

Slide 1



This is a presentation on the second edition of the Standards and Guidelines (2010). This edition clarifies and updates the information contained in the 2003 edition.




Introduction to the *Standards and Guidelines (S&Gs)*:

- The document contains four chapters: the Conservation Decision-making process; the Conservation Treatments; the Standards; and the Guidelines.
- It is an introduction to the decision-making process or the main steps to follow to achieve a successful conservation project.

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### What are the *Standards and Guidelines*?

- General principles and practical advice to guide decision-making when planning interventions on an historic place
- An approach based on the conservation of the heritage values of an historic place and its character-defining elements



So what are the S&Gs?

They are general principles – the Standards – and specific advice – the Guidelines – to guide decision making when planning interventions on historic places.

The document presents the Standards before the Guidelines.

It is also an approach based on the conservation of the heritage value of an historic place and its character-defining elements.

It is also important to note what they are not:

The Standards and Guidelines are not a technical manual, or a case-by-case resolution of problems.

They do not replace policies or directives.

They are not a substitute for a conservation specialist. It is always recommended to obtain the advice of qualified conservation professionals and specialists early in the planning stage of a conservation project.



The SoS and the S&Gs are important tools for the conservation of historic places. The SoS tells you **why** an historic place is important (its heritage value) and **what** should be conserved to protect that value (its character-defining elements); the S&Gs guide you on **how** best to plan interventions so as not to compromise heritage value.



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### For whom ?

- Anyone with interest in conservation
- Conservation practitioners
- Used by the Federal Government
- Provincial, Territorial and Municipal Jurisdictions
- Any other appropriate authority



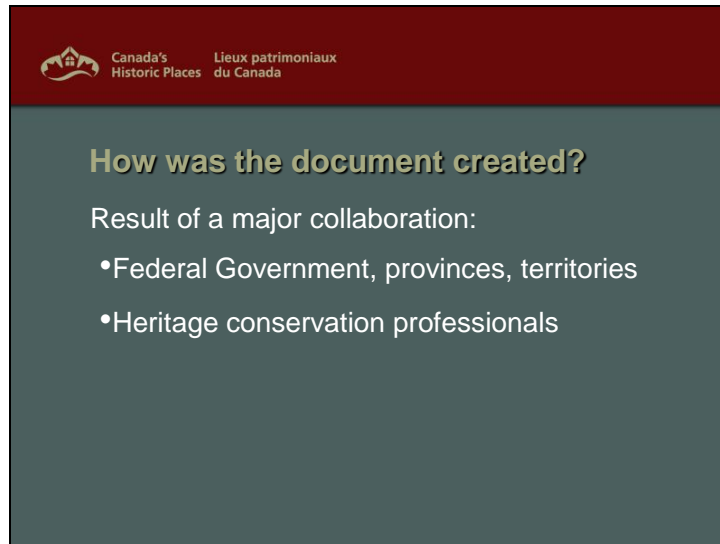
The Standards and Guidelines are intended:

- to provide guidance to historic property owners and facility managers, heritage consultants, architects, landscapes architects, contractors, etc.
- to help local, provincial and federal authorities assess interventions on historic places

They are endorsed by most provinces and territories. They were adopted by many and by Parks Canada at the federal level.

They are used as a reference document to analyse projects submitted for funding under federal, provincial and municipal programs.

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### How was the document created?


Result of a major collaboration:

- Federal Government, provinces, territories
- Heritage conservation professionals

The Standards and Guidelines evolved out of a collaborative process based on:

- Cross-jurisdictional collaboration
- Involvement of stakeholders and interested parties

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## The Conservation Decision-making Process

**3 phases and 9 steps:**

- Understanding
- Planning
- Intervening




The Understanding phase includes two steps; Planning has five; and Intervening, two. The Standards and Guidelines pertain specifically to three steps of the Planning phase.



