Managing Historic Places

Protection and Stewardship of Your Local Heritage

Municipal Heritage Partnership Program

Canada's Historic Places | Lieux patrimoniaux du Canada

Alberta

Preface

Whether it's the corner coffee shop that has always served as a local gathering place or the ornate church at the centre of town with a soaring steeple, historic places are vitally important to defining a community's sense of itself. This series of publications is designed to help Alberta's municipalities create and implement local heritage programs to protect the historic places they value and wish to preserve. The following manuals describe the steps involved in establishing a municipal heritage program, and in identifying, evaluating and developing municipal historic places. It is intended to be used by municipal staff members; elected officials and heritage advisory committees; local heritage organizations and historical societies; volunteers and business organizations; heritage conservation professionals such as planners and architects; and the owners of historic properties.

This guide, comprised of the publications listed below, have been prepared as part of the Government of Alberta's Municipal Heritage Partnership Program, which supports municipal contributions to the Alberta Register of Historic Places and the Canadian Register of Historic Places. Each publication in the series describes the processes involved in identifying, evaluating and managing locally significant historic places in Alberta.

The Historic Places Initiative, a Pan-Canadian partnership of all the Provinces and Territories together with the Federal Government, has developed tools to assist communities in achieving their goals. Alberta, as a partner in the Historic Places Initiative, gratefully recognizes the support of the Government of Canada in the production of these manuals.

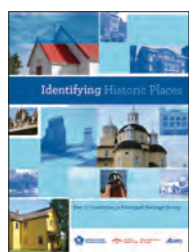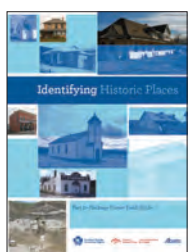**Municipal Heritage Partnership Program**   **Canada's Historic Places   Lieux patrimoniaux du Canada**   **Alberta**
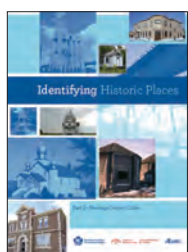
Creating a Future for Alberta's Historic Places: Identifying, Evaluating, Managing

Identifying Historic Places: Part 1—Conducting A Municipal Heritage Survey

Identifying Historic Places: Part 2—Heritage Survey Field Guide

Identifying Historic Places: Part 3—Heritage Survey Codes

Evaluating Historic Places: Eligibility, Significance and Integrity

Managing Historic Places: Protection and Stewardship of Your Local Heritage

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Foreword

Alberta has a rich history, and many of the province's communities have historic places of value. Heritage conservation is an essential way of maintaining each community's unique sense of place, which distinguishes one community from another and distinguishes Alberta from other places in Canada and across North America. Heritage conservation is becoming ever more important in today's world of increasing urban and suburban uniformity.

A sense of place springs from many sources, including natural and built landscapes and the people who inhabit them. It is a product of a community's particular experiences, history, cultures and traditions. The historic built environment – our stores on main streets, churches, schools, banks and a variety of homes built by Albertans – all have a story to tell. They may tell us about a typical historical trend or be associated with a significant personality or event. Architectural features reflect ideas and tastes from the past, older construction methods, and give a building character.

Heritage conservation brings our historic places back to our collective consciousness. It fosters pride and vitality, which attracts others to our communities. Heritage and cultural tourism are important economic factor for many communities and increasingly is a reason why people travel to certain areas – they are drawn by a sense of place and an interest in the past. Our efforts to preserve heritage recognize the significance and value of these places and acknowledge that we cannot afford to overlook them.

There is currently a renewed and active heritage conservation movement across Canada. Extensive heritage funding and programming is available to help protect these non-renewable resources and thus preserve our national heritage, strengthen our communities and promote heritage tourism. These initiatives present local governments with opportunities to identify and preserve their heritage and to strengthen community pride and economic vitality. The Government of Alberta, through its Historic Resources Management Branch, supports this worthy undertaking through the Municipal Heritage Partnership Program.

Introduction

A grand historic home. A modest, false-fronted blacksmith shop. Fur trading forts and buffalo jumps. Alberta's historic places are as diverse as the history of the province. These structures, archaeological sites and landscapes make communities distinctive and contribute to an understanding of the past and of who we are today. They represent the sweep of provincial history and contribute to a rich mosaic of historic places across Canada.

However, historic places continue to disappear at an alarming rate. According to a 1999 study commissioned by the federal Department of Canadian Heritage, Canada has lost more than 20 per cent of its pre-1920 heritage buildings to demolition over the past 30 years. To counter this trend, a partnership of federal, provincial and territorial governments conceived Canada's Historic Places Initiative in 1999. The aims of this initiative are to recognize and encourage awareness of Canada's historic places, to set standards for their conservation, and to facilitate funding and incentives toward maintaining these places.

As part of the Historic Places Initiative, Alberta's Historic Resources Management Branch has launched the Municipal Heritage Partnership Program (MHPP). This program supports the vital municipal role in conservation envisioned by the Alberta *Historical Resources Act* and promotes local government involvement in the Historic Places Initiative.

The MHPP also offers municipalities enhanced advisory services, new conservation tools and a series of cost-shared funding programs. Local governments now have greater access to provincial and federal conservation incentives and the resources to develop local heritage programs.

The benefits of conserving your local heritage

Municipal heritage programs can generate social, economic and environmental benefits that reach far beyond the virtues of conserving a legacy for future generations. Investment in heritage property rehabilitation can, for example, boost property values and tax revenues, create local jobs and skills, attract new businesses, and promote tourism. Heritage character contributes to a sense of place, builds community pride and enhances the quality of life. Local historic places are a key to smart, sustainable community development, and an opportunity for municipalities to participate in a national conservation initiative.

This guide is intended to help municipalities:

- Understand the processes and programs available for identifying, protecting and conserving local heritage
- Plan heritage initiatives that are appropriate to municipal goals and resources
- Integrate heritage initiatives into other community plans and programs
- Identify significant historic places
- Nominate local historic places to the Alberta and Canadian Registers of Historic Places
- Determine ways to protect historic places
- Access and develop conservation incentive programs
- Locate sources of additional information and advice

www.historicplaces.ca/acc-hom.aspx

Creating a Heritage Conservation Strategy

Formulating a plan

Heritage planning is a participatory, community-based process that enables communities to achieve heritage conservation goals within the limits of available financial resources, time and energy. These goals may be as modest as the planning of a single event commemorating local history, or they may be considerably more ambitious. The outcome may be a formal heritage plan, or simply an unwritten community consensus about why local heritage should be conserved for future generations, what ought to be conserved, and how this can be accomplished.

The heritage planning process is based on these underlying principles.

- **Heritage planning is both process- and product-oriented.** Heritage conservation is as much about listening to and managing people as it is about dealing with the technical issues of conserving heritage resources. Planning is not an end in itself but a means of conserving local historic places and strengthening community.
- **Heritage planning focuses on a "values-based" approach** to managing historic places. Local knowledge and the unique stories of your municipality guide the process of determining significance.
- **Heritage planning is based on public participation.** People will generally support what they have helped to create.
- **Heritage Planning means it is sometimes not possible or desirable to conserve "everything."** Because time, money and human resources are always limited, the community has to make choices and set priorities.
- **Heritage planning is an integral part of the overall community planning system.** Heritage programs cannot be developed or implemented in isolation. They should interact with and relate to other municipal plans and policies.
- **Heritage planning is an open-ended, cyclical process.** The results of monitoring and evaluation activities may indicate a need for resource managers to change the plans to respond to new circumstances and changing priorities.

