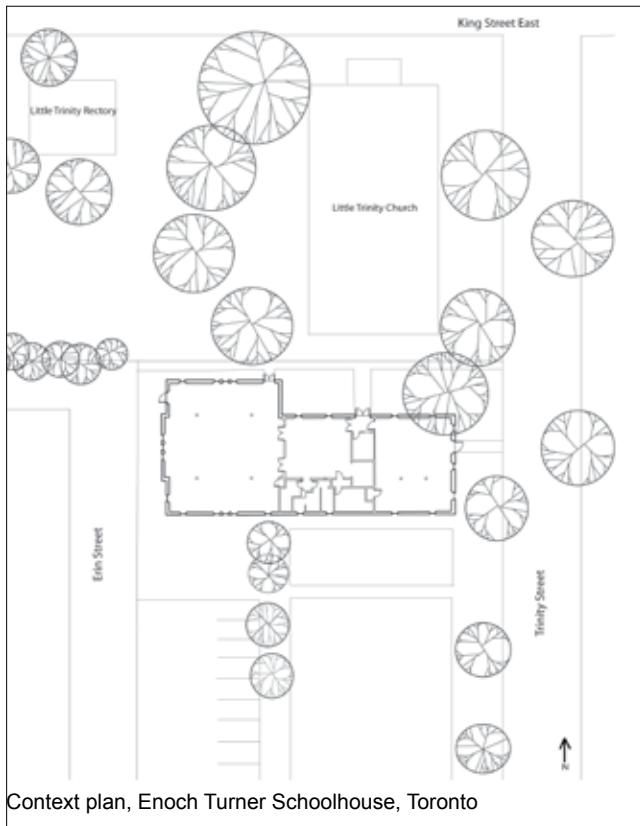


## Conservation plans for heritage properties

The objectives of a conservation plan are to identify the cultural and historic significance of a site and to set out a policy and strategy for the management and conservation of the heritage values, attributes and integrity of that site. The conservation plan examines the long-term planning of a cultural resource and should determine how to retain its significance in any future use, alteration, repair or development. The following is a brief outline that includes relevant topics to be discussed within the conservation plan.



### 1.0 Introduction

- Scope and summary of the main aims of the plan
- Methodology of investigation and data collection (e.g., types of testing, historical

documents, archaeological work, other studies referenced, technical literature search, comparable projects, etc.)

- Stakeholders and users

## 2.0 Description and analysis

### 2.1.1 Description of resource

- Location information (include maps, as needed)
- Detailed documentation of the resources (sketches, measured drawings and photos)
- Description of the resource and existing character of the site, including its context and neighbourhood
- History of the resource and its evolution over time, highlighting changes
- Current management (activities, costs, budget, operations), ownership, responsibilities and roles of other organizations and agencies

### 2.1.2 Significance

- Identify values associated with the resource (i.e., historical, architectural, archeologically, environmental, etc.)
- Statement of Significance, including a list of character-defining elements
- Can include the designation bylaw, if applicable

### 2.1.3 Planning policy framework

- Regulatory context of the heritage resource with attention to approval processes
- Listing, designations, easements, heritage conservation district
- Local planning and policies (zoning and official plans)

## 3.0 Assessment

### 3.1.1 Condition of resource

- Condition assessment of the resource/attributes with an inventory of prioritized deficiencies
- Discussion and analysis of mechanisms of deterioration

- A discussion of use (historic, current and proposed) as it relates to the conservation of the heritage resource

### **3.1.2 Issues**

- List key issues pertaining to the resource, identifying opportunities and restrictions (development, financial and capital needs, public access requirements)
- Conservation constraints and requirements of users and owners
- Planning issues relating to the place

## **4.0 Management**

### **4.1.1 Aims and goals**

- Series of aims for conservation
- Objectives for future vision (long- and short-term)
- Factors for consideration when planning new work
- Proposed remedies, interventions and implementation
- Conservation policies for the resource, including appropriate adaptation (policies should provide practical guidelines to explain how the significance of the site can be retained in any future uses, alterations, maintenance regimes or development, and can relate to individual topics such as disabled access, restoration, lighting, setting or fabric or individual areas of the site)

## **5.0 Implementation**

### **5.1.1 Program of action**

- Recommended actions and mechanisms to achieve objectives
- Long-term and short-term maintenance programs
- Costing and scheduling of the implementation

### **5.1.2 Limitations**

- Limitations of the plan/recommendation for further work
- Monitoring and reviewing the plan (process and timing for reviewing and updating the plan)

## **6.0 Supplementary information**

The Appendices should include the following, as appropriate:

- Bibliography
- Chronological history
- Phase 1-2 Archaeology report
- Documentation of the character-defining elements
- Schedule of previous reports and studies
- Detailed building condition report
- Site plan(s) (current/proposed)
- Architectural drawings (current/proposed)
- Arborist's report
- Other reports as needed



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