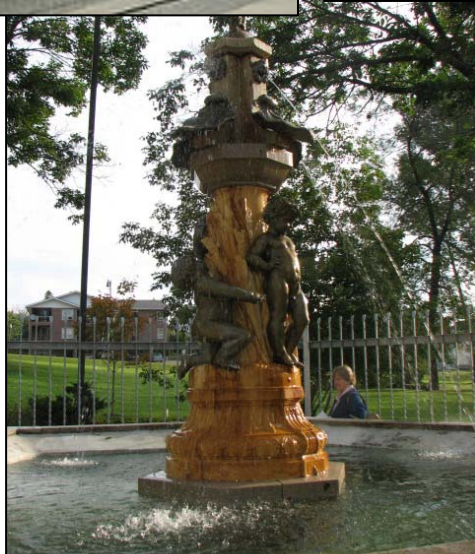


Heritage Districts Work!

Heritage Conservation District Study
Waverly Park - City of Thunder Bay
2009



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Heritage Conservation District Study 2009

Prepared By

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Thanks!

Waverly Park Executive Summary

Introduction

- 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
- 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
- 32 districts designated in or before 1992 were examined

Background of Waverly Park Heritage Conservation District

- Located in the City of Thunder Bay
- Consists of 60 properties, which are predominantly residential with several institutional and public buildings and a centrally located park
- The district was designated in 1986
- Plan was written by DeLCan Consulting Engineers and Planners

Study Approach

- Resident surveys were delivered through the mail and were returned to the City of Thunder Bay
- Sales history trends were collected from GeoWarehouse™ and analyzed
- Key stakeholders were interviewed

Analysis of Key Findings

- The following objective of the district plan has been met:
 - to protect and enhance the heritage character of the area
- The following objectives of the district plan have been less successful:
 - to strengthen the identity of the area and enhance its image as an important heritage area within the City of Thunder Bay
 - to encourage public and private participation in the protection and improvement of the district
- 63% of the people surveyed are very satisfied or satisfied with living in the district
- Most properties (six of eight) in the district had average or above sales history trajectories
- Overall, the Waverly Park Heritage Conservation District has been a successful planning initiative

Recommendations

- Track alteration requests in a comprehensive and easily accessible manner
- Provide opportunities for public and private involvement in the district
- Make information about the district more accessible
- Provide a grant program

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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”¹. 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”².

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 objectives³.

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.

¹ Ontario Heritage Toolkit, Heritage Conservation Districts, Ministry of Culture (2006), Page 5

² Ontario Heritage Toolkit, Heritage Conservation Districts, Ministry of Culture (2006), Page 5

³ 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 Waverly Park Heritage Conservation District

2.1 Description of the District

The Waverly Park Heritage Conservation District is a linear corridor comprised of buildings along Red River Road and Waverly Street, from Algoma Street at the east end to High Street in the West . The district consists of 60 properties which are predominantly residential with several institutional and public buildings and a centrally located park.

2.2 Cultural Heritage Value of the District

According to the Heritage Conservation District plan the significance of Waverly Park is:

“The Waverly Park Heritage Conservation District is rich in historical significance, given its location at the beginning of the “Dawson Route” and at the centre of an early wave of development in Port Arthur. It is an area which contains a good mix of building types, primarily residential, but also including institutional and commercial structures”⁴.