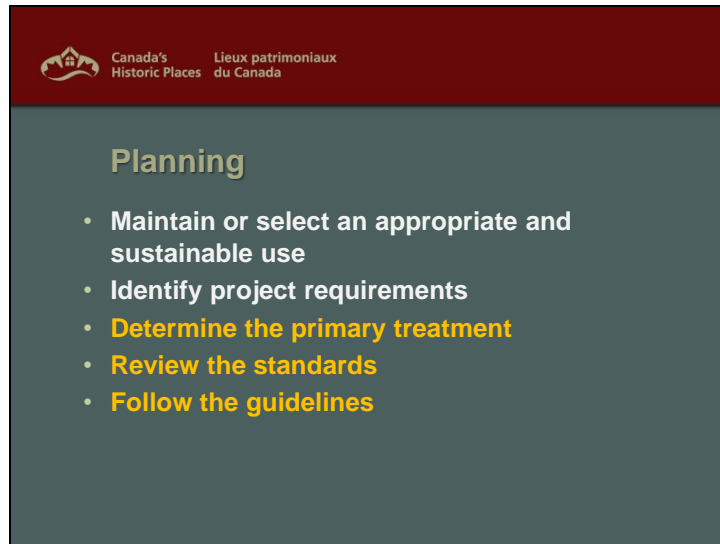
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## Understanding

- Refer to heritage value and character-defining elements
- Investigate and document conditions and changes

A photograph showing two individuals standing in a narrow, dimly lit tunnel or underground passage. They are looking at a large, textured stone wall that shows signs of age and wear. The person on the right is pointing towards the wall, while the person on the left looks on. The floor is dark and appears to be made of concrete or stone.

These are the two steps of the Understanding phase. It is important to understand not only the heritage value of the historic place but also its physical condition and changes over time.



The slide features a dark red header with the logo of Canada's Historic Places (Lieux patrimoniaux du Canada) on the left. The main content area is a dark grey rectangle containing the title 'Planning' and a bulleted list of five items. The last three items are highlighted in yellow.

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### Planning

- Maintain or select an appropriate and sustainable use
- Identify project requirements
- **Determine the primary treatment**
- **Review the standards**
- **Follow the guidelines**

The first point relates to use. If the use is a character-defining element (CDE), then that use should be conserved if possible. If not, the proposed use should have minimal impact on the heritage value of the historic place.

In any project, the project requirements must be clearly identified and understood: client's needs, available financial and human resources, etc.

The S&Gs focus on the three steps in yellow; these are about planning interventions to historic places.

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## Intervening

- Undertake the project work
- Carry out regular maintenance



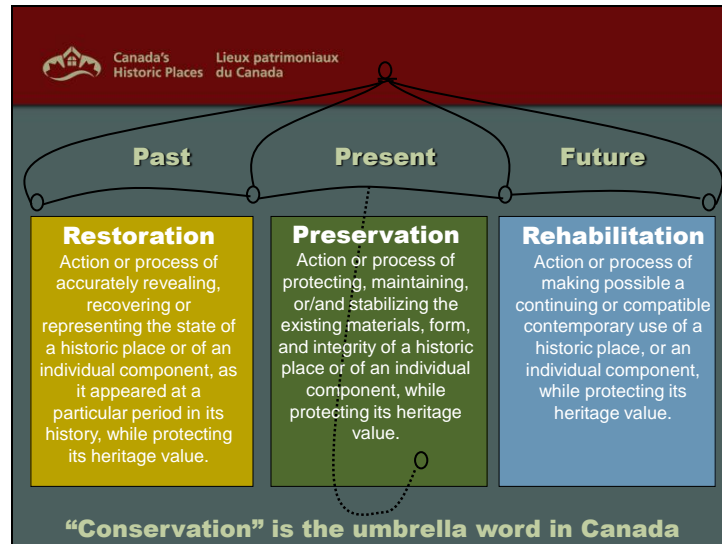
Any intervention should be carried out with the protection of heritage value and CDEs in mind. Always seek the intervention that will have the least impact on the historic place. How many people here have heard of the concept of minimal intervention? It does not mean do nothing. It means doing enough, but only enough, to meet functional objectives while protecting heritage value.

There are different approaches to interventions: this will be developed further in the section on conservation treatments.

Maintenance is also a form of intervention because it can have an impact (good or bad) on a CDE.



This is the Conservation Decision-making Process (DMP) chart. The first step is Determine the Primary Treatment. Why do we say primary treatment? The primary treatment is the project's main focus: is it primarily about maintaining the place in good condition (preservation), about upgrading the place to current codes or changing its use (rehabilitation) or about representing it as it was at a particular period in its history (restoration)? For example, a rehabilitation project can have a restoration or a preservation component. You may want to reinstate a grand staircase (restoration) or clean a marble floor (preservation) in the context of a rehabilitation project that involves a change in use. It is safe to say that 90% of projects today are rehabilitation projects because giving them a new sustainable use and upgrading them to current codes is the best way to prolong their life. There are few restoration projects as primary treatment. Restoration often involves recreating a period atmosphere in a museum-like setting.



