

POLICY Heritage Resource Management



Policy C5003

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1.0 POLICY

This policy provides strategic management framework to support the preservation and commemoration of heritage sites in Banff.

2.0 PURPOSE

As an incorporated municipality constituted under a joint federal/provincial agreement, the Town of Banff is responsible for the identification, management of local cultural assets under its jurisdiction.

This policy contains:

- Definitions, terminology and standards for heritage resources management;
- Direction for the maintenance and periodic updates to the municipal heritage inventory;
- Framework to ensure that a diversity of heritage sites are recognized and protected;
- Direction for the development of a local thematic framework and research area priorities;
- Standards for inclusiveness and participation in the heritage planning process;
- Processes related to the dissemination, review and sharing of research; and,
- Financial incentives guide to ensure consistency in the heritage funding allocations.

3.0 SCOPE

This policy applies to properties under municipal jurisdiction that demonstrate heritage value.

4.0 DEFINITIONS

- 4.1 **Adaptive Reuse** refers to the process of reusing an old site or building for a purpose other than which it was built or designed for.
- 4.2 **Assessed Value** means the current assessed value as calculated for the property by the Town Assessor.

- 4.3 **Character-Defining Element** means the materials, forms, location, spatial configurations, uses, and cultural associations or meanings that contribute to the heritage value of a resource, and which must be retained in order to preserve its heritage value.
- 4.4 **Financial Incentive** is a grant or tax relief paid to encourage property owners of heritage sites identified on the Banff Heritage Inventory to conserve the character-defining features of the building. The financial incentive is provided to meet the compensation requirements as specified under the *Alberta Historical Resources Act*.
- 4.5 **Conservation Plan** means a plan prepared to ensure the safeguarding of the character-defining features of a heritage site over time. The conservation plan includes a description of the current state of the heritage site, required rehabilitation work as well as a maintenance methodology. The conservation plan must be prepared by a conservation architect or licenced contractor with similar project experience.
- 4.6 **Contributing Property** means a heritage site which demonstrates a connection to the local cultural landscape.
- 4.7 **Cultural Practice** means a community's historically rooted activities, customs and practices.
- 4.8 **Cultural Landscape** means any geographical area that has been modified, influenced, or given special cultural meaning by people. The *Standards and Guidelines for the Conservation of Historic Places* recognises three types of cultural landscapes including:
- **Designed Cultural Landscapes** were intentionally created by human beings;
 - **Organically Evolved Cultural Landscapes** were developed in response to social, economic, administrative or religious forces interacting with the natural environment. They fall into two sub-categories:
 - **Relict Landscapes** in which an evolutionary process came to an end. Its significant distinguishing features are, however, still visible in material form.
 - **Continuing Landscapes** in which the evolutionary process is still in progress. They exhibit significant material evidence of their evolution over time.
 - **Associative Cultural Landscapes** are distinguished by the power of their spiritual, artistic or cultural associations, rather than their surviving material evidence.
- 4.9 **Designation** means the protection of a historic site by bylaw or order-in-council under the *Alberta Historical Resources Act*.

