



# Historic Resource Management Plan

**THE CITY OF**  
**Edmonton** PLANNING AND DEVELOPMENT

May 2009





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*John Walter Residence*



*Westmount Architectural Heritage Area*



## *Introduction*

*"...the greenest building is the one that is already built."*

*– Carl Elefante*







## Our Mission

To identify, facilitate, protect, manage and promote the preservation and reuse of historic resources to enhance the quality of Edmonton's environment for the benefit of present and future generations.

## Role of the Plan

The role of the *Historic Resource Management Plan* is to articulate a clear long term strategy to manage Edmonton's historic resources. This plan establishes clear guidelines to deal with heritage issues in a precise and consistent manner. The *Historic Resource Management Plan* also simplifies City heritage policies, priorities, procedures and implementation strategy for both staff and clients to provide a working document on heritage issues. Finally, this plan builds on and compliments the heritage work of other individuals, agencies and organizations in Edmonton.

## Introduction

Heritage preservation is mandated by legislation at all three levels of government. Municipalities recognize the need to develop strategic plans to identify, protect, manage and promote their valuable historic resources. The *Historic Resource Management Plan* sets out a long-term strategy to leverage the best available resources and approaches to protect the city's historic resources. The plan contains policies and actions that provide specific direction to the City administration or agencies involved in the management of historic resources. This plan is very specific to the protection of Edmonton's tangible built resources or cultural landscapes. The management of heritage facilities (museums,

archives) or cultural events, organizations or intangible heritage (festivals, cultural practices) is not covered in this plan. Broader heritage issues and policies can be found in the cultural and heritage plan *The Art of Living*, developed by the Edmonton Arts Council.

The *Historic Resource Management Plan* has five interrelated areas of activity:

- Activity 1: Register and Inventory (inventory and evaluation processes)
- Activity 2: Incentives (to encourage designation and preservation)
- Activity 3: Promotion (assistance, advice and publicity)
- Activity 4: Monitoring (of heritage resources affected by any development processes)
- Activity 5: Broader heritage initiatives (to integrate the program with museums, archives and archaeological projects)



Lemarchand Mansion



## Background

### History

In 1980, Planning and Development was given the responsibility by Council to create a management plan for Edmonton's historic resources. A Heritage Officer position was created to develop a historic building inventory and administer the new heritage program. In 1981, City Council passed the following motion:

*“That development applications be reviewed by the Heritage Officer in the Planning and Development department before demolition permits are issued by the Bylaw Enforcement Officer and that any buildings that he deems to have historical or architectural value will be brought to Council’s attention.”*

In 1984, City Council created the *Register of Historic Resources in Edmonton* (Register) to identify those buildings that were significant. The Register, at the time, was maintained by the Edmonton Historical Board and only contained those buildings located in the downtown. In 1988, it was recognized that the Register should cover the whole city and as a result, City Council directed the administration to “conduct a comprehensive inventory of all historic and/or architecturally significant buildings in Edmonton.” A consultant team was hired to conduct the city-wide inventory and the Register was officially expanded in 1993 by the Edmonton Historical Board.

The expanded Register was comprised of A and B-listed buildings, plus appendices listing significant architectural fragments, landscapes, Fort Edmonton Park buildings, cemeteries and monuments. The Register has continued to grow, as newly identified resources are added. The City also passed a policy in 1988 to offer financial incentives, through tax incentives or grants, thereby encouraging owners to designate their

properties. In 1995, a Historic Resources Reserve Fund Account was created to ensure a secure source of funding would be available. In 2001, this fund was increased and linked to construction inflation rates and another Heritage Officer was hired.

### Reasons for Changes to the Historic Resource Management Plan

The heritage program strives for continuous quality improvement. This involves a continuous process of evaluation to ensure that the *Historic Resource Management Plan* is a dynamic and practical tool to assist Planning and Development and heritage stakeholders in protecting Edmonton's historic resources. The plan will continue to evolve and adapt over time to meet the future needs and changes that affect Edmonton's historic resources. The diagram here illustrates how the continuous review process allows for policies to be reviewed, changed, rewritten and implemented.





In 2005 it was recognized that the *Historic Resource Management Plan* was over 13 years old and was in need of review and updating for the following reasons:

- In 2003 the *Standards and Guidelines for the Conservation of Historic Places in Canada* was adopted by the Province of Alberta. The *Historic Resource Management Program* needed to align itself to the new standards and adjust to changes in provincial legislation.
- The heritage program also witnessed significant growth in the number of designated Municipal Historic Resources and in the overall inventory of buildings on the Register. As a result of increased numbers and the need to align with provincial and federal heritage terminology, the format of the Register of Historic Resources in Edmonton needed to be re-evaluated.
- The evaluation and documentation standards for historic resources have changed from a numerical system to a qualitative approach (see Appendix 4).

### Public Involvement

The heritage community and other interested stakeholders were consulted to update the *Historic Resource Management Plan*. A series of visioning exercises were held, where participants were asked where they felt Edmonton's heritage program should be in 20 years and what needed to happen to achieve these visions. These visions were incorporated into this plan and the result is a list of policies and actions that will result in a very comprehensive heritage program and profile for Edmonton. The actions in the plan range from short to long term. The plan will need to be reviewed within ten years as new procedures, initiatives and processes develop.

### Legal Basis of Plan

The *Historic Resource Management Plan* is not a statutory policy document and does not supersede any other existing approved Area Redevelopment Plans, Policy Consolidations, or Bylaws. The *Historic Resource Management Plan* should be used in conjunction with other City plans and projects. The plan is linked to Council approved *City Policy C450B - A Policy to encourage the Designation and Rehabilitation of Historic Resources in Edmonton*. Approval of this policy by Council denotes 'approval in principle.' The strategic direction of this plan is endorsed, but further actions and processes need to be developed, budgeted for, approved, and implemented over a longer period of time.



*TD Bank Building on Jasper Avenue*





## Municipal Development Plan

Development in Edmonton is guided by the Municipal Development Plan. The existing Municipal Development Plan, *Plan Edmonton*, has the following strategy regarding Edmonton's heritage:

*"Preserve historically significant older buildings, structures and areas through the Register of Historic Resources in Edmonton and related programs and policies."*

The City is currently preparing a new municipal development plan. It received first reading in late 2008. The new municipal development plan, *The Way We Grow* provides for much stronger protection of historic and cultural resources in Edmonton. The objective is:

*Encourage a sense of local identity and create connections to the city's cultural and historical roots through the conservation and preservation of significant buildings, districts, landscapes and archaeological resources.*

*The Way We Grow* outlines a number of policies to achieve this objective:

- Integrate heritage conservation into the broader context of planning and decision making.
- Ensure new development adjacent to properties on the Register and Inventory of Historic Resources in Edmonton respects the scale, massing, proportions and character of existing buildings.
- Support conservation and adaptive reuse of historic resources through creative design solutions and incentives
- Ensure all City owned historic resources are conserved and maintained in a good state of repair.
- Support policies and actions outlined in the Historic Resource Management Plan.

- Develop an archaeological plan or overlay that identifies significant sites and serves as a reference during the development application process.
- Create an inventory of significant cultural landscapes and develop a method of protecting them.
- Develop regulations to identify, guide and protect the character of historic areas or districts.
- Seek innovative design approaches to reflect and embrace the culture of Edmonton's new and emerging minority groups.

The new municipal development plan has not yet received final approval at the time of writing.



*The Hotel Macdonald*



### **Definition**

Historic resources are defined as buildings, structures, man-made or natural sites, or areas of historical, cultural and architectural significance to the history of Edmonton that contribute to the city’s unique sense of time and place. Significance may be based on aesthetic, historic, scientific, economic, cultural, social, natural or spiritual values or qualities.

### **Benefits of Heritage Planning**

Heritage planning has many cultural, social and economic benefits. Built heritage retains and conveys a sense of place and community history and contributes to the aesthetic enrichment of Edmonton. Historic resources provide physical links to the past; allowing us to understand where we have come from and helping us make sound decisions on how we develop our city in the future. Historic buildings and streetscapes become landmarks and touchstones for the community, reminding us of our collective history. Conserving our historic resources has many positive aspects, which include:

#### **Strengthening the tax base**

Municipalities improve their tax base by retaining, enhancing and adapting existing historic structures for new uses.

#### **Job creation**

Restoration projects are more labour intensive than new construction, which stimulates demand for a wider range of skills, services and materials within the local economy. It also ensures that a base of specialized tradespeople is developed within the city’s labour market.



*Roy Gerolamy Residence*



### **Tourism**

The preservation and renewal of historic resources creates historical, architectural and cultural attractions, and retains and enhances the character of established communities and neighbourhoods. Whyte Avenue owes its popularity and existence to this fact. Heritage conservation is now inextricably linked with tourism, and is the fastest growing segment of the tourism industry.

### **Economic development**

The restoration and preservation of heritage buildings can be marketed as a tool to create positive economic development and cultural sustainability in the city. 104 Street Promenade draws its strength and marketing from its historic character, attracting major new investment and development into the area.

### **Urban design**

Heritage buildings and icons help create a city's distinctive character. They reflect the rich traditions of the city and enhance the sense of time and place for its citizens. Heritage buildings have cultural and educational benefits that link us to events and styles of the past. Heritage initiatives have a strong positive impact on developing complete communities and creating a vibrant culture of creativity and innovation. They also contribute significantly to attractive pedestrian-oriented spaces.

### **Reusing resources/sustainability**

Recycling of existing buildings makes good use of our building stock and prevents tonnes of materials ending up in landfills. It also prevents the need to expend more energy to create new material. Reusing and adapting buildings is a sustainable and smart choice.



*Hotel Macdonald*

### **Compensation**

Owners are rewarded through the incentive programs and acknowledged through publicity and plaque programs. This ensures that they are financially assisted for contributing to the city's built legacy.

### **Stable property values**

Historic properties are desirable locations to live or work and are good investments in the long term, as they tend to retain their value when maintained.

### **Pride**

Property owners and businesses are usually proud of their historic properties and choose to maintain them well, as they are unique and distinctive.



### **Free professional heritage advice**

The City provides advice to owners and users of historic resources to enable them to maintain, save or develop their properties in the best possible manner.

### **Development process liaison**

The heritage planners may act as a liaison for owners during the permitting process. Owners may benefit where development regulations may be relaxed or innovative solutions are proposed to ensure buildings remain viable.



*St. Joachim Church*

## ***Plan Activities***

The principal focus of the *Historic Resource Management Plan* is to identify, protect, manage and promote historic structures and landscapes, particularly buildings. The plan has five principal areas of activity that direct and guide future efforts to protect historic resources as follows:

### **1. Register and Inventory**

The continual work to maintain, update and review the *Register and Inventory of Historic Resources in Edmonton* to ensure that important resources are identified and recorded. This enables appropriate effort and policy to be put in to place to protect and/or incorporate historic resources facing ongoing development pressures. The core basis for identifying resources is the hope that they will be designated as Municipal Historic Resources.

### **2. Incentives**

The identification and creation of appropriate initiatives, incentives and policies to encourage the restoration and rehabilitation of historic resources. These may vary from financial incentives and zoning relaxations to greater direct involvement (such as practical restoration advice).

### **3. Promotion**

The ongoing work to raise the profile of the benefits that heritage conservation brings to the city at large, while enabling individuals to access appropriate resources, advice and assistance to allow them to evaluate and protect historic resources in future plans.



**4. Monitoring**

Continuing to put in place appropriate mechanisms to ensure historic resources are accounted for in the development process and enabling the long term management of existing resources.

**5. Broader Heritage Initiatives**

Integrating the Historic Resource Management Program with other heritage initiatives such as museums, archives and archaeological efforts.



*John McNeill Residence*



## *Activity 1: Register and Inventory*

*"It is better to preserve than to repair, better to repair than to restore, better to restore than to reconstruct."*

*– Adolphe-Napoléon Didron, 1839*







## Context

The key element of any heritage program is to identify significant resources that have heritage value. Significance can be based on aesthetic, historic, scientific, economic, cultural, social, natural or spiritual values that are important to the city or neighbourhood in which the resource is located. Age alone is not enough justification to recognize a historic resource. There are many instances when “younger” resources hold heritage



Garneau Theatre

value. The *Historical Resources Act* empowers municipalities to designate and regulate historic resources or areas. Section 28 of the Act requires municipalities to compensate owners of designated Municipal Historic Resources. However, the Province may designate a resource against an owner's wishes without the requirement to compensate. In these cases the resources tend to be of Provincial significance, rather than of local heritage value.

Planning and Development has been given the authority to maintain and update the *Register and Inventory of Historic Resources in Edmonton* through the establishment of the Historic Resources Review Panel. The panel is a sub-committee of the Edmonton Historical Board, established to review nominations and amendments to the Inventory and make recommendations to Planning and Development. The historic resources that are selected must go through an evaluation process that is aligned with established provincial and federal standards. The review process, based on sound and thorough research, evaluates the heritage values, overall integrity and future intentions. The process of identifying historic resources is open to any individual who may feel that a particular resource has been overlooked.

Properties on the Register and Inventory are afforded some protection by being flagged in the City's management system when any development issues arise. This enables the Heritage Officer to seek ways to save the buildings or ensure appropriate redevelopment occurs. All resources on the Register and Inventory are also eligible for a variety of incentives that will enable them to be restored or rehabilitated. In order to be afforded legal protection and receive grant money, a property must be designated as a Municipal Historic Resource through a bylaw passed by City Council. Municipal Historic Resources cannot be demolished and any changes or alterations must meet specific standards and guidelines. After designation, City Council has the authority to review any development matters and to intervene should it feel inappropriate work is being conducted on the Municipal Historic Resource.





## Policies

### Heritage Policy 1. Register and Inventory of Historic Resources in Edmonton

The City will develop and maintain a comprehensive document, the Register and Inventory of Historic Resources in Edmonton, that identifies all historic resources and areas in the City that are of architectural, social and cultural value.

