

# Heritage Districts Work!

Heritage Conservation District Study  
Town of Bath - Loyalist Township  
2009





# Heritage Conservation District Study 2009

Prepared By

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Generous support provided by the Ontario Trillium Foundation

May 2009





# Acknowledgements

This project was carried out by the Architectural Conservancy of Ontario (ACO) on behalf of the hundreds of volunteers in communities across Ontario who work hard to maintain the built culture of our province. The ACO partnered with several other volunteer groups including Heritage Ottawa and Community Heritage Ontario. The project was directed by a steering committee made up of representatives from these organizations. Particular thanks go to ACO Manager Rollo Myers, President Catherine Nasmith and ACO board member Richard Longley for their time, effort and guidance.

We would like to thank staff at the Ministry of Culture for providing information and advice about the project: Paul King, Chris Mahood and Bert Duclos. Gratitude is also owed to Paul King, President of Community Heritage Ontario for providing technical services.

The project was undertaken in support of the volunteer efforts of ACO branch presidents and members, Heritage Ottawa, members of the local Municipal Heritage Committees and interested citizens across Ontario. These dedicated volunteers surveyed residences in the Heritage Conservation Districts and provided energy and purpose to the project.

The efforts of the volunteers were assisted and coordinated through cooperation between the ACO and the Heritage Resources Centre (HRC) at the University of Waterloo. Professor Robert Shipley is the Director of the HRC. The Project Coordinator, report manager and principal volunteer facilitator was Kayla Jonas. Additional data collection and research analysis was conducted by Jason Kovacs, Beatrice Tam and Martha Fallis. Administration and help was also provided by Marg Rowell, Chelsey Tyers, Paul Dubniak and Kirsten Pries.

Recognition is deserved as well for Professor Rob Feick, Richard Pinnell and Scott MacFarlane at the University of Waterloo for their help obtaining and formatting the GIS maps and to Philip Carter and Paul Oberst for their advice. Thanks are extended to Dr. Susan Sykes at the Office of Research Ethics at the University of Waterloo for the thorough and timely approval of our research design.

We would also like to thank the following local volunteers and municipal staff for their time and effort surveying residents, answering interview questions and helping to gather other vital information: Jim Sova and David Casemore.

**Thanks!**



# Town of Bath Executive Summary

## Introduction

- This study of Heritage Conservation Districts has been funded by the Ontario Trillium Foundation and is a joint effort among volunteers of the Architectural Conservancy of Ontario, the Heritage Resources Centre and volunteer historical societies across the province
- The Ontario Heritage Act enables municipalities to designate Heritage Conservation Districts (HCDs)
- Heritage Conservation Districts allow municipalities to guide future changes in these areas of special character
- 32 districts designated in or before 1992 were examined

## Background of Bath Heritage Conservation District

- Located in the former Village of Bath, now Loyalist Township
- District includes seven residential buildings, a former Town Hall, now a museum, and a meeting hall
- The district was designated in 1983

## Study Approach

- Resident surveys were conducted door to door by members of the Heritage Resources Centre
- Land use mapping and a streetscape evaluation were conducted
- Sales history trends were collected from GeoWarehouse™ and analyzed
- A key stakeholder was interviewed

## Analysis of Key Findings

- The Bath Heritage Conservation District Plan does not have clearly stated objectives
- The assumed objective to conserve historic buildings has been met
- 100% of people are very satisfied with living in the district
- The one property with a sales history had an above average trajectory
- There has not been a need to call on the Heritage Conservation District processes
- The protection and processes afforded by Heritage Conservation District designation is proactive and will be in place when decisions about the future use of the area are needed
- Overall, the Bath Heritage Conservation District has been a successful planning initiative

## Recommendations

- Update the district plan including a statement of cultural heritage value for the district as well as goals and objectives
- Track future alteration requests in a comprehensive and easily accessible manner





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# 1.0 Introduction

## 1.1 Heritage Act and Designation

The *Ontario Heritage Act* (Subsection 41. (1)) enables municipalities to designate Heritage Conservation Districts (HCDs). A Heritage Conservation District is an area with “a concentration of heritage resources with special character or historical association that distinguishes it from its surroundings”<sup>1</sup>. Districts can be areas that are residential, commercial, rural, industrial, institutional or mixed use. According to the Ministry of Culture “the significance of a HCD often extends beyond its built heritage, structures, streets, landscape and other physical and special elements to include important vistas and views between buildings and spaces within the district”<sup>2</sup>.