It is important to agree on terminology to ensure we are speaking the same language. Conservation is the umbrella term in Canada. Preservation, restoration and rehabilitation are treatment types that fall under conservation.

These four terms are often used interchangeably because many people don't know exactly what they mean.

Read definitions first: restoration looks to the past; preservation is about the present; rehabilitation is turned toward the future.

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### Preservation

- Documenting
- Protecting
- Maintaining
- Retaining
- Stabilizing
- Repairing
- Replacing in kind



Wellington Wall, Ottawa

Manitoulin Island, Ontario

Prince of Wales, Manitoba

The focus of preservation is on maintenance and repair. Look at these verbs: they are listed by increasing order of intervention. It's all about maintaining what you have to slow deterioration, prevent damage, extend life.

- Preservation is also about continued use.
- Can be short term or temporary while expecting funds for a rehabilitation or restoration project.
- Preservation is the most cautious of conservation treatments; it promotes minimal intervention.

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## Rehabilitation

Making possible a continuing use  
Choosing a compatible use  
Code upgrades



Historic Properties, Halifax

Windsor Station, Montreal

Old London Bldg, Calgary

Everything we said about Preservation applies to Rehabilitation, too. But Rehabilitation goes a step further: it is about adapting an historic place to a new use and/or updating it to meet current Codes and standards. Projects involving additions are usually Rehabilitation.

Images:

Historic Properties in Halifax are warehouses converted to offices.

This old bank in Calgary was turned into a restaurant.

This waiting room in Windsor Station in Montreal was rehabilitated as a concourse.

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### Restoration

- Repairing
- Replacing in kind
- Removing features from another period
- Recreating missing features from the restoration period



Wellington Wall, Ottawa



Bideford Parsonage House, PEI

Restoration is about bringing an historic place back to a particular period in time. It can mean:

- Removing features from a later period
- Recreating missing features from the restoration period

All information must be based on clear evidence and detailed knowledge of the period to which historic place is being restored. There is no conjecture in restoration.

Images:

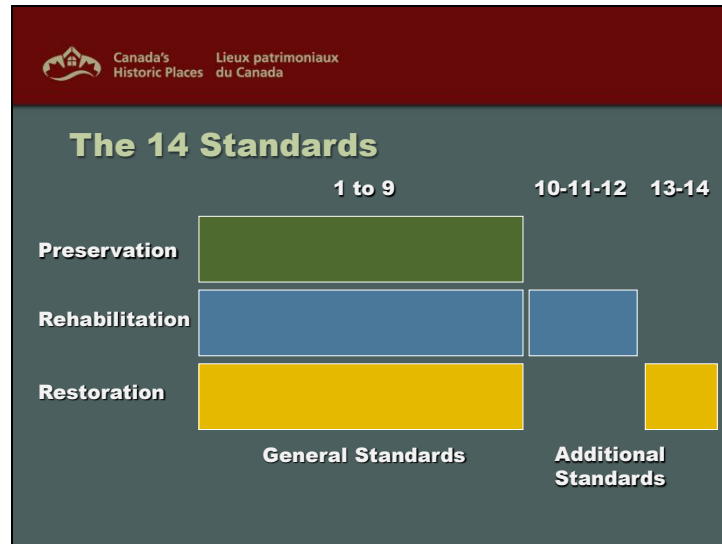
Recreated detail of the Wellington Wall in Ottawa based on physical evidence.

Based on documentary evidence, the original fenestration of the Bideford Parsonage Museum in P.E.I. was restored and roof finials replaced.





The next step in the DMP is Review the Standards. The standards are conservation principles based on internationally-accepted conservation charters.



There are:

9 **General Standards** relating to all projects. They also correspond to the standards for preservation

3 **Additional Standards** relating to Rehabilitation (10-11-12)

2 **Additional Standards** relating to Restoration (13-14)

The core of any conservation project is preservation. No matter if you're changing the use (rehabilitation) or depicting a particular period in time (restoration), you still must maintain, stabilize and prolong the life of the historic place.