The need for a comprehensive document which identifies all historic resources that are significant in some recognized manner allows administrators, developers and citizens to identify or be aware of these historic resources as part of any future planning or development process or for general interest. The Register and Inventory should not be a static document as new historic resources gain significance over time. Traditionally, only buildings over 50 years are considered, but there are exceptions where exemplary historic resources need to be recognized before they are subject to development or demolition pressures. Moreover, some types of historic resources, such as industrial or rural need to be targeted to capture a representation of their kind for the future. It is important that the process to nominate historic resources and monitor them be open and readily available to all Edmontonians.

## Actions

- 1.1 Create the *Register and Inventory of Historic Resources in Edmonton*, where the Register lists designated Municipal Historic Resources and the Inventory identifies historic resources worthy of designation.
- 1.2 Review the format of the Register and Inventory and determine how best to identify historic resources that are added, allowing for the most effective administration and monitoring.
- 1.3 Merge the B listed buildings into the A list of the Inventory to provide an additional layer of protection and ensure that all historic resources are treated equally.
- 1.4 Ensure that the review and assessment process that evaluates an historic resource is based on its own merits. The assessment should include aesthetic, historic, scientific, economic, cultural, social, natural or spiritual values. This process must complement Provincial guidelines.
- 1.5 Investigate if the *Register and Inventory of Historic Resources in Edmonton* can be broadened to include other types of resources, including but not limited to: historic neighbourhoods or areas, urban, cultural and natural landscapes as well as archaeological sites and trails.
- 1.6 Re-evaluate the makeup and role of the Historic Resources Review Panel and evaluate whether there is a need for professional requirements and/or support.
- 1.7 Identify neighbourhoods or areas and building periods or types in need of inventories or updates and work with the community and individuals to identify significant local historic resources that may qualify for addition to the *Register and Inventory of Historic Resources in Edmonton*.
- 1.8 Work with the Edmonton Historical Board to develop criteria for historic plaques.



### Heritage Policy 2. Readily Available Documentation

**The Register and Inventory of Historic Resources in Edmonton will be a readily available document and resource.**

Traditionally, the *Register and Inventory of Historic Resources in Edmonton* was a paper document, but the internet is now a normal source of information for most people, so the document must be electronic, interactive and printable. It must also be current to ensure interested stakeholders are aware and able to be properly informed.

#### Actions

- 2.1 The Register and Inventory is to be made readily available in all formats.
- 2.2 Identify target audiences who need to be aware of the Register and Inventory.
- 2.3 Ensure that the Register and Inventory is electronically searchable by certain categories (names, dates, types, etc).

### Heritage Policy 3. Historic Interiors

**The City will consider historic interiors as part of the assessment of historic resources at the register and inventory stages.**

In the past, few interior elements were considered as part of the designation process, arguably from the perspective that public funds spent on interior elements could not be seen by the public. However, some interior elements are an integral part of the building's character defining elements and without them the building becomes a historic shell without any cues to how or when the building was built or functioned.

#### Actions

- 3.1 Develop criteria to determine which historic interior elements may be included in designation and how they will be managed.
- 3.2 Explore methods to encourage historic resources to be occasionally opened to visitors so that interior elements can be viewed and enjoyed by the public.



#### Heritage Policy 4. Historic Areas

**The City will recognize, protect, enhance and promote the character of its historic areas.**

Protecting individual buildings has many merits, but occasionally their surrounding context changes as development occurs around them. Sometimes it is the sum of buildings, rather than individual ones that makes an area unique, such as the Westmount Architectural Heritage Area. Edmonton's historic areas have guidelines or regulations in place to help protect their historic character. Many historic areas have not been recognized and their unique characters are being eroded with poor quality or unsympathetic infill development. There is a need to identify and recognize these areas and develop regulations, design briefs and urban design principles that will preserve and enhance the qualities that make the areas distinct.

#### Actions

- 4.1 Investigate and identify which neighbourhoods and commercial districts have areas worthy of being recognized as historic or character areas.
- 4.2 Promote partnerships that help identify and recognize historic areas.
- 4.3 Develop appropriate zoning, regulations, guidelines or overlays to identify, guide and protect the character of historic areas.
- 4.4 Develop urban design guidelines or landscaping plans in identified historic areas.

- 4.5 Develop an outdoor sign museum area in the downtown to conserve and promote the City's historic signs that have been salvaged or rescued.
- 4.6 The Rossdale Area will be afforded appropriate protection and recognition that commemorates its significance to Edmonton's development and its pre-contact history.

#### Heritage Policy 5. Legislation

**The City supports efforts to encourage legislative changes at all levels of government that would enable proactive heritage programming.**

The *Historical Resources Act* inhibits municipalities from protecting historic resources that they might have otherwise designated, if compensation were not required. However, there are other components of the *Act* that need to be addressed as well as opportunities in the *Municipal Government Act* to enable proactive heritage planning. Any such changes will require a coordinated approach involving politicians, other municipalities and provincial agencies to work together. Heritage is an area that is legislated, but more proactive tools are required to facilitate the protection of Alberta's historic resources.

#### Actions

- 5.1 The City, in partnership with heritage groups and other municipalities, will work with the provincial government to amend the *Historical Resources Act* to enable municipalities to be more proactive and remove the 'compensation' clause.



*Jubilee Auditorium*

- 5.2 The City, in partnership with heritage groups and other municipalities, will work with the provincial government to address any matters in the *Municipal Government Act* that may enable municipalities to deal with historic resources in a proactive manner.
- 5.3 The City will explore what other legislation can be used to prevent demolition of historic resources and enforce non-compliance issues without jeopardizing the historic resource.
- 5.4 The City, in partnership with heritage groups and other associations, will advocate for federal heritage incentives and initiatives.
- 5.5 The City will identify best practices in legislation from other jurisdictions to promote heritage preservation, and work with the provincial and federal governments to change the legislation to reflect these best practices.

### Heritage Policy 6. Standards

**The Historic Resource Management Program will be aligned with Standards and Guidelines for the Conservation of Historic Places in Canada.**

In order to ensure consistency and that heritage projects qualify for existing provincial and future federal incentives, the City of Edmonton will use the *Standards and Guidelines for the Conservation of Historic Places in Canada*. The Standards and Guidelines will be the basis for all projects, evaluations and data documentation for inclusion on the Canadian Register of Historic Places. There will be occasions where flexibility will be required as on-site decisions are made to protect the overall integrity of the project. Successful historic preservation is a matter of balancing a wide range of goals, issues, opportunities and constraints. Aligned standards will also provide building owners with an easier transition between the different levels of government.

### Actions

- 6.1 The City will review and amend its policies, standards and terminology to align with the *Standards and Guidelines for the Conservation of Historic Place in Canada*.



### **Heritage Policy 7. Research**

**The City will seek to encourage and facilitate adequate and professional levels of research to be carried out that relate to historic resources on or being nominated to the Register and Inventory of Historic Resources in Edmonton.**

The Historic Resource Management Program receives many inquiries on how historic resources may be added to the *Register and Inventory of Historic Resources in Edmonton*. In order to be added, there must be justification that the resource is significant enough to qualify. This process is time consuming and can be complex if people are unaware of the research resources available to generate the required historical backgrounds. Some owners see this as a burden and will not commit the money or time; thus the City potentially loses another historic resource. If incentives are made available to assist in the required research, submitted material would be more comprehensive and make decision-making processes easier and better informed. Only those historic resources that are to be added to the Register and Inventory would be eligible.

### ***Actions***

- 7.1** Provide funding to property owners to assist in conducting appropriate research on historic resources.
- 7.2** Investigate how other heritage agencies can assist in the collection and distribution of relevant heritage information.



*Parkview Apartments*



## *Activity 2: Incentives*

*"...these old buildings do not belong to us only; that they have belonged to our forefathers, and they will belong to our descendants..."*

*– William Morris*







## *Context*

In 1995, City Council approved the creation of a fund to provide financial compensation for the designation of Municipal Historic Resources. Funds are withdrawn annually from the operating budget of the Planning and Development Department



*(Above)  
Phillips Building  
after renovations  
(Left) Before  
renovations*

into a reserve account. Monies unspent in a calendar year are retained in the reserve fund for future years. These funds are used to provide an incentive to designate, rehabilitate, preserve and promote Municipal Historic Resources. The incentives given include direct grants, property tax rebates and non-monetary incentives.

These grants given to owners of Municipal Historic Resources will pay for themselves through long term tax benefits. On average, most of the grants that have been provided have been recovered over a 5 – 10 year period. The creation of vibrant buildings also stimulates new growth and investment in the surrounding areas over time, which in turn generates greater economic activity and subsequently, taxable revenues (e.g. 104 Street Promenade). Other than direct investment into the property, there are trade and construction spin offs as well as other long-term benefits to the character and economic well being of the city.

Other than financial incentives to developers or private owners there needs to be greater flexibility given to the administration to negotiate other incentives or benefits, where the outcome will secure a designation. Tools such as land use policies and zoning regulations, tax incentives, advocacy, stewardship and promotion, partnerships and collaborative relationships and any other innovative approaches should be pursued. Incentives also need to be directed at all historic resources, regardless of ownership (City owned, privately owned) so that they may be restored and maintained in the long term.

A strong economic climate plus negative perceptions towards historic resources can make it difficult for developers or owners to justify saving a historic resource when new buildings are easier to develop. However, there is an awareness that heritage character sells, and opportunities to persuade developers to be innovative and include historic resources in their plans should be investigated. This will require some flexibility and innovative preservation work to address difficult circumstances that some historic resources will create.





## Policies

### Heritage Policy 8. Variety of Incentives

The City will endeavor to provide a variety of incentives to assist with the preservation and adaptive reuse of historic resources.

It is imperative that the Planning and Development Department be given the flexibility to negotiate and explore a variety of incentives and measures to enable historic resources to be saved and incorporated into new development.

## Actions

- 8.1 Explore other funding sources to ensure additional incentives are available to assist with restoration costs.
- 8.2 Develop a program to provide for ongoing maintenance to Municipal Historic Resources.
- 8.3 Provide funding to remove graffiti from historic resources, with a priority given to designated buildings.
- 8.4 Explore best practices related to heritage incentive programs and apply the appropriate ones that will help achieve the City's heritage goals.
- 8.5 Explore the feasibility of creating a land bank where historic resources facing demolition can be relocated.
- 8.6 Explore the feasibility of developing storage facilities for significant architectural remnants that may be salvaged from demolitions, so that they may be incorporated into new development in the future.
- 8.7 The City should identify resources to enable the purchase, restoration and sale of historic resources for the specific purpose of saving the building.
- 8.8 Explore how the City could facilitate training in restoration techniques for owners of historic resources as part of incentives or broader initiatives.



Ortona Armoury detail



### **Heritage Policy 9. Collaboration**

**The City will work and align with federal and provincial programs that support and promote heritage preservation at the municipal level.**

The Government of Alberta recently stopped providing incentives for Registered Historic Resources since there was no legislative requirement to be protected. It was determined that if future incentives were sought they must be legally protected at the municipal level. The province in effect extended its incentives to all existing and future Municipal Historic Resources. There are no federal incentives currently available, but should there be in the future, it is vital that Municipal Historic Resources be eligible. The City should seek to leverage the greatest amount of funding available from all sources to rehabilitate its historic resources. However, there needs to be some flexibility and creativity allowed at the municipal level where provincial or federal guidelines may be more stringent.

#### **Actions**

- 9.1** Develop partnerships with all levels of government to review, develop and increase appropriate incentive programs.
- 9.2** Encourage the Government of Alberta to increase its annual heritage budget.
- 9.3** Identify what forums exist to enable municipalities (such as the Federation of Canadian Municipalities) and the provincial government to encourage the federal government to develop a federal heritage incentive program.
- 9.4** Facilitate the development of an advocacy group that represents owners of designated historic resources.



*The Gibson Block*



### **Heritage Policy 10. Heritage specialist services**

**The City will make financial resources available to heritage advocacy groups and professionals where it can be demonstrated that the resources will directly lead to the preservation of historic resources.**

There are circumstances where the administration is unable to take on particular tasks as it does not have the personnel or mandate to do so. Where it can be proven to be beneficial to certain heritage initiatives or projects, financial assistance should be provided to heritage groups or professionals to complete the work. Prior to designation, many historic resources require extensive studies or specialist input to determine their feasibility or inform owners of the true nature of work required. These studies can be costly when viewed against easier less heritage-sensitive redevelopment options. Only those resources that are to be added to the Register and Inventory would be eligible.

#### **Actions**

- 10.1** Provide incentives, criteria and guidelines for heritage specialists who wish to conduct new research related to historic resources.
- 10.2** Provide financial incentives to enable architectural/engineering/building studies to be done on historic resources, which help determine and/or guide future work. These studies must be tied into agreements that work towards the designation of the historic resource. Financial incentives would be up to 50% of costs.
- 10.3** Investigate the feasibility of establishing a non-profit heritage agency that could purchase and restore threatened historic resources.

- 10.4** Develop community and strategic partnerships within the private sector to achieve heritage preservation objectives.

### **Heritage Policy 11. Stewardship of City Historic Resources**

**The City will encourage the retention, restoration and designation of all of its own historic resources and advocate for its ad-hoc bodies, autonomous agencies and other public bodies to do the same.**

The City owns and manages many historic resources and to date has shown leadership, and designated many of them as Municipal Historic Resources. It is imperative that the City be seen as a leader and set standards and benchmarks for the private sector to follow. The City also has controlling interests in groups such as EPCOR, and should pursue the same course of action with these entities that manage building portfolios. Ideally, all City owned historic resources will be designated and incorporated into new development, not demolished.

