Cultural Heritage Resources

An Information Bulletin for
Projects Subject to

Ontario Regulation 359/09 - Renewable Energy Approvals

DRAFT

Ministry of Tourism, Culture and Sport
2011 (updated September 2012)

Disclaimer: This Information Bulletin is guidance material and should not be construed as legal advice. Please review Ontario Regulation 359/09 - Renewable Energy Approvals (O. Reg. 359/09). If the reader has any questions about the application or interpretation of this regulation, he or she should obtain legal advice. It is the responsibility of the applicant to meet all relevant requirements when seeking a Renewable Energy Approval.
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INTRODUCTION

The purpose of this Information Bulletin is to provide guidance on the preparation of cultural heritage materials required as part of the application for a Renewable Energy Approval (REA). Applicants must meet the applicable cultural heritage requirements of the REA regulation and ensure that impacts on cultural heritage resources are addressed. This Information Bulletin may be updated from time to time. Please read the full document as issues may be addressed in different sections. This document is intended as guidance only; legislative and regulatory requirements must be met.

The Renewable Energy Approvals regulation (O. Reg. 359/09), issued under the Environmental Protection Act (2009), sets out the requirements for obtaining approval to proceed with a renewable energy project. The regulation provides a streamlined approvals process, while simultaneously ensuring that the proponent of a proposed project considers and avoids or mitigates impacts to the environment, including the cultural environment. In order to submit an application to the Ministry of the Environment (MOE) for a Renewable Energy Approval, applicants must demonstrate that they have met the applicable cultural heritage requirements of the regulation. This document reviews sections 19 through 23 of O. Reg. 359/09 and provides guidance on how to meet these requirements.

The Ministry of Tourism, Culture and Sport (MTCS) has a mandate to conserve Ontario’s cultural heritage resources, which comprise archaeological resources, built heritage resources and cultural heritage landscapes. O. Reg. 359/09 addresses the issue of cultural heritage resources by setting out requirements specific to heritage resources (including both built heritage and cultural heritage landscapes) and archaeological resources.

The REA regulation requires the proponent to conduct archaeological and heritage assessments that identify and consider potential impacts to cultural heritage resources and propose mitigation strategies. The regulation allows for a “self-assessment” using MTCS checklists found in Appendices C and D to determine if there is potential for archaeological or heritage resources. If, based on these checklists, the applicant can demonstrate that there is low potential for resources to be present at the project location, they may submit their application without further assessment. In that case, written summaries supporting the self-assessments must be included in the design and operations report. If low potential cannot be determined, heritage and archaeological assessments must be conducted.

Part 1 of this Bulletin provides clarification and advice to applicants on meeting the cultural heritage requirements of the REA, and provides further guidance on the self-assessment process.

Part 2 of this Bulletin provides information on the heritage assessment and reporting requirements. In order to meet the requirements of subsection 23 (2.1) of O. Reg. 359/09, a heritage assessment report must be prepared summarizing the assessment process and results and outlining the measures proposed to avoid, eliminate, or mitigate any impacts. The report must also include a summary of the qualifications and experience of the person(s) who conducted the assessment and prepared the report.

MTCS strongly recommends that applicants begin their assessments early in the project planning process. Knowing from an early stage what cultural heritage resources exist at the project location helps applicants determine an approach to designing, planning and implementing their project in a way that considers and avoids or mitigates impacts to these resources. Starting early provides the applicant and the public with more certainty that cultural heritage resource concerns have been adequately addressed. Issues or information related to archaeological or heritage resources are less likely to come to light later in the process, and delay the completion and approval of an application.

A glossary of terms used in this Bulletin is included in Appendix A. Please refer to this glossary for more information about items in bold type.
PART 2

GUIDANCE FOR CONDUCTING THE HERITAGE ASSESSMENT
Section 23 of O. Reg. 359/09 outlines the requirements of the heritage assessment. The heritage assessment must include historical research and a visual inspection to determine whether there is potential for heritage resources, or abutting protected properties. Below are some of the key terms and concepts that will be relevant to this report. Please note that the assessment should be conducted by a qualified person, and the report must provide a summary of the qualifications and experience of the person(s) who conducted the assessment and prepared the report.

