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.
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.
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.
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
The table of contents provides an overview of the document.
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.
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 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.
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.
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.
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.
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.
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.
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).
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.
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.
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.
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.
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.
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 viewscapes 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 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 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.
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.