2.3 Location of the District

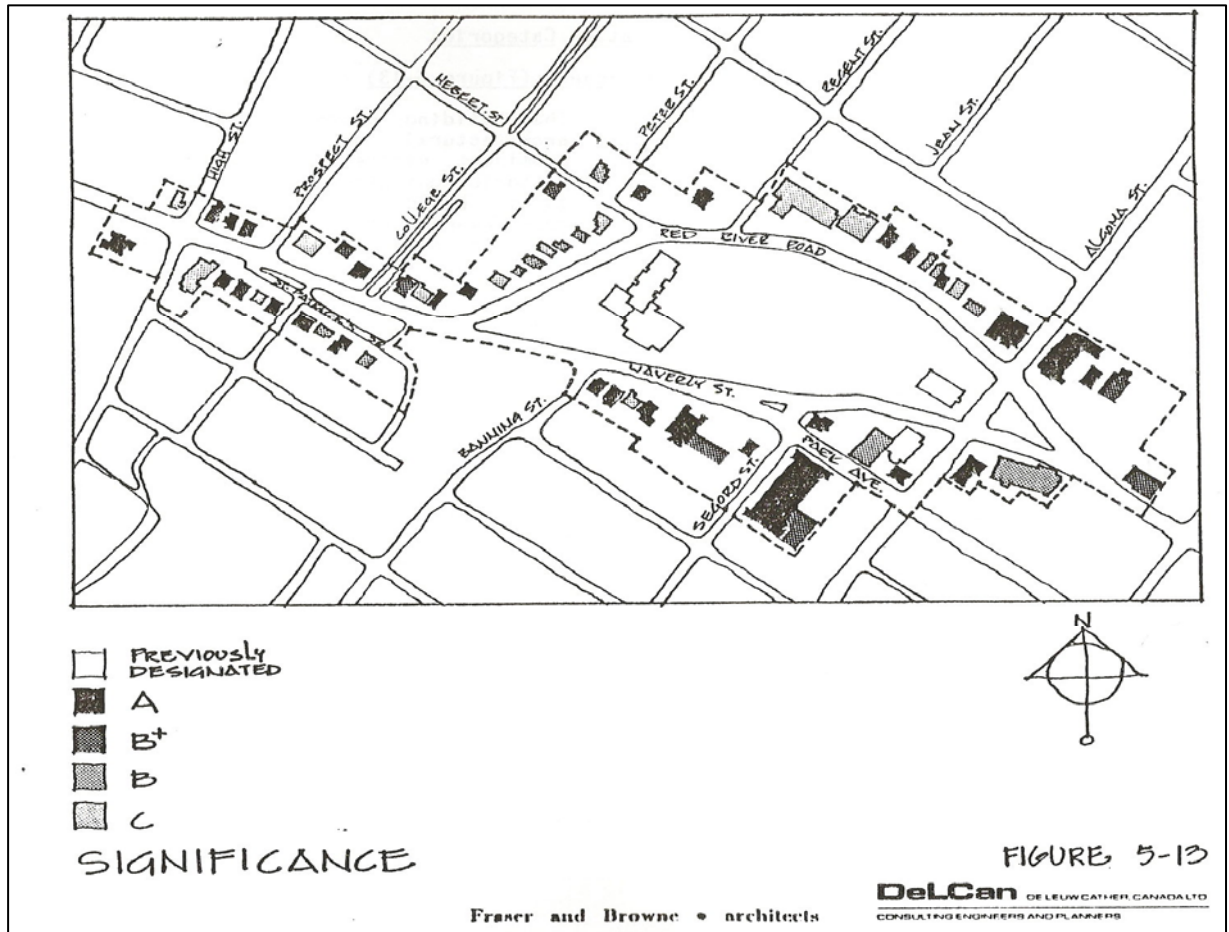


Figure 2: Map of Waverly Park Heritage Conservation District

⁴ Waverly Park Heritage Conservation District Study, DeLCan Consulting Engineers and Planners (1986), Page 5-1

2.3 Designation of the District

The Waverly Park Heritage Conservation District is protected by By-law 65-1988 which was passed on March 28, 1988 by the City of Thunder Bay. The designation was approved by the Ontario Municipal Board under the 1980 *Ontario Heritage Act* on October 17, 1988.

The Waverly Park Heritage Conservation District Plan was prepared for the City of Thunder Bay by DeLCan Consulting Engineers and Planners in 1986. The Heritage Conservation District Plan contains sections on the goals and objectives, planning recommendations, building design guidelines and implementation.

3.0 Study Approach

3.1 Resident Surveys

Residents of the Waverly Park Heritage Conservation District were asked a series of questions relating to their experiences and satisfaction with living in the district. These surveys were mailed to each property in the district and were returned to the City of Thunder Bay. Twenty-seven of 60 residents answered surveys, representing a 45% response rate. The tabulated findings of the survey are presented in Appendix A.

3.2 Townscape Survey

A Townscape Survey of Waverly Park was conducted not conducted due to lack of resources.

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)⁵. 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 of 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. Two people were interviewed for the Waverly Park Heritage Conservation District. Two interviews were conducted over the phone. Those interviewed included a local resident and a committee member. A summary of the responses is included in Appendix C. Interviewees are not identified in accordance with the University of Waterloo policy on research ethics.

⁵The 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 a 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 Waverly Park Heritage Conservation District, the information about the number of applications for alterations and their time for approval was not available.