**Heritage Resources**

Under O. Reg. 359/09 a heritage resource refers to real property that is of cultural heritage value or interest and may include a building, structure, landscape or other feature of real property. Generally speaking, heritage resources would be divided into built heritage resources and cultural heritage landscapes. Of particular importance for consideration within the context of renewable energy projects is the inter-relationship between a building, structure or ruin with the surrounding landscape including significant views from and of the heritage resource.

Consideration of all heritage resources includes resources that have not yet been identified as significant, that are identified through the research, evaluation and assessment process. It also includes resources that have been previously identified or commemorated by the community, province or in the national context (e.g., a property that is listed on the municipal register, identified with a local plaque, included on a local walking tour, the subject of a provincial plaque, or designated a National Historic Site).

**Built Heritage Resources:**

Examples of built heritage resources include: residential structures, farm buildings, mills, industrial, commercial, institutional buildings, bridges, water systems, dams, canals, locks, cairns, statues, monuments, fountains, retaining walls, boundary or claim marker, or ruins.

**Cultural Heritage Landscapes**

Cultural heritage landscapes provide the context, setting or support for the character of an area. Cultural heritage landscapes are groupings of buildings, structures, spaces, archaeological sites, and/or natural elements that collectively are significant or representative. Examples include: burial sites, cemeteries, historic roadways, rail corridors, waterscapes, historical settlements, battlefields, streetscapes, agricultural landscapes, a park or designed recreational community space, or a heritage conservation district.

The following definitions of cultural heritage landscapes are taken from the Operational Guidelines adopted by the United Nations Educational, Scientific and Cultural Organization (UNESCO) World Heritage Committee in 1992, and are widely accepted as the three primary landscape types:

- **Designed landscapes:** those which have been intentionally designed (e.g., a planned garden or downtown square).
- **Evolved landscapes:** those which have evolved through use by people whose activities have directly shaped the landscape or area. This can include continuing or ongoing use, or a relict landscape where the evolutionary processes has come to an end (e.g., an abandoned mine or historical settlement area).
- **Associative landscapes:** those with powerful religious, artistic, or cultural associations of the natural element, as well as with material cultural evidence (e.g., a sacred site within a natural environment or an historic battlefield). These landscapes may have material cultural evidence or material culture may be absent.

**Abutting Protected Properties**

Properties that share a common boundary or border, or overlap for some distance are considered abutting. For the purposes of renewable energy projects, the term ‘abutting’ also
includes parcels of land that are separated by an intervening road allowance, trail, etc.

**Project Location**

O. Reg. 359/09 requires consideration of heritage resources at the project location. Project location is defined as a part of land and all or part of any building or structure in, on or over which a person is engaging in or proposes to engage in the project and any air space in which a person is engaging in or proposes to engage in the project. This includes all land, buildings or structures which may be impacted by activities for all project phases (i.e. the construction, installation, operation and use, changing or retiring of the facility).

**Study Area**

As the project location may be situated within a cultural heritage landscape, for the purposes of the heritage assessment MTCS recommends that the qualified person consider the whole property (or properties) on which project components are located. Assessing a cultural heritage landscape involves looking beyond the footprint of the project and analyzing the surrounding area. As cultural heritage landscapes are included in the definition of 'heritage resource', defining a broader study area is an important step in determining impacts to this type of heritage resource.

Additionally, assessing a larger study area is a best practice that encourages identification of heritage resources early in the design phase and allows for a broader range of options for avoiding, eliminating or mitigating impacts. This approach provides proponents with greater flexibility should they have to alter the project layout either because additional environmental constraints are identified at a later stage, or as a result of the consultation and engagement process.