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### THE STANDARDS

The standards are not intended to be a prescriptive code. All standards are subject to interpretation and may be amended, modified, where appropriate, by any conservation project.

#### General Standards for Preservation, Rehabilitation and Restoration

1. **Conserve the heritage value of a historic place.** Do not remove, replace or substantially alter the fabric or significant character-defining elements. Do not remove a part of an historic place if its current function is a character-defining element.
2. **Conserve the heritage value of a historic place that, over time, has become character-defining elements in their own right.**
3. **Conserve heritage value by adopting an approach calling for minimal interventions.**
4. **Integrate each historic place as a physical element of its site, place and use.** Do not create a false sense of historical development by adding elements from other historic places or other properties, or by creating features of the same property that were not created.
5. **Plan a use for an historic place that requires minimal or no change to its character-defining elements.**
6. **Protect and, if necessary, stabilize an historic place until any subsequent intervention is undertaken.** Protect and preserve archaeological resources in place. Where there is potential for disturbing archaeological resources, take preventative measures to limit damage and loss of information.
7. **Review the existing condition of character-defining elements to determine the appropriate intervention needed. Use the greatest means possible for any intervention. Repair heritage signs when undertaking an intervention.**
8. **Minimize character-defining elements or an existing fabric. Repair character-defining elements by restoring their materials using appropriate conservation methods. Repairs to lost or substantially deteriorated or missing parts of character-defining elements, where they are necessary, should be:**
9. **Make any interventions needed to preserve character-defining elements physically and visually compatible with the historic place and identifiable as clear interventions. Document any interventions by future reference.**

#### Additional Standards Relating to Rehabilitation

10. **Repair rather than replace character-defining elements. Where character-defining elements are too severely deteriorated to repair, and when neither preservation nor repair is feasible, then only new elements that match the form, materials and detailing of original elements of the same character. Where there is no feasible original solution, match the form, material and detailing of the new elements compatible with the character of the historic place.**
11. **Conserve the heritage value and character-defining elements when detailing new elements in an historic place in any related use intervention. Make the new work physically and visually compatible with, and subordinate to, the fabric and character of the historic place.**
12. **Check any new additions or related use interventions so that the essential form and integrity of an historic place will not be impaired if the new work is removed in the future.**

#### Additional Standards Relating to Restoration

13. **Repair rather than replace character-defining elements in the restoration period. Where character-defining elements are too severely deteriorated to repair and where authentic original elements exist, replace them with new elements that match the form, materials and detailing of original elements of the same character.**
14. **Restore missing features from the restoration period with new fabric where form, materials and detailing are based on sufficient physical documentation or other evidence.**

20 | THE STANDARDS | 21

STANDARDS AND GUIDELINES FOR THE CONSERVATION OF HISTORIC PLACES IN CANADA


Here are the 14 standards.  
Let's look at a few standards to give you a better idea of what they contain in terms of general principles. We'll examine the two first general standards as well as one additional standard for rehabilitation and one additional standard for restoration.

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### General Standards (1 to 9)

**Standard 1**

- Conserve the *heritage value* of an historic place.
- Do not remove, replace, or substantially alter its intact or repairable *character-defining elements*.
- Do not move a part of an historic place if its current location is a *character-defining element*.



Rideau Canal, Lockmaster's House

The first part of Standard 1 contains a very basic conservation message: it says to conserve heritage value and tells you how to do it, referring specifically to the character-defining elements.

The second part adds another dimension... suggesting the importance of elements in relation to a specific place, and that value can be lost if they are moved. The recognition of this fact has increased over time and today there is more hesitation about saving buildings by moving them (i.e. for the creation of historic villages).

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## General Standards (1 to 9)

**Standard 2**

• Conserve changes to an *historic place* that, over time, have become *character-defining elements* in their own right.

Convocation Hall, University of Saskatchewan, Saskatoon

The next standard speaks to the fact that heritage value evolves over time and may change.

Changes to a place can acquire value over time and become character defining elements (CDEs). These CDEs should be protected.

A historic place that derives part of its heritage value from its evolution over time will be respected for that evolution, not just for its existence at a single moment in time.

This example shows that important changes or added layers may also exist at the scale of interior finishes or furnishings.