① **Strategic plans** that set out broad goals and priorities for heritage conservation over a relatively long term (five years or more)

② **Action plans** that describe relatively short-term actions and work programs designed to achieve the heritage program's objectives

③ **Project-specific plans** that focus on implementing Surveys, conservation projects and other activities

In a formal, written plan, the strategic and management components are combined to create a blueprint for a heritage program, which is often referred to as a "Heritage Management Plan." There is no standard plan format. However, an effective document will consider at least some of the following criteria:

- **Achievability:** Are the plan's objectives realistic and achievable within a certain time period and/or budget?
- **Flexibility:** Does the plan provide for adapting to changing circumstances?
- **Responsiveness:** Heritage plans are most effective and strongly supported when they respond to broad community issues and to other related planning processes.
- **Accountability:** Does the content of the plan reflect community consensus? Was it developed through public participation?
- **Usability:** Are the heritage plans available to the community through municipal offices, libraries and websites? Are the plans succinct, clearly written and free of jargon so that they are accessible to a diverse audience?

The components of a heritage plan might include:

- An introduction and summary
- A vision statement
- A description of the historical context
- The goals, priorities and objectives of the heritage program

The project-oriented or "management" component of the plan defines tasks, roles and responsibilities; targets and schedules; and budgets that reflect the value of staff time, consultant services, materials, and donated time and resources.

Establishing a heritage advisory body

Councils and municipal administrators often rely on special committees that provide advice on policy matters and introduce public input and expertise into the decision-making process. Established by bylaw, heritage advisory bodies (which may be boards, committees, commissions or corporations) consist of a formally appointed membership that:

• Represents a cross-section of community interests
• Advises council on heritage issues
• Oversees the implementation of heritage initiatives
• Makes recommendations to Council regarding Municipal
  Historic Resource designation

Heritage programs may also involve other council-appointed committees that specialize in development and design review, planning, and economic development. It is important ensure good coordination by sharing information and understanding the mandates of other related committees.

The staff of the Municipal Heritage Partnership Program are available to help orient Heritage Advisory Bodies to the principles and background for heritage conservation in Alberta. In order to access this service, contact MHPP at *www.mhpp.ab.ca*.

Assessing the current situation

Regardless of the scope of a proposed heritage program, elected officials and administrators should review the overall community context before deciding whether or not to move to the next step.

Determine community interest and support

Is your community ready for and interested in undertaking a heritage program? Is there an awareness or understanding of heritage conservation issues? Is there political support for a municipal heritage program?

Establish a historical context

What are the major stories that define your community's past and contribute to its present character? A historical context describes significant, broad patterns of development and provides a framework for making decisions related to the identification, protection and conservation of historic places that tell these stories.

Identify community resources

Does the community have the capacity to implement a heritage program? Do residents or municipal employees already have some experience in planning and carrying out heritage projects? The Historic Places Initiative and the Municipal Heritage Partnership Program provide resources that municipalities can use.

Identify the strengths, weaknesses, opportunities and threats that might affect a heritage program

A rich stock of significant heritage buildings is an obvious strength, while a shortage of financial or other resources to care for these buildings might be considered a weakness. An example of a threat is the possibility that current support programs may not be available in the future.

Identify additional resources needed

Professional and technical expertise is available from consultants, advisory staff of the Historic Resources Management Branch, and other communities that have experience in the development and implementation of municipal heritage programs. Financial assistance is available through various provincial programs, such as the Municipal Heritage Partnership Program.

Building awareness and support

Make the case for heritage conservation

It is important to communicate to the public the social, cultural and economic benefits of heritage conservation. A lack of support for heritage initiatives often stems from a lack of understanding of conservation's many benefits. Communities especially need to build a "business case" that illustrates how investment in a municipal heritage program gives dividends in the form of increased property values, tax revenue, employment opportunities and tourism.

Create opportunities for community participation

Heritage events and activities that engage members of the community build awareness of heritage program opportunities and draw out ideas from residents. Public support is then more likely to lead to acceptance by elected representatives. As in community planning in general, public awareness and participation are integral to all aspects of a heritage program.

Consider a manageable and highly visible demonstration project

A walking tour, a commemorative plaque program or the conservation of a well-known heritage building can generate interest in local history, illustrate the benefits of conserving historic places and serve as a catalyst for other initiatives. To mobilize interest and support, choose a project that has good potential to succeed.

Developing a vision, goals and priorities

Agree on a vision

A vision statement is a brief expression of where a community wishes to be in five to ten years. It is a shared notion of a "preferred future" that ideally is consistent with the basic values of other community plans, such as those for economic development and environmental sustainability. The process of developing a vision statement builds consensus on the role of historic places and promotes a sense of shared responsibility and cooperation vital to implementing a heritage program.

Identify goals

Goals are idealized statements of what a community needs to do to achieve its vision. As ideals, goals themselves are not intended to be fully attainable but instead provide important guiding principles that are directly related to strengths and opportunities. For example, "Preserving local heritage" is a valid goal even though inevitably limited resources and the creation of "new" historic places with the passing of time makes it difficult, if not impossible, to achieve. Heritage program goals should be compatible with and supportive of other community goals and policies.

Set priorities

Heritage activities are more likely to succeed if they focus on a few initial goals and then develop in phases. The notion is to plan as comprehensively as possible, but to implement plans incrementally while adapting to changing needs and circumstances.

Identify objectives and targets

Unlike goals, objectives are detailed tasks or activities that can be accomplished in a certain period of time. They relate to goals but are defined by clearly specified targets and time frames. For example, the objective, "Developing a municipal register of historic places," relates to the goal, "Identifying and protecting historic places in the community." Objectives that are realistic, achievable and (perhaps) measurable may serve as performance measures for evaluating the success of heritage activities.

Everyone involved in a heritage program needs to understand how provincial legislation empowers municipalities to conserve historic places. Understanding Alberta's *Historical Resources Act* and the legal and policy tools it provides will help to establish roles and responsibilities in a heritage program.

Identifying roles and players

Like all planning processes, heritage planning involves the coordinated efforts of many community groups. A basic organizational challenge in developing and implementing heritage initiatives is that of matching program functions or roles with the appropriate individuals or groups. Even municipalities with mature heritage programs and specialized, full-time staff view the administration of such programs as a community-wide undertaking that relies on the support of many community partners. The major roles in a heritage program—in addition to advising the heritage advisory body described earlier—are policy making, administration, coordination or liaison, providing professional expertise, and community partnerships.

Policy making

Provincial legislation gives municipal councils a wide range of policy-making powers, including the authority to establish and administer a municipal heritage program. Although council members are unlikely to be directly involved in heritage program operations, especially in larger municipalities, they must ultimately understand and endorse all policies, programs, budgets and bylaws that relate to the protection and conservation of local historic places.

Administration

Municipal staff members are often involved in at least some aspects of heritage program administration, and sometimes their role is instrumental. Staff may assist a heritage advisory body, lead a particular heritage project or coordinate the heritage program according to policies set by council on the recommendations of the heritage advisory body. In a heritage program's formative stages, planners or development officers are often assigned tasks on an ad hoc basis because their expertise in land use and development issues can directly affect historic places. Building inspectors can play an important role in the application of building codes to heritage building rehabilitation projects. Municipal public works departments may also be involved in managing heritage properties owned by the municipality. Mature municipal heritage programs may have specially qualified staff, such as heritage planners, who are dedicated exclusively to managing and developing the program.

Coordination and liaison

Coordination and liaison may be delegated to a member of the heritage advisory body or to municipal staff. A coordinator serves as a clearinghouse for information exchanged between the heritage advisory body, municipal administration, volunteers and other community partners. A coordinator also provides a liaison with other levels of government, particularly if the municipality has entered into partnerships with provincial and federal programs.