#### **Actions**

- 11.1** The City will carry out a review and create an inventory of its building stock to determine heritage value and place a high priority on designation. The inventory should be reviewed periodically.
- 11.2** Encourage the University of Alberta, Government of Alberta, Edmonton Catholic and Public School Boards, EPCOR and other similar groups to create a heritage inventory of their building stock. The City will work with these organizations towards designation.



**Heritage Policy 12. Demolition and inappropriate alterations**

**The City will place a high priority on preventing the demolition of historic resources and any inappropriate alterations.**

With the loss of some significant buildings, there is a need to put in place restrictions that will either prevent demolition or give more time to negotiate with owners for alternative options to be explored fully. It would be desirable if pre-consultation became a matter of course, prior to firm commitments being made.

There is also concern that many lost historic resources have nothing built or proposed in their place. As a result it is hoped that potential development that may replace historic resources will face closer review and greater design input. Many resources have also been inappropriately altered or are poorly maintained. A stronger enforcement process is required to get owners to explore appropriate solutions that preserve the character defining elements of the historic resource. There are also processes, regulations and programs that run counter to preservation efforts such as safety code orders which often require immediate remediation or demolition, where demolition is usually the easier and cheaper option.

**Actions**

- 12.1** Identify all policies, programs and incentives that could help prevent historic resources from being demolished.
- 12.2** Investigate enforcement options and disincentives to prevent demolition or willful neglect.

- 12.3** Investigate the possibility of requiring justifications, timelines and development permits for new development prior to demolition permits being issued for historic resources, to prevent inappropriate development or land being left vacant.
- 12.4** Develop stronger maintenance regulations to enable the City to enforce repairs on Municipal Historic Resources.
- 12.5** Ensure that lost historic resources or sites are commemorated through incorporation into new development.



*St. Agnes Roman Catholic Church*



### **Heritage Policy 13. Expedite processes**

**The City will give priority to those development applications involving historic resources.**

Saving historic resources in many cases requires that the City provides some form of incentive. However, there are circumstances when allocating resources (i.e. staff) to expedite processes, or offering greater flexibility are of greater benefit to developers than financial incentives.

#### ***Actions***

- 13.1** Encourage pre-consultation processes for owners of historic resources intending on developing their properties.
- 13.2** Investigate what options are available for streamlining applications related to the redevelopment of historic resources.



*Cecil Burgess Residence*

### **Heritage Policy 14. Development policies and guidelines**

**The City will develop policies, regulations or guidelines to ensure that historic resources and their immediate surroundings are included in the development process.**

Many planning processes are specialized and are subject to strict time frames, with heritage as an afterthought or not part of the process. There is a need to make heritage, like urban design, an integral part of the overall planning, review and decision making process.

#### ***Actions***

- 14.1** Develop policies, regulations or guidelines in statutory plans, zoning and overlays that protect historic resources.
- 14.2** Develop regulations, guidelines or processes to ensure that development in areas surrounding historic resources respects the heritage value of the historic resource.
- 14.3** Maintain a Heritage Checklist and encourage all planners to utilize it as part of the evaluation process.
- 14.4** Develop design regulations for identified historic areas to ensure infill development is sensitive and in character.
- 14.5** Develop partnerships with other programs and agencies to allow historic resources to accommodate new technology or modern standards, e.g. insulation, windows.



## Activity 3: Promotion

*"...while waiting for new monuments, preserve the ancient monuments. Let us, if possible, inspire the nation with a love for national architecture."*

*– Victor Hugo, 1832*







## *Context*

The promotion of the heritage value of historic resources is an integral part of the Historic Resource Management Program, from public talks and displays, practical building workshops to media stories, historic walking tours and newsletters. Planning and Development also sponsors events, such as Historic Edmonton Week and Doors Open Edmonton, where the profile of heritage is elevated.

Greater promotion of the Program within Planning and Development is also required. It is important for staff to be aware of what potential historic resources may offer. With the rapid pace of development it is easy for heritage issues to be

given less priority in the overall decision-making process. The challenge is to position heritage issues into all decision making processes and to give them greater weight.

While the heritage program is successful, it does not have a high profile or a distinct identity that could be promoted and marketed. This needs to change if the City wishes to successfully retain its significant historic resources. New marketing and promotion needs to stimulate private preservation efforts to the fullest extent possible and further encourage the involvement of public groups in heritage conservation.



*Queen Elizabeth Planetarium*





### *Policies*

#### **Heritage Policy 15. Heritage promotion and awareness**

**The City will continue to support and initiate heritage programs and initiatives that promote and advocate for greater heritage awareness.**

The Historic Resource Management Program needs to be better marketed to create greater public awareness, especially with regards to developers, investors and property owners. By working and partnering with the various stakeholders and increasing awareness of the benefits of retaining and restoring historic resources, there is more likely to be support from the larger community.

### *Actions*

- 15.1** Develop partnerships with social, cultural and business groups to promote heritage and consider providing funds where deemed appropriate.
- 15.2** Research promotional practices in other cities or jurisdictions.
- 15.3** Develop a heritage communications plan to promote the Historic Resource Management Program.
- 15.4** Develop heritage tours in partnership with other groups.
- 15.5** Develop promotional material on heritage programs in the city, such as brochures, handbooks, books, videos, and websites.
- 15.6** Develop regular media (e.g. print, television, radio) reports to promote heritage preservation.
- 15.7** Develop a Heritage Awards Program to recognize various aspects of heritage work in the city; not limited to designated or recognized historic resources; but more broad based, including such organizations as the Federation of Community Leagues and the Edmonton Historical Board.
- 15.8** Develop an internal information workshop to educate staff about the Historic Resource Management Program and how it impacts their decision making processes.



*Sarah McLellan Residence*



### **Heritage Policy 16. Heritage documentation**

**The City will promote and ensure that heritage education, documentation and research material is readily available.**

The program would benefit from having pamphlets or brochures which provide a range of building restoration advice, information sources, program information and building information. These and other heritage material should be readily available to historic resource owners and developers. Traditionally, historical information is filed in the City of Edmonton Archives. However, a significant number of inquiries come through the Historic Resource Management Program and having information readily available should be a priority to enable citizens to make informed decisions.



*Edmonton Cemetery Office*

### **Actions**

- 16.1** Develop a variety of heritage talks and promotional materials dealing with heritage to educate both the public and special groups like realtors and developers.
- 16.2** Identify social, economic and community benefits of heritage preservation.
- 16.3** Develop materials that could be implemented in Edmonton's school curriculums and in various outreach programs.
- 16.4** Develop a comprehensive website to ensure accessibility of information.
- 16.5** Develop a list of services and trades skilled in heritage conservation and preservation.





## *Activity 4: Monitoring*

*"We shape our buildings; thereafter,  
our buildings shape us.."*

*– Sir Winston Churchill*







## *Context*

The Heritage Officer reviews all development applications affecting historic resources before demolition permits are issued. All buildings on the Register and Inventory have been flagged in Planning and Development's electronic database. This provides the owners with an opportunity to benefit from the Historic Resource Management Program and develop their historic property in a way that maintains the integrity of the property, while meeting their objectives and needs.

Area Redevelopment Plans, such as Old Strathcona, West-Ingle and Downtown, contain development guidelines and regulations for heritage related direct control zones. These Plans require the Heritage Officer to review development applications that fall within these neighbourhoods and offer advice to the Development Officer. Increasingly, heritage policies are being inserted into new or amended plans, identifying specific resources in the plan, or through actual zoning regulations. When these are affected or triggered, the Heritage Officers are notified and get involved to review applications and provide advice.

Planning and Development maintains a computerized database of information on Edmonton's historic resources gathered through the inventory process. This database provides an important tool to manage information on Edmonton's historic resources and is maintained and updated on a regular basis.

There is strong support for enabling communities to be more involved in monitoring historic resources. There is a need to embed heritage into the zoning process and into plans through policy statements or identification of specific resources. If the plans do not mention heritage, it is considerably more difficult to get owners to the support the idea of retaining their historic resources. Monitoring ensures that policies and processes acknowledge and respect the value and integrity of heritage. Effective monitoring is best realized through a coordinated planning approach and an open dialogue between citizens, owners, developers, consultants, city staff and City Council.



*Shandro Residence*



## Policies

### Heritage Policy 17. City Governance

**Heritage will be an integral consideration in policy development and in other City incentives and programs.**

There are many interest groups, directives, policies and incentive programs that all influence how decisions are being made. Decision-making processes are complex and as a result heritage issues can be overlooked or not given much weight. There is a need to position heritage statements into key documents and programs so that Edmonton's built heritage becomes a recognized and valid consideration or trigger in the overall process. Heritage is also affected by other City incentives, sometimes positively and occasionally negatively. Where this occurs, communication channels need to be opened with other program coordinators.

### Actions

- 17.1** Develop additional triggers, where possible, in the planning process to ensure historic resources are identified and relevant processes are initiated to protect them.
- 17.2** Determine what other government incentives and programs serve as disincentives for heritage projects. For example, inappropriate windows may be installed through the Residential Rehabilitation Assistance Program (RRAP).
- 17.3** Investigate what municipal legislation supports or negatively impacts historic resources and identify how it may be utilized and improved to further heritage conservation efforts.

### Heritage Policy 18. Notification and circulation

**The City will work to improve the notification and circulation process where historic resources are affected by development.**

As a result of a few notable heritage building losses, there is a need to ensure that heritage groups are informed ahead of time if an historic resource is facing redevelopment or demolition and not forced to react at the last minute. Working with developers early in the planning process has been successful and resulted in saving historic resources while supporting new development. The public consultation process should include groups with recognized and vested heritage interests.

### Actions

- 18.1** Work with the media (TV, Newspaper, Internet) to respond to heritage issues as they arise.
- 18.2** Develop and maintain a list of heritage organizations that should be notified or contacted to review applications that negatively affect major historic resources.
- 18.3** Investigate if it is feasible to create a notification process for properties immediately surrounding historic resources that are subject to development proposals.



### **Heritage Policy 19. Enforcement**

**The City will enforce non-compliance issues pertaining to historic resources.**

The City is often criticized for failing to enforce non-compliance matters, such as poor maintenance or willful neglect, which may lead to the demolition of the resource. Most non-compliance matters occur on buildings on the Inventory, rather than designated Municipal Historic Resources. This makes it more challenging since these properties are not subject to bylaw regulations and legal caveats. The City does have powers to enforce most areas of concern, but due process is required (e.g. rights to appeal etc), which can mean significant delays, to the detriment of the historic resource. Conversely, delays may enable the administration to develop alternative solutions that may save a historic resource.

#### ***Actions***

- 19.1** Investigate what tools and legislation are available to enforce appropriate heritage standards on non-compliant historic resources or those being willfully neglected.

### **Heritage Policy 20. Maintenance**

**The City will continue to monitor and implement the maintenance process for its Municipal Historic Resources.**

The number of legally protected Municipal Historic Resources has increased over 400% in the last seven years. The City has an interest in the future of these historic resources and it must ensure that the elements that make them significant are retained and maintained. The original bylaws had cumbersome maintenance agreements, which are now simplified and easier to enforce. The reality is, most historic resources are well maintained. Owners of historic properties tend to be aware and proud of the significance of their property. For owners who are genuinely unaware that there are maintenance issues that need to be addressed, a maintenance review process is important for highlighting immediate and long-term issues to both the City and owners alike.

#### ***Actions***

- 20.1** Maintain a monitoring schedule and process for owners and heritage planners to review all Municipal Historic Resources.





**Heritage Policy 21. External monitoring**

**The City will develop and maintain working relationships with heritage groups to consult with or assist in monitoring historic resources.**

There are occasions where an outside agency may be seen as a more impartial body when considering heritage issues, or they lend true legitimacy to a given position. An outside agency may also be better informed on local historical matters and contexts, than the City administration.

***Actions***

- 21.1** Investigate ways in which the City could work with various civic agencies, heritage groups, advisory panels and the Edmonton Federation of Community Leagues for consultation and assistance with monitoring and identifying historic resources.
  
- 21.2** Investigate how the recommendation for an Edmonton Heritage Council in the Edmonton Arts Council's cultural and heritage plan, *The Art of Living* can be closely aligned or integrated with the initiatives of the *Historic Resource Management Plan*.



*Louis Residence*



## *Activity 5: Broader Heritage Initiatives*

*“The concept of an historic monument embraces not only the single architectural work but also the urban or rural setting in which is found the evidence of a particular civilization, a significant development or an historic event. This applies not only to great works of art but also to more modest works of the past which have acquired cultural significance with the passing of time.”*

*– Venice Charter, 1964*







## *Context*

The following policies deal with historic resources that are not physical structures but have heritage value. The mandate of the heritage program has been expanded to include archaeology and cultural landscapes. Planning and Development will partner with other City departments, agencies or other levels of government to achieve the actions below.

Where there is a desire and need to develop further inventories, such as archaeological sites, it may be logical to integrate them into the *Register and Inventory of Historic Resources in Edmonton*, to create a central document that covers all significant sites, objects or resources in the city. Matters related to the City Archives, Artifact Centre, or museums are covered in the cultural plan, *The Art of Living*, as developed by the Edmonton Arts Council.



*Heritage Trail and LeMarchand Mansion*



## *Policies*

### **Heritage Policy 22. Cultural places**

**Significant landscapes, icons, viewsapes and activities, that contribute to the City's urban fabric and character will be afforded appropriate recognition and suitable protection.**

Often many significant places owe their character or sense of place to elements that are not heritage buildings. While historic resources within these settings may be important, good landscaping or open views or vistas to other locations help make the place more enjoyable or memorable. These features can be viewed as contributing elements worthy of protection or recognition. Some elements may not be historic, but form a key part of the local landscape, e.g. public art, character areas and vistas.

## *Actions*

- 22.1** In collaboration with other City departments, create an inventory of significant historic cultural icons, landscapes, corridors, activities or locations and set up an appropriate methodology to review them.
- 22.2** In collaboration with other City departments, create an inventory of significant natural landscapes and trees and set up an appropriate methodology to review them.
- 22.3** Pursue natural/cultural landscape designation for significant sites.
- 22.4** Develop zoning regulations or guidelines for significant cultural landscapes.