The designation of a Heritage Conservation District allows municipalities to protect the special character of an area by guiding future changes. The policies for guiding changes are outlined in a Heritage Conservation District Plan that can be prepared by city staff, local residents or heritage consultants. A Heritage Conservation District Plan must also include a statement of objectives and guidelines that outline how to achieve these objectives<sup>3</sup>.

## 1.2 Rationale for Heritage Conservation District Study

Many people now consider the Heritage Conservation District to be one of the most effective tools not only for historic conservation but for good urban design and sound planning. At least 92 HCDs are already in existence in Ontario with the earliest designations dating back to 1980. While more are being planned and proposed all the time there is also a residual resistance to HCDs from some members of the public. Typically this resistance centres on concerns about loss of control over one’s property, impact on property values and bureaucratic processes. On the other hand, the benefits of HCDs, establishing high standards of maintenance and design, allowing the development of and compliance with shared community values and the potential for increasing property values, are not as widely perceived as might be the case.

With funding from the Ontario Trillium Foundation, volunteers from branches of the Architectural Conservancy of Ontario (ACO) and Historical Societies were assisted by the Heritage Resources Centre (HRC) at the University of Waterloo to undertake a province wide research program to answer the question: have Heritage Conservation Districts in Ontario been successful heritage planning initiatives over a period of time?

Since it takes a period of time for the impacts of district designation to manifest this study concentrated on examining districts that are well established. Applying the criterion of residential, commercial or mixed use areas designated in 1992 or before there were 32 HCDs that the study examined. These districts are found in or near the following areas: Cobourg, Hamilton, Kingston, Ottawa, St. Catharines, Huron County, Brampton, Toronto, Ottawa, the Region of Waterloo and Thunder Bay.

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<sup>1</sup> Ontario Heritage Toolkit, Heritage Conservation Districts, Ministry of Culture (2006), Page 5

<sup>2</sup> Ontario Heritage Toolkit, Heritage Conservation Districts, Ministry of Culture (2006), Page 5

<sup>3</sup> Ontario Heritage Toolkit, Heritage Conservation Districts, Ministry of Culture (2006), Page 12

Figure 1 shows that the 32 districts have a wide geographic distribution and represent the various community sizes. The various types of districts which are part of the study are also evident.

Geographical Distribution		Community Size		Type	
Northern	1	Small Community	9 ~	Commercial	9~
Eastern	11 *	Medium Sized	11	Residential	18*
Central	12	Large City	12 *	Mixed	5
South Western	8 ~				
	32		32		32

\* 5 of these districts make up the HCD known as Sandy Hill  
 ~ 2 of these districts make up the HCD known as Goderich Square

*Figure 1: Distribution of Heritage Conservation Districts under Examination*

The study sought to answer the following specific questions in each of the 32 Heritage Conservation Districts:

- Have the goals or objectives set out in the District Plan been met?
- Are residents content living in the Heritage Conservation District?
- Is it difficult to make alterations to buildings in the Heritage Conservation District?
- Have property values been impacted by the designation of the district?
- What are the key issues in the district?

These questions were answered through the contributions of local volunteers from the Architectural Conservancy of Ontario branches, Historical Societies and local heritage committees as well as through communication with local municipal officials.

## 2.0 Background of Bath Heritage Conservation District

### 2.1 Description of the District

The Bath Heritage Conservation District runs along Main Street in the Village of Bath in Loyalist Township. The district consists of nine properties. These properties include seven residential buildings, a former Town Hall, now a museum, and a meeting hall.



Figure 3: Plaque at the Town Hall, now a museum

### 2.2 Cultural Heritage Value of the District

The Bath Heritage Conservation District Plan does not contain a statement of value for the district as a whole. The closest the documentation comes is to state, "In depth research has been done on seven of these buildings and there is no doubt regarding their historic and architectural importance to the village"<sup>4</sup>.

