



Heritage Impact Assessment Terms of Reference

Kawartha Lakes Economic Development





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Heritage Impact Assessment Terms of Reference

A Heritage Impact Assessment (HIA) is a study to determine the impact of a proposed development on the cultural heritage value of a property and to recommend an overall approach to the conservation of the heritage resource. The assessment results in a report that identifies all heritage resources present on a site, provides an evaluation of those resources and makes recommendations regarding conservation methods and/or mitigation that would minimize the impact of the proposed development. HIAs are important planning tools to ensure that heritage values and attributes are considered in the land development process.

The study will be based on a thorough understanding of the significance and heritage attributes of the cultural heritage resource, identify the proposed development or alteration will have, and consider and recommend mitigation and conservation strategies that best conserves the resources within the context of the proposed development.

Minimal intervention should be the guiding principle for all work.

Policy Context

An HIA is intended required to determine compliance of a proposed development with heritage policies and assist staff with analysis and report preparation. The rationale for requiring a heritage impact assessment arises from:

- The Ontario Heritage Act
- Section 2(d) of the Planning Act
- Section 2.6 of the Provincial Policy Statement (2020)
- The City of Kawartha Lakes Official Plan, Sections 10.5 – Heritage Policies and 36.11 Appendix K – Heritage Impact Assessment

Heritage impact assessments should be based on accepted conservation principles and guidelines including:

- *The Standards and Guidelines for the Conservation of Historic Places in Canada* (Parks Canada)
- *Heritage Conservation Principles for Land Use Planning* (Ontario Ministry of Tourism, Culture and Sport)
- *Eight Guiding Principles in the Conservation of Historic Properties* (Ontario Ministry of Tourism, Culture and Sport)
- *Standards and Guidelines for the Conservation of Provincial Heritage Properties* (Ontario Ministry of Tourism, Culture and Sport)
- *Well-Preserved: The Ontario Heritage Foundation's Manual of Principles and Practice for Architectural Conservation* (Ontario Heritage Trust)

- *The Appleton Charter for the Protection and Enhancement of the Built Environment* (ICOMOS Canada)

When is a Heritage Impact Assessment Required?

In accordance with the policies in the PPS (2020) and the City of Kawartha Lakes' Official Plan, a heritage impact assessment is required when there is a proposed alteration, demolition, or development involving or adjacent to an identified heritage resource. This includes properties which are:

- Designated individually under Part IV of the Ontario Heritage Act
- Located in a Heritage Conservation District designated under Part V of the Ontario Heritage Act
- Listed on the City's Heritage Register
- Adjacent to designated properties, heritage conservation districts, or listed properties
- Designated provincially under Part IV of the Ontario Heritage Act, federally as a National Historic Site or as a UNESCO World Heritage Site

The City's Official Plan also allows the City to request an HIA for any property which is deemed to exhibit cultural heritage value, even if it is not designated or listed.

For the purpose of an HIA, adjacent means lands that are contiguous to a heritage property or which are near to a heritage property and separated by a road, trail, right of way, walkway, greenspace, or park, as defined in the City's Official Plan.

HIAs are triggered by certain types of applications which include, but are not limited to:

- Official Plan Amendment
- Zoning By-law Amendment
- Plan of Subdivision
- Site Plan
- Consent
- Minor Variance
- Heritage Alteration Permit
- Demolition Permit

Depending on the scope of the proposed project, a heritage impact assessment may not be required. Heritage impact assessments may be scoped or waived at staff's discretion in certain circumstances.

Proposed projects occurring in major areas where there is the potential for substantial impact with regard to the overall urban fabric of an area may also be required to prepare an urban design addendum to the primary heritage impact assessment. These project may include larger projects within the City's settlement areas that impact the local urban structure, such as in downtowns and areas identified for intensification. The intent of this addendum is to address the impact of the

proposed development on the wider urban fabric and provide strategies to ensure that the proposed development has explored design solutions that are context specific and respond to the opportunities of the site with regard to place making. The need for an urban design addendum will be identified through the City's existing pre-consultation process.