4.0 Analysis of Key Findings

4.1 Have the goals or objectives been met?

The Heritage Conservation District, written in 1986 lists three objectives:

a) Strengthen the identity of the area and enhance its image as an important heritage area within the City of Thunder Bay

The objective to strengthen the identity of the area has not been met. According to the resident surveys 24 of 27 people know that they live in the district. However, three people (11%) do not have a knowledge that they live in the district. Six of 27 people said they had “little knowledge” of how the district works. There were also several comments from the residents which indicate that there is a lack of knowledge about the identity of the area. These comments include “have only heard second hand that the area exists”, “didn't know when buying” and “information about the district is not accessible”. According to the stakeholders, people outside the district also have very little knowledge of the formal recognition of the area.

b) Protect and enhance the heritage character of the area

The second objective to protect and enhance the heritage character of the area appears to have been met. According to the resident surveys, only nine people made alteration requests and eight were approved. This indicates that there have not been a lot of changes in the area. Moreover, there is only one negative comment made from the residents about the appearance of the area.

c) Encourage public and private participation in the protection and improvement of the district

The objective to encourage public and private participation has not been met. There is a lack of knowledge that the area exists and how it works. If people do not know about the area and how it works, they cannot participate. However, there appears to be a desire from the residents to participate in the process. This is evident by the every high response rate (45%) from the mail out surveys.

4.2 Are people content?

Two questions in the resident survey addressed people's contentment with living in the district. At the time of designation only ten people surveyed lived in the area and only half were positive about the initiation of the district. Now, 63% of people are very satisfied or satisfied with living in the district. However, 30% expressed neutral opinions. Overall, people are satisfied but there are several people with expectations that are not being met.

4.3 Is it difficult to make alterations?

According to the resident surveys, only nine people made applications for alteration and eight were approved. Of those that were approved the majority were approved within three months. The records from the City of Thunder Bay were not available. Clearly, the process for completing alterations to buildings in Waverly Park is neither difficult nor lengthy.

4.4 Have property values been impacted?

According to the resident surveys 12 of 27 people (67%) thought the designation had no affect on their property values. The data from GeoWarehouse™ indicated that eight of 60 properties had sales histories. Of these eight properties five had above average sales value increases (see Figure 3). One of the remaining three properties had an average sales history trajectory. Two of the properties performed below average. Almost all the properties had an above average sale price which indicates the district is a better neighbourhood than its immediate surroundings.

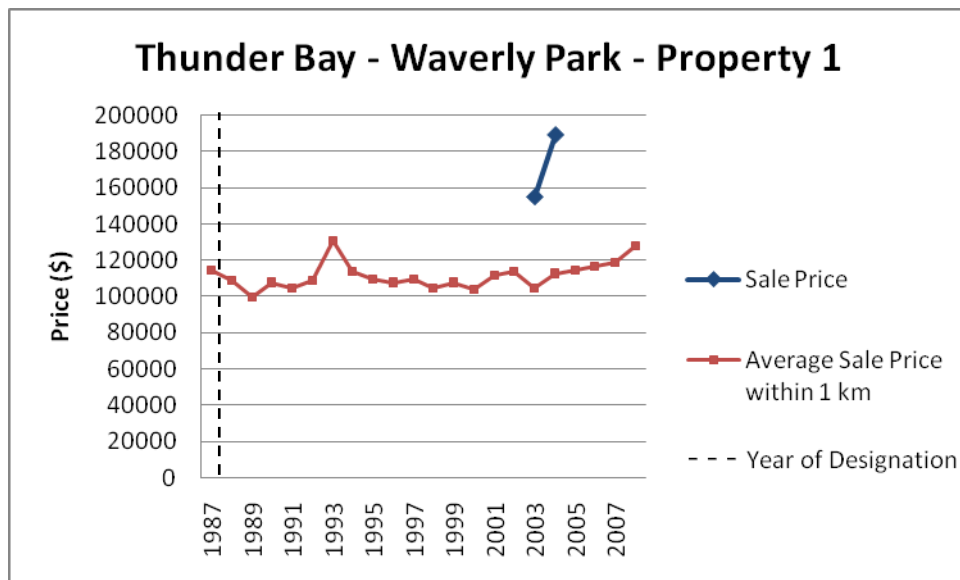


Figure 3: Above Average Sale History Trajectory

4.5 What are the key issues in the district?

a) Financial Incentives

According to both stakeholders there is a need for a grant program in the City of Thunder Bay. One stakeholder indicated that grants would help to meet the expectations of owning a heritage building. The issue of financial incentives was also mentioned in the resident surveys.