### 2.3 Location of the District

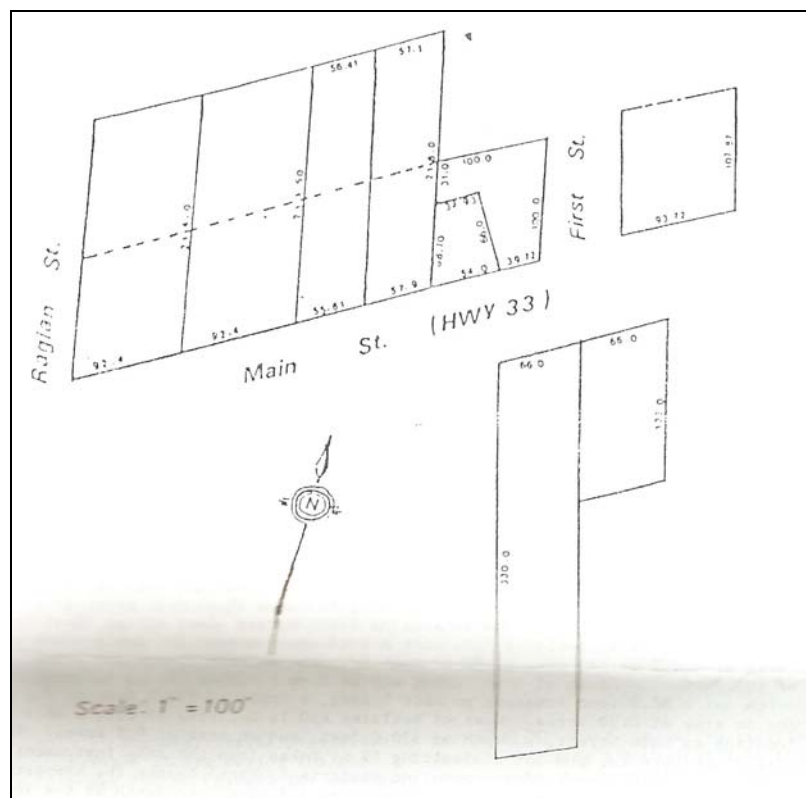


Figure 2: Map of Bath Heritage Conservation District

<sup>4</sup> Bath District #2 Plan (1982), Page 1

## 2.4 Designation of the District

According to the stakeholder, the designation of the Bath Heritage Conservation District was initiated by local residents. The Bath Heritage Conservation District is protected by By-law 514-1982 which was passed on October 4, 1982 by the Village of Bath, now Loyalist Township. The designation was approved by the Ontario Municipal Board under the 1980 *Ontario Heritage Act* on October 25, 1983 (M820103).

According to the stakeholder, the Bath Conservation District Plan was prepared for the Village of Bath in 1982 with some involvement from the Queen's Planning School. The Heritage Conservation District Plan contains sections on each of the nine buildings and their architectural details. The plan also addresses the landscape, movements, land use, land values and structural condition of the buildings.

## 3.0 Study Approach

### 3.1 Resident Surveys

Residents of the Bath Heritage Conservation District were asked a series of questions relating to their experiences and satisfaction living in the district. These surveys were conducted door to door by members of the Heritage Resources Centre. Three of eight residents (one property was vacant) answered surveys, representing a 37.5% response rate. The tabulated findings of the survey are presented in Appendix A.

### 3.2 Townscape Survey

A Townscape Survey of Bath was conducted in March 2009. The purpose of this survey is to provide an objective way to evaluate streetscapes. There are two elements to the survey; land use mapping and a streetscape evaluation. Land use maps, which represent the current use of buildings in the district, were produced for Bath (see Appendix B). The streetscape evaluation involves the use of a view assessment pro forma which generates scores between one and five for 25 factors in view. A total of three views were photographed and evaluated (see Appendices C and D). The summary of the scores is included as Appendix E.

### 3.3 Real Estate Data

Sales history trends for properties within each Heritage Conservation District under study were calculated and compared against non-designated properties in the immediate vicinity of each district. Sales records spanning an average 30 year period range were identified for individual district properties using GeoWarehouse™, an online subscription database commonly used by real estate professionals.