Professional expertise

Heritage projects occasionally require specialized technical or professional expertise that may not be locally available. For example, heritage planners can facilitate the planning and public consultation processes and prepare strategic and heritage management plans. Historians have the research expertise to play an important role in evaluating Surveyed sites and preparing heritage inventories. Conservation architects often assist qualified contractors with conservation projects. Private sector consultants are available to provide these kinds of expertise, and the Historic Resources Management Branch, Government of Alberta, provides advisory services.

Community partners

Heritage resource management is a community-wide responsibility that relies on the support and contributions of volunteers, historical societies, service clubs and business organizations, local media and other partners. Public awareness, recruitment and volunteer recognition programs help to build a resource base that extends far beyond the committee and staff members who manage heritage activities on a day-to-day basis.

Identifying Heritage Resources

The Municipal Heritage Partnership Program (MHPP) has expertise and cost-sharing available to help municipalities identify their heritage resources. Visit *www.mhpp.ab.ca.*

The process of identifying heritage resources involves gathering, compiling and evaluating information in order to understand a community's historic places, why they are significant and the role they can play in municipal programs. This process consists of:

① Identifying buildings, sites and districts that may have historical significance
② Using evaluation techniques to identify places that are indeed significant

Identifying historic places is important and useful for several reasons:

- It contributes to an understanding and appreciation of local history and of the places that give a community special character and cultural depth.
- The municipality and community members can use information on local history and historic places to develop public education and school programs, walking tours and interpretive programs, history books, tourism promotions and events that celebrate local heritage.
- Databases of historic places such as Surveys and inventories help decision makers to:
  - Make sound judgments about community planning
  - Integrate heritage resource programs with other local programs and initiatives, rather than considering them in isolation
  - Select candidates for nomination to the Alberta and Canadian Registers of Historic Places
  - Develop policies, procedures and strategies for a municipal heritage program

Heritage Surveys

Heritage surveys are a common way of beginning to identify potential historic places such as:

- Recognized community landmarks
- Places identified through common knowledge of local history
- Historic sites recorded in databases such as the Alberta Heritage Survey Program, which extensively documented communities across the province in the 1970s and '80s

The scope of a heritage survey depends on:

- The community's planning needs
- The types of heritage resources that are available
- The availability of resources (e.g., staff, volunteers, funding)
- The heritage program objectives that were identified during the planning process

Some communities may be interested in doing small-scale surveys using volunteer labour. Others may wish to conduct a comprehensive review of every structure with the help of professional consultants.

A **Reconnaissance Survey** is a relatively superficial overview of an area guided by historical records. It may involve a "windshield" survey conducted from a vehicle, a study of aerial photographs to gain a sense of community's layout and evolution, or an inspection of sample areas as a basis for drawing tentative conclusions about the community as a whole. Reconnaissance Surveys may also lead to more intensive survey efforts.

Intensive Surveys are intended to identify all the heritage resources in a certain area, such as those that lie within municipal boundaries. Intensive Surveys, which often document a community block-by-block, provide a "snapshot" that has broad heritage and community planning applications.

The Municipal Heritage Partnership Program supports municipalities that wish to undertake and/or update heritage surveys.

The survey process has four main components:

1. Planning and organization, including the development of public awareness, recruiting volunteers, and securing funding and other resources
2. Background research to guide Survey fieldwork
3. The fieldwork itself, which involves physically searching for and recording historic places
4. Organizing and presenting, or documenting, survey data

Research, fieldwork and documentation often take place concurrently. Surveys also need to be updated periodically as historic sites are lost and as additional places age and take on potential historical significance.

Evaluating Historic Places

Evaluation is a process of determining whether potential historic places, identified through a Survey or by other means, meet criteria of historical, architectural, archeological or cultural significance. This process establishes significance by comparing historic places with other similar places in a geographical, chronological, or historical context. Context is essential because it sets out related historical patterns or trends that help us to understand a place and give it meaning.

For example, a ranch house might be architecturally significant because of its unique design or exceptional construction quality but perhaps less important with respect to ranching history. In such a case, ranching history might be more strongly represented by other sites that happen to be less architecturally distinguished. In other instances, a site might be significant in a particular municipality, even though there are more exemplary or better preserved sites elsewhere.

Significance is usually determined by municipal and provincial authorities. Municipalities may have qualified professional staff such as heritage planners to conduct evaluations, or they may rely on the expertise of historians, archaeologists and consultants. The Historic Resources Management Branch determines significance as part of its process for reviewing applications for designation as Provincial Historic Resources. In this way, the "jurisdictional" context of the evaluation process is important: municipal and provincial authorities are ultimately empowered under provincial legislation to make decisions about protecting and managing the historic places they identify in their respective jurisdictions.

In the past, municipal heritage programs have used somewhat varying evaluation schemes. However, the province is currently working to normalize the historic resource evaluation framework across provincial and municipal jurisdictions. Consistent methods for determining and documenting significance will make it easier to identify places that are eligible for listing on the Canadian Register of Historic Places and that may qualify for conservation incentives.

To sum up, then, municipal and provincial heritage programs will use the same evaluation criteria but apply these criteria in different contexts. The result will be varying determinations or levels of significance. If either a local government or the province determines that a historic place has both significance and integrity, that place is eligible for protection by that authority.

FOR MORE DETAILED INFORMATION ON IDENTIFYING HERITAGE RESOURCES, SEE THE MANUAL PRODUCED IN THIS SERIES: *Evaluating Historic Places: Eligibility, Significance and Integrity.*

The Municipal Heritage Partnership Program (MHPP) has expertise and cost-sharing available to help municipalities evaluate their heritage resources.

The evaluation framework

① Usually be fifty or more years or age
② Satisfy one or more of five criteria of significance, and
③ Retain integrity, or the ability to convey significance

① Age

Most historic places are at least fifty years old. The fifty-year limitation is intended to exclude places that may be of passing contemporary interest and that lack enduring historical importance.

② Significance

The following five evaluation criteria provide a means for assessing the significance of a resource (historic district, landscape, place, site, building, structure or object) in relation to Alberta history, architecture, archaeology, paleontology, natural history, engineering and culture.

A. **Theme/Activity/Cultural Practice/Event:** Resources significant under this criterion are those that are directly associated with themes, activities or events that have made a significant contribution to the broad pattern of our history.

B. **Institution/Person:** These resources are directly associated with significant institutions or the lives of significant persons in our past.

C. **Design/Style/Construction:** Resources significant under this criterion embody the distinctive characteristics of a type, style, period or method of construction; represent the work of a master; possess high artistic values; or present a significant and distinguishing entity even though the components may lack individual distinction.

D. **Information Potential**: These resources have yielded or may be likely to yield information that is important in history, prehistory or natural history.

E. **Landmark/Symbolic Value:** Resources significant in this respect are particularly prominent or conspicuous; have acquired special visual, sentimental or symbolic value that transcends their function; or contribute to the distinctive character of the province or a region of the province.

③ Integrity

A heritage resource must have integrity as well as significance. That is to say, it must retain the qualities that distinguish it as a significant resource. Integrity is a principle of wholeness or completeness, both of material or "fabric" as well as historical character. Assessing it is a subjective process that can occur only after significance has been established. This process must always be grounded in an understanding of the resource's physical features and how they relate to its significance. There are no "degrees" of integrity: heritage resources either possess integrity fully—that is, they convey their significance—or they lack it altogether.

Heritage Inventories

An important outcome of the evaluation process is an "Inventory" or list of significant historic places. Some municipalities may also identify sites of provincial significance, or even (in rare cases) national significance.

An Inventory consists of basic site data, such as the location and date of construction, in the form of photographs, maps or sketches and other supporting documentation. Some of these records may have been collected through a Survey. The Inventory also includes a description or evaluation of each place's significance. If the place is to be nominated to the Alberta and/or Canadian Registers of Historic Places, a "Statement of Significance" is prepared. This document briefly describes the historic place, its heritage value and the character-defining elements that are essential to preserving its significance. These statements are part of the mandatory documentation for the listing of protected historic places on the Alberta and Canadian Registers.