### **Heritage Policy 23. Archaeological and paleological sites**

**The City will document and map archaeological or paleological sites and integrate them into the development decision making processes.**

Archaeological/paleological sites fall under provincial jurisdiction and though documentation exists for these sites, it is not conveniently available in order to offer the sites some protection. Having all such sites noted in Planning and Development's electronic database would enable staff to make informed decisions when planning around such sites.

## *Actions*

- 23.1** Develop an archaeological/paleological plan or overlay in cooperation with the province for planners to reference when dealing with development applications.
- 23.2** Develop minimal development setbacks from archaeological/paleological sites and with appropriate interpretation on the findings.



#### **Heritage Policy 24. First Nations, Métis and Inuit**

**The City will document and map all known First Nations, Métis and Inuit sites, burial grounds and areas of cultural significance and integrate them into the development decision making processes.**

Documentation of First Nations, Métis and Inuit sites exists, but it is neither widely known nor promoted. Having all such sites noted in Planning and Development's electronic database would enable planners to make informed decisions when planning around such sites. It would also assist in formally recognizing much of Edmonton's pre-contact history (before the fur trade) and enable proper inclusion in the future growth and development of the city.

#### **Actions**

- 24.1** Develop a plan or overlay with the Office of Diversity and Inclusion that identifies sites of significance to First Nations, Métis and Inuit for planners to reference when dealing with development applications. As part of the plan or overlay consideration will be given to establishing minimal development setbacks and appropriate interpretation.
  
- 24.2** Recognize the Rossdale area as a significant site to the First Nations, Métis and early settlers.



*Rossdale Archaeological Dig*





## *Implementation Strategy*

*"The city, however, does not tell its past, but contains it like the lines of a hand."*

*– Italo Calvino, Invisible Cities*









### ***Implementing the Plan***

The Historic Resource Management Plan is a 20 year vision for the management of Edmonton's historic resources with a 10 year implementation strategy. The actions in the Plan range from short to long term with short term being 1-3 years, medium term being 4-6 years and long term being 7-10 years.

#### **Activity 1: Register and Inventory**

Many of the actions related to the Register and Inventory are considered urgent and will be addressed in the first year of implementation. However, there are a number of actions related to legislative changes that require a much longer period to implement.

#### **Activity 2: Incentives**

Incentives are the key component of the Historic Resource Management Program and the provision of ongoing incentives for property owners is integral to the conservation of heritage in Edmonton. The need for ongoing incentives will be addressed through the development of a maintenance grant program in the first year. In the medium term, the Historic Resource Management Program may engage in demonstrative projects that involve the purchase, restoration and sale of historic resources that might otherwise be lost.

#### **Activity 3: Promotion**

In order to successfully increase public awareness and market the Historic Resource Management Program, a new searchable website will be developed in the short term. The Program will also work to develop promotional materials such as walking tour booklets and brochures on an ongoing basis to further promote and educate the public about Edmonton's heritage.

#### **Activity 4: Monitoring**

Effective monitoring of historic resources is best realized through a coordinated planning approach and open dialogue among all stakeholders. Monitoring will be approached in a holistic manner including expanded notification and circulation systems, stronger enforcement, and greater overall integration of historic resources into the planning process within the next six years.

#### **Activity 5: Broader Heritage Initiatives**

The mandate of the Historic Resource Management Program has been expanded to include broader heritage issues including archaeology and cultural landscapes. Most of the actions are short and medium term in order to address these new issues in a proactive manner.



### ***Potential risks to implementation***

#### **Funding**

Currently, the City of Edmonton has one of the better funded heritage programs of any municipality in Canada. The Program also benefits from a well funded heritage program at the provincial level. These financial incentives are integral in encouraging the designation of historic resources in Edmonton given the ‘compensation clause’ in the *Alberta Historical Resources Act*. Should funding for these programs be cut it would set the Program and particularly the policies under Activity 2 back significantly. Moreover, the lack of incentive funding at the federal level for conservation work may prove challenging as costs rise and large projects become significantly more expensive. The Program will work to encourage the federal government to re-introduce incentives at the national level.

#### **Staffing**

This plan is very forward-thinking and requires additional staff resources to implement. Most of the actions outlined in the plan require the dedication of staff resources rather than additional funding. If additional staff resources are not made available to the Program, the actions outlined in the Plan will take longer to successfully implement and more projects may have to be outsourced to consultants.

#### **Changes in heritage practice**

This Plan is based around current best practice in heritage planning, conservation, and archaeology. However, as methods and philosophies change, the direction of this Plan may need to be adjusted. For instance, current best practice in Canada is the use of the *Standards and Guidelines for the Conservation of Historic Places in Canada*. However, the Standards and Guidelines may be revisited, updated and changed throughout the life of this plan. Consequently, the actions contained within the Plan may need to be updated to reflect best practices.

The following table outlines the implementation strategy for all policies and actions in the Historic Resource Management Plan.



Activity 1: Inventory and Register

Policy 1 - Inventory and Register of Historic Resources in Edmonton

The City will develop and maintain a comprehensive document, the Register and Inventory of Historic Resources in Edmonton, that identifies all historic resources and areas in the City that are of architectural, social and cultural value.

Actions	Time
1.1 Create the <i>Register and Inventory of Historic Resources in Edmonton</i> , where the Register lists designated Municipal Historic Resources and the Inventory identifies historic resources worthy of designation.	Short
1.2 Review the format of the Register and Inventory and determine how best to identify historic resources that are added, allowing for the most effective administration and monitoring.	Short
1.3 Merge the B listed buildings into the A list of the Inventory to provide an additional layer of protection and ensure that all resources are treated equally.	Short
1.4 Ensure that the review and assessment process that evaluates a historic resource is based on its own merits. The assessment should include aesthetic, historic, scientific, economic, cultural, social, natural, or spiritual values. This process must complement Provincial guidelines.	Short
1.5 Investigate if the <i>Register and Inventory of Historic Resources in Edmonton</i> can be broadened to include other types of resources, including but not limited to: historic neighbourhoods or areas, urban, cultural and natural landscapes as well as archaeological sites and trails.	Short
1.6 Re-evaluate the makeup and role of the Historic Resources Review Panel and evaluate whether there is a need for professional requirements and/or support.	Short
1.7 Identify neighbourhoods or areas and building periods or types in need of inventories or updates and work with the community and individuals to identify significant local resources that may qualify for addition to the <i>Inventory and Register of Historic Resources in Edmonton</i>	Medium
1.8 Work with the Edmonton Historical Board to develop criteria for historic plaques.	Short

Short = 1-3 years  
 Medium = 4-6 years  
 Long = 7-10 years



**Policy 2 - Readily Available Documentation**

**The Register and Inventory of Historic Resources in Edmonton will be a readily available document and resource.**

Actions	Time
2.1 The Register and Inventory is to be made readily available in all formats.	Short
2.2 Identify target audiences who need to be aware of the Inventory	Short
2.3 Ensure that the <i>Inventory and Register of Historic Resources in Edmonton</i> is electronically searchable by certain categories (names, dates, types, etc).	Short

**Policy 3 - Historic Interiors**

**The City will consider historic interiors as part of the assessment of historic resources at the Register and Inventory stages.**

Actions	Time
3.1 Develop criteria to determine which interior elements may be included in designation and how they will be managed.	Short
3.2 Explore methods to encourage resources to be opened to visitors occasionally so that interior elements can be viewed and enjoyed by the public.	Medium

**Policy 4 - Historic Areas**

**The City will recognize, protect, enhance and promote the character of its historic areas.**

Actions	Time
4.1 Investigate and identify which neighbourhoods and commercial districts have areas worthy of being recognized as heritage or character areas	Medium
4.2 Promote partnerships that help identify and recognize historic areas.	Ongoing
4.3 Develop appropriate zoning, regulations, guidelines or overlays to identify, guide and protect the character of heritage areas.	Medium
4.4 Develop urban design guidelines or landscaping plans in identified heritage areas.	Medium
4.5 Develop an outdoor sign museum in the downtown to conserve and promote the City's historic signs that have been salvaged or rescued.	Short
4.6 The Rossdale Area will be afforded appropriate protection and recognition that commemorates its significance to Edmonton's development and its pre-contact history.	Medium



**Policy 5 - Legislation**

The City supports efforts to encourage legislative changes at all levels of government that would enable proactive heritage programming.

Actions	Time
5.1 The City, in partnership with heritage groups and other municipalities will work with the provincial Government to amend the <i>Historical Resources Act</i> to enable municipalities to be more proactive and remove the ‘compensation’ clause.	Long
5.2 The City, in partnership with heritage groups and other municipalities will work with the provincial government to address any matters in the Municipal Government Act that may enable municipalities to deal with historic resources in a proactive manner	Long
5.3 The City will explore what other legislation can be used to prevent demolition of historic resources and enforce non-compliance issues without jeopardizing the historic resource.	Medium
5.4 The City in partnership with heritage groups and other associations will advocate for federal heritage incentives and initiatives.	Medium
5.5 The City will identify best practices in legislation from other jurisdictions to promote heritage preservation, and work with the provincial and federal governments to change the legislation to reflect these best practices.	Long

**Policy 6 - Standards**

The Historic Resource Management Program will be aligned with the *Standards and Guidelines for the Conservation of Historic Places in Canada*.

Actions	Time
6.1 The City will review and amend its policies, standards and terminology to align with the <i>Standards and Guidelines for the Conservation of Historic Places in Canada</i> .	Short

**Policy 7 - Research**

The City will seek to encourage and facilitate adequate and professional levels of research to be carried out that relate to historic resources on or being nominated to the *Register and Inventory of Historic Resources in Edmonton*.

Actions	Time
7.1 Provide funding to property owners to assist in conducting appropriate research on historic resources.	Short
7.2 Investigate how other heritage agencies can assist in the collection and distribution of relevant heritage information.	Short



**Activity 2: Incentives**

**Policy 8 - Variety of Incentives**

The City will endeavor to provide a variety of incentives to assist with the preservation and adaptive reuse of historic resources.

<b>Actions</b>	<b>Time</b>
8.1 Explore other funding sources to ensure additional incentives are available to assist with restoration costs.	Short
8.2 Develop a program to provide for ongoing maintenance to Municipal Historic Resources.	Short
8.3 Provide funding to remove graffiti from historic resources, with a priority given to designated buildings.	Ongoing
8.4 Explore best practices related to various heritage incentive programs and apply the appropriate ones that will help achieve the City's heritage goals.	Ongoing
8.5 Explore the feasibility of creating a land bank where historic resources facing demolition can be relocated.	Long
8.6 Explore the feasibility of developing storage facilities for significant architectural remnants that have been or may be salvaged from demolitions, so that they may be incorporated into new development in the future.	Medium
8.7 The City should identify resources to enable the purchase, restoration and sale of historic resources for the specific purpose of saving the building on a limited or demonstrative basis.	Medium
8.8 Explore how the City could facilitate hands on training for owners of resources as part of incentives or broader initiatives.	Short

**Policy 9 - Collaboration**

The City will work and align with federal and provincial programs that support and promote heritage preservation at the municipal level.

<b>Actions</b>	<b>Time</b>
9.1 Develop partnerships with all levels of government to review, develop and increase appropriate incentives programs.	Ongoing
9.2 Encourage the Government of Alberta to increase its annual heritage budget.	Ongoing
9.3 Identify what forums exist to enable municipalities (such as the Federation of Canadian Municipalities) and the provincial government to encourage the federal government to develop a federal heritage incentive program.	Ongoing
9.4 Facilitate the development of an advocacy group that represents owners of designated heritage resources.	Medium



**Policy 10 - Heritage specialist services**

**The City will make financial resources available to heritage advocacy groups and professionals where it can be demonstrated that the resources will directly lead to the preservation of historic resources.**

<b>Actions</b>	<b>Time</b>
10.1 Provide incentives, criteria and guidelines for heritage specialists that wish to conduct new research related to historic resources.	Short
10.2 Provide financial incentives to enable architectural/engineering/building studies to be done on heritage resources, which help determine/guide future work on specific resources. These studies must be tied into agreements that work towards the designation of the resource.	Short
10.3 Investigate the feasibility of establishing a non profit heritage agency that could purchase and restore threatened heritage buildings.	Long
10.4 Develop community and strategic partnerships within the private sector to achieve heritage preservation objectives.	Ongoing

**Policy 11 - Stewardship of City Resources**

**The City will encourage the retention, restoration and designation of all of its own historic resources and advocate for its ad-hoc bodies, autonomous agencies and other public bodies to do the same.**

<b>Actions</b>	<b>Time</b>
11.1 The City will carry out a review and create an inventory of its building stock to determine heritage value and place a high priority on their designation. This review should be done on a periodic basis.	Short
11.2 Encourage the University of Alberta, Provincial Government, Edmonton Catholic and Public School Boards, EPCOR, etc) to create a heritage inventory of their building stock. The City will work with these organizations towards designation.	Ongoing

**Policy 12 - Demolition and inappropriate alterations**

**The City will place a high priority on preventing the demolition of historic resources and any inappropriate alterations.**

<b>Actions</b>	<b>Time</b>
12.1 Identify all policies, programs and incentives that could help prevent resources from being demolished.	Short
12.2 Investigate enforcement options and disincentives to prevent demolition or willful neglect.	Short
12.3 Investigate the possibility of requiring justifications, timelines and development permits for new development prior to demolition permits being issued for heritage resources, to prevent mediocre development or land being left vacant.	Short
12.4 Develop stronger maintenance regulations to enable the City to enforce repairs on Municipal Historic Resources.	Short
12.5 Ensure that lost historic resources or sites are commemorated through incorporation into new development.	Ongoing





**Policy 13 - Expedite processes**

**The City will give priority to those development applications involving historic resources.**

<b>Actions</b>	<b>Time</b>
13.1 Encourage pre-consultation processes for owners of historic resources intending on developing their properties.	Ongoing
13.2 Investigate what options are available for streamlining applications related to the redevelopment of historic resources.	Short

**Policy 14 - Development policies and guidelines**

**The City will develop policies, regulations or guidelines to ensure that historic resources and their immediate surroundings are included in the development process.**

<b>Actions</b>	<b>Time</b>
14.1 Develop policies, regulations or guidelines in statutory plans, zoning and overlays that protect historic resources.	Long
14.2 Develop regulations, guidelines, or processes to ensure that development in areas surrounding historic resources respects the heritage value of the historic resource.	Long
14.3 Maintain a Heritage Checklist and encourage all planners to utilize it as part of the evaluation process.	Ongoing
14.4 Develop design regulations for identified heritage areas to ensure infill development is sensitive and in character.	Medium
14.5 Develop partnerships with other programs and agencies that allow historic resources to accommodate new technology or modern standards. e.g. insulation, windows.	Long



Activity 3: Promotion

Policy 15 - Heritage promotion and awareness

The City will continue to support and initiate heritage programs and initiatives that promote and advocate for greater heritage awareness.