Properties with more than one record of sale were plotted on graphs and compared with the average sales figures for non-designated properties. A number of sales property averages were obtained for each “non-designated area” within a 1 km radius from the district. The mean selling price for these property averages, which were also obtained through GeoWarehouse™, were calculated and plotted against each district unit sales record (see Appendix F)<sup>5</sup>. It was expected that the use of average sales prices from the immediate vicinity of a district as opposed to the use of city-wide sales trends would provide a more accurate comparative record to show how the district designation status itself affects property values. Aside from the locational factor (*i.e.* properties located within an district), it must be recognized that this study did not take into account a variety of other issues that can also affect sales prices (*e.g.* architecture, lot size, *etc.*).

### 3.4 Key Stakeholder Interviews

People who had special knowledge of each district were interviewed for their experiences and opinions. These stakeholders often included the local planner, the chair or a member of the Municipal Heritage Committee and members of the community association or BIA. One person was interviewed for the Bath Heritage Conservation District. The interview was conducted over the phone. A summary of their responses is included in Appendix G. Interviewees are not identified in accordance with the University of Waterloo policy on research ethics.

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<sup>5</sup> The method for obtaining the average sales price for non-designated areas within the 1 km radius was adjusted according to the number of properties within an Heritage Conservation District. For example, to obtain figures on non-designated areas, average sales histories within a 1 km radius from the largest districts (201-600 properties) were obtained using every fiftieth district property as a basis for calculating each area sales record. The mean average of these sales records were subsequently calculated and used as the comparative sales history trend on each graph. Every fifth, tenth, and twenty-fifth property were used to find the immediate average sales histories within a 1 km radius for smaller districts with 1-10, 11-100 and 101-200 properties respectively.

### 3.5 Requests for Alterations

With respect to the requests for alterations within the Heritage Conservation Districts, the study wished to answer these questions in each district:

- How many applications for building alterations have been made?
- How many applications have been approved or rejected?
- How long did the application process take for individual properties?
- What type of changes were the applications for?

For the Bath Heritage Conservation District, the information about the number of applications for alterations and their time for approval was not available since there have been no recent applications.



## 4.0 Analysis of Key Findings

### 4.1 Have the goals or objectives been met?

The Bath Heritage Conservation District Plan does not have clearly stated goals or objectives to measure the progress of the site over time.

It can be assumed that the goal of the district was to conserve the historic buildings within its boundaries. Drawing on measures from the Townscape Survey coherence, facade quality and quality of conservation work all scored well. However, conserved elements and neglected historic features scored just above average. The implied objective to protect the buildings has been met.



*Figure 3: An example of a view with high facade quality but poor conserved elements*

### 4.2 Are people content?

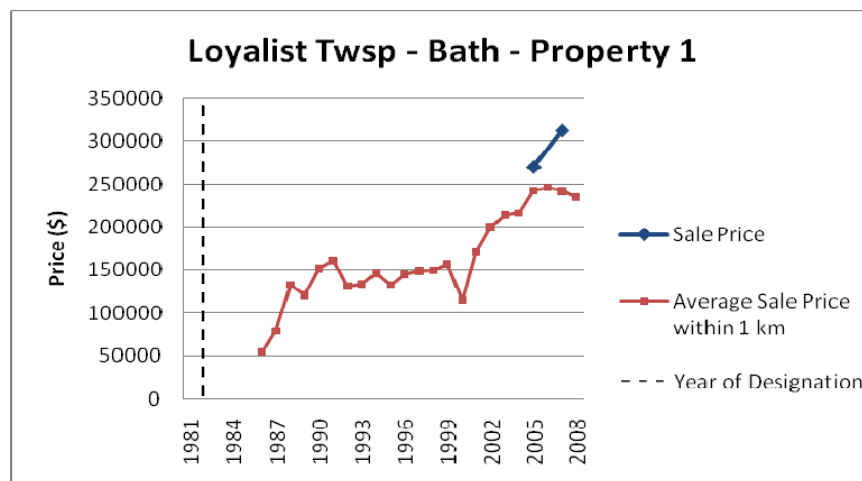
One question in the resident survey addressed people's contentment with living in the district. Of the three people surveyed, all three said they were very satisfied with living in the district.