Heritage inventories serve various functions:

- They are a useful source of information for the development of heritage awareness, education and interpretation programs, and for promoting tourism.
- Inventories provide a valuable planning and management tool in heritage programs and other municipal initiatives.
- Although they simply identify significant sites and are not protective in themselves, heritage inventories can serve a quasi-protective role by raising awareness of these sites. Damage to historic places often results from a lack of understanding by property owners and others of the importance of treating character-defining elements with sensitivity.
- Inventories can help municipal staff to monitor certain areas and direct development in a way that respects and preserves heritage values.
- For many municipal heritage programs, inventories play a crucial role in identifying potential candidates for Municipal Historic Resource designation or other means of legal protection.

FOR DETAILED INFORMATION ON HOW TO UNDERTAKE A HERITAGE INVENTORY FOR YOUR MUNICIPALITY, REFER TO THE ACCOMPANYING MANUAL, *Evaluating Historic Places: Eligibility, Significance and Integrity*.

Protecting Heritage Resources

In heritage conservation, "protection" refers to a variety of regulatory or legal methods that are intended to prevent actions that could damage or destroy the character-defining elements and heritage value of significant historic places. Protection is an important part — sometimes considered to be the most important part — of a heritage program, Common threats to historic places include not only the outright demolition of heritage properties for redevelopment purposes, but also renovations that erode or destroy heritage character. Alberta's *Historical Resources Act* gives municipal governments several avenues for legal protection; the most commonly used one is designation as a *Municipal Historic Resource*.

In Alberta, any place related to the province's human and natural history that meets the Act's definition of a "historic resource" can be considered for designation as a Municipal or Provincial Historic Resource. In this context, a historic resource is any work of people or nature that is primarily of value for its paleontological, archaeological, prehistoric, historic, cultural, natural, scientific or aesthetic interest. Historic resources can be paleontological, archaeological, prehistoric, historic or natural sites, structures or objects.

Historic resource designation

The designation of historic resources has three main functions:

1. **Legal Protection**: The Provincial and Municipal Historic Resource designation categories legally protect historic places by preventing inappropriate actions that would damage or destroy their heritage value.
2. **Formal Recognition**: Designation officially acknowledges the significance of historic places in the context of local and/or provincial history. This significance is usually established through a formal evaluation process.
3. **Gateway to Funding**: Designation is an opportunity to link historic resource protection with financial and other incentives for heritage property owners. It recognizes that historic resource management is a collaborative undertaking. Property owners may voluntarily relinquish certain property rights in the public interest in return for eligibility for these incentives.

Historic resource designation is not imposed on heritage property owners. Rather, it is a distinction that many owners are pleased to receive. Only in very exceptional circumstances have places been designated without owners' consent.

Designation does not compel owners to restore a historic place to its original appearance. It simply requires owners to obtain approval for proposed alterations.

Designation does not affect the use of a heritage property—unless a proposed change of use would have a negative impact on a site's integrity.

Designation does not impose any legal restrictions on the sale of a historic place. Owners of Provincial Historic Resources, for example, are required only to notify the province at least thirty days prior to selling.

Designation has not been shown to reduce property values. On the contrary, the conservation work undertaken by owners with the assistance of grants available for protected resources adds value to the property.

What can be designated as a Municipal Historic Resource?
Any historic place in the municipality can be designated through a bylaw of Council. MHPP has resources available to help with this process.

If Council designates something as a Municipal Historic Resource, is the Town then responsible for the upkeep of the building?
Only if the Town owns the building. The building owner (whether private or public) is always the steward of the building. The municipality is simply responsible for upholding its designation bylaw.

Is the Town required to compensate owners in exchange for Municipal Historic Resource designation?
The *Historical Resources Act* does include provisions for owner compensation, which applies when the economic value of a property is negatively affected by designation. Sometimes, however, designated properties increase in value. Across Alberta, compensation agreements are often worked out in advance of designation in ways that benefit both owners and municipalities. Owners of Municipal Historic Resources have ongoing access to Provincial conservation funding through the Alberta Historical Resources Foundation. Often municipal compensation is waived by the owner in response to this funding. In addition, many municipalities choose to employ local incentives. The local environment tends to indicate the best type of solutions to the "compensation clause."

Does Municipal Historic Resource designation mean owners can't make any changes to their own properties?
No. Buildings evolve over time, and changes often need to occur to keep a building functional. Designation protects the character-defining elements of the building's historic values. Changes affecting these elements are approved on a case-by-case basis by Town Council or its appointee (i.e., a local heritage advisory committee).

Exclusions and exceptions

Under Alberta provincial policy, some resources are not eligible for designation under any circumstances. Resources excluded from designation are:

- Human remains
- Buildings, structures or objects that have been moved to a historical park or village

Other resources that are not ordinarily eligible for designation include:

① Structures that have been moved from their original location
② Birthplaces
③ Cemeteries
④ Reconstructed buildings
⑤ Resources that are primarily commemorative in intent
⑥ Resources that have achieved significance within the last 50 years

Under special circumstances, however, the ordinarily ineligible resources noted above may qualify for designation. The exceptions are as follows.

① A structure that has been moved, if:
  - It was moved early in its history and has developed significant historical associations on its new location prior to the last fifty years, or
  - It is primarily significant for its exceptional architectural value, or
  - It is the sole surviving structure most importantly associated with an historic theme, event, activity, person or institution, or
  - The structure or building was specifically designed to be relocated as part of its normal use, or
  - Its association with its original location is maintained

② The birthplace of an individual of outstanding importance, if there is no other appropriate resource associated with his or her productive life

③ A cemetery, if it derives its primary significance from distinctive design features or is associated with a significant event

④ A resource that is primarily commemorative in intent, if its design, age, tradition or symbolic value has invested it with its own exceptional significance

Municipal Historic Resource designation

Leading with incentives

All levels of government recognize that effective conservation is possible only when heritage property owners understand the benefits of conservation and willingly apply for designation. An important objective of the Historic Places Initiative is to build partnerships through which municipal, provincial and federal authorities deliver incentive programs promoting interest in heritage properties as an investment opportunity. The Alberta Historical Resources Foundation has also greatly enhanced the conservation funding available for Municipal Historic Resources through its Heritage Preservation Partnership Program.

Section 26 of the Alberta *Historical Resources Act* gives municipal governments the authority to protect historic places through the Municipal Historic Resource designation. Once designated by municipal bylaw, owners of the protected Municipal Historic Resources must obtain written permission from council (or its appointee) before undertaking renovations or additions that may affect the heritage character or integrity of the designated place. A designation bylaw is registered on the Certificate of Land Title and is transferred with the property from owner to owner.

Most historic places are of local significance and will qualify for protection as Municipal Historic Resources. Selecting candidates for municipal designation may occur in a variety of different ways:

- Heritage inventories, which are comprised of sites that have already been identified as significant, provide a useful "shopping list" of designation candidates and help municipalities make owners aware of the heritage value of their properties and of opportunities to qualify for conservation incentives. The information gathered and articulated in a comprehensive Inventory often includes all the information needed for your local municipal council to confidently proceed into a bylaw process. Well-inventoried resources are often considered as "designation" ready. Because Inventories also include draft Statements of Significance for the places evaluated, they also gather much of the mandatory documentation for listing on the Alberta and Canadian Registers of Historic Places.

- Property owners, or heritage organizations acting on the owner's behalf and with their support, may nominate a site that may or may not already be identified on a heritage Inventory. An appropriate authority, such as official heritage advisory body, then reviews the nominations. Public awareness programs play an important role in communicating to property owners the significance of historic places and the opportunities available through designation and conservation programs.