These changes (1960s light fixtures and acoustic tile) were acknowledged in the SoS of this NHSC and protected throughout the conservation project because of their association with a significant dean of the University.

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### Additional Standards for Rehabilitation (10-11-12)

**Standard 11**

- Conserve the *heritage value* and *character-defining elements* when creating any new additions to an historic place (...).
- Make the new work physically and visually compatible with, subordinate to and distinguishable from the *historic place*.



Office building, Calgary


Additions are often a controversial topic in heritage conservation. Standard 11 doesn't encourage additions but tells you that if you have no other choice but to build one (i.e., because the program associated with the proposed new use doesn't fit), it should be physically and visually compatible with, subordinate to, and distinguishable from the heritage building. Note that it talks about physical and visual compatibility. Subordinate does not mean smaller in size but rather being subordinate to the heritage value of the historic place.

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### Additional Standards for Restoration (13-14)

**Standard 14**

- Replace missing features from the restoration period with new features whose forms, materials and detailing are based on sufficient physical, documentary and/or oral evidence.



Detail, Windsor Station, Montréal

In the context of a restoration project, where the emphasis is on the value of the place at a particular period in its history, replacement elements must correspond to the original and be based on solid evidence. The best evidence of course is the surviving elements or materials.

It is important to note that the heritage value resides in an earlier period, therefore it is okay to remove later additions (in this case, an office infill in the arcade). Today we often restore elements or features of a building as part of rehabilitation projects. It is rare to have entire projects that are purely restoration.

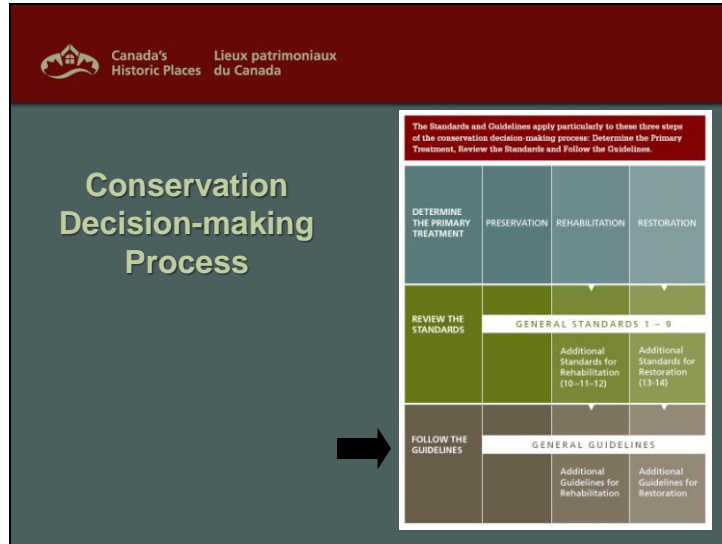


The infographic is titled "Canada's Historic Places / Lieux patrimoniaux du Canada" and is divided into three main sections: General Standards, Additional Standards for Rehabilitation, and Additional Standards for Restoration. Each standard is presented in a colored box with a number and a brief description.

General Standards	Additional Standards for Rehabilitation	Additional Standards for Restoration
1. Conserve the values	10. Repair or replace deteriorated features	13. Replace deteriorated features
2. Conserve changes	11. Compatible, distinguishable, subordinate additions	14. Recreate missing features
3. Minimal intervention		
4. No false impressions		
5. Find an appropriate use	12. Reversible additions	
6. Stabilize. Protect archaeological resources		
7. Evaluate condition		
8. Maintain and repair		
9. Identifiable interventions		

Here are the standards in a nutshell. These few words capture the essence of each standard.