### 4.3 Is it difficult to make alterations?

According to the stakeholder, there have been no recent requests for alterations. This is supported by the resident surveys. Of the three residents surveyed all of them said they had not made any applications.

### 4.4 Have property values been impacted?

According to the resident surveys the two people who an opinion about real estate values believed that the designation of the area has no impact on their real estate values. The stakeholder reinforced this opinion stating the value of the buildings has been maintained. However, the one sales record from GeoWarehouse™ indicated an above average sales value increase.



*Figure 6: Above Average Sale History Trajectory*

#### 4.5 What are the key issues in the district?

##### *a) Isolated group of buildings in a small Township*

The Bath Heritage Conservation District is an isolated group of buildings in a small Township. There has been no development pressure. Furthermore, residents within the district have not made changes to their houses recently. As a result, there has not been a need to manage change or call on the Heritage Conservation District processes. In this district, the protection and processes afforded by Heritage Conservation District designation is proactive and will be in place when decisions need to be made about the future use of the area.

##### *b) Lack of goals and statement of cultural heritage value*

The Bath Heritage Conservation District Plan has sections on each building focusing on its architectural details. This type of layout represents old fashion architectural conservation approach. Although the area clearly has no development pressure, an updated plan with a statement of cultural heritage value and objectives would avoid future character loss.

# 5.0 Conclusions

## 5.1 Conclusions

- The Bath Heritage Conservation District Plan does not have clearly stated objectives
- The assumed objective to conserve historic buildings has been met
- 100% of people are very satisfied with living in the district
- The one property with a sales history had an above average trajectory
- There has not been a need to call on the Heritage Conservation District processes
- The protection and processes afforded by Heritage Conservation District designation is proactive and will be in place when decisions about the future use of the area are needed

Overall, the Bath Heritage Conservation District has been a successful planning initiative.

## 5.2 Recommendations

The following aspects of the district are areas for improvement:

- Update the district plan including a statement of cultural heritage value for the district as well as goals and objectives
- Track future alteration requests in a comprehensive and easily accessible manner

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# Appendices



# Appendix A

## Tabular Results of Resident Surveys





1. Are you the owner or tenant of this property?

Responses

	Owner	Tenant-Commercial	Tenant - Residential
Counts	1	1	1
Percentage	33.33	33.33	33.33

2. Are you aware you live within a HCD?

Responses

	Yes	No
Counts	3	0
Percentage	100.00	0.00

3. Did you move here before or after the area was designated?

Responses

	Before	After
Counts	0	2
Percentage	0.00	100.00

4. If you lived here before designation, how did you feel about it at the time?

Responses

Positive	0
Negative	0
Neutral	0
Mixed Feelings	0

5. If you came after the designation did the designation affect your decision to move here?

Responses

	Yes	No
Counts	0	2
Percentage	0.00	100.00

6. What is your understanding of how the HCD works?

Responses

Preserve/maintain	1
Restrictions	2
Do not know	1

*Note: Residents could have more than one response to question 6*

7. Have you made application(s) for building alterations?

Responses

	Yes	No
Counts	0	3
Percentage	0.00	100.00

8. If so, were your applications for alterations approved?

Responses

	Yes	No
Counts	0	0
Percentage	0.00	0.00

9. On average, how long did the application take?

Responses

Over 5 months	0
4 to 5 months	0
1 to 3 months	0
Less than 1 month	0
Not long	0

10. Overall, how satisfied are you with living in a HCD?

Responses

	Mean Score out of 5	Very Satisfied	Satisfied	Neither Satisfied or Dissatisfied	Dissatisfied	Very Dissatisfied	Do not Know
Counts	5.00	3	0	0	0	0	0
Percentage		100.00	0.00	0.00	0.00	0.00	0.00

11. How do you think the HCD designation has affected the value of your property compared to similar non-designated districts?