**Impacts**

Evaluating impacts can be broadly defined as the process of identifying, predicting, and evaluating the cultural, biological, physical, social and other relevant effects of the renewable energy project. With respect to a renewable energy project, alteration refers to the erection or construction of project components on the property which may impact views and vistas, alter the existing landscape, require demolition of existing buildings or structures, or have other impacts on heritage resources. Project components include not only primary elements such as wind turbines or solar panels, but also secondary elements such as access roads, laydown areas, etc.

Impacts can be temporary (e.g., dust and vibration during construction) or longer term (e.g., visual intrusions of new or modified infrastructure). The heritage assessment report must identify and describe the extent of all potential impacts; describe how each identified heritage resource may be impacted with reference to the specific cultural heritage value of the resource; and examine mitigation options and project changes to prevent or reduce negative impacts. Finally, the heritage assessment report must recommend a mitigation option and explain why it is preferred.
2.2: Investigation

This section provides guidance on how to conduct an investigation, including historical research and visual inspection.

There are five steps involved in undertaking a site investigation:

1. Identify the study area.
2. Consult with municipal staff, Aboriginal communities, heritage organizations and the public to learn more about the cultural heritage of the community.
3. Apply preliminary criteria to screen for known and potential heritage resources and create an inventory.
4. Analyze inventoried resources through a site visit.
5. Investigate inventoried resources through further historical and archival research, historical maps, municipal records and interviews.

1) The Study Area:

For the purposes of the heritage assessment, considering a larger study area is a recommended best practice. The study area may be defined as the geographic area that may be altered or impacted because of the proposed project.

The nature of the existing terrain, land elevations, vegetation, waterways, roadways, rail corridors, protected properties and known heritage resources, along with any other relevant environmental factors should be considered when defining the study area. The study area and project location should be clearly depicted on a map that is included in the final report.

2) Community Input:

Under O. Reg. 359/09, the applicant is required to consult with the public, municipalities, and Aboriginal communities regarding the proposed project. The person conducting the heritage assessment should make their best efforts to ensure that any heritage concerns brought forward during early public meetings and through any engagement with Aboriginal communities are incorporated into the heritage assessment. Proactive engagement with community members can save the proponent from having to make costly alterations to project layouts if a heritage concern is brought forward at the final public meeting, or after the application is submitted to MOE.

Heritage and archaeological sites are of critical importance to First Nations, Métis and Inuit communities. Aboriginal communities may have information about heritage sites that are of special importance to their community and should be involved in the assessment process. Information about cultural heritage resources should be requested during the formal Aboriginal engagement process. Please note that traditional knowledge may be considered sensitive. For further information on engaging Aboriginal communities please see MTCS’ Draft Technical Bulletin: Engaging Aboriginal Communities in Archaeology. Although this document refers specifically to archaeology, it provides general background material on effective approaches to engaging with Aboriginal communities overall.

Municipal staff will be a helpful resource throughout the identification and evaluation processes. If the municipality has a municipal heritage planner and/or a Municipal Heritage Committee (MHC), they should be contacted when conducting the heritage assessment. The local community may also have a historical society, heritage museum, Architectural Conservancy of Ontario (ACO) local chapter, or other local heritage interest groups that may be consulted.

Information can also be gathered from local heritage groups, librarians, museum curators and historians, as well as published local histories. These sources will help to establish the community context and identify historical themes that can be used in screening for potential heritage resources. Community members may also direct the qualified person to important heritage resources that are not easily identifiable through archival sources or site visits.

The objective of consulting with interested individuals and groups is to identify all potential and known cultural heritage resources that may be affected by the proposed development. Engaging interested parties early in the heritage assessment process can help to ensure that review is not
delayed. Efforts to conduct interviews and the information gathered in the interviews should be documented in the heritage assessment report.

Under O. Reg. 359/09, the municipality in which the renewable energy project is to be located is required to identify any heritage or archaeological resources at the project location on their Municipal Consultation Form, which is submitted to MOE in keeping with the consultation requirements for REA. The person conducting the heritage assessment should make a best practice of reviewing this document to ensure that all heritage resources indicated by the municipality have been addressed in the heritage assessment report.