Actions	Time
15.1 Develop partnerships with social, cultural and business groups to promote heritage and consider providing funding where deemed appropriate.	Ongoing
15.2 Research promotional practices in other cities/jurisdictions.	Ongoing
15.3 Develop a heritage communications plan to promote the Historic Resource Management Program.	Short
15.4 Develop heritage tours in partnership with other groups.	Ongoing
15.5 Develop promotional material on heritage programs in the City, such as brochures, hand book, books, videos, web, etc.	Ongoing
15.6 Develop regular media (e.g. print, television, radio) reports to promote heritage preservation	Ongoing
15.7 Develop a Heritage Awards Program to recognize various aspects of heritage work in the city; not limited to designated or recognized historic resources; but also more broad based and include such organizations as the Federation of Community Leagues and the Edmonton Historical Board.	Short
15.8 Develop an internal information workshop to educate staff about the Historic Resource Management Program and how it impacts their decision making processes.	Short

Policy 16 - Heritage documentation

The City will promote and ensure that heritage education, documentation and research material is readily available.

Actions	Time
16.1 Develop a variety of heritage talks and promotional materials dealing with heritage to educate the public and special groups like realtors and developers.	Short
16.2 Identify social, economic and community benefits of heritage preservation.	Ongoing
16.3 Develop materials that could be implemented in Edmonton's school board curriculums and various outreach programs.	Long
16.4 Develop a comprehensive website to ensure accessibility of heritage information.	Short
16.5 Develop a list of services and trades skilled in heritage conservation/ preservation.	Short



**Activity 4: Monitoring**

**Policy 17 - City Governance**

**Heritage will be an integral consideration in policy development and in other City incentives and programs.**

<b>Actions</b>	<b>Time</b>
17.1 Develop additional triggers, where possible, in the planning process to ensure heritage resources are identified and relevant processes to protect them are initiated.	Medium
17.2 Determine what other government incentives and programs serve as disincentives for heritage projects. For example, inappropriate windows may be installed through the Residential Rehabilitation Alberta Program (RRAP).	Medium
17.3 Investigate what legislation supports or negatively impacts historic resources and identify how it may be utilized and improved to further heritage conservation efforts.	Medium

**Policy 18 - Notification and circulation**

**The City will work to improve the notification and circulation process where historic resources are affected by development.**

<b>Actions</b>	<b>Time</b>
18.1 Work with the media (TV, Newspaper, Internet) to respond to heritage issues as they arise.	Ongoing
18.2 Develop and maintain a list of heritage organizations that should be notified or contacted to review applications that negatively affect major historic resources.	Short
18.3 Investigate if it is feasible to create a notification process for properties immediately surrounding historic resources that are subject to development proposals.	Long

**Policy 19 - Enforcement**

**The City will enforce non-compliance issues pertaining to historic resources.**

<b>Actions</b>	<b>Time</b>
19.1 Investigate what tools and legislation are available to enforce appropriate heritage standards on non-compliant historic resources or those being willfully neglected.	Medium



**Policy 20 - Maintenance**

**The City will continue to monitor and implement the maintenance process for its Municipal Historic Resources.**

<b>Actions</b>	<b>Time</b>
20.1 Maintain a monitoring schedule and process for owners and heritage planners to review all historic resources.	Short

**Policy 21 - External monitoring**

**The City will develop and maintain working relationships with heritage groups to consult with or assist in monitoring historic resources.**

<b>Actions</b>	<b>Time</b>
21.1 Investigate ways in which the City could work with various civic agencies, heritage groups, advisory panels and the Edmonton Federation of Community leagues for consultation and assistance with monitoring and identifying historic resources.	Medium
21.2 Investigate how the recommendation for an Edmonton Heritage Council in the Edmonton Arts Council's cultural and heritage plan, <i>The Art of Living</i> , can be closely aligned or integrated with the initiatives of the <i>Historic Resource Management Plan</i> .	Short



Activity 5: Broader Heritage Initiatives

Policy 22 - Cultural places

Significant landscapes, icons, viewsapes and activities that contribute to the City’s urban fabric and character will be afforded appropriate recognition and suitable protection.

Actions	Time
22.1 In collaboration with other City departments, create an inventory of significant historic cultural icons, landscapes, corridors, activities or locations and set up an appropriate methodology to review them.	Short
22.2 In collaboration with other City departments, create an inventory of significant natural landscapes and trees and set up an appropriate methodology to review them.	Short
22.3 Pursue natural/cultural landscape designation for significant sites	Medium
22.4 Develop zoning regulations and/or guidelines for significant cultural landscapes.	Long

Policy 24 - Archaeological/Paleological

The City will document and map archaeological or paleological sites and integrate them into the development decision making processes.

Actions	Time
23.1 Develop an archaeological/paleological plan or overlay in cooperation with the province for planners to reference when dealing with development applications.	Short
23.2 Develop minimal development setbacks from archaeological/paleological sites and with appropriate interpretation on the findings.	Long

Policy 24 - First Nation, Métis and Inuit

The City will document and map all known First Nations, Métis and Inuit sites, burial grounds and areas of cultural significance and integrate them into the development decision making processes.

Actions	Time
24.1 Develop a plan or overlay with the Office of Diversity and Inclusion that identifies sites of significance to First Nations, Métis, and Inuit for planners to reference when dealing with development applications. As part of the plan or overlay consideration will be given to establishing minimal development setbacks and appropriate interpretation.	Medium
24.2 Recognize the Rosedale area as a significant site to the First Nation, Métis and early settlers	Medium



## Glossary

**Canadian Register of Historic Places:** the Canadian Register of Historic Places provides a single source of information about all historic places recognized for their heritage value at the local, provincial, territorial and national levels throughout Canada.

**Character-defining elements:** the materials, forms, location, spatial configurations, uses and cultural associations or meanings that contribute to the heritage value of a historic place, and which must be retained in order to preserve its heritage value.

**Edmonton Historical Board:** the Edmonton Historical Board is a civic agency that advises City Council on historical issues and civic heritage policies. The mandate of the Board is to encourage, promote, and advocate for the preservation and safeguarding of historical properties, resources, communities, and documentary heritage.

**Heritage value:** the aesthetic, historic, scientific, cultural, social or spiritual importance or significance for past, present or future generations. The heritage value of a historic place is embodied in its character-defining materials, forms, locations, spatial configurations, uses and cultural associations or meanings.

**Historic Places Initiative:** a collaborative program between the federal, provincial, and territorial governments to recognize the value of historic places in Canada. The Initiative has produced the Canadian Register of Historic Places and the Standards and Guidelines for the Conservation of Historic Places in Canada.

**Historic Resource:** structures, manmade or natural sites or areas of significance to the history of Edmonton which contribute to the City's unique sense of time and place.

**Historic Resources Review Panel:** a sub-committee of the Edmonton Historical Board that reviews applications to amend the *Register and Inventory of Historic Resources in Edmonton*. The Panel is composed of volunteers from the Edmonton community who have been selected for their knowledge of or interest in local history and architecture.

**Municipal Historic Resource:** a Municipal Historic Resource is legally protected from demolition through a bylaw passed by City Council. All designated Municipal Historic Resources are listed on the Register of Historic Resources in Edmonton and are eligible for funding through the Historic Resource Management Program.

**Register and Inventory of Historic Resources in Edmonton:** the Register and Inventory is a comprehensive list of historic places in Edmonton. The Register refers to those buildings that have been designated as Municipal Historic Resources while the Inventory refers to a list of buildings that are worthy of municipal designation. The Inventory also includes an appendix of buildings in Fort Edmonton Park, important landscape features, monuments, street furnishings and architectural fragments.

**Standards and Guidelines for the Conservation of Historic Places in Canada:** the standards and guidelines were developed by Parks Canada as a common reference point for the conservation practice across Canada. The Standards and Guidelines have been adopted as best practice by the Government of Alberta.



## Appendix 1

### 1a. Process to acquire a development permit for direct control (DC1) heritage districts.

Certain statutory plans require the Heritage Officer to review development proposals in Direct Control (DC1) districts and to comment on whether the proposed development complies with the objectives and development regulations of that district. For example, the Old Strathcona Area Redevelopment Plan includes specific regulations governing the appearance of buildings in the Provincial Historic Area.

The steps below outline the process to acquire a development permit in a Heritage DC1:

- Step 1.** Any member of the public may complete a development application for a development permit if they are proposing new construction or alterations to a building located in a Direct Control (DC1) Heritage District.
- Step 2.** All development applications for structures in Direct Control (DC1) Heritage Districts are reviewed by the Heritage Planner with Planning and Development.
- Step 3.** If the Heritage Officer recommends that the application be approved, then it is returned to the Development Officer.
- Step 4.** The Development Officer considers the opinion of the Heritage Officer plus other planning related issues and then may approve the permit.

- Step 5.** If the Heritage Officer does not recommend approval of the application, then the owner, Development Officer and Heritage Officer meet to discuss possible changes to the application.
- Step 6.** If the discussions are successful and the application is changed, then the Development Officer may issue the permit with or without conditions.
- Step 7.** If the discussions are not successful, then the permit is refused at which point the applicant may appeal to the Subdivision Development Appeal Board (SDAB).
- Step 8.** The SDAB may approve or refuse the permit. If refused, the applicant may reapply for another development permit after 6 months has lapsed.

The process may be amended from time to time.



**1b. Process to designate a municipal historic resource according to the Alberta Historical Resources Act and City Policy C-450B, where an owner wishes to have a resource designated.**

The steps below outline the process to designate a building as a Municipal Historic Resource:

- Step 1:** An owner submits a proposal to have a building designated as a Municipal Historic Resource to the Heritage Officer of Planning and Development.
- Step 2:** The Heritage Officer determines if the building meets the criteria for designation as a Municipal Historic Resource, i.e. is the building on the *Register and Inventory of Historic Resources in Edmonton*? If the building is not on the Inventory, the applicant is notified to apply for inclusion on to the Inventory through the Historic Resources Review Panel of the Edmonton Historical Board.
- Step 3:** If the historic resource does not merit designation, the applicant is notified.
- Step 4:** If the building meets the criteria for designation, the City Administration prepares the necessary documents (as per City policy) and recommends that Council issue a “Notice of Intention to Designate a Municipal Historic Resource.”
- Step 5:** Council will consider the application for designation.

**Step 6:** If Council agrees to designate the resource, the “Notice of Intention to Designate a Municipal Historic Resource” is issued and a designating Bylaw is passed after a 60 day period has lapsed.

**Step 7:** If Council does not agree to designate the building, the “Notice of Intention to Designate a Municipal Historic Resource” is not issued and the applicant is notified.

The process may be amended from time to time.





**1c. Process to designate a Municipal Historic Resource according to the Alberta Historical Resources Act and City Policy C-450B where an owner does not wish to have resource designated.**

- Step 1:** A building owner or their representative applies to a Development Officer for a development permit to demolish a building on the Inventory or within a heritage DC1.
- Step 2:** The Heritage Officer reviews all Development Permit Applications before demolition permits are issued. The Heritage Officer evaluates the architectural and/or historical significance of the structure and recommends approval or refusal of the application for demolition.
- Step 3:** If the structure is deemed not to warrant designation, a development permit for demolition is issued.
- Step 4:** If the building is significant, the Heritage Officer requests that the Development Officer not grant a permit. The Heritage Officer will approach the owner to determine what options are available to save the resource.
- Step 5:** If the applicant and the Heritage Officer can agree on a process or course of action that saves the building and/or designates it, see the process to designate a Municipal Historic Resource. If there is no agreement with the owner proceed to step 6.
- Step 6:** The Heritage Officer prepares a Notice of Intention to Designate for Council consideration. (This report must be brought forward to Council within 40 days of the permit application. Under the Municipal Government Act, after 40 days the demolition permit is deemed to have been refused and the owner may appeal this decision to the SDAB – see Step 10).
- Step 7:** If Council does not approve the issuance, the Notice of Intention to Designate a Municipal Historic Resource is not issued and the applicant is notified that the City will allow a demolition permit to be approved. The Development Officer issues the demolition permit.
- Step 8:** If Council approves the issuance, the Notice of Intention to Designate a Municipal Historic Resource is issued. In order to protect the resource, a designating bylaw must be passed within 120 days of the issuance of the Notice of Intention to designate.
- Step 9:** The Designating Bylaw identifies the details of the compensation to be made to the owner of the property. If compensation is not agreed to, the owner may apply to the Land Compensation Board, which will determine the amount of compensation.
- Step 10:** If 40 days from the time of application for a demolition permit elapses prior to a report to Council, the applicant may appeal to the SDAB, which may grant the permit. If the permit is granted, the building may be demolished, unless a Notice of Intention to Designate is issued prior to demolition.
- Step 11:** If the SDAB upholds Planning and Development's position that the building cannot be demolished, then Planning and Development will negotiate with the property owner in accordance with City Policy C450B. A report is prepared for Council's consideration recommending designation.