- Registered Historic Resources are excellent candidates for Municipal Historic Resource designation. These sites are not protected but have been identified as having local or regional significance. Once protected by a municipality and listed on the Alberta Register of Historic Places, owners of these properties are eligible to apply for conservation funding through the Alberta Historical Resources Foundation's Heritage Conservation Partnership Program. Municipal Historic Resources now qualify for the same level of financial support that has been available to Registered Historic Resources.
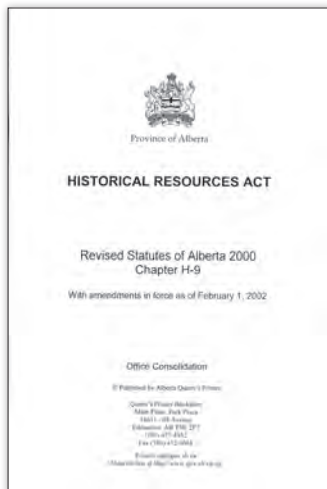
The *Historical Resources Act* outlines legal procedures for Municipal Historic Resource designation but the actual designation process depends on how each community's heritage program is managed. Some municipalities have few established heritage policies, while others have well-defined designation review procedures administered by specialized staff.

Designation candidates are reviewed by the community's heritage authority. This authority may be a municipal staff member such as a heritage planner, a heritage advisory committee or some other individual or group that council has identified to take on heritage responsibilities. The heritage authority determines whether:

① Candidates have sufficient significance and integrity to merit protection as Municipal Historic Resources
② Adequate documentation has been provided through a Statement of Significance or other records
③ The affected property owners and the community support the proposed designation.

Sites that meet these requirements are recommended to council for designation as Municipal Historic Resources. After giving property owners sixty days notice, council may then pass a designation bylaw. This bylaw requires owners to obtain written municipal approval for alterations that might affect the character of these heritage properties.

Although municipalities have developed various schemes for evaluating local historic places, the fundamental principles are similar. To promote participation in the nation-wide Historic Places Initiative, the Province encourages all local governments to harmonize their evaluation and documentation procedures with the provincial and national framework. Doing so facilitates property owners' access to conservation incentives offered through provincial and federal programs in addition to support that may be provided by municipalities themselves. Municipally designated sites that are appropriately documented and "register-ready" can be easily added to the Alberta and Canadian Registers of Historic Places, thereby making these lists of significant places more comprehensive and effective as public awareness and conservation tools.

Provincial Historic Resource designation

The *Historical Resources Act* enables the province to designate any historic place as a Provincial Historic Resource if the conservation of that place is in the public interest. This designation category is used by the Minister acting on behalf of all Albertans, to protect structures, archaeological sites, paleontological resources and other works of people or nature that are of outstanding, provincial significance for their historical, cultural, natural, scientific or aesthetic interest.

The Act legally obligates Provincial Historic Resource owners to obtain written permission from the Minister prior to making alterations to a designated historic place. Failure to do so may be sanctioned by a fine of up to $50,000 and/or a maximum of one year in prison. If a Provincial Historic Resource is altered or destroyed in contravention of the Act, the Province may recover damages for the loss of the resource or the cost of restoring (that is, reconstructing) the resource from the person responsible for the damage or destruction.

The Minister has protected more than 275 places of outstanding historical interest as Provincial Historic Resources. Provincial Historic Resource designation can play a role in protecting the historic places in a municipality that have exceptional, province-wide historic significance.

Property owners or local heritage organizations usually initiate the provincial designation process by submitting a standard application form to the Historic Places Designation Program. This form contains information about the history and significance of the designation candidate. Branch staff members review this information using the province's evaluation framework and recommend sites of outstanding, provincial significance to the Minister for designation. With property owners' support, Provincial Historic Resource designation is registered on the Certificate of Land Title and is transferred with the property from owner to owner.

Historic area designation

The *Historical Resources Act* also provides for designating historic areas when the heritage significance of an area lies in the area's overall character rather than its constituent buildings or other features. That is, the elements of the area are collectively significant. They contribute to the character of the area even though individually they may not be of sufficient significance to merit designation. The grain elevators in Rowley, for example, are significant in large part because they represent a succession of grain elevator construction periods and types. This collective significance distinguishes them from other individually designated elevators elsewhere.

Municipal Historic Areas

Section 27 of the Act enables municipal councils to pass bylaws that designate Municipal Historic Areas in the municipality to preserve the historic character of these areas in the public interest. The designation bylaw can prohibit or control the use and development of land as well as the demolition, removal, construction or reconstruction of buildings in the Municipal Historic Area. It becomes part of the municipality's land use bylaws (as provided under Part 17 of the Municipal Government Act) or functions as such even in the (unlikely) event that the municipality has no established land use policies for the area in question. In practice, however, because all owners in the proposed area must consent to the designation, municipalities have chosen to protect municipal historic districts indirectly; that is, by designating individual properties as Municipal Historic Resources.

Provincial Historic Areas

Section 24(1) of the *Historical Resources Act* allows the Lieutenant Governor in Council to establish Provincial Historic Areas and policies that regulate development and uses in the area. These regulations, which may concern the height, size and construction of buildings, land use and any activity that might have an impact on the historic character of the area, take precedence over municipal land use policies for the area. The designation is registered with the Registrar of Land Titles on each Certificate of Land Title in the area, and property owners are notified accordingly.

The effectiveness of Provincial Historic Area designation hinges on the development and implementation of regulatory policies for the area. Without these policies, Provincial Historic Area designation is largely honorific. To date, Alberta has only two Provincial Historic Areas, downtown Fort Macleod, and Old Strathcona in Edmonton.

Conserving Historic Places

"Conservation" refers to a range of strategies or interventions meant to extend the physical life of historic places. In general, these strategies attempt to prevent or lessen the deterioration that results from environmental processes and human activities. Conservation activities may also try to safeguard the non-physical associations between people and places such as uses, cultural values, and spiritual significance. The importance of conservation strategies within a heritage program reflects the reality that historic places are fragile, irreplaceable assets. The long-term physical survival of historic places gives purpose and meaning to interpretation, public education and many other aspects of a heritage program.

Conservation priorities vary according to:

- The municipal goals identified through planning processes
- The availability of funds, people and other resources
- The nature of the community's historic places
- Unexpected opportunities and threats that may arise

Opportunities for conservation can arise in the following ways:

- Survey and evaluation processes identify significant historic places and, in this way, play a role in translating planning priorities into potential candidates for conservation.
- Municipal Historic Resource designation and other protective tools lead to conservation opportunities by linking legal protection with conservation incentives. In other words, incentives for heritage property owners are usually realized through conservation projects and grant programs.
- Legal protection is a passive conservation strategy in that it helps to ensure that significant places retain their character-defining elements and that there is, ultimately, something left to conserve. It is certainly possible to conserve historic places that are not legally protected. For example, many Registered Historic Resources have been successfully preserved and restored through partnerships between dedicated property owners and the Alberta Historical Resources Foundation.

Conservation programs have three key components:

① Standards and guidelines ensure that historic places are treated in ways that conserve their heritage value
② Policies and processes enable municipalities to respond to threats and seize conservation opportunities
③ Support and incentive programs

Successful conservation programs build on a combination of incentives and controls that are administered by a heritage authority within a framework of conservation guidelines. Incentives are inducements for private property owners to conserve historic places, and often take the form of conservation grants. Controls can consist of bylaws or regulations that prevent actions that might damage or destroy historic places' heritage value. For example, a municipality may include the maintenance of character-defining historic elements in bylaws protecting Municipal Historic Resources.