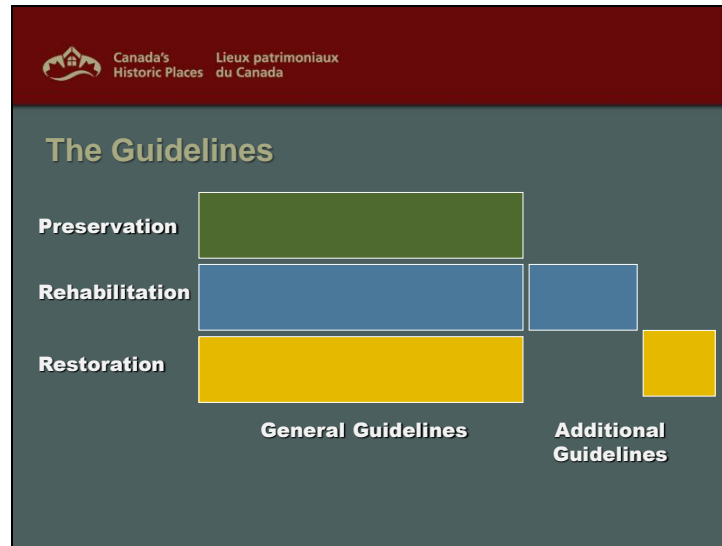




The next step in the DMP is Follow the Guidelines. The Guidelines offer guidance on how to plan your interventions. However, they don't suggest specific methods or products because they continually change. The conservation professional or specialist will develop detailed plans and specifications for the project based on the S&Gs.

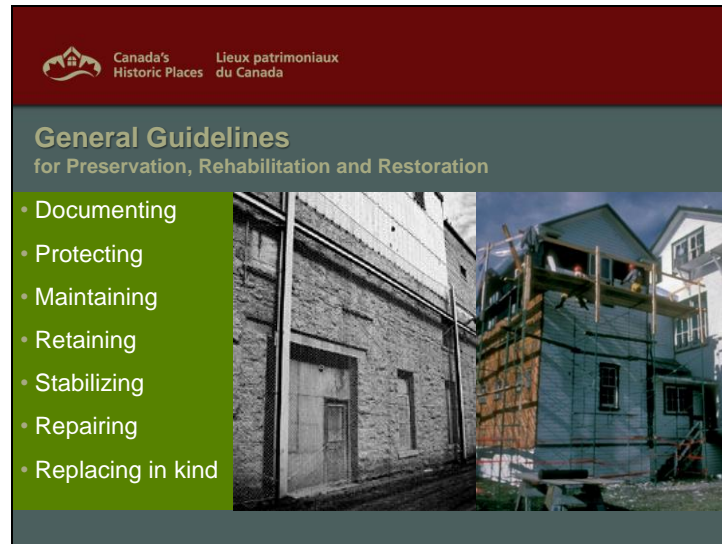


Here are the four types of resources addressed in the guidelines: cultural landscapes, archaeological sites, buildings and engineering works. The S&Gs also address the materials that compose these resources.



The Guidelines follow the same structure as the Standards (refer to the diagram on Standards – slide 18):

- General Guidelines that apply to all projects
- Additional Guidelines for Rehabilitation projects
- Additional Guidelines for Restoration projects

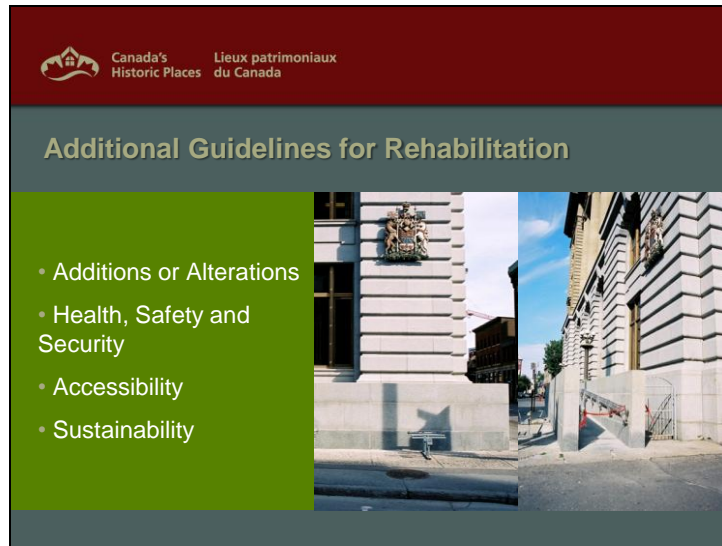


The guidelines are presented in ascending sequence of lesser to greater intervention : from documenting, to maintaining, to repairing, to replacing CDEs.

Projects should always focus on the first activities in the sequence and resort to the last activities only when project objectives cannot be met otherwise. Note that these are the same verbs we used to describe Preservation. Why? Because the general guidelines apply to all projects and that Preservation is at the core of all conservation projects.