## Appendix 2 Management strategy for the Register and Inventory of Historic Resources in Edmonton

The table outlines the Planning and Development Department’s strategy for resources identified on the *Register and Inventory of Historic Resources in Edmonton*. The Heritage Officer will notify City Council when a demolition permit application has been received for any building on the Register and Inventory as per Appendix 1c.

All resources on the Register and Inventory of Historic Resources in Edmonton:	
1	merit preservation and designation as Municipal Historic Resources;
2	are eligible for designation under Policy C-4 50B and a variety of incentives);
3	are flagged on POSSE (Building Inspection Information System) where development permits are tracked;
4	should have priority processing for development permits;
5	may have potential development regulations relaxed (parking, loading, amenity space requirements setbacks, nonconforming building relaxations, etc.);
6	are reviewed by the Heritage Officer when development applications are received. In cases where the proposal is unsympathetic to the resources character, the Heritage Officer will provide the owner with appropriate alternatives. The Heritage Officer may bring proposals to the Historic Resources Review Panel and/or the Edmonton Design Committee for review where there is difficulty in obtaining an appropriate solution;
7	will be reviewed and subject to intervention by the Heritage Officer when a development application to demolish is received. When this occurs the Heritage Officer will provide the owner with information on alternative options to demolition and explore options to retain the resource;
8	that are subject to a development application to demolish will be brought to the attention of Council.



## Appendix 3

### *Mandated Tasks of the Heritage Officer*

The main priority of the Historic Resource Management Plan is to preserve buildings on the *Register and Inventory of Historic Resources in Edmonton*. Other priorities are identified below:

- Implement the Historic Resources Management Plan and keep it current.
- Maintain and update the *Register and Inventory of Historic Resources in Edmonton*.
- Fulfill the statutory requirements relating to historic resources. These include the provisions of the *Historical Resources Act* and municipal bylaws. These provisions relate to the designation and administration of Municipal Historic Resources, the review of proposed developments in Direct Control Districts, and any other legal requirements relating to historic resources.
- To continue to develop policy options for the City of Edmonton to encourage the preservation of historic resources and Municipal Historic Resources.
- Increase public awareness of Edmonton's historic resources by providing information and advice to owners, developers, interest groups, individuals and the media.
- Provide advice and assistance to individuals, Council and groups interested in the preservation of Edmonton's historic resources.
- Review all development and demolition applications that affect historic resources on the Register and Inventory.

## Appendix 4

### *Review criteria for assessing resources to be placed on the Register and Inventory of Historic Resources in Edmonton*

To be eligible for designation as a Municipal Historic Resource a potential historic place must:

#### **1. Be an eligible resource type**

The resource must be eligible. All resources will be considered unless they are a Type 1 or Type 2 exclusion. In exceptional circumstances some Type 2 resources will be considered.

#### **2. Be significant to our past**

The significance of the resource is assessed within its historic context, using five criteria. A resource only needs to be significant in one of these categories to merit consideration for designation. Significance is determined by looking at the resource's historical and architectural merits in the context of when it is deemed to have been important.

#### **3. Possess Integrity**

The integrity of the resource is assessed in relation to its significance, taking into account its character-defining elements. Integrity is directly related to the criterion for which it has been determined to have significance. The integrity evaluation must look at the resource's physical features and how to maintain or keep the evaluated significance.



## Eligibility

### Type 1 Exclusions:

The following resources are not eligible for municipal designation:

**a. Buildings, structures or objects that are situated in an historical theme park**

One of the basic purposes of designation is to encourage the preservation of historic resources as living parts of their communities. In keeping with this purpose, artificial groupings of buildings that have been created for purposes of interpretation, protection, or maintenance are not eligible.

**b. Small moveable objects**

Small moveable objects not designed for a specific location are not eligible. Such works include transportable artifacts, sculpture, furniture, and other decorative arts that, unlike a fixed outdoor sculpture, are not associated with a specific place.

**c. Reconstructions**

Reconstruction is defined as the process of recreating the exact form and detail of a vanished resource or major part thereof. A resource in which most or all of the fabric is not authentic is not eligible for designation.

**d. Human remains**

Human remains are beyond the purview of the *Historical Resources Act* and therefore are not eligible for designation.

**e. Buildings, structures or objects outside municipal jurisdiction**

Resources located in areas owned or regulated by the federal government, provincial government and the University of Alberta, nor are any resources located outside of Edmonton's municipal boundary.

### Type 2 Exclusions:

The following resources are not ordinarily eligible for municipal designation, but may qualify for an exception:

**a. Cemeteries**

A cemetery is a collection of marked graves, or is unmarked but recognizable by features such as fencing or depressions, or through maps, or by means of testing. Cemeteries serve as a primary means of an individual's recognition of family history and as expressions of collective identity.

*However:* A cemetery may qualify if it derives its primary significance from distinctive design features or is associated with a significant event (in all circumstances, cemeteries are designated exclusive of any human remains).

**b. Birthplaces or graves**

Significant persons are normally recognized by designating resources related to the period of their importance/significance, which reflects that person's productive life's work. Therefore, birthplaces or graves, which represent the beginning and the end of the life of individuals and may relate to the period and location of a person's significant activities, are not usually considered eligible.

*However:* The birthplace or grave of a figure of importance may qualify, if there is no other appropriate resource associated with their productive life (in all circumstances, human remains are excluded).



**c. Resources that have been moved**

Moving a resource destroys the relationships with its surroundings and destroys associations with historic events and persons. A move may also cause the loss of historic features such as landscaping, foundations, and chimneys, as well as loss of the potential for associated archaeological deposits.

*However:* A moved resource may qualify if:

- i. it was moved early in its history and became significant on its new location in the last 50 years. OR
- ii. it has exceptional architectural value. OR
- iii. it is one of the last significant resources associated with an historic theme, event, activity, person or institution. OR
- iv. it was specifically designed to be relocated as part of its normal use. OR
- v. it is in the immediate vicinity of its original location and its association with its historic environment is maintained.

**d. Resources primarily commemorative in nature**

Commemorative resources are designed or constructed after the occurrence of an important historic event or after the life of an important person and serve as evidence of a later generation's assessment of the past.

*However:* A commemorative resource may qualify if its design, age, tradition, or symbolic value has invested it with its own significance, where its value is as a cultural expression from the date of its creation. Therefore, such a resource generally must be over 50 years old and possess significance based on its own value, not on the value of the event or person being memorialized.

**e. Resources that have achieved significance in the last 50 years**

50 years is the general estimated time needed to develop historical significance. This prevents listing resources of passing contemporary interest and ensures Edmonton's designated resources are truly historic places.

*However:* A resource less than 50 years old may qualify if:

- i. it can be demonstrated that the resource is extraordinarily significant under any of the five significance criteria. OR
- ii. it is particularly fragile, of high significance, and would probably not survive for 50 years without protection/recognition.

**Significance**

Significant resources are important under at least one of the five criteria listed below. A resource's significance is determined by looking at:

**Context:** The framework within which the significance of a resource can be examined. The context of a resource does NOT make an argument for the importance of the resource, but provides relevant background information to assess the resource in relation to similar resources. The context depends upon which evaluation criteria are applicable.

**Significance:** A resource must be significant within the established context. Simple association with one or more significance criteria is not sufficient. The association must be important. For example, a building historically in commercial use must be shown to have been significant in Edmonton's commercial history. Important associations must be documented, not speculative.



### **Significance Criteria:**

#### **A. Theme/Activity/Cultural Practice/Event**

A resource must be directly associated with a theme, activity, cultural practice or event that has made a significant contribution to the broad pattern of Edmonton's history.

**Context:** What is the historical context with which this resource is associated? Explain how the event or pattern of events contributed to Edmonton's history, and how related types of resources reflect these events. Are there more similar resources?

**Significance:** A resource could be associated with a single event, such as the signing of a treaty, or with a pattern of events, repeated activities, historic trends or themes, such as the rise to prominence of the oil and gas industry. Significance relating to cultural practice is derived from the role a resource plays in historically rooted beliefs, customs, and practices.

#### **B. Institution/Person**

A resource must be directly associated with a significant institution or with the life of a significant person in Edmonton's past.

**Context:** What is the historical context of the institution or person associated with this resource? Explain the role of the institution or person in Edmonton's history. Identify other resources associated with the institution or person and explain their role in the career of the institution or person.

**Significance:** A resource must be directly associated with an institution or person that is significant within the defined context. The resource is usually associated with an institution or person's productive life, reflecting the time period when he or she or it achieved significance. For example, a person's home, laboratory, or studio may best represent their contribution. Can it be demonstrated that the activities during this period were historically significant or that no other resources from the person's productive years survive? Consider the time period associated with the resource and significant person or institution.

Several resources associated with an institution or person may be eligible if each resource represents an important aspect of their productive life. A resource may also be eligible if it had brief but consequential associations with an important institution or person.

#### **C. Design/Style/Construction**

A resource must embody the distinctive characteristics of a type, style, period, or method of construction, or represent the work of a master, or express high artistic values, or represent a significant and distinguishing entity or district, the components of which may lack individual distinction.

##### **i. Type, style, period or method of construction**

**Context:** Explain why the type, style, period, method of construction, or architectural features represent a significant period or part of Edmonton's development.

**Significance:** A resource must clearly illustrate the following:

- The pattern of features common to a particular class of resources;
- The individuality or variation of features that occurs within the class;
- The evolution of that class;
- The transition between classes of resources.

##### **ii. Work of a master**

**Context:** Provide facts about the career and work of the artist, architect, engineer, or landscape architect to explain how the person was accomplished in his or her field and made contributions to the art, architecture, or landscape architecture of Edmonton.

**Significance:** A master is a figure of generally recognized greatness in a field, a known craftsman of consummate skill, or an anonymous craftsman whose work is distinguishable from others by its characteristic style and quality. The resource must express a particular phase in the development of the master's



career, an aspect of their work, or a particular idea or theme in their craft. A resource is not eligible simply because it was designed by a prominent architect.

### **iii. High artistic values**

**Context:** Describe the quality of artistry or craftsmanship present in comparable works in Edmonton.

**Significance:** High artistic value may be in the form of community design or planning, engineering, architecture and sculpture. A resource is eligible if it fully articulates a particular concept of design that expresses an aesthetic ideal. A resource is not eligible, however, if it does not express aesthetic ideals or design concepts more fully than other properties of its type.

### **iv. Districts**

**Context:** Discuss how the associations, architectural types, styles and periods reflected by the district represent one or several aspects of Edmonton's historic development, whether the city has a number of districts with the same or similar qualities, and how the district is unique or representative in comparison to other districts representing its theme and period.

**Significance:** Is the district unique, having a distinct quality not commonly found elsewhere, or, are the collective resources in near original condition, representing a significant and distinguishable entity but whose components may lack individual distinction?

### **D. Information Potential**

A resource must have yielded, or be likely to yield, information important to Edmonton's history, prehistory or natural history.

**Context:** What is the historical context for the research topic that this resource and its physical materials have the potential to address? Explain why the information the resource has yielded or is likely to yield is important to the knowledge of Edmonton's prehistory or history.

**Significance:** A resource must have provided or have the potential to provide:

- important information about a particular theme, event, institution or person, or about a particular type of building, structure or object;
- an opportunity to test a hypothesis, corroborate or amplify currently available information, or reconstruct the sequence of cultures, species or geological formations.

Certain important research questions about human history can only be answered by the actual physical material that comprises some cultural resources. The most common type of resource under this criterion are archaeological sites. Buildings, objects, and structures, however, may also be eligible.

### **E. Landmark/Symbolic Value**

A resource must be particularly prominent or conspicuous and must have acquired special visual, sentimental or symbolic value that transcends its function. A landmark contributes to the distinctive character of Edmonton or its neighbourhoods.

**Context:** What is the historical context within which this resource acquired its landmark or symbolic value? Describe the historical events associated with the resource, and the geographical situation of the resource within Edmonton. Provide information about how and why it acquired its landmark or symbolic value, and indicate its relationship to any other similar resources in the city.

**Significance:** A resource must satisfy one or more of the following conditions:

1. It is particularly prominent or conspicuous and contributes to the distinctive character of the city or neighbourhood
2. It has acquired special visual, sentimental or symbolic value that transcends its function or physical characteristics within the city or neighbourhood.



## Integrity

Integrity is the ability of the resource to convey its significance. A resource must not only be shown to be significant and of an eligible type; it also must have integrity. The integrity assessment takes into account both the resource's character-defining elements and the applicable 'aspects of integrity'. It is important to understand how a resource's physical features relate to its significance.

### Steps Involved In Assessing Integrity

1. Identify the resource's key character-defining elements. These are the physical features that must be present to communicate its significance.
2. Determine which of the 'aspects of integrity' are applicable to the criterion under which the resource is being evaluated, and whether they are present.

## Seven Aspects of Integrity

The following seven areas are considered against the criteria that make the resource significant and its character-defining elements.

### 1. Location

Location is the *place* where an historic resource was constructed or the site where an historic activity or event occurred. It is important to understand why a resource was created or why an event happened there. Except in rare cases, the relationship between a resource and its historical associations is destroyed if the resource is moved. Location is not the same as the character of the place in which a resource played its historic role (see 3. Environment, below).

### 2. Design

Design is the *combination of elements* that create the form, plan, space, structure and style of a resource. A resource's design reflects historic function, technologies and aesthetics. Design should relate to either the original conception and planning or its significant alteration. Design may include: structural systems, form and massing, arrangement of spaces, pattern of fenestration, textures and colours of surface materials, type, amount and style of detailing, arrangement and type of plantings in a landscape, etc.