Standards and guidelines
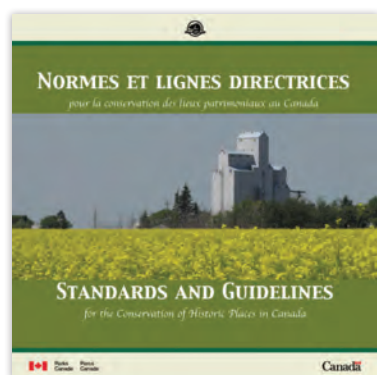
Standards and Guidelines for the Conservation of Historic Places in Canada

The *Standards and Guidelines for the Conservation of Historic Places in Canada* takes the place of Alberta's *Guidelines for the Rehabilitation of Designated Historic Resources* (the Government of Alberta, 1992). Although the two documents are fundamentally consistent, the new *Standards and Guidelines* are a formal, integral component of the national conservation framework established through the Historic Places Initiative.

The *Standards and Guidelines for the Conservation of Historic Places in Canada* is the definitive national guide for conservation practice. Formally adopted by the Province of Alberta, these Standards and Guidelines are an indispensable, practical guide for conservation projects of all kinds. They are equally appropriate for property owners who are making changes to a historic place listed on the Canadian Register and for people who wish to apply for conservation incentive programs.

Sound conservation practice is rooted in principles that have emerged through generations of professional practice and are enshrined in a series of internationally recognized conservation charters. Canada's Standards and Guidelines, which are consistent with these charters, state the principles for Canadian practitioners as follows:

- **Understanding:** A comprehensive understanding of a historic place is essential to good conservation practice. This understanding is the result of research and physical inspection to identify the character-defining elements of the historic place and the relationship of the place to its physical surroundings and the community. Understanding guides the subsequent activities of planning, using and intervening in a historic place.

- **Planning:** Conservation work must take into account the long-term future of the historic place. It considers owners' needs, resources and other opportunities and constraints – not just issues related to the physical conservation of character-defining elements. Planning links the comprehensive understanding of the historic place with interventions that respect its heritage value.

- **Use:** A viable use is an important economic and social means of ensuring the long-term survival of a historic place. Day-to-day use is an intervention in its own right and adds to the legacy of the historic place.

- **Intervention:** Any act or process that has a physical impact on the elements of a historic place must respect its heritage value. A "minimal intervention" approach is the foundation of good conservation practice. Reversible treatments are preferable to ones that are non-reversible.

① Identifying character-defining elements
② Determining the primary treatment
③ Reviewing the conservation standards
④ Following the guidelines for the appropriate resource type and treatment
⑤ Undertaking project work

① Identifying character-defining elements

All conservation is based on an understanding of and respect for character-defining elements. These elements may include materials, forms, spatial configurations, uses, cultural associations and meanings that together constitute the heritage value of a historic place. A Statement of Significance, which is mandatory documentation for listing on the Alberta and Canadian Registers of Historic Places, clearly identifies the heritage values and character-defining elements of a historic place and plays a vital role in the development of a conservation strategy.

② Determining the primary treatment

Conservation encompasses a range of strategies or treatments to retain (and enhance) the historic places' heritage value and to extend their physical life. The Canadian *Standards and Guidelines* recognize three main treatments: conservation, rehabilitation and restoration. One of these approaches usually dominates in a conservation project, although aspects of each may play a role.

Preservation involves protecting, maintaining and stabilizing the form, material and integrity of a historic place while protecting its character-defining elements. It is the primary treatment when the character-defining elements are relatively intact and have sufficient integrity to convey significance without extensive repair or replacement. Conservation is the most cautious or conservative intervention and is the foundation of all conservation activity, including the additional treatments of rehabilitation and restoration.

Rehabilitation involves the sensitive adaptation of a historic place, or a component of it, for a continuing or compatible contemporary use while protecting its character-defining elements. Rehabilitation can include repairs, alterations and additions. It is the primary treatment when use is important to the conservation of the historic place and heritage value lies principally in the relationship with its context.

Restoration involves accurately revealing, recovering or representing the state of a historic place, or a component of it, as it appeared at a particular period in its history, while protecting its character-defining elements. Restoration may be the primary conservation treatment when the significance of the historic place significantly outweighs the potential loss of existing materials or features from other periods. Restoration must always be based on substantial physical and documentary or oral evidence, and never on conjecture. It is the most extensive intervention into a historic place and potentially the most damaging.

③ **Reviewing the conservation standards**

The *Standards and Guidelines* provide eight general standards that apply to all conservation projects and five additional standards for rehabilitation and restoration projects. The standards help ensure that interventions – that is, any actions or deliberate inactions that have a physical effect on the tangible elements of a historic place— do not obscure, damage or destroy character-defining elements. These elements and the cultural associations or meanings they embody constitute the place's heritage value. Like the conservation treatments to which they apply, the standards recommend doing the minimal intervention that is required to extend the physical life of the historic place.

④ **Following the guidelines for the appropriate resource type and treatment**

The guidelines are practical recommendations for the treatment of materials, components, spatial configurations and character-defining elements of four major resource types: archaeological sites, landscapes, buildings and engineering works such as bridges or other structures. These treatments address the conservation of heritage value as well as health and safety issues, energy efficiency, and strategies for maximizing the accessibility of historic places for people with limited mobility.

⑤ **Undertaking project work**

The successful implementation of conservation plans and treatments depends crucially on the work of skilled trades people and the expertise of conservation professionals. To receive advice or assistance on any proposed interventions to a local heritage resource, you may contact the Historic Resources Management Branch's Heritage Conservation Advisory Services at 780–431–2326 (available toll-free in Alberta by dialing 310-0000).

Conservation resources

For good additional guidance on the unique conservation challenges of historic districts, refer to the Alberta Main Street Program's *Downtown Historic Area Design Guidelines and Sign Guidelines: Sign Design Fundamentals for Historic Commercial Areas*. Available through the Program's web site, these documents are consistent with the *Standards and Guidelines for the Conservation of Historic Places in Canada* and offer specialized, practical advice for conservation projects in historic commercial districts.

Policies and processes

Protected properties

Although historic resource designation is primarily a means of protection, it also enables municipalities to monitor and manage historic places. Designation requires heritage property owners to notify the appropriate municipal or provincial heritage authority of any action they intend to take that may affect the integrity of the designated site. This obligation, which is built into designation, triggers a review and management process. Owners of Municipal Historic Resources contact the municipality as part of the development review or heritage alteration permit process, and owners of Provincial Historic Resources notify the Provincial Historic Resources Management Branch, which undertakes a review process. Owners of Registered Historic Resources are also required to notify the province ninety days prior to making alterations. In this way, designation provides opportunities for municipalities and the province to evaluate proposed interventions and react accordingly.

Special area zoning

Alberta's *Municipal Government Act* enables municipalities to control the development and land use on and near heritage properties through special zoning provisions. Zoning bylaws can prohibit or restrict inappropriate uses or alterations that may affect the integrity of historic places. For example, Direct Control (DC) land use districts enable councils or designated heritage authorities to review and, if necessary, block inappropriate development in these areas. The City of Edmonton combines DC zoning and municipal designation to protect and manage its Municipal Historic Resources. The procedures for municipal design review vary according to the heritage program, land use policies, and the local development review process.

Heritage alteration permits

Heritage Alteration Permits enable municipalities to review interventions proposed for significant historic places to ensure that work conforms to conservation standards and guidelines, building codes and land use bylaws. Heritage Alteration Permits usually apply to Municipal Historic Resources, contributing resources in a Municipal Historic Area, and properties protected by heritage covenants. The permit process also enables local heritage authorities to intervene and offer valuable conservation advice to property owners and to refer them to the *Standards and Guidelines for the Conservation of Historic Places in Canada.*

Typically, municipalities establish a standardized permit application and review procedure that relies on qualified municipal staff, the heritage advisory committee, or the expertise of a heritage consultant. This procedure may be integrated into the normal development permit process or be a supplemental review that considers land use regulations in the context of conservation standards and guidelines. Such regulations often deal with issues such as parking requirements, height restrictions, density and facade setbacks. Municipalities may also review alteration permit applications in relation to local historic area guidelines and other planning documents.