Responses

	Mean Score out of 5	Increased a Lot	Increased	No Impact	Lowered	Lowered a lot	Do not Know
Counts	3.00	0	0	2	0	0	0
Percentage		0.00	0.00	100.00	0.00	0.00	0.00

12. Do you think the HCD designation will affect your ability to sell your property?

Responses

No	0
Yes	0
Yes, easier	0
Yes, harder	2
Don't know	0
Maybe	1

13. Comments

**Additional Comments:** Love owning an older home, it is like owning a piece of history (1), something might not be marketable (1)

Total Population	8
Participants	3
Participation Rate	37.5



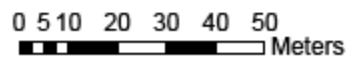
Appendix B  
Land Use Maps



# Ground Level Land Use in Bath Heritage Conservation District



## Legend

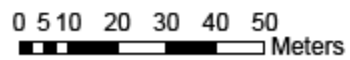


Author: Heritage Resources Centre  
 April 8, 2009  
 Data provider: Teranet Inc.  
 Coordinate system:  
 NAD\_1983\_UTM\_Zone\_18N

## Second Floor Land Use in Bath Heritage Conservation District



### Legend



Author: Heritage Resources Centre  
 April 8, 2009  
 Data provider: Teranet Inc.  
 Coordinate system:  
 NAD\_1983\_UTM\_Zone\_18N



# Appendix C






## Map of Views



## Views in Bath Heritage Conservation District



### Legend

-  Viewpoints
-  Viewlines
-  HCD Boundary
-  Not in HCD
-  In HCD

0 10 20 40 60 80 100 Meters



Author: Heritage Resources Centre  
 April 8, 2009  
 Data provider: Teranet Inc.  
 Coordinate system: NAD\_1983\_UTM\_Zone\_18N



Appendix D  
Photographs of Views





View 1



View 2



View 3





# Appendix E

## Townscape Evaluation Pro Forma



## Heritage Conservation District Townscape Summary

**Name of District:** Bath HCD

**Date:** March 17, 2009

<b>A. Streetscape Quality</b>				
	Score	Out of	%	Out of 5
A1-Pedestrian friendly	10.5	15	70.00	3.5
A2-Cleanliness	7.5	15	50.00	2.5
A3-Coherence	11.5	15	76.67	3.8
A4-Edgefeature Quality	11	15	73.33	3.7
A5-Floorscape Quality	9.5	15	63.33	3.2
A6-Legibility	12.5	15	83.33	4.2
A7-Sense of Threat	11	15	73.33	3.7
A8-Personal Safety: Traffic	11	15	73.33	3.7
A9-Planting: Public	4	5	80.00	4.0
A10-Vitality	7.5	15	50.00	2.5
A11- Appropriate Resting Places	4.5	5	90.00	4.5
A12-Signage	4	5	80.00	4.0
A13-Street Furniture Quality	10	15	66.67	3.3
A14-Traffic Flow Appropriateness	7.5	15	50.00	2.5
<b>SUM A</b>	122	180	67.78	3.4

<b>B. Private Space in View</b>				
	Score	Out of	%	Out of 5
B15-Advertising, In keeping	4	5	80.00	4.0
B16-Dereliction, Absence of	11	15	73.33	3.7
B17-Detailing, Maintenance	10.5	15	70.00	3.5
B18-Facade Quality	11	15	73.33	3.7
B19-Planting: Private	10	15	66.67	3.3
<b>SUM B</b>	46.5	65	71.54	3.6

<b>C. Heritage in View</b>				
	Score	Out of	%	Out of 5
C20-Conserved Elements Evident	9.5	15	63.33	3.2
C21-Historic Reference Seen	6	15	40.00	2.0
C22-Nomenclature/Place Reference	8	15	53.33	2.7
C23-Quality of Conservation Work	10.5	15	70.00	3.5
C24-Quality of New Development	0	0	n/a	n/a
C25-Historic Features, Maintained	10	15	66.67	3.3
<b>SUM C</b>	44	75	58.67	2.9