**3. Environment**

Environment is the *physical setting* of an historic resource, referring to the character of the place in which a resource played its historic role. It considers relationships between resources and their surrounding features and its contribution to the sense of continuity to the area. Features to consider include: topographic features, vegetation, manmade features (paths or fences), open space, character of the street, neighbourhood or area, etc.

**4. Materials**

Materials are the *physical elements* that were combined or deposited during a particular time frame and in a particular pattern or configuration to form the resource during its period of historical significance. The historic materials and significant features should be present and their original inter-relationships retained.

**5. Workmanship**

Workmanship is the *physical evidence* of the crafts of a particular culture or people during any given period in history. It is important because it can provide information about technological practices and aesthetic principles. Workmanship can be: plain or ornamental, basic or sophisticated, based on tradition or innovative techniques and be seen in all or individual parts of a resource.

**6. Feeling**

Feeling is the resource's continued *ability to convey* the aesthetic or historic sense of a particular period of time. It results from the presence of physical features that, taken together, express the resource's historic character.

**7. Association**

Association is a *direct link* between an historic resource and a significant historical theme, activity or event; or an institution or person. A resource retains association if it is the place where the event or activity occurred and is sufficiently intact to convey that relationship to an observer.



# CITY POLICY

Policy #: C450B  
Supersedes: C450A

Reference: City Council 1988 October 25  
Historical Resource Act RSA 2000

Date: September 3, 2008  
Prepared by: Planning and Development

## **Policy Statement:**

Historic Resources are integral in providing a sense of identity and place both for tourists and more importantly, for local citizens. Historic buildings and streetscapes in Edmonton provide a tangible connection to the past and serve as a testament to the passage of time, reminding us of our collective history. This policy provides guidelines for the identification, management, protection and promotion of historic resource to enhance the quality of Edmonton's environment for the benefit of present and future generations.

## **The purpose of this policy is to:**

Encourage the designation and conservation of historic resources in Edmonton. Through this policy the City of Edmonton will be involved in five main areas of activity:

### **1. Inventory and Register of Historic Resources in Edmonton**

The City of Edmonton will maintain, update and review the Inventory and Register of Historic Resources in Edmonton to ensure that important resources are identified and recorded.

### **2. Rehabilitation Incentives**

The City of Edmonton will provide incentives to encourage the restoration of historic resources. These incentives may be in the form of financial or development incentives.

### **3. Promotion**

Educate the public about the benefits that heritage conservation brings to the city at large.

### **4. Monitoring**

The City of Edmonton will continue to put in place mechanisms to ensure that historic resources are accounted for in the development process.

### **5. Broader Heritage Initiatives**

The City of Edmonton will integrate the Historic Resource Management Program with other heritage initiatives such as museums, archives and archaeological work.

This policy is subject to any provisions of the Municipal Government Act or other relevant legislation.



# CITY POLICY

## 1.0 DEFINITIONS

- 1.1 Application for Designation: an application submitted to the Planning and Development Department by the owner of the historic resource voluntarily requesting that it be designated a Municipal Historic Resource.
- 1.2 Assessed Value: the current year's assessed value as calculated for the property by the City Assessor.
- 1.3 Building Permit Documents: means the documents, which fully develop and detail the Development Permit Documents, which authorize the implementation of the work as approved by the Development Officer. The Building Permit Documents includes the plans, specifications and conditions of final approval for the rehabilitation of the Historic Resource. The City of Edmonton Planning and Development Department shall issue a building permit upon satisfactory compliance with the appropriate building regulations and approved Development Permit as verified by the Safety Codes Officer and the Heritage Planner.
- 1.4 Compensation: In circumstances where a designation is pending against the wishes of an owner, and the owner has demonstrated by way of an independent property/building analysis and appraisal to City Council, an economic loss as a direct result of a Municipal Historic Resources designation, compensation will be paid pursuant to the Historical Resources Act, Revised Statutes of Alberta, 2000, c.H-9, as amended. Compensation may be in the form of a direct grant, rebate of property taxes in, planning relaxations or variances or by any other means of incentive deemed acceptable to the City and owner of the resource. Compensation will not be paid to the owner until a minimum of 120 days after receipt of the above reports by the Planning and Development Department and after such time as the financial commitment has been approved by City Council.
- 1.5 Development Permit: means the document authorizing a development issued by the Development Officer pursuant to the Edmonton Land Use Bylaw. The document includes the plans and conditions of approval for the substantial rehabilitation of the Historic Resource, which are required to be detailed at the building permit application stage.
- 1.6 Hard Costs: pursuant to this policy, hard costs shall mean those costs directly attributable to the rehabilitation of the historic resource and may include:



# CITY POLICY

- architectural detailing and woodwork
- exterior cleaning, preparation and painting
- doors and windows
- major structural work, including foundations
- roofs
- flashing, caulking and weather-stripping
- masonry conservation
- interior spaces (in exceptional circumstances)
- exterior cladding
- professional services that contribute to the restoration of the building

but does not include:

costs associated with work not specified in the Rehabilitation Incentive Agreement or not identified in the Regulated Portions, administration, permit, legal, consulting and other similar soft costs acquisition, operating, tenant improvements (except those described as interior spaces, above) new construction and energy retrofitting (i.e. insulation, vapour and moisture retardants), building or utility services including amenities and/or access mechanisms features which do not exist at the time of Application for Designation, except for those components which are essential to the overall heritage character and/or understanding of the historical significance of the resource.

- 1.7 Historic Resource: means any built structure, object or cultural resource on *The Inventory and Register of Historic Resources in Edmonton* that is primarily of value for its history, architecture, urban context and integrity.
- 1.8 Historic Site: means any site which includes or is comprised of an historic resource of an immovable nature or which cannot be disassociated from its context without destroying some or all of its value as an historical resource and includes an historic or natural site or structure.
- 1.9 The Inventory of Historic Resources in Edmonton (*The Inventory*): an inventory of historic resources, which have been identified as having historical and/or architectural significance and are located within the corporate boundaries of the City of Edmonton.



# CITY POLICY

- 1.10 Maintenance Agreement: a legal agreement entered into, between the City of Edmonton and the owner of a municipal historic resource which obliges the owner to undertake the necessary maintenance required to prevent unnecessary deterioration of the public portions of the designated resource. The Maintenance Agreement shall be effective upon the date at which City Council adopts the Designation Bylaw and associated agreements and applies to the entire designated building. The Maintenance Agreement shall be effective upon the date at which the rehabilitation work outlined in the agreements is complete to the satisfaction of the Heritage Planner and is accompanied by a Notice of Completion Report or letter. The agreement specifically applies to those 'regulated portions' associated with designating Bylaw or work that affects the integrity of those portions.
- 1.11 Maintenance Incentive: a direct grant, rebate of property taxes in various forms, planning relaxations or variances or by any other means of incentive provided by the City which may be offered to a building owner for maintenance work to the regulated portions of a designated municipal historic resource. The Maintenance incentive is for the hard costs directly associated with the maintenance of the historic resource and is payable according to the terms and conditions of the Maintenance Incentive Agreement.
- 1.12 Maintenance Incentive Agreement: a legal agreement entered into, between the City of Edmonton and the owner of a municipal historic resource which details the financial aspects of the Maintenance Incentive as well as the terms and conditions for payment.
- 1.13 Municipal Historic Resource Designation: the designation by bylaw of an historic resource and land upon which it sits, by City Council pursuant to the Historical Resources Act, Section 26, Revised Statutes of Alberta, 2000, , c.H-9, as amended. The designated land and building will be rezoned DC1 (Direct Development Control) Zone, under the Land Use Bylaw. The designating bylaw shall apply to the whole historic building.
- 1.14 Municipal Property Tax: the tax amount levied by the City of Edmonton based on the assessment established by the City Assessor and the mill rate established annually by bylaw by City Council. The municipal property tax excludes the school taxes.



# CITY POLICY

- 1.15 Occupancy Permit: the permit issued by the City of Edmonton Planning and Development Department upon full completion of the rehabilitation and compliance with the appropriate building regulations have been verified by the Safety Codes Officer and the Heritage Planner.
- 1.16 Rehabilitation: the process of returning a building or portions of a building to a state of utility, through repair, or alteration, which make it possible to facilitate a contemporary use while preserving those portions and features of the building which are significant to its historic,–architectural values. Rehabilitation shall also mean the work which is described in the Rehabilitation Incentive Agreement.
- 1.17 Rehabilitation Incentive: A direct grant, rebate of property taxes various forms, planning relaxations or variances or by any other means of incentive which may be offered to a building’s owner who voluntarily requests Municipal Historic Resource Designation. A rehabilitation incentive is a direct payment for the rehabilitation of specified regulated portions of the historic resource as determined by the Planning and Development Department and approved by City Council. The rehabilitation incentive is a one-time grant for the hard costs directly associated with the rehabilitation of the historic resource and is payable according to the terms and conditions of the Rehabilitation Incentive Agreement.
- 1.18 Rehabilitation Incentive Agreement: a legal agreement entered into, between the City of Edmonton and the owner of a municipal historic resource which details the financial aspects of the Rehabilitation Incentive as well as the terms and conditions for payment. The Rehabilitation Incentive Agreement requires that an owner waive any future claim, which has monetary or other value from the City of Edmonton.
- 1.19 The Register of Historic Resources in Edmonton (*The Register*): an inventory of designated Municipal Historic Resources historic resources, which have been identified as having historical and/or architectural significance and are located within the corporate boundaries of the City of Edmonton.

## **2.0 Eligibility and Applicability**

- 2.1 A Rehabilitation Incentive for eligible Historic Resources may be granted for buildings, which have been identified as having architectural and/or historical significance and are located within the corporate boundaries of the City of Edmonton.



# CITY POLICY

- 2.2 Only those portions of an historic resource, which have been identified in the Rehabilitation Incentive Agreement, are eligible for financial assistance. Eligible rehabilitation work must conform to the City's 'General Guidelines for Renovation' and the Standards and Guidelines for the Conservation of Historic Places in Canada.
- 2.3 This policy is applicable upon application by an owner of a building or by being offered by the City when the City wishes to designate a building or site as a Municipal Historic Resource.
- 2.4 A Maintenance Incentive for eligible Municipal Historic Resources may be granted for those portions of the building which have been identified as having architectural and/or historical significance as identified in their designating Bylaw (Regulated Portions).

## **3.0 Rehabilitation Incentives**

An owner of a historic resource may be eligible for rehabilitation incentives provided that Types 1 and 3 are not part of the same Rehabilitation Incentive Agreement.

### 3.1 Type 1 - Direct Grant

A direct payment to assist with the hard costs associated with the rehabilitation of the regulated portions of a designated Municipal Historic Resource will be reimbursed to the property owner upon submission of all certified receipts which apply to the approved work and to the satisfaction of the Heritage Officer. Such incentives shall not exceed 50% of the rehabilitation costs.

### 3.2 Type 2 - Non- Monetary Incentives

City Council may also consider other incentives deemed appropriate by the Planning and Development Department which encourage rehabilitation of a Municipal Historic Resource. These incentives may include the transfer of land use density, relaxation of parking, loading and amenity requirements, land transfers on any other means deemed appropriate by City Council.



# CITY POLICY

## 3.3 Type 3 - Tax Incentives

Level 1 If a building is designated a Municipal Historic Resource and undergoes rehabilitation a payment equal to the property taxes may be given to the owner up to a maximum 10 year period commencing January 1 of the year within which the construction is started. Such payments shall not exceed 50% of the approved rehabilitation costs.

Level 2 Upon completion of the rehabilitation and issuance of an occupancy permit, a payment may be given to the owner equal to any increase in the incremental portion of the municipal property tax for the designated building and may be rebated up to a maximum 10 year period. The portion of the municipal property tax which this payment shall be based upon shall be the difference between the taxes levied in the year prior to the beginning of the maximum 10 year period and the municipal property taxes levied in each year during the 10 year period. The maximum 10 year period shall commence in the year in which an occupancy permit is issued for the rehabilitation of the building. Such payments shall not exceed 50% of the approved rehabilitation costs.

## 4.0 **Maintenance Incentives**

An owner of a historic resource may be eligible for maintenance incentives provided that only one type of incentive is in the Maintenance Agreement.

### 4.1 Type 1 - Direct Grant

A direct payment to assist with the hard costs associated with the rehabilitation of the regulated portions of a designated Municipal Historic Resource will be reimbursed to the property owner upon submission of all certified receipts which apply to the approved work and to the satisfaction of the Heritage Officer. Maintenance Incentive grants shall not exceed 33% of the approved maintenance costs.





# CITY POLICY

## 4.2 Type 2- Tax Incentives

- Level 1 If a building is designated a Municipal Historic Resource and undergoes maintenance work, a payment equal to the property taxes may be given to the owner up to a maximum 10 year period commencing January 1 of the year within which the construction is started. Such payments shall not exceed 33% of maintenance costs.
- Level 2 Upon completion of the rehabilitation and issuance of an occupancy permit, a payment may be given to the owner equal to any increase in the incremental portion of the municipal property tax for the designated building and may be rebated up to a maximum 10 year period. The portion of the municipal property tax which this payment shall be based upon shall be the difference between the taxes levied in the year prior to the beginning of the maximum 10 year period and the municipal property taxes levied in each year during the 10 year period. The maximum 10 year period shall commence in the year in which an occupancy permit is issued for the rehabilitation of the building. Such payments shall not exceed 33% of maintenance costs.

## 5.0 Compensation Process

- 5.1 Compensation proposal to be prepared in accordance with format established by the Administration, to ensure adequate, consistent review and evaluation.
- 5.2 Administration reviews and evaluates proposal as outlined Section 4 of this policy.
- 5.3 Administration submits report, proposal recommendation, and designating bylaw to the Executive Committee.
- 5.4 Executive Committee considers report, recommendation and presents proposal, and designating bylaw to Council.
- 5.5 Proposed compensation request, redistricting if applicable, and designating bylaw considered by City Council.