- 4.10 **Heritage District** means a recognized concentration, linkage or continuity of sites, buildings, structures or objects united historically or aesthetically by plan or physical development.
- 4.11 **Heritage Value** means the aesthetic, architectural, cultural, environmental, historic, and/or spiritual importance associated with heritage sites. The heritage value of a site is embodied in its character-defining elements: materials, forms, location, spatial configurations, uses and cultural associations or meanings.
- a) **Aesthetic Value** refers to the sensory qualities of a historic place (seeing, hearing, touching, smelling and tasting) in the context of broader categories of design and tradition. A place may have aesthetic because it epitomizes a defined architectural style or landscape concept.
 - b) **Architectural/Design Value** means a site which demonstrates a unique architectural style, method of construction or craftsmanship and/or a site which is attributed to the work of a well-known architect, engineer or builder.
 - c) **Cultural Value** refers to the associations that a place has with past events and historical themes, as well as its capacity to evoke a way of life or a memory of the past. Cultural value may lie in its association with important events, activities, people or traditions; its role in the development of a community, region, province, territory or nation; or its patterns of use.
 - d) **Environmental / Scientific Value** means a heritage site which has natural, ecological feature and/or unique geographic features which contribute to the understanding of place or the unique interactions between people and the environment that have taken place at the heritage site over time.
 - e) **Historic Value** refers to the associations that a place has with past events and local thematic framework, as well as its capacity to yield historical information relevant to the local community.
 - f) **Spiritual Value** means the value attributed to the site's association with religious, sacred, or symbolic meanings.
- 4.12 **Heritage Corporation** is a municipally owned *not-for-profit* corporation which advises Council on matters related to heritage. The Heritage Corporation is established to: advance, promote, maintain, assist, and support by any means whatsoever the objectives of this *Heritage Resource Management Policy*.
- 4.13 **Heritage Plaque Program** is a municipal commemoration program designed to promote and commemorate heritage sites from the municipal heritage inventory.

- 4.14 **Heritage Reserve Fund** is a municipal capital reserve designed to support the preservation and commemoration of identified heritage sites in Banff. The heritage reserve fund may also be used to assist the development and delivery of projects, products and services provided by the Banff Heritage Corporation.
- 4.15 **Historic Integrity** means a site, building or landscape that retains the ability to convey its significance.
- 4.16 **Heritage Site** means a structure, building, group of buildings, district, landscape, archaeological site or other place that has been identified on the municipal heritage inventory which demonstrates heritage value.
- 4.17 **Landscape Features** means a human-made or s naturally occurring resource that is not a building or structure but can be identified within a landscape.
- 4.18 **Landmarks and Legends** is a commemorative series profiling Banff's identified heritage sites and the people associated with their development.
- 4.19 **Maintenance** means routine, cyclical, non-destructive actions necessary to slow the deterioration of an historic place. It entails periodic inspection; routine, cyclical, non-destructive cleaning; minor repair and refinishing operations; replacement of damaged or deteriorated materials that are impractical to save.
- 4.20 **Matching Restoration Grant** is a municipal financial incentive offered to maintain, protect and preserve the character-defining elements of an identified heritage site. Matching restoration grant may only be provided to properties applying for Municipal Historic Resource Status or identified as Municipal Historic Resources.
- 4.21 **Minimal Intervention** means an approach that allows functional goals to be met with the least physical intervention.
- 4.22 **Mothballing** means to temporarily close a building or other structure to protect it from the weather as well as to secure it from vandalism.
- 4.23 **Municipal Heritage Inventory** is a list of heritage sites prepared and reviewed by the Banff Heritage Corporation.
- 4.24 **Municipal Property Tax** means the tax amount levied by the Corporate Services Department based on the assessment established by the Town Assessor and the mill rate established annually by bylaw by Town Council. The municipal property tax excludes the school taxes levied by the Province of Alberta.
- 4.25 **Municipal Historic Resource** means a heritage site that is protected by municipal bylaw pursuant to the requirements of the *Alberta Historical Resources Act*.