Minimum Content Requirements

An HIA submitted to the City will contain, but is not limited to, the following sections. The report must clearly analyze the historic value of the site, the impact of the proposed development, and appropriate mitigation measures specific to the property and its heritage attributes, history and context. Staff may scope or expand the HIA in consultation with the applicant to develop a modified terms of reference specific the proposed project, as appropriate. The scope of the HIA will be established at a preconsultation meeting.

Introduction

- A location and site plan of the current property, showing any adjacent heritage properties if applicable.
- A fulsome written description of the site, identifying significant features, buildings, landscapes and vistas and associated photographs clearly showing the identified features. Sites with adjacent heritage properties should identify the heritage features of the adjacent property and their relationship to the site.

Research and Analysis

- A comprehensive history of the site and its development as documented in pictorial and textual records and on-site evidence
- A chronological description of the development of any structures on the site include original construction, additions, demolitions and major alterations, with substantiated dates of construction
- An evaluation of the heritage significance of the site with specific emphasis on its architectural/physical features, historical associations with the community, and situation of the site in the local context
- Description and maps of any known archaeological resources. Properties with known archaeological resources will require a separate archaeological assessment prepared in accordance with Ministry of Heritage, Sport, Tourism and Culture Industries requirements
- Reproductions of any relevant visual and archival material including maps, historic photographs, surveys, drawings, land title records, assessments etc.

Statement of Culture Heritage Value

- A statement of cultural heritage value or interest and description of heritage attributes of the heritage resource(s), in accordance with Ontario Regulation 9/06

- A summary of the Regulation 9/06 criteria outlining which criteria the heritage resource(s) meets and how
- The statement and criteria summary will be based on current analysis of the site and pre-existing heritage descriptions
- The statement and summary will be written in such a way that does not respond or anticipate any current or proposed interventions to the site

Assessment of Current Conditions

- Comprehensive written description of the current physical condition of the heritage resource, both interior and exterior
- Current photographs of the property, including, but not limited to:
 - i. Contextual views of the property to showing its relationship with surrounding properties
 - ii. Exterior views of each elevation of all buildings and structures
 - iii. Views of the property including all significant landscape features
 - iv. Interior views of each room of the building
 - v. Close-up views of all significant architectural features (i.e. brackets, trim, cornices, windows, etc.)

Description of Proposed Development

- A written description of the proposed development
- Conceptual drawings and site plans clearly illustrating the proposed future use of the site including but not limited to:
 - i. Massing and elevations
 - ii. Proposed materials and architectural treatment
 - iii. Setbacks
 - iv. Lighting and signage
 - v. Access, circulation, and parking
 - vi. Public views and vistas being maintained or established
- Description and drawings should include which heritage features are proposed for retention and which are considered for removal or alteration
- For proposals adjacent to a heritage resource, the drawings and site plans should indicate the location of the adjacent heritage resource and the relationship of the proposed development to it

Impact of Development on Heritage Attributes

- A discussion of the potential impact the development will have on the site, or adjacent site, and its heritage attributes, both positive and negative
- Positive impacts may include:
 - i. Restoration of heritage features including replacement of missing, documented attributes

- ii. Restoration or enhancement of existing streetscape
 - iii. Adaptive re-use of a heritage resource to ensure long-term viability
 - iv. Access to new funds to allow new or continued protection of a heritage resource
- Negative impact may include, but are not limited to:
 - i. Destruction of any, or part of any, significant heritage attributes
 - ii. Alteration that is not sympathetic to, or is incompatible with, the historic fabric and appearance of a heritage resource
 - iii. Shadows created that alter the appearance of a heritage attribute or change the viability of a natural feature or planting
 - iv. Isolation of a heritage attribute from its surrounding environment, context or significant relationship
 - v. Direct or indirect obstruction of significant views or vista within, from or to built and natural features
 - vi. A change in land use that affects a property's heritage value
 - vii. Land disturbances such as a change in grade which alters soils, and drainage patterns that adversely affect a heritage resource

Mitigation and Conservation Strategies

- An assessment of alternative options, mitigation measures and conservation methods that would avoid or limit the negative impact on the heritage resource. Mitigation methods include, but are not limited to:
 - i. Alternative development approaches
 - ii. Isolating development and site alteration from significant built and natural heritage features
 - iii. Design guidelines that harmonize mass, setback, setting and materials
 - iv. Limiting height and density
 - v. Allowing only compatible infill and additions
 - vi. Reversible alterations
- If a property cannot be conserved, a full analysis explaining why these conclusions have been drawn
- Short term and long term maintenance and conservation strategies and any additional site-specific studies or plans that might be required
- Alternative and strategies should have consideration for relevant heritage policies as applicable