For more information please refer to MOE’s Technical Guide to Renewable Energy Approvals which provides guidance on preparing the consultation report, and MOE’s Draft Aboriginal Consultation Guide.

3) Screening and Inventory:

Conducting a screening and preparing a cultural heritage inventory is an important step in the heritage assessment process. The principle objective of the screening is to take stock of all known and potential heritage resources and to identify the number, type, and location of buildings, structures, landscapes and/or features that could be considered to be of potential cultural heritage value.

The heritage assessment report should clearly outline the methodology used for conducting the screening and identify preliminary screening criteria such as age, theme, or category (e.g., the number and location of farm complexes, rivers, roads or settlements).

There are two types of surveys that should be conducted during the screening phase: the first is a desktop survey, which involves conducting preliminary research using readily available sources, such as Illustrated Historical Atlases and published histories. The second is a windshield survey, where a large area is observed by driving and noting particular landscapes, views, buildings and structures within the study area.

Once potential heritage resources have been identified, the information should be organized into an inventory. The inventory should include photographs and preliminary historical information determined during the screening. Further research and evaluation against O. Reg. 9/06 under the Ontario Heritage Act (“Criteria for Determining Cultural Heritage Value or Interest”) is required to distinguish which of the inventoried resources are heritage resources that should be considered further in the heritage assessment (see section 2.3: Evaluation). A summary of all heritage resources identified at this stage should be provided in the heritage assessment report along with a rationale for those resources screened out during this step.

4) Site Visit:

The purpose of the site visit or windshield survey is to record and analyze the physical characteristics of the project location and to develop knowledge of the landscape and context of the heritage resources.

The qualified person should make a visual and written record of each building, structure or landscape in sufficient detail to clearly illustrate significant features. Descriptions should be clear and concise and touch on all significant features, and photographs should accompany a brief written profile of each heritage resource. Photographs should be cross-referenced to vantage points marked on plans and should include compass point references for each view.

Photographs of buildings and structures should provide information on massing, materials, architectural features such as wall design, roof shape, windows, property layout, principle views and the setting of the building and relationship between the building or structure and the surrounding landscape. For example, photographs should show:

- principle elevation and at least one side elevation
- perspective views of rear, front and side
- general view from a distance sufficient to show setting, landscape and adjacent buildings
- if relevant, detailed views of important components such as entrances, windows, structural components, and/or technological features such as machinery and equipment

For landscapes, multiple views and perspectives should be recorded and photographed. Topography, elevations, and any significant man-made or natural features which may provide clues to the historical development and character of the
area should be identified. For example, photographs should:

- demonstrate overall contextual views and show the relationship and placement of site elements
- show general views of features that characterize the landscape
- show perspective views of contributing elements, buildings and structures

Photographs should be taken from the nearest publicly accessible viewpoint. For private property, permission must be sought to access the property for the purposes of site analysis and photographic documentation.

5) Historical research:

In depth historical research should be conducted in order to support the identification and evaluation of heritage resources. This is particularly important as the historical association and contextual value of a heritage resource cannot always be determined easily through a site visit or windshield survey. Historical research involves consulting archival records and other documentation to learn the history and cultural associations of the property. This may include accessing municipal and provincial records such as land titles, municipal assessment rolls, county atlases, and fire insurance maps. Local museums, libraries and archives are also valuable sources of information.

Some of the available historical resources that should be consulted include:

- Land Registry Office records
- Property tax assessment rolls
- Illustrated Historical Atlases
- Survey maps and historic town plans
- Fire insurance maps
- Aerial photographs
- Census records
- Local directories
- Archival sources (e.g., newspapers, historic photographs, postcards, business records, and family records)
- Local histories and secondary sources

The collected information should be analyzed and presented in a written narrative of the historical context of the lands on which the project is located as well as the surrounding area. The report should identify significant patterns, events, and persons having cultural heritage value or interest. The historical research should reveal details about land occupancy, ownership and use of the site, and settlement and building patterns, as well as historical themes that may have impacted the evolution of the landscape. All historical sources should be appropriately documented and referenced.