- 4.26 **Preservation** means the process of protecting, maintaining, or stabilizing the character-defining elements of a heritage site to conserve its heritage value.
- 4.27 **Property Database** means a catalogue of buildings, structures, landscapes, archeological sites located within the town of Banff.
- 4.28 **Reconstruction** is the process of rebuilding a heritage site to a known earlier state and is distinguished from restoration by the introduction of new material. Reconstruction is not considered heritage conservation but may be appropriate if the heritage site was intentionally destroyed, partially damaged or if the heritage site is integral to the understanding of a broader cultural landscape. Proposed reconstruction of a heritage site is weighed in relation to the heritage's sites connection to the collective memory of the community.
- 4.29 **Relocation** involves removing a heritage site and character-defining elements from its original context. The relocation of heritage buildings and/or character-defining elements is a local cultural practice in Banff.
- 4.30 **Replication** is considered a recreation or copy of a former heritage site on another site.
- 4.31 **Restoration** means the action or process of accurately revealing, recovering or re-instating the character-defining features of an identified heritage site.
- 4.32 **Stabilization** is a measure designed to protect buildings or landscapes from deterioration. Long-term stabilization measures are employed when a greater level of intervention is not planned in the foreseeable future.
- 4.33 **Statement of Significance** is a summary outlining the value of a given heritage site. A statement of significance must contain the following information: description of historic resource, heritage value, heritage integrity and a list of character-defining elements.
- 4.34 **Streetscape** means a collection of buildings whom together form an integral portion of the neighbourhood's character.
- 4.35 **Thematic Framework** is a framework which organizes local history into broad interconnected themes. A thematic framework is developed in order to place local heritage sites within their relative historical, cultural and environmental context.
- 4.36 **Windshield Survey** is a physical assessment of a property carried out to determine primarily environmental, aesthetic and/or architectural value.
- 4.37 **Vernacular** means a style of architecture or a cultural practice that is indigenous to or inspired by a specific region.

5.0 STANDARDS

5.1 Identification of Heritage Sites

- a) To ensure heritage sites are identified the Town of Banff will:
 - i. Analyse research trends to ensure municipal heritage inventory remains representative of local thematic priority areas.
 - ii. Work with Heritage Corporation to conduct an annual consolidation of the municipal heritage inventory.
 - iii. Direct applications to remove or add properties to the municipal heritage inventory to the Heritage Corporation for review and input.
 - iv. Conduct a windshield survey of properties not listed on the municipal heritage inventory every five (5) years.
 - v. Prepare statements of significance for heritage sites identified on the municipal heritage inventory.
 - vi. Provide historical record information to property owners of heritage sites identified on the municipal heritage inventory.

5.2 Protection of Heritage Sites

- a) To ensure heritage sites are protected the Town of Banff will:
 - i. Encourage property owners of heritage sites identified on the municipal heritage inventory to apply for designation as municipal historic resource.
 - ii. Encourage the preservation and repair of the character-defining elements of heritage sites in conjunction with redevelopment.
 - iii. Provide formal protection to heritage sites through municipal bylaw as provided under the *Alberta Historical Resources Act*.
 - iv. Require all maintenance, repair and rehabilitation to Municipal Historic Resources and identified heritage sites to follow the general direction provided in the *Standards and Guidelines for the Conservation of Historic Places in Canada*.
 - v. Forward redevelopment applications affecting Municipal Historic Resources to Heritage Corporation for review and input.
 - vi. Provide financial incentives to encourage property owners to both protect heritage sites and maintain the character-defining elements as outlined in the statement of significance.

5.3 Integration with Land Use Planning

- a) To integrate the heritage and land use planning, the Town of Banff will:
 - i. Engage proactively with property owners of heritage sites identified on the municipal heritage inventory.
 - ii. Continue to support variances to the Land Use Bylaw to protect heritage sites identified on the municipal heritage inventory.
 - iii. Require appropriate mothballing and recording for all demolitions and alterations to heritage sites.

- iv. Refer development permit applications for properties on the municipal heritage inventory to the Heritage Corporation for review.

5.4 Commemoration

- a) In order to increase the public's awareness of heritage sites and cultural landscapes within the townsite, the Town of Banff will:
 - i. Encourage property owners of heritage sites identified on the municipal heritage inventory to participate in the Heritage Plaque Program.
 - ii. Restrict the heritage plaque program to sites identified on the municipal heritage inventory.
 - iii. Create short and accessible narratives of sites on the municipal heritage inventory for inclusion in the Landmarks and Legends Series.
 - iv. Develop an annual plan with the Heritage Corporation to prioritize heritage commemoration projects based on heritage reserve funding, annual priorities and procedural updates to the municipal heritage inventory.

