

Groupings by type reveal the architectural and design forms of the district, their application to structures, landscape and features and their relationship to style. The categorization by type will reveal trends in architectural style, development and the general form of the study area. The characteristics or defining features must be thoroughly described and illustrated using examples from within the study area.

Typology may consider, but is not limited to, such attributes of design as:

- form and massing
- layout and arrangement
- number of storeys/height
- number of structural bays
- roof forms
- fenestration
- porches and storefronts

- setback.
- relationship to lot and landscape
- plantings and arrangement
- hedge rows and wind breaks, etc.

Conclusions and Character Statement

Through the systematic grouping of themes and types within a study area, significant trends and potential cultural heritage values will reveal themselves. However, the evaluation of the study area must be comprehensive and deliberate and the results of the character analysis should not serve to pre-determine the results of the evaluation of cultural heritage values, but rather inform it. Because the characteristic elements of the study area that illustrate, typify or define the cultural heritage values cannot be determined until after cultural heritage values are determined, conclusions about the significant or character defining elements of study area should be made once the significance of the area is understood and articulated.

Once the cultural heritage values of the study area have been determined through a thorough application of the criteria in Section 8 of this document, a statement of heritage character should be prepared that is informed by the both the identified values and the results of the character analysis. Requirements for the heritage character statement can be found in the Terms of Reference located in Section 4 of this document.

Section 8: Criteria for the Determination of Cultural Heritage Value

Introduction

To define the sense of time and place within a district the City of Toronto has established cultural heritage value and integrity criteria. For a district to communicate a sense of time and place it must have a defined set of cultural heritage values that identify it as a significant heritage area, and it must possess sufficient integrity to communicate those values.

A sense of time and place is the compelling feeling that a district has coherence of cultural heritage values, including history, design and functions that are conveyed in a way that is significant to the area. Sense of time and place can be a difficult thing to pinpoint and may consist of both tangible and intangible qualities of a district. The sense of time and place is compelling to residents and visitors to the area and can be stewarded in the long term.

Applying the Criteria

Criteria for the determination of cultural heritage value are individually sufficient and a district may qualify for designation by demonstrating significance under a single criterion. In all cases, more is learned by articulating multiple values where they exist, however this does not mean that districts with more than one cultural heritage value are more important than districts with a singular cultural heritage value.

Applying the criteria is a step-by-step process. Cultural heritage value must first be determined so that an understanding of the significance of the district is achieved. Only once the district's values are understood and articulated can the integrity criteria be applied. These help determine if enough of the authentic physical fabric remains to communicate the values of the district.

In considering the cultural heritage values of a district, there is no minimum age required for it to be a district; however enough time should have passed for the community to reflect upon and assess its cultural heritage values in an objective and considered way.

When applying the criteria for the determination of significance of a heritage conservation district, the following requirements must be satisfied:

- the criteria must apply to the whole district and not a single or few properties within its boundaries
- how the criteria applies to the district must be articulated in a clear way that makes evident why the district is significant
- the resulting cultural heritage values of the district must be demonstrable within the attributes of the district

Criteria for determining if an HCD has sufficient integrity to warrant designation are mandatory criteria, but they are applied only after significance is demonstrated through the application of the criteria for determining cultural heritage value. A district must possess both elements of integrity to merit designation for its cultural heritage values.

Criteria for the Determination of Cultural Heritage Value within a Heritage Conservation District

- The district has **design value or physical value** because it,
 - o has a rare, unique, representative or early collection of a style, type, expression, material or construction method
 - o has a rare, unique, or representative layout, plan, landscape, or spatial organizations
 - o displays a consistently high degree of overall craftsmanship, or artistic merit
- The district has **historical value or associative value** because it,
 - o has direct associations with a theme, event, person, activity, organization or institution that is significant to a community
 - o yields, or has the potential to yield, information that contributes to an understanding of the history of a community or culture
 - o demonstrates or reflects the work or ideas of a planner, architect, landscape architect, artist, builder, designer or theorist who is significant to a community
- The district has **contextual value** because it,
 - o possess a character that defines, maintains or supports the area
 - o contains resources that are interrelated by design, history, use and/or setting
 - o is defined by, planned around, or is a landmark
- The district has **social value or community value** because it,
 - o yields information that contributes to the understanding of, supports, or maintains a community, culture or identity within the district
 - o is historically, visually or functionally linked to a cultural group, an organized movement or ideology
 - o plays a past or ongoing role in the practice or recognition of religious, spiritual or sacred beliefs of a defined group of people
- The district has **natural value or scientific value** because it,
 - o is a rare, unique or representative collection of significant natural resources
 - o represents, or is a result of, a significant technical or scientific advancement