To demonstrate the value of built heritage resources and/or cultural heritage landscapes, a description of historical development should focus on historical settlement and the industrial, commercial, political and cultural development of the area. While pre-contact and archaeological context will be described in the archaeology assessments, this information should also be presented in the heritage assessment if it helps to inform an understanding and evaluation of the identified heritage resources.

Archival research should be combined with a site visit and/or windshield survey for a full evaluation of the cultural heritage resources at the project location.
2.3: Evaluation

This section provides guidance on how to conduct an evaluation of potential heritage resources against the *Criteria for Determining Cultural Heritage Value or Interest* (O. Reg. 9/06) made under the *Ontario Heritage Act*.

The findings of the historical research and site analysis (outlined in Section 2.2 of this Bulletin) are used to evaluate heritage resources in relation to the criteria set out in Regulation 9/06 made under the OHA. The evaluation should provide sufficient information about the physical, associative and contextual value of each heritage resource located at or abutting the project location to determine cultural heritage value or interest.

**Cultural Heritage Value or Interest (CHVI)**

A resource can be said to be of cultural heritage value or interest if it meets one or more of the criteria set out in O. Reg. 9/06. Potential cultural heritage resources identified during background research and preliminary screening should be referred to as potential heritage resources until an evaluation against O. Reg. 9/06 determines they are of cultural heritage value or interest.

The Criteria for Determining Cultural Heritage Value or Interest established under O. Reg. 9/06 are:

- The property has design value or physical value because it:
  - is a rare, unique, representative or early example of a style, type, expression, material or construction method;
  - displays a high degree of craftsmanship or artistic merit; or
  - demonstrates a high degree of technical or scientific achievement.

- The property has historical or associative value because it:
  - has direct associations with a theme, event, belief, person, activity, organization or institution that is significant to a community;
  - yields, or has the potential to yield, information that contributes to an understanding of a community or culture; or
  - demonstrates or reflects the work or ideas of an architect, artist, builder, designer or theorist who is significant to a community.

- The property has contextual value because it:
  - is important in defining, maintaining or supporting the character of an area;
  - is physically, functionally, visually or historically linked to its surroundings; or
  - is a landmark.

The evaluation form included in this Bulletin as Appendix E may be used to help to organize and document the evaluation of potential heritage resources against Regulation 9/06.

In some cases it may be difficult to obtain the required information (e.g., if historical records have been destroyed). It is important to acknowledge in the heritage assessment report what information was not obtainable and how the missing information may affect the evaluation.

**Statement of Cultural Heritage Value or Interest**

For any property or landscape that is determined to be of cultural heritage value or interest, the report should articulate how the resource meets Regulation 9/06 in a Statement of Cultural Heritage Value or Interest. The Statement should convey why the property is important, explaining those cultural meanings, associations and connections the property holds.

The Statement should clearly articulate why or what makes the resource significant and anticipate potential changes or alterations resulting from the proposed project that may have an impact on the cultural heritage value of the property. The statement should identify the resource’s heritage attributes. Heritage attributes can be defined as the physical features, materials, forms, locations or spatial configurations that contribute to, support, or embody each value and provide an explanation as to why this is significant.
The heritage assessment should clearly describe the relationship between heritage value of the site or property and the identified heritage attributes.

The Statement should provide sufficient information to explain the significance of the resource, and should be approximately two to three paragraphs. The Statement should include built, structural and landscape features, and clearly identify the resource’s physical attributes and associations, as well as the cultural meaning that the resource holds to the community. For each identified value, the Statement should specify the key heritage attributes that are associated with these meanings.

If, after the evaluation process, a resource is found not to have cultural heritage value or interest, the person conducting the heritage assessment should prepare a summary statement that explains the conclusions and recommendations of the heritage assessment report. There should be a clear rationale made in the report specifying why no further assessment or evaluation is required.
Renewable energy projects have the potential to affect cultural heritage resources in a variety of ways including loss or displacement of resources through removal or demolition and alteration of resources by introducing physical, or visual elements that are not in keeping with the heritage value and/or their setting.