Heritage property maintenance standards

Municipalities may establish and enforce maintenance standards that require heritage property owners to maintain designated sites. Like the "unsightly premises" bylaw that is common in many communities, these standards are premised on the idea that residents have a public obligation to maintain their properties, and that this includes mundane activities such as regularly mowing a lawn. In the case of heritage properties, this obligation extends to the maintenance of essential character-defining elements that are identified in a Statement of Significance. To help owners maintain their heritage properties, municipalities may offer financial incentives and technical conservation advice.

Municipalities are encouraged to base the ir heritage property maintenance standards on the *Standards and Guidelines for the Conservation of Historic Places in Canada.* Municipalities will also need to establish procedures for monitoring the condition of local heritage properties and enforcing the standards. As with all policy development, this process involves public consultation, discussion with heritage property owners, and participation of the heritage advisory body. The standards take effect through municipal bylaw, which may be either part of the designation bylaw for individual sites or a bylaw that applies to all significant, protected places in the community. Once the bylaw is ratified, municipalities inform heritage property owners that heritage property maintenance standards are in effect.

Support and incentive programs
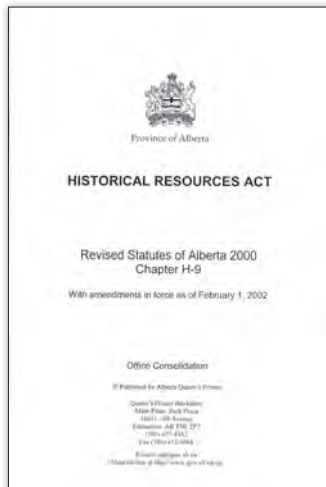
Incentive programs are clearly intended to encourage and support private investment in the conservation of historic places. These programs also help to offset the additional costs often associated with the specialized materials and skills required for conservation projects. The investment of public funds in privately owned heritage properties also represents a community stake in the conservation of its historic places and further reflects the collaborative nature of preserving what is ultimately a shared trust. Municipalities may offer conservation incentives to heritage property owners in lieu of the financial compensation that Section 28 of the *Historical Resources Act* requires that municipalities provide for any loss of economic value resulting from Municipal Historic Resource designation.

Incentives can be monetary or non-monetary. For example, municipal heritage programs may offer significant regulatory relaxations, such as parking bylaws, that can play a crucial role in the feasibility of a heritage project, even in the absence of conservation funding. Furthermore, financial support through conservation programs is usually linked to advisory services provided by a municipal and/or provincial heritage authority. Financial assistance programs gain impact and effectiveness when they are combined with expertise in the application of conservation standards and guidelines.

In addition to the conservation incentives noted below, there may be other provincial and federal assistance for building upgrades related to matters such as improved energy efficiency and the development of affordable housing in inner city areas. While not related specifically to conservation, these programs can support heritage building rehabilitation projects. Information on other funding programs may be available though provincial and municipal conservation advisors.

Provincial incentive programs

The Alberta Historical Resources Foundation offers the following conservation incentives:

Heritage Conservation Partnership Program. The Conservation category offers matching grants, along with technical and professional assistance, for conservation projects that meet the Canadian *Standards and Guidelines*.

The Alberta Main Street Program offers a broad-based strategy that consists of funding and professional design assistance toward the conservation of storefronts in historic downtown areas. The program also includes strategies and funding for organization, marketing and economic development activities of the historic downtown.

Municipal incentive programs

Municipal governments can offer a wide range of conservation incentives under provincial legislation. The nature and extent of these incentives will vary with the sort of conservation activity local governments wish to encourage, the scope of community heritage initiatives, and the resources available to support these local incentive programs. Monetary incentives are a well-known means of encouraging heritage conservation, but non-monetary incentives can have a significant impact even when a municipality lacks the resources to provide direct financial assistance.

Municipal grants

Municipalities may provide direct financial support in the form of one-time or renewing grants. Grants may be popular with heritage property developers that are eager to recoup costs up-front, rather than over a period of time through a tax incentive program. Municipalities may also develop grant programs tailored to certain types of heritage properties. An innovative initiative, the True Colours program of the Vancouver Heritage Foundation, contributes paint in historically appropriate colors to heritage homeowners in return for municipal protection of the property through designation. In Alberta, the City of Edmonton has developed its own granting program to assist owners of designated historic resources with conservation work.

Property tax deferrals and exemptions

Property tax deferrals and exemptions mitigate increases in property taxes that might result from conservation – increases that would otherwise effectively penalize owners and developers for investing in heritage properties. The amount of the tax incentives may be calculated in relation to the scope and cost of conservation projects. Enabled through municipal bylaw, tax incentives can be applied to entire neighbourhoods or land use districts, certain classes of heritage buildings, or individual properties on a case-by-case basis. The City of Victoria, BC, has a well established tax incentive program with a remarkably successful track record. The case of Victoria illustrates the importance of monitoring an incentive program, both to ensure compliance with the incentive bylaw and to demonstrate the long-term effectiveness and benefits of a municipal investment in the program. A property owner would be required to repay the exempted taxes in the event of non-compliance. In Alberta, the City of Calgary has successfully used tax-based incentives to support their heritage conservation program. In addition, Calgary has developed creative options in other incentives areas, such as:

Density transfers and bonuses

Density transfers and bonuses can play a role where a property occupied by a heritage structure has much higher development potential than the building currently exploits. This development potential, referred to as "density" can be expressed as a ratio of floor area to lot size (floor-area ratio). This incentive allows heritage property owners to transfer or sell unused density or development potential to another property or property owner, usually in the same land use district. The resulting financial benefits can then be applied to the conservation of the heritage structure. Some municipalities have even established systems of "banking" unused density to increase flexibility and reduce risk for inventors in heritage properties. A density bonus gives a developer additional development rights or density on the same property in return for conserving certain historic features of that property. For example, a density bonus might permit a developer to build a high-rise office tower on a downtown site that exceeds the density normally allowed in that land use district while conserving the heritage structure or incorporating it in a sympathetic manner into the new development. Density-related incentives are most effective in urban centres that are under exceptional development pressure.

Regulatory relaxations and variances

Heritage buildings are often situated or constructed in ways that do not meet current land use regulations and/or building codes. This often presents a significant perceived barrier to investment in heritage properties. To alleviate this situation and make building rehabilitation more feasible to developers, a municipal development authority has some discretion to relax certain bylaw requirements when processing development permits, such as those related to parking, setbacks and barrier-free accessibility.

Municipal authorities and conservation professionals can collaboratively identify compromises such as building code equivalencies that satisfy conservation standards and guidelines but also meet fundamental life-safety requirements.

Municipalities can develop policies that permit the conversion of historic residences to commercial use if such conversion is vital to the economic viability of the structure and is able to retain the character-defining features of the building.

Administrative incentives

Expediting the processing of development applications and reducing or waiving development fees related to heritage properties can have significant monetary value to investors. Special treatment of these applications also reduces the inconvenience, uncertainty and expense of delays resulting from the additional scrutiny needed for heritage properties.

Support services

Depending on local resources, municipalities may be able to provide professional and technical advice to heritage property owners about conservation issues. Municipalities can maintain a database of provincial and federal support programs that apply to historic buildings, and provide this information as a service to heritage property owners.

Commemoration and recognition

Many municipalities develop award programs that recognize exemplary conservation work and heritage property owners' contributions to the quality of life in the community. Plaque programs, which commemorate significant properties in a highly visible and permanent way, can offer a potent, personal incentive for owners to engage in conservation activities.