5.5 Research

- a) The Town of Banff will conduct regular knowledge sharing projects in order to foster research and collaboration on heritage projects. To achieve this the Town of Banff will:
 - i. Apply international best practice to the evaluation and assessment of heritage sites.
 - ii. Support the development of thematic framework to ensure the assessment of heritage sites are placed within their relative social and environmental context.
 - iii. Publish recording sheets, documentation and municipal heritage bylaws online;
 - iv. Develop a digital platform to share historical site assessments, research and knowledge.
 - v. Support cooperative research programmes as well as community lecture series to ensure new research is incorporated into the heritage planning process.
 - vi. Encourage the publication and distribution of research related to the townsite's cultural heritage and heritage sites.

5.6 Partnerships

- a) The Town of Banff will contribute to the development of regional heritage partnerships through:
 - i. The creation of opportunities for partner organizations to collaborate on heritage conservation projects.
 - ii. The facilitation of networking opportunities including: open houses, community workshops, community lecture series, and heritage awards.
 - iii. Direct engagement with regional heritage stakeholders including but not limited to; Parks Canada, Alberta Culture, Banff Housing Corporation, Fairmont Banff Springs Hotel, Peter and Catharine Whyte Foundation, The Whyte Museum of the Canadian Rockies, Banff and Lake Louise Tourism, The Banff Public Library,

The Luxton Museum, the Eleanor Luxton Historical Foundation, The Banff Centre and Canadian Pacific Railway.

6.0 PROCEDURES

6.1 Heritage Corporation

a) Membership Structure

- i. The Banff Heritage Corporation is comprised of two (2) shareholders, eight (8) directors and two (2) ex-officio representatives unless changed as a result of Council resolution.
- ii. The shares of the Heritage Corporation are held by the Town of Banff and Council. Shareholders are non-voting.
- iii. Heritage Corporation directors represent a voting member of the Heritage Corporation. The director composition for the Heritage Corporation is as follows:
 - One (1) Councillor director
 - One (1) Parks Canada director
 - One (1) Whyte Museum of the Canadian Rockies director
 - One (1) Eleanor Luxton Historical Foundation director
 - Four (4) directors appointed by Council
- iv. Ex-officio members support the Banff Heritage Corporation in an advisory role and do not comprise the voting membership. The ex-officio representation for the Banff Heritage Corporation is as follows:
 - One (1) representative advisor from the Alberta Association of Architects
 - One (1) representative advisor from the Province of Alberta

6.2 Municipal Historic Resources

a) Application Requirements

- i. The application for municipal historic designation will require the following information:
 - A completed application form.
 - Certificate of title, letter of endorsement from the property owner or for cultural landscapes a completed statement of association.
 - Current property information including: photographs, site survey as well as a description of current use and property conditions.
 - Historic property information including: historic photographs, architectural plans, previous leaseholders of interest.
 - Architectural information including: condition assessment, and description of architectural features, renovations, property over time.
 - A draft statement of significance.
 - A conservation plan.

- Financial incentive proposal.
- ii. Applications for municipal historic designation will not be received unless all taxes and levies owed by the owner have been paid to the Town of Banff.
- iii. All applications for municipal historic designation will be reviewed and considered by Heritage Corporation prior to presentation and review by Council.
- iv. Municipal historic resource designation shall contain: a statement of significance, maintenance and rehabilitation guidelines as well as a signed compensation agreement.

b) Adaptive Reuse

- i. Redevelopment applications affecting the use of a designated municipal heritage resource shall maintain the site's character-defining elements.
- ii. Redevelopment applications proposing a change of use to a heritage site identified on the municipal heritage inventory will be referred to the Heritage Corporation for review and input.

c) Inspection and Enforcement

- i. The Town of Banff may require the periodic inspection of designated municipal historic resources in order to evaluate the condition of the heritage site and to determine whether any maintenance work is required.

d) Removal of Municipal Historic Resource Designation

- i. Rescinding a municipal historic resource designation remains at the discretion of Council.
- ii. If the historic integrity of the municipal historic resource is damaged beyond repair or demolished, the Town of Banff may require the repayment with interest of any compensation received by the owner (interest charged at current prime plus 3% offered by the Town's bank).