**Impacts**

Evaluating impacts is the process of identifying, predicting, evaluating and mitigating the cultural, physical, social and other relevant effects of the renewable energy project on heritage resources.

The context and qualities of the surroundings of a heritage resource can play an important role in modern perceptions of heritage resources and the alteration of those qualities has the potential to adversely affect the cultural heritage value of heritage resources. A renewable energy project might not have a direct physical impact on cultural heritage resources on or abutting the project location, however there may be a wide range of impacts to the visual and contextual relationship between the heritage resource and its surroundings.

Examples of impacts of renewable energy projects on heritage resources include (but are not limited to):

**Destruction**
- Destruction or removal of any, or part of any of the identified heritage attributes.

**Alteration**
- Alteration of a building, structure or landscape in a manner that is not sympathetic, or is incompatible with the historic fabric and appearance.
- Vibration damages to a structure or building during construction or because of changes to adjacent land use.
- Introduction of elements that visually or physically diminish the heritage value of a landscape, structure or building.

**Shadows**
- Shadows that alter the appearance of a heritage attribute or change the visibility of a natural feature.

**Isolation**
- Reduced accessibility to landmark, monument or public site.
- Change in relationship or isolation of a heritage attribute or resource from its surrounding environment or context.

**Obstruction**
- Obstruction of significant views from or of a built heritage resource or a cultural heritage landscape.
- Obstruction through the rerouting of traffic, alteration of roadways or gateways near a landmark that limit access to a resource or property.

**Change in Use**
- Change of use or neglect of a heritage resource which causes deterioration of heritage attributes.

**Land disturbances**
- Widening of existing rural roads, introduction of new roads, and/or removal of plantings, etc.
- Land disturbance, such as a change in grade that alters historical patterns of topography or drainage.

If a proposed project will not affect the attributes that embody the cultural heritage value of a resource, it is generally understood that a finding of no impact is appropriate; however the report should demonstrate how this conclusion was reached for each identified heritage value.

**Mitigation**

The heritage assessment report must provide recommendations including mitigation options and conservation strategies to avoid or reduce impacts. The heritage assessment report should
include a rationale for why the proposed mitigation is the best possible solution and why other alternatives are not viable (e.g., perhaps other environmental constraints limit potential mitigation options).

Mitigation may include, but is not limited to the following:
- impacts are avoided and project components and construction activities are distanced from heritage resources
- mitigation through design, or alternative development approaches
- sympathetic alteration that respects the heritage attributes of the cultural heritage resource
- alterations or new construction that are reversible
- physical and visual compatibility with the existing cultural heritage resource
- layout or component design alternatives that minimize visual intrusions
- separation distances or compatible visual barriers specified to avoid or reduce visual impact to the identified heritage resource
- introduction of sympathetic plantings, materials and features
- where no in-situ conservation option is feasible, moving and/or relocating a built heritage resource
- interpretation and commemoration (where relevant)

Where the effect of proposed work is likely to negatively impact the cultural heritage value of a resource, each negative impact should be identified with a statement as to why they could not be avoided.

If heritage attributes are to be removed or the heritage resource is to be demolished, the heritage assessment report must include the rationale for removal and the process for documentation of pre-existing conditions (e.g., photographs, measured drawings and salvage materials).

If long-term protection of a heritage resource is proposed, the heritage assessment report might recommend that a heritage conservation plan be developed. The conservation plan, prepared separately as a condition of approval, should be a stand-alone document with a defined purpose, tailored to the heritage resource being conserved. The objective of a conservation plan is to set out a strategy for managing and conserving the heritage attributes of a resource over the long term. It should provide the owners and managers of the heritage resource with useful tools and advice for ongoing management of the resource. The heritage assessment report should include the rationale for recommending a conservation plan over other mitigation strategies.
2.5: Preparing the Heritage Assessment Report

This section provides advice on report components that will support the findings in a heritage assessment report.