#### Images

- Stabilization of a wall at the E.B. Eddy pulp and paper mill in Gatineau, Québec, while waiting for funds to carry out a conservation project.
- Maintenance work such as replacing siding and repainting.



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### Additional Guidelines for Rehabilitation

- Additions or Alterations
- Health, Safety and Security
- Accessibility
- Sustainability

The image shows a photograph of a historic building with a modern ramp added to its exterior, illustrating the concept of rehabilitation. The building has a classical facade with a crest above a window. The ramp is a modern, light-colored structure that contrasts with the historic architecture.

The additional guidelines for rehabilitation also address contemporary requirements related to changes in use, code upgrades, human rights and greening technologies.

Image: ramp addition in front of heritage building in Montreal.

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### Guidelines for Cultural Landscapes

- Evidence of Land Use
- Evidence of Traditional Practices
- Land Patterns
- Spatial Organization
- Visual Relationships
- Circulation
- Ecological Features
- Vegetation
- Landforms
- Water Features
- Built Features

Recommended and Not Recommended Actions

The first set of guidelines are for cultural landscapes. They were placed first because cultural landscapes can contain all types of resources: archaeological sites, buildings and engineering works. Seven of the eleven guidelines were covered in the first edition under Guidelines for Landscapes. The guidelines for viewsapes were replaced by guidelines for visual relationships and incorporate scale. Three new guidelines refer to ecological features (natural features that have heritage value), evidence of land use and evidence of traditional practices (TP). These last two cover the features (or CDEs) that express or support a past or continuing land use or TP when these features have been identified as CDEs in a SoS.



The slide features a dark red header with the logo of Canada's Historic Places and the text 'Canada's Historic Places' and 'Lieux patrimoniaux du Canada'. Below the header, the title 'Guidelines for Archaeological Sites' is displayed in a light green font. A bulleted list of site categories follows, and at the bottom, the text 'Recommended and Not Recommended Actions' is shown in white.

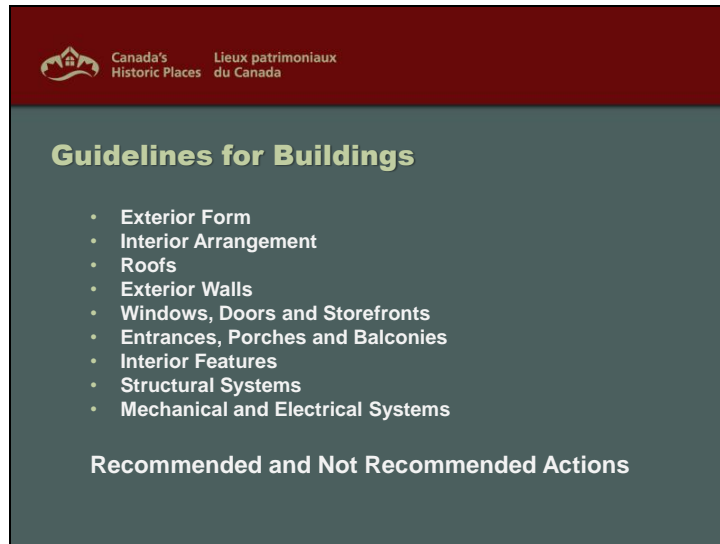
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### Guidelines for Archaeological Sites

- Archaeological Sites
- Sites in Urban Environments
- Industrial Sites
- Sites in Cultural Landscapes
- Sites in Protected Natural Areas
- Sites Underwater
- Rock Art and Culturally-modified Trees
- Culturally-sensitive Places

Recommended and Not Recommended Actions

The Guidelines for Archaeological Sites contain general guidelines that apply to all archaeological sites as well as guidelines for archaeological sites in a specific context.



The slide features a dark red header with the logo of Canada's Historic Places and its French equivalent, 'Lieux patrimoniaux du Canada'. Below the header, the title 'Guidelines for Buildings' is displayed in a light green font. A bulleted list follows, detailing nine subsections: Exterior Form, Interior Arrangement, Roofs, Exterior Walls, Windows, Doors and Storefronts, Entrances, Porches and Balconies, Interior Features, Structural Systems, and Mechanical and Electrical Systems. At the bottom of the slide, the text 'Recommended and Not Recommended Actions' is written in white.