6.3 Financial Incentives

a) Conditions

- i. The Town of Banff will offer financial incentives in conjunction with the protection and restoration of heritage sites identified on the municipal heritage inventory.
- ii. Financial incentives shall form part of the compensation agreement for municipal historic resource designation.
- iii. Financial incentives will not be provided for the reconstruction of a former heritage site.
- iv. Financial incentives are awarded only in conjunction with the protection of heritage sites identified on the municipal heritage inventory.
- v. Property owners of designated heritage resources may re-apply for financial incentive. Applications for additional financial incentives will be evaluated with respect to the condition of the municipal historic resource, the conservation plan,

policy direction, recommendation from the Heritage Corporation, council objectives and the funding available in the heritage reserve fund.

- vi. Financial incentives associated with municipal historic resource designation shall be offered in two forms either a ‘matching restoration grant’ or a ‘grant in aid of municipal property tax’.

b) Grant in Aid of Municipal Property Tax

- i. The owner of the municipal historic resource may be eligible to receive a grant covering the municipal portion of their property taxes, commencing January 1 of the year following the year in which Council passes the designating bylaw.
- ii. The maximum municipal contribution provided by way of *Grant in Aid of Municipal Property Tax* shall not exceed a total of \$45,000.
- iii. The owner of the municipal historic resource may be eligible to receive this grant on an annual basis up over a period of five-years for residential buildings and three years for non-residential buildings.
- iv. In no case shall the grant exceed \$2,000 per year for residential buildings or \$15,000 per year for non-residential buildings.

c) Matching Rehabilitation Grant

- i. The resource owner may be eligible to receive a matching rehabilitation grant intended to address structural integrity and exterior work as part of a capital re-investment project.
- ii. The maximum municipal contribution provided by way of *Matching Restoration Grants* shall not exceed \$50,000.
- i. The amount of the grant shall be limited to a maximum of 50% of the eligible costs based on the assessment of the total restoration/rehabilitation costs in the conservation plan.
- ii. The amount of the grant shall be no greater than \$25,000 for residential buildings or \$50,000 for non-residential buildings and shall be provided within five (5) years of the project start

7.0 RESPONSIBILITIES

7.1 Council is responsible for approving this policy and any amendments thereto.

7.2 The Director of Planning and Development or designate is responsible to:

- a) Implement this policy.
- b) Recommend amendments and any changes to this policy to Council.
- c) Review and recommend to Council any requests for compensation pursuant to this policy.
- d) Prepare a report for Town Council outlining the designation proposal and recommended compensation.
- e) Prepares a designation bylaw for consideration by Council.

- f) Ensure that the current municipal inventory, database and thematic framework is available to the general public and property owners.
- 7.3 Director of Corporate Services or designate is responsible to:
- a) Provide advice and recommendations for heritage project funding.
 - b) Recommend financial incentive from the Banff Heritage Reserve Fund.
 - c) Review and analyse proposals to designate heritage sites.
 - d) Recommend to Council any form of compensation pursuant to this policy.
- 7.4 The Heritage Corporation shall be responsible for:
- a) Providing advice to Council regarding municipal heritage designation, heritage initiatives, development proposals, the development of thematic framework and projects impacting heritage sites.
 - b) Determining a building or site's eligibility for the municipal heritage inventory.
 - c) Reviewing schedules for the municipal historic resource designation including the preparation of the statement of significance.
 - d) Reviewing conservation plans and financial incentive proposals;
 - e) Preparing annual working plans to implement strategic priorities and attain community heritage management objectives.
 - f) Drafting recommendations to the Director of Planning on local heritage initiatives.

8.0 ATTACHMENTS

This policy shall be in effect on the date it is approved by resolution of Council.

On original

Karen Sorensen
Mayor

On original

Robert Earl
Town Manager