<b>Impression Score</b>				
<b>Aggregate Score</b>	212.5	320	66.406	3.3

**Weather:** Sunny

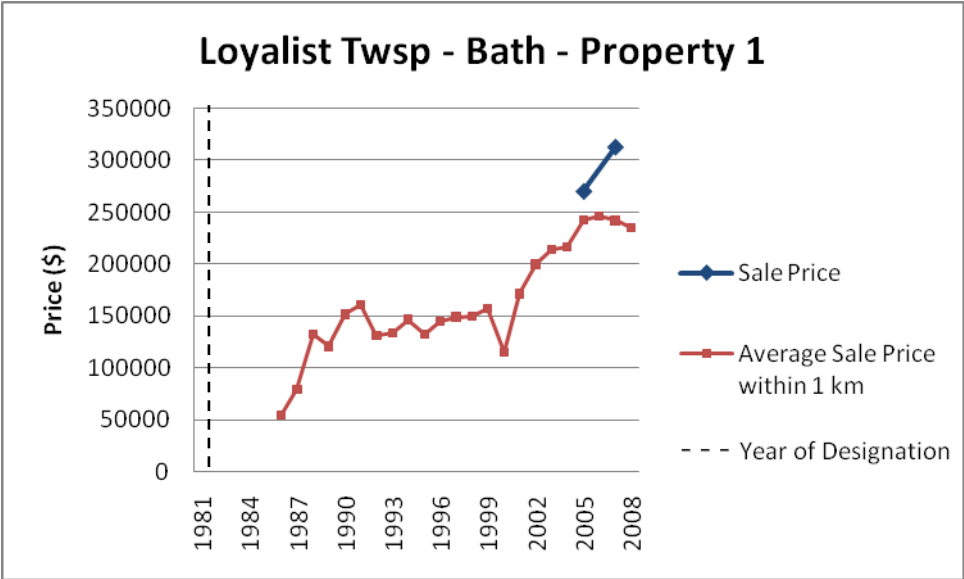
**# Views:** 3



# Appendix F

## Real Estate Data









## Appendix G

### Summary of Key Stakeholder Interview



Heritage Conservation District Name: Bath Heritage Conservation District, Loyalist Township

Month(s) of Interviews: March 2009

Number of People Interviewed: 1

Question	Summary of Answer
1. How are you involved in the HCD?	<ul style="list-style-type: none"> <li>• In charge of heritage for the Township (1)</li> <li>• Resources person for the committee as well as the public (1)</li> </ul>
2. How did the HCD come about?	<ul style="list-style-type: none"> <li>• Local citizens – one person owned half the properties in the area (1)</li> <li>• Some involvement from Queen Planning School (1)</li> </ul>
3. In your opinion how has the HCD designation been accepted?	<ul style="list-style-type: none"> <li>• Well accepted (1)</li> <li>• Not an area with huge development pressures – no recent requests for alterations (1)</li> <li>• Years ago there was a request by one owner to be removed from the district, but once the area found out they would have to do with the way the designation of the whole area the effort fizzled out (1)</li> <li>• Area is well looked after, buildings are in good shape- owners recognize the value (1)</li> </ul>
4. In your experience what are the HCD management processes in place and how do they work?	<ul style="list-style-type: none"> <li>• There has not been a review of the district guidelines because it has not been needed, if there were pressures guidelines would have been updated (1)</li> </ul>
5. In your experience what is the process for applications for alterations?	<ul style="list-style-type: none"> <li>• No recent requests for alterations – very quiet (1)</li> <li>• Less detailed plan – does not address district as a whole, but rather each building individually, thus an applications would be treated as a Part IV application (1)</li> <li>• Might have been less strict enforcement at some point (1)</li> </ul>
6. Is there a communication process set up for the HCD?	<ul style="list-style-type: none"> <li>• There has not been a huge need – no broad education (1)</li> <li>• Municipal heritage committee has tried to go to events and have a booth to spread information (1)</li> <li>• Owners come into the Township (1)</li> </ul>
7. In your opinion, what are the issues that are unique to the HCD and how have they been managed?	<ul style="list-style-type: none"> <li>• Small size- Queens identified two areas and only one was designated (the other was more commercial and there was some resistance) (1) <ul style="list-style-type: none"> <li>- Area that was designated was generally already accepted and the designation just helped to recognize what was understood</li> <li>- Area was stable and in good shape, seems to still be stable and in good shape</li> </ul> </li> </ul>
8. Other comments	<ul style="list-style-type: none"> <li>• Overall it works well (1)</li> <li>• Property values have probably been maintained (1)</li> </ul>