# CITY POLICY

- 5.6 If the building merits designation as a Municipal Historic Resource, the building is designated through bylaw and the compensation agreement is approved by City Council.

## **6.0 Municipal Control**

- 6.1 The City of Edmonton shall be protected in the granting of compensation for the designation and rehabilitation of a Municipal Historic Resource through a variety of mechanisms including:
- 6.1.1 The Municipal Historic Resource will be designated through a bylaw approved by City Council prior to the granting of compensation;
  - 6.1.2 Full payment of all taxes and levies owed by the owner prior to submission of a request for compensation;
  - 6.1.3 Appropriate investigation of the owner and developer and the specific project;
  - 6.1.4 All school taxes, local improvement charges will continue to be paid;
  - 6.1.5 The total timeframe for compensation for the building will not exceed 7 years;
  - 6.1.6 No further compensation approved pursuant to Section 24.(4) of the Historical Resource Act, Revised Statutes of Alberta, 1980, as amended will be given to the owner once the Municipal Historic Resource Bylaw and agreement is passed by Council;
  - 6.1.7 Periodic inspection by the Heritage Officer will be conducted during construction of the project to ensure the development meets the "General Guidelines for Rehabilitation" and the "Standards and Guidelines for the Conservation of Historic Places in Edmonton";
  - 6.1.8 Tax rebate or cancellation received by the owner to be repaid if the Municipal Historic Resource is destroyed other than by an act of God or if the designating bylaw is rescinded by Council at the request of the owner/developer; and

This policy is subject to any provisions of the Municipal Government Act or other relevant legislation.



# CITY POLICY

6.1.9 The building and land upon which it sits will be districted DC1 (Direct Development Control District) under the Land Use Bylaw.



# CITY PROCEDURE

Policy Number: C450B

Authority: City Manager

Title: Policy to encourage the designation and rehabilitation of historic resources in Edmonton

## 1. Application Process for Rehabilitation Incentives

- 1.1 Owner submits proposal to the General Manager, Planning and Development Department.
- 1.2 The building must be designated a Municipal Historic Resource, pursuant to Section 26 of the Historical Resources Act, Registered Statutes of Alberta, 2000 as amended in order to be eligible for compensation pursuant to this policy. Prior to the submission of a Notice of Intention to Designate by the Planning and Development Department, the owner must have agreed to the type and amount of rehabilitation incentives.
- 1.3 As noted in the Historic Resource Management Plan, in order to qualify for designation as a Municipal Historic Resource, the building must first be listed on the Inventory of Historic Resources in Edmonton. The application process to amend the Inventory is outlined in Section 3 of this procedure.
- 1.4 As part of the designation process, a property owner may be eligible for compensation or various incentives in the form of a direct grant, rebate of property taxes, various forms, planning relaxations or variances or any other means of incentive deemed acceptable to both the City and owner of the resource. Financial assistance is payable according to the terms and conditions of the Rehabilitation Incentive Agreement, which is an attachment to the Designation Bylaw.

## 2. Application process for Maintenance Incentives

- 2.1 Owner submits an Application for Maintenance Incentive to the Planning and Development Department.
- 2.2 The building must be designated as a Municipal Historic Resource pursuant to Section 26 of the Historical Resources Act, RSA 2000, c.H-9, as amended, in order to be eligible for maintenance incentives. The owner must agree with the Planning and Development Department to the type and amount of maintenance incentives pursuant to this policy.



# CITY PROCEDURE

- 2.3 A property owner applying for a maintenance incentive may be eligible for various types of incentives including a direct grant or property tax rebate. Other means of incentive may also be used as deemed acceptable to both the City and the owner of the Municipal Historic Resource.
- 2.4 The incentive will be payable according to the terms and conditions of the Maintenance Incentive Agreement between the property owner and the City.

## 3. Other Considerations

- 3.1 The City is under no obligation to provide financial assistance in circumstances where it is offering an historic resource for sale; an inappropriate rehabilitation is being proposed or/and an owner breeches the spirit and/or significant aspect of an agreement or condition established to conserve the historic resource.
- 3.2 For all types of incentives a minimum level of maintenance must be ensured to minimize the deterioration of the historic resource. Minimum maintenance will include items deemed necessary by the Heritage Planner to ensure that the historic resource is not exposed to unnecessary or preventable deterioration.
- 3.3 Any resource that is on the Inventory of Historic Resources in Edmonton is eligible to become a Municipal Historic Resource. The total financial rehabilitation incentive shall not exceed 50% of the approved rehabilitation or 33% of the approved maintenance costs required by the designated resource. The Maximum period of time for receiving tax incentives shall not exceed 10 years, unless granted by City Council. Matching funds from other public sources will not be considered as the owner's contribution, but may be considered when calculating the maximum public source contribution.
- 3.4 Any financial assistance received by the owner shall be repaid if the Municipal Historic Resource or portions thereof are significantly altered or destroyed other than by Act of God.



# CITY PROCEDURE

3.5 Rehabilitation Incentives, as outlined in Section 4.0 of this policy will depend upon the extent of the rehabilitation and must comply with the “General Guidelines for Rehabilitation” and the Standards and Guidelines for the Conservation of Historic Places in Canada” as outlined in Section 6.0 of this policy.

## 4. Application Processes

4.1 The application process to amend the Inventory of Historic Resources in Edmonton is as follows:

4.1.1 An owner or owner's representative or other concerned party submits a written proposal or completed application form to the General Manager of the Planning and Development Department, or his designate, to amend the Inventory.

4.1.2 The Heritage Officer of Planning and Development Department evaluates the proposal to determine whether it meets any of the four criteria required to amend the Register. These are as follows:

- i) new information
- ii) alterations to the resource
- iii) demolition of similar resources
- iv) periodic review

4.1.3 The following information is required from applicants applying to amend the Inventory:

- name of resource
- municipal address
- photograph of resource
- registered owner of property
- age of resource
- descriptive summary concerning the architecture and history of the resource
- information relating to one or more of the amendment criteria as listed in Section 4.1.2



# CITY PROCEDURE

4.2 Once the application as been accepted, the following is the sequence of review and approval for amendments to the Inventory of Historic Resources in Edmonton:

- The Heritage Officer reviews the proposal and forwards it to the Edmonton Historical Board.
- The Historic Resource Review Panel reviews the proposal of the Edmonton Historical Board.
- The owner of the affected historic resource(s) is notified by the Heritage Officer and invited to provide input to the Heritage Officer.
- The Edmonton Historical Board reviews and either approves, modifies, or rejects the proposed amendment to the Inventory. The Board's recommendation is submitted to the Heritage Officer.
- The Heritage Officer submits his/her recommendation and the recommendation of the Edmonton Historical Board to the General Manager of the Planning and Development Department, or his designate.
- The General Manager of the Planning and Development Department, or his designate, approves/rejects/modifies the recommendations.

4.3 A Rehabilitation Incentive proposal shall be prepared in accordance with the format established by the Administration, to ensure adequate, consistent review and evaluation.

4.3.1 General information required from building owners applying for rehabilitation incentives pursuant to this policy shall include:

- Name of the building;
- municipal address and legal description of land;
- a legal survey of the building and site to be designated a Municipal Historic Resource. The survey will be prepared in accordance with standard practice and shall include any specific items as requested by the Heritage Planner. The survey must be no older than one year old;
- a copy of the City of Edmonton property tax notice showing taxes and levies have been paid for the year previous to the request being made for rehabilitation incentives;
- photographs of the building;
- name of the property owner;
- construction date



# CITY PROCEDURE

- Statements of significance of the architectural and historical aspects of the resource in a format supplied by the Heritage Planner.
- other information and/or documents required in the Application for Designation or as requested by the Heritage Planner in order to complete the application.
- outline of the type and total amount of rehabilitation incentive requested.

## 4.3.2 Additional Type 1 Information Requirements

Where rehabilitation is proposed by the owner and a Direct Grant is sought, then the following additional information is required:

- Three estimates of construction costs regarding the permit value of the project, certified by a contractor having demonstrated an acceptable level of experience in the type of work specified in the scope of work.
- Submission of a development permit application.
- Proposed work schedule on estimated time frames for project work to occur;
- Development plans or drawings in sufficient detail to allow consideration of the development permit by the Development Officer and the Heritage Planner.

## 4.3.3 Additional Type 2 Information Requirements

Where rehabilitation is proposed by the owner and a Non Monetary incentive is being sought the following additional information is required:

- A rationale or explanation for the desired incentive.
- The estimated economic value of such an incentive to the resource.
- Submission of a development permit application.
- Development plans in sufficient detail to allow consideration of the development permit by the Development Officer and the Heritage Planner.





# CITY PROCEDURE

## 4.3.4 Additional Type 3 Information Requirements

Where rehabilitation is proposed by the owner and a Tax Incentive is being sought the following additional information is required:

- Three estimates of construction costs regarding the permit value of the project, certified by a contractor having demonstrated an acceptable level of experience in the type of work specified in the scope of work
- Submission of a development permit application
- Development plans in sufficient detail to allow consideration of the development permit by the Development Officer and the Heritage Planner
- Proposed work schedule on estimated time frames for project work to occur

## 5.0 Evaluation Process

5.1 Based on the owner's proposal and analysis, the administration will conduct an evaluation based on:

- a) whether or not the building merits Municipal Historic Resource Designation;
- b) how the proposal conforms to the definition of "rehabilitation";
- c) whether or not the project is a substantial renovation;
- d) whether or not the owner/developer is requesting compensation pursuant to Section 4.4 of this Policy from City Council;
- e) what the costs/benefits are for the City, and;
- f) whether or not the rehabilitation adheres to the "General Guidelines for Rehabilitation" as outlined in Section 4.2 of this policy.

## 5.2 General Guidelines for Rehabilitation

These guidelines shall form part of the bylaw designating a Municipal Historic Resource.



# CITY PROCEDURE

## 5.2.1 Compatible Uses

Wherever possible, the uses proposed for a Municipal Historic Resource shall be compatible with the existing building such that only minimal changes are required to the building. The use of a Municipal Historic Resource for its original purpose is desirable.

## 5.2.2 Original Character

The original distinctive qualities and character of the building as designated by the Municipal Historic Resource Bylaw should be preserved. The removal or alteration of any historical materials or features shall be avoided whenever possible.

## 5.2.3 The Historic Period

The Municipal Historic Resource should be recognized as a product of its own time. Alterations which are not based on historical fact or which recreate an earlier or a later design idiom shall be discouraged.

## 5.2.4 Witness to Change

Changes to the Municipal Historic Resource may have occurred over time. These alterations are evidence of the history and development of the building. Because this evolution may have acquired a significance in its own right, alterations to the original building should be recognized and respected where indicated.

## 5.2.5 Style and Craftsmanship

Distinctive stylistic features and examples of skilled craftsmanship which have been designated by the Municipal Historic Resource Bylaw shall be preserved and treated sensitively.



# CITY PROCEDURE

## 5.2.6 Repair and Replacement

Deteriorated architectural features shall be repaired rather than replaced whenever possible. Where replacement is necessary, the new material should match the original as to composition, color, texture, design, etc. The repair or replacement of architectural features shall be based on a sound knowledge of the original characteristics of the feature. Such knowledge shall be based on historical or pictorial evidence and not upon conjecture.

## 5.2.7 Cleaning

In all cases, surface cleaning shall be undertaken with the gentlest means available. Sandblasting in particular, but also other cleaning methods, damage historic buildings and should not be undertaken without thorough testing prior to use on a building. Sandblasting is not recommended on brick, stone or wood. In all instances, it should be ascertained that a building exterior is really in need of cleaning prior to undertaking the work.

## 5.2.8 Reversibility of Improvements

When the introduction of new elements or materials are necessary to stabilize or preserve a municipally designated historic resource, alteration shall be undertaken such that the new materials, should they fail, may be removed at a later date without damage to the original fabric of the Municipal Historic Resource. Where this is not possible (i.e. use of epoxy) only those methods and materials which have been thoroughly tested and found satisfactory in situ, shall be used.

## 5.2.9 Recording

Prior to undertaking any alterations, particularly in cases where alterations may threaten the building fabric (underpinning, moving structures), the applicant shall compile a complete record of the architectural features of the Municipal Historic Resource. Measured drawings and photographs of details may prove invaluable if major features are damaged or lost during the subsequent repair work.



# CITY PROCEDURE

## 5.2.10 Original Construction Details

In some historic structures, poor construction details or inappropriate materials resulted in rapid deterioration of certain building elements. In these instances, accurate reconstruction of the original detail will inevitably result in the failure of the element. Therefore, reconstruction should be undertaken in such a fashion as to duplicate the original appearance as closely as possible while using details based on sound construction practice.

## 5.2.11 Codes

At no time should the life and safety of occupants of a Municipal Historic Resource be deemed of lesser importance than the preservation of the original fabric of the Municipal Historic Resource. The required life and safety standards are those required by the current Alberta Building Code. However, notwithstanding these Code requirements, where the essential character of the structure is threatened by changes for Code reasons, every effort shall be made to achieve an equivalent safety standard by alternate means so as to minimize the impact on the historic fabric.

## 5.2.12 Improvements

Prior to undertaking any improvements, a schedule of alterations should be prepared. This schedule should include phasing of alterations where necessary due to program or budget restrictions. The type and timing of both short and long term maintenance work shall also be included.

## 5.2.13 Signs

As a general rule signs should be limited to signs which were originally present on the building. In instances where new uses or interpretive functions dictate the use of additional signs, these new elements should be integrated into the general design of the project. The size, typeface, graphics, and materials should be chosen to suit the period of the Municipal Historic Resource wherever possible.



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Avoid installing new signs such that the repair, replacement or removal of the signs damages the original fabric of the structure.

## 5.2.14 Enforcement

The owner and the City shall enter into an agreement to provide that the designated structure will be maintained in such a manner as to prevent any deterioration.