The heritage assessment report should include a general description of all project components, including facilities, operational equipment, construction equipment and activities, and all permanent and temporary structures, associated with infrastructure (e.g., transmission components and transformer areas). The report should also include descriptions and rationale for the development or site alteration, for the proposed works and graphical layout, and for how the development or alteration fits within the context/landscape of the study area. Support documents should include:

- a map showing the project location, the project layout, and the study area.
- a map showing project components in relation to identified heritage resources.
- drawings and schematics of all major project components to show their size and scope.

Using maps, photomontages, and written descriptions, the heritage assessment report should describe the relationship between project components, heritage resources and abutting protected properties identified in the study area.

Identification of Potential Heritage Resources

The report must include a summary of how heritage resources were identified and the methodology used for screening. The summary should include an inventory of potential heritage resources, with a rationale for any properties screened out at this phase. Specifically, this section of the report should include:

- A description of any potential built heritage resources and structures that may be impacted. The description should cover location and function, building materials, architectural finishes and design elements, setting, landscape and context.
- A description of any potential cultural heritage landscapes, views and vistas that may be impacted. The description should cover the physical characteristics of the property or properties including site layout, plantings and historical landscape elements.
- Photographs and written summaries of potential heritage resources and landscapes from site visits.

Summary of research

The report must include a summary of the historical research, consultation and community engagement undertaken in order to determine cultural heritage value. The heritage resource or landscape and its setting should be defined in sufficient detail for the reader to know the location and understand the references in the other sections of the plan. Support materials might include:

- historical maps, plans, drawings and illustrations
- historical and current photographs
- aerial photographs
Evaluation of Heritage Resources

The report must include a description of the evaluation of each heritage resource against each of the criteria in Regulation 9/06. The summary should include:

- a written and visual documentation of the physical context of the project including abutting properties;
- analysis of relationship of the heritage resource(s) to its surroundings, including principal views to and from the property; and
- a Statement of Cultural Heritage Value or Interest that identifies key heritage attributes for each confirmed resource.

Evaluation of Impacts

The report should include a description of all potential impacts to confirmed heritage resources and abutting protected properties with reference to specific heritage attributes. Supporting material may include:

- visual simulations, renderings, diagrams, photomontages and visual analysis
- documentation to support analysis of impacts

Mitigation Strategies

The report should include a summary of proposed alternatives and mitigation and conservation strategies where an impact on a heritage resource has been identified. These alternatives should be discussed with the project proponent and a preferred alternative selected.

The summary should clarify why a particular conservation, mitigation measure or alternative development approach is the preferred way to conserve the heritage resource(s) within the context of the proposed development. Support materials such as photographs, photomontages and aids should be provided in support of the preferred approach.

MTCS encourages in-situ conservation of heritage resources where possible. This includes the maintenance of all identified heritage attributes including physical features, significant views and contextual setting. Only when this option is not available should other alternatives be considered.

References

A bibliography listing all source materials referenced in the heritage assessment should be appended to the report, and citations should be included where appropriate. If personal conversations were used as a source, the participants' positions and the time, place and theme(s) of the conversation(s) should be listed, as should any institutions/organizations that were consulted.

New Information and Project Changes

It is possible for new information or project changes to arise after the heritage assessment is complete and the report submitted to MTCS for review. The applicant should discuss this information or changes with the person preparing the report to determine if any additional assessment or reporting is required.

Summary

Overall the heritage assessment report should:

- demonstrate early identification, consideration and management of heritage resources throughout the decision-making process;
- describe efforts to engage the community, Aboriginal communities, municipal staff, heritage groups, etc;
- demonstrate consideration of community and Aboriginal input;
- demonstrate consideration of resources in the context of the community and surrounding area;
- encourage approaches to planning that are sustainable and minimize negative long-term impacts on the social, cultural, economic and physical aspects of heritage resources;
- demonstrate consideration of the significance, type, use and condition of a resource and recommend changes that will offer the least harm to the resource, or will provide the greatest potential to enhance its significance and appreciation; and
- demonstrate that the design of the project has avoided or minimized impacts to heritage resources where possible.
Appendix E: Evaluation of Heritage Resources