Recommendations and Executive Summary

- Concise summary of the findings of the report, including significance of the site, the potential need for additional plans and assessments, and mitigation strategies
- Clear recommendations regarding the most appropriate course of action for the subject property and its heritage resources
- The recommendations and summary must address the following questions:

- i. Does the property meet the criteria for designation under Ontario Regulation 9/06?
- ii. Why does or does not the property meet the criteria?
- iii. Regardless of meeting the criteria, can the structure feasibly be integrated into the proposed development?

Appendices

- A complete bibliography including all sources consulted
- A summary of the author's qualifications

Urban Design Addendum

An urban design addendum to a Heritage Impact Assessment is intended to address the integration of the proposed project into the wider urban fabric. It must address the vision and direction for the proposed design solution, how the design is informed and guided by good urban design practices and the way in which these practices and principles will be implemented. The addendum should be focussed through the lens of heritage conservation and the preservation and enhancement of the City's existing historic urban landscapes.

Vision and Goals

- A statement outlining the broad mission for the function, look and feel of the proposed design.
- Identification of the urban design goals and objectives for the project.
- Discussion of these goals relate to the preservation and enhancement of existing cultural heritage resources.
- Overview of how the proposed development responds to and implements the City's Official and Secondary Plan urban design policies.

Site Specific Context

- An assessment of how the proposed development fits into the area's existing neighbourhood/area structure (landmarks, gateways, corridors, etc.)
- An outline of the surrounding urban design and architectural patterns
- Identification of the surrounding land uses and relations to the existing site.
- Identification of the proposed development's relation to the adjacent and nearby cultural heritage resources including built heritage resources, cultural heritage landscapes, natural heritage landscapes, and views and vistas

Design Elements

- An assessment of the following design considerations:
 - i. Approach to streetscape and public spaces

- ii. Compatibility with and enhancement of surrounding heritage resources, including landscapes, views and vistas
 - iii. Response to the local urban context with regard to height, massing and architectural design
 - iv. Transitions to the surrounding structures and context
 - v. Shadow impacts (as appropriate)
- An overview of the interaction between the proposed development and the public realm including:
 - i. Contribution to attractive and functional streetscapes
 - ii. The role of landscaping in creating a link between the public and private realms
 - iii. Overview of streetscape features (street furniture, trees, lights, etc.) and publically accessible open spaces (public art, squares, plazas, etc.)

Qualified Heritage Professional

A heritage impact assessment will be prepared by a qualified heritage professional such as a heritage planner, heritage architect, and heritage landscape architect with appropriate qualifications, demonstrated knowledge of heritage conservation principles, and who has undertaken historical research and evaluation of cultural heritage resources.

Heritage consultants must be members in good standing of the Canadian Association of Heritage Professionals (CAHP). Consultants who are not CAHP members but who hold equivalent qualifications may be considered. The background and qualifications of the heritage consultant(s) must be included in the report. The consultant preparing the report must also be independent from the planning, consulting or engineering firm making the development application or working on behalf of the applicant.

In addition, any archaeological component of the assessment must be carried out by a licensed professional archaeologist as required by provincial law and must follow provincial standards and guidelines for archaeological assessments.

Peer Review

The City of Kawartha Lakes reserves the right to request an independent peer review of the heritage impact assessment at the applicant's cost if a peer review is deemed necessary by the Director of Development Services. Peer reviews will evaluate the assessments provided in the submitted report. These reviews may include, but are not limited to, addressing inconsistencies, factual errors, discrepancies, inappropriate conservation advice not consistent with recognized standards, omissions, and misrepresentations.

Submission

The heritage impact assessment is to be submitted in two hard copies and a PDF. Staff will review the submission for completeness and advise the applicant if additional information is required. Submissions will be reviewed within 20 working days unless a longer time is agreed upon by the municipality and the applicant or if the application requires peer review.



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