Integrity Criteria

A district must have physical integrity in order to communicate its significance in the most effective manner. Although a threshold of contributing properties can be important to the integrity of a district, it is the quality of the interrelationship of the resources in the district that is important to establishing integrity. The City of Toronto requires that a thorough analysis of integrity be undertaken based on the overall ability of the district to communicate its significance.

Some places, although in poor condition retain much of their authentic values, style, materials and sense of place and can be returned, through careful restoration, to good condition. Condition is not the same as integrity. The following two criteria must be satisfied and analysis of each demonstrated in order for a property to qualify:

- **Visual, functional or historical coherence** is generally tied to the consistency of resources related to the cultural heritage values of the district. It can be determined by analyzing resources in a district to understand if there are common thematic, architectural or associative characteristics that unify, relate to, and communicate the cultural heritage values of the district.
- **Authenticity** means that a district accurately and honestly conveys its cultural heritage values through its attributes. To be authentic a district should retain most of its original or appropriate materials and structures. Where alterations and infill exist they are sensitive, compatible and reinforce the cultural heritage values of the district.

Once it is determined that a district merits designation under the cultural heritage value and integrity criteria, it should be analyzed to determine its period of significance and if it is a designed, evolved and/or, relic or associative landscape (these terms are defined in the *Ontario Heritage Toolkit: Heritage Conservation Districts*). Identification of the period of significance and the district type will assist in the crafting of policies and guidelines for the future management of the district.

Section 9: Archaeological Requirements within a Heritage Conservation District Study and Plan

Archaeology is an important part of our cultural heritage and tells us much about our history. The City of Toronto has an Archaeological Management Plan that identifies areas of known archaeological potential, including Archaeologically Sensitive Areas (ASAs) and areas where there is potential to encounter archaeological deposits, although their presence has not been confirmed on the ground. These latter areas are known as areas of general archaeological potential.

Within the study of an HCD, archaeology must be addressed not only by mapping the area, but also by including it in the district history, timeline and cultural heritage values. Where they exist within an HCD boundary, ASAs must be included as an attribute of the district that represents its archaeological importance. As such, any permits issued under Part V of the Ontario Heritage Act will be conditional upon satisfying all archaeological requirements for ASAs where they apply.

The HCD plan and ASAs.

The plan must identify, in a map overlay for the district, the extent of any ASAs identified by Heritage Preservation Service staff, or their designate, and those ASAs must be identified as attributes of the district.

As an attribute of the HCD, any actions that will affect an ASA must be completed under permit through the authority of the Ontario Heritage Act. Actions within an ASA that require permits include, but are not limited to:

- Installation of patios and decks, fences, pools, sheds and other outbuildings
- Major landscaping, including all soil disturbances beyond minor gardening
- Excavation for below grade utilities
- Site grading
- Work on existing or new driveways and sidewalks.

Site alteration would also include any construction activities requiring permits or approvals under provincial legislation, i.e. Conservation Authorities Act, Planning Act, Building Code, etc.

Procedures for ASAs

In addition to obtaining a permit under Part V of the Ontario Heritage Act for any ASA within the district, procedures for archaeology identified within the Archaeological Management Plan must be adhered to, where they apply.

ASAs identified after the designation of an HCD.

Where an HCD exists prior to the identification of an ASA, the plan shall be amended once the extent of the ASA has been determined, and will be subject to all of the requirements detailed above. Likewise, if the boundary of an ASA changes after an area is designated, the plan shall be amended to reflect those changes.

The HCD Plan and Areas of General Archaeological Potential

Lands holding general archaeological potential should be identified in a map overlay for the district as determined by the archaeological master Plan.

Procedures for Areas of Archaeological Potential

Within the areas of general archaeological potential, soil disturbance activities associated with larger scale development, such as applications made under the Planning Act, will be subject to archeological review by City staff and an archaeological assessment may be required prior to any on-site work.