The chart below outlines some of the key information that the qualified person should consider when evaluating a resource for cultural heritage value or interest:

<table>
<thead>
<tr>
<th>Property description</th>
<th></th>
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<tbody>
<tr>
<td>Location/context</td>
<td></td>
</tr>
<tr>
<td>Abstract</td>
<td></td>
</tr>
<tr>
<td>Documentation date</td>
<td></td>
</tr>
<tr>
<td>Use (original and current)</td>
<td></td>
</tr>
</tbody>
</table>

**Major historical themes**

**Documented discrete components**

Discrete elements requiring independent evaluation.

**Evaluation**

The evaluation criteria presented below reflect Ontario Regulation 9/06 Criteria for Determining Cultural Heritage Value or Interest, under the Ontario Heritage Act.

1. The property □ has □ does not have **design value** or **physical value**.

   i. It is a rare\textsuperscript{,} unique\textsuperscript{,} representative\textsuperscript{,} or early\textsuperscript{,} example of a style, type, expression, material or construction method described below.

   **Style**

   Use (Original and Current)

   **Expression**

   **Material(s)**

   **Construction method**

   Frame of reference

   ii. It displays a high degree of craftsmanship\textsuperscript{,} and/or artistic merit\textsuperscript{.}

   **Y** The property satisfies the criterion.
   **U** There is insufficient information to know whether or how the property satisfies the criterion.
   **N** The property does not satisfy the criterion.

Note to evaluator(s): In the Frame of reference line, briefly describe the physical and historical context within which the rarity or representativeness of the property is being considered.
### iii. It demonstrates a high degree of technical or scientific achievement.

Y – U – N

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### 2. The property □ has □ does not have historical value or associative value.

<table>
<thead>
<tr>
<th>i. It has direct associations with a theme, event, belief, person, activity, organization or institution that is significant to a community.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community of interest</td>
</tr>
<tr>
<td>International □, National □, Provincial □, Regional □, Local □, Aboriginal □, Other community □ (identify)</td>
</tr>
</tbody>
</table>

Y – U – N

Note to evaluator(s): In the notes below, provide brief details about the theme, event, etc.

**Notes:**

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<table>
<thead>
<tr>
<th>ii. It demonstrates or reflects the work or ideas of an architect, artist, builder, designer or theorist who is significant to a community.</th>
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</tr>
<tr>
<td>International □, National □, Provincial □, Regional □, Local □, Aboriginal □, Other community □ (identify)</td>
</tr>
</tbody>
</table>

Y – U – N

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<table>
<thead>
<tr>
<th>iii. It yields, or has the potential to yield, information that contributes to an understanding of a community or culture.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community or culture</td>
</tr>
<tr>
<td>Local □, Aboriginal □, Other community □ (identify)</td>
</tr>
</tbody>
</table>

Y – U – N

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### 3. The property □ has □ does not have contextual value.

<table>
<thead>
<tr>
<th>i. It is important in defining, maintaining or supporting the character of an area.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Context</td>
</tr>
</tbody>
</table>

Y – U – N

Note to evaluator(s): In the Context line, briefly describe the physical context within which the property is being considered.

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<table>
<thead>
<tr>
<th>ii. It is physically, functionally, visually or historically linked to its surroundings.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Context</td>
</tr>
</tbody>
</table>

Y – U – N

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<table>
<thead>
<tr>
<th>iii. It is a landmark.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Context</td>
</tr>
</tbody>
</table>

Y – U – N

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### General rating

For a heritage resource to merit recognition as having “cultural heritage value” it must get a positive answer in at least one of the three categories.

### Evaluation summary

- □ Judged to have cultural heritage value (in at least one of the three categories)
- □ Assessed to have notable cultural heritage value (positive answers in two or more categories)
- INAPPLICABLE
  - Assessed to have no definitive cultural heritage value

### Project Name:

Draft statement of cultural heritage value and description of heritage attributes.