Federal and provincial heritage programs

Created through a partnership of federal, provincial and territorial governments, the Historic Places Initiative (HPI) is Canada's first national framework for conserving the country's built heritage. Its purposes are to:

- Create awareness of historic places and sites
- Set standards for sound conservation practice
- Encourage citizen involvement in conservation
- Facilitate the funding required to conserve and support the continued use of these places

HPI is a unique opportunity to harmonize national, provincial and municipal heritage programs, thereby boosting their effectiveness and providing municipalities with unprecedented resources to participate in this ambitious nation-wide conservation initiative. It is made up of the following components.

The Canadian Register of Historic Places *(www.historicplaces.ca)* is an online listing of historic places across the country that promotes and celebrates our heritage. The Register includes all historic places that have been evaluated and formally evaluated by an appropriate provincial or territorial authority and that have satisfied the Register's documentation standards.

The *Standards and Guidelines for the Conservation of Historic Places in Canada (www.pc.gc.ca/docs/pc/guide/nldclpc-sgchpc/ nldclpc-sgchpc1_E.asp)* provide a comprehensive guide to modern conservation principles and practice tailored to a Canadian context. A collaborative effort of provincial, territorial and federal heritage authorities, the *Standards and Guidelines* set out a disciplined approach to identifying appropriate intervention strategies for all heritage conservation projects in Canada. Conservation projects must satisfy the Canadian *Standards and Guidelines* to qualify for provincial incentive programs.

The Municipal Heritage Partnership Program (www.mhpp.ab.ca)

To support Alberta communities that wish to manage their historic places, the Municipal Heritage Partnership Program provides municipalities with advisory services, tools and training, and a suite of cost-shared funding programs integrated into other provincial and federal programs and incentives. It enables municipalities to:

- Identify historic places through Surveys and inventories
- Protect significant places through municipal designation and other means
- Access provincial and federal conservation incentive programs
- Develop municipal conservation incentive programs
- Apply Canada's conservation standards and guidelines to alterations and treatments to historic places
- Promote public awareness of community heritage
- Participate in Canada's Historic Places Initiative

Advisory services

Historic Resources Management Branch staff can help municipal governments and local heritage organizations to develop local heritage programs and access funding programs.

Tools and training

In addition to this guide, the Historic Resources Management Branch has developed a series of additional manuals for municipalities and heritage organizations. These manuals offer guidance on such topics as the identification and evaluation of potential historic places, nomination of historic places to the Alberta Register, development of heritage awareness programs, and the economics of heritage conservation.

- *Identifying Historic Places: Part 1—Conducting a Municipal Heritage Survey*
- *Identifying Historic Places: Part 2—Heritage Survey Field Guide*
- *Identifying Historic Places: Part 3—Heritage Survey Codes*
- *Evaluating Historic Places: Eligibility, Significance and Integrity*
- *Managing Historic Places: Protection and Stewardship of Your Local Heritage*

The Branch is also collaborating with Athabasca University, through the Heritage Resources Management Program, to develop training programs to meet the needs of municipal staff, heritage professionals, volunteers and community organizations.

For more information on Athabasca University's Heritage Resources Management Program see the program website at: *http://heritage.resources.athabascau.ca*

Funding programs

Cost-shared funding is available to municipalities through a combination of provincial programs with support from the Government of Canada. These funds, which cannot be used to pay for local administration costs, are available to:

- Identify local historic places through a Survey and Inventory process
- Nominate significant, protected historic places to the Alberta and Canadian Registers of Historic Places
- Develop municipal plans and policies to manage historic places
- Maintain and enhance established local heritage programs

Owners of historic places that are designated as Municipal Historic Resources and listed on the Alberta Register of Historic Places are now eligible to compete for funding through the Alberta Historical Resources Foundation's Conservation Partnership Program *(www.cd.gov.ab.ca/ahrf)*. This program offers cost-shared conservation grants of up to $25,000 over a five-year period, with an additional $25,000 available for architecture and engineering studies. Certain revenue-generating properties that are listed on the Canadian Register of Historic Places will be eligible for federal assistance through the Commercial Heritage Properties Incentive Fund (see "Historic Places Initiative" above).

Heritage conservation advisory services

Heritage conservation advisors provide technical information to historic resource owners to assist with building restoration/rehabilitation projects. Such assistance is often done in conjunction with an application to the Heritage Preservation Partnership Program of the Alberta Historical Resources Foundation. There are five conservation advisors for Alberta, each assigned to a specific services area.

The *Historical Resource Act* requires owners of all designated historic resources to notify the Minister of proposed alterations to the resource. Consultation with heritage conservation advisors is required prior to issuance of approval documents to ensure that work does not compromise the historical integrity of the building or the site. All conservation work must be undertaken in compliance with the *Standards and Guidelines for the Conservation of Historic Places in Canada.*

*Heritage Preservation
Partnership Program*

The preservation category of the Heritage Preservation Partnership Program offers matching grants, along with technical and professional assistance, for conservation projects that meet the Canadian *Standards and Guidelines*. This program supports the conservation of character-defining features and does not include rehabilitation-related building upgrades.

The Conservation category also provides funds for architectural and engineering studies, historic structure reports or concept plans associated with the conservation or restoration of a historic place. The program does not provide funding toward the purchase of a historic resource, moving a structure from its historic location or the reconstruction of a historic resource.

For more information, call 780–431–2305 (available toll-free in Alberta by dialing 310-0000).

*Alberta Main Street Program
(www.albertamainstreet.org)*

The Alberta Main Street Program provides funding and expertise toward the conservation of historic building facades in qualifying commercial areas. Intended for selected project communities with a core of significant historic commercial buildings, the program's broad-based strategy includes matching conservation funding and professional design assistance as well as resources and funds for organization, marketing and economic development activities of the historic downtown. For more information, call 780–438–8502 (available toll-free in Alberta by dialing 310-0000).

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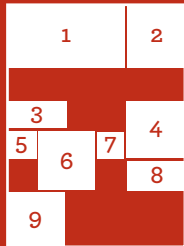Email: larry.pearson@gov.ab.ca

Or by regular mail at:
Historic Resources Management
Old St. Stephen's College
8820–112 Street
Edmonton, Alberta
T6G 2P8

1. Bird Drug Co. Building, Ponoka
2. DU Ranchlands Log Cabin, M.D. of Pincher Creek
3. St. Norbert's Roman Catholic Church, near Provost
4. Flatiron Building, Lacombe © Glenbow Museum
5. Thomson Bros. Block, Calgary
6. Alberta Wheat Pool Grain Elevator and
    Alberta Grain Company Grain Elevator, St. Albert
7. Knox United Church, Calgary
8. Memorial Park Library, Calgary
9. Father Lacombe Chapel, St. Albert
10. Central / Dr. Carl Safran High School, Calgary
11. George Pegg Gardens, Lac Ste. Anne County
12. Rutherford House, Edmonton
13. Haultain School, Calgary
14. Searle Grain Company Grain Elevator, Rowley
15. United Grain Growers Alberta Wheat Pool Grain Elevator,
    Rowley
16. Old Strathcona Provincial Historic Area
17. Fort Macleod Provincial Historic Area
18. McDougall Memorial United Church, Morley
19. Lorraine Apartments, Calgary

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1. Cronquist House, Red Deer © CITY OF RED DEER
2. Bitumont Site, near Fort McMurrary
3. Magrath Mansion, Edmonton
4. Notre Dame Convent, Morinville
5. St. Thomas Roman Catholic Church, Duhamel
6. Athabasca United Church
7. C.O. Card House, Cardston
8. Dickson Store
9. Coking Ovens, Village of Lille, Crowsnest Pass