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## Guidelines for Buildings

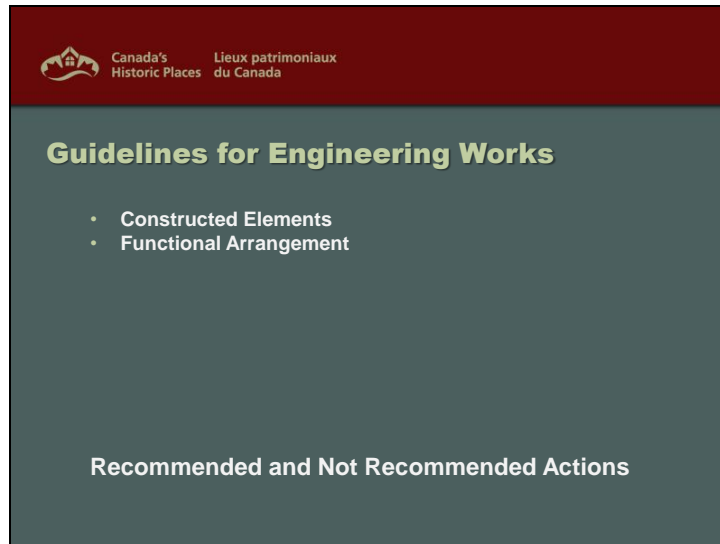
- Exterior Form
- Interior Arrangement
- Roofs
- Exterior Walls
- Windows, Doors and Storefronts
- Entrances, Porches and Balconies
- Interior Features
- Structural Systems
- Mechanical and Electrical Systems

Recommended and Not Recommended Actions

The Guidelines for Buildings contain nine subsections: the first two pertain to form and layout, the next five to elements of a building, and the last two to systems.

The guidelines for exterior form largely deal with additions. Exterior walls is a new subsection: it deals with traditional load-bearing walls as well as modern curtain walls. New elements were added such as doors, balconies and electrical systems.





The slide features a dark red header with the logo of Canada's Historic Places and the text 'Canada's Historic Places' and 'Lieux patrimoniaux du Canada'. Below the header, the title 'Guidelines for Engineering Works' is displayed in a light green font. A bulleted list follows, containing 'Constructed Elements' and 'Functional Arrangement'. At the bottom of the slide, the text 'Recommended and Not Recommended Actions' is centered in a light green font.

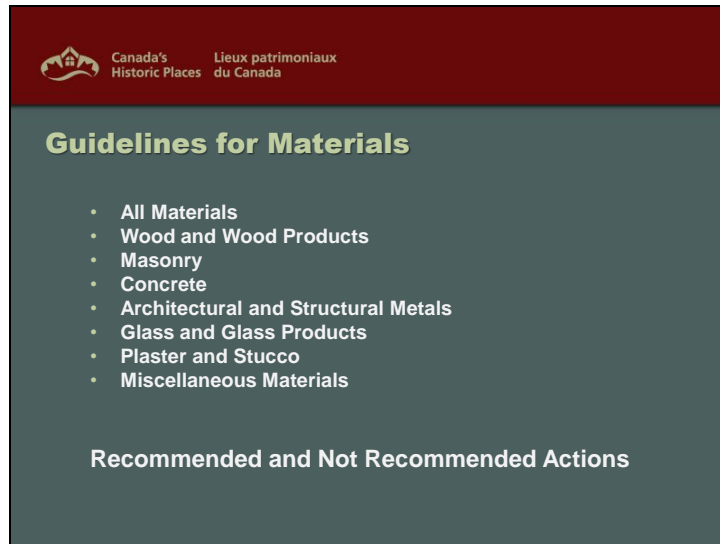
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## Guidelines for Engineering Works

- Constructed Elements
- Functional Arrangement

Recommended and Not Recommended Actions

Because of the immense variety of engineering works, this section has been simplified to present an engineering work as a series of constructed elements that are linked together in a functional arrangement to form a structure or process (i.e., an industry). Many examples illustrate this approach.



The Guidelines for Materials were pulled out of the Buildings section of the first edition to form a standalone section in the second. Materials compose all types of historic places. This new section acknowledges modern materials such as wood products, concrete, glass products as well as more recent materials like masonite, linoleum or porcelain enamel under Miscellaneous Materials.

The subsection on All Materials (4.5.1) must always be consulted in conjunction with one of the other subsections.