5.0 Conclusions

5.1 Conclusions

- The following objective of the district plan has been met:
 - to protect and enhance the heritage character of the area
- The following objectives of the district plan have been less successful:
 - to strengthen the identity of the area and enhance its image as an important heritage area within the City of Thunder Bay
 - to encourage public and private participation in the protection and improvement of the district
- 63% of the people surveyed are very satisfied or satisfied with living in the district
- Most properties (six of eight) in the district had average or above sales history trajectories

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

5.2 Recommendations

The following aspects of the district are areas for improvement:

- Track alteration requests in a comprehensive and easily accessible manner
- Provide opportunities for public and private involvement in the district
- Make information about the district more accessible
- Provide a grant program

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	27	0	0
Percentage	100.00	0.00	0.00

2. Are you aware you live within a HCD?

Responses

	Yes	No
Counts	24	3
Percentage	88.89	11.11

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

Responses

	Before	After
Counts	12	13
Percentage	48.00	52.00

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

Responses

Positive	5
Negative	1
Neutral	1
Mixed Feelings	3

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

Responses

	Yes	No
Counts	3	10
Percentage	23.08	76.92

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

Responses

Preserve	12
Restrict	6
Guidelines	2
Committee	2
Little Knowledge	6

Note: Residents could provide more than one response to question 6

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

Responses

	Yes	No
Counts	9	18
Percentage	33.33	66.67

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

Responses

	Yes	No
Counts	8	1
Percentage	88.89	11.11

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

Responses

Over 5 months	0
4 to 5 months	0
1 to 3 months	2
Less than 1 month	2
Not long	2
Too long	2

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	3.70	5	12	8	1	1	0
Percentage		18.52	44.44	29.63	3.70	3.70	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	2.83	0	2	12	3	1	9
Percentage		0.00	11.11	66.67	16.67	5.56	33.33

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

Responses

No	9
Yes	4
Yes, easier	2
Yes, harder	0
Don't know	3
Maybe	7

13. Comments

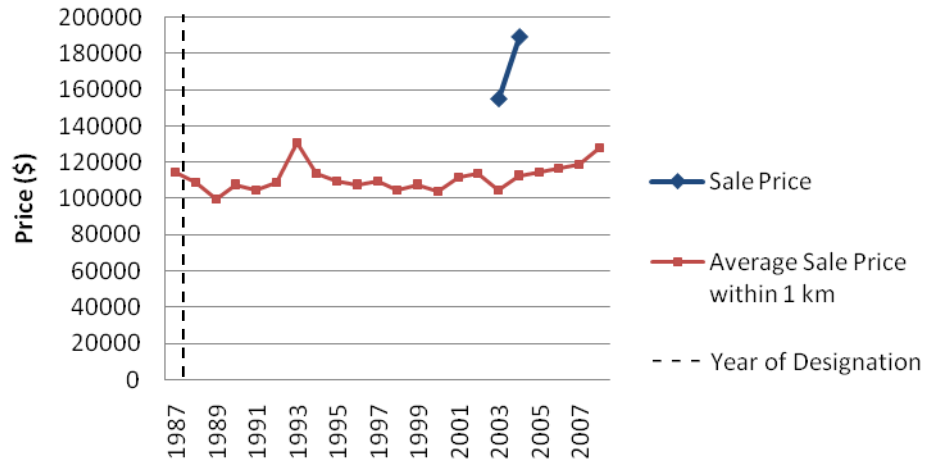
Additional Comments: new signs detract from character (1), have only heard second hand that the area exists (1), didn't know when buying (1), information about the district is not accessible (4), too much power in the wrong hands (1), stop order put on roof repairs (1), tax relief (1), have never been contacted by the district until now (1), would like to have known a committee existed (1), getting insurance was a nightmare (1), there is no monetary effect on the city or the province, only on the property owner (1)

Total Population	60
Participants	27
Participation Rate	45.00

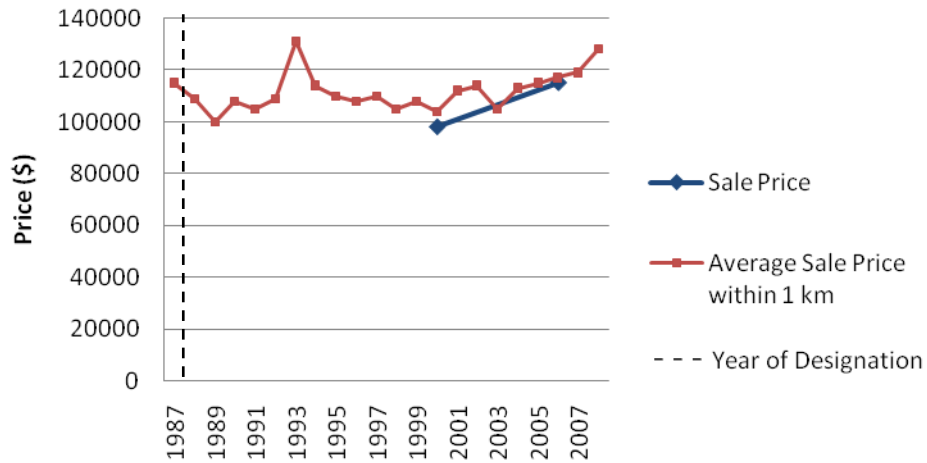
Appendix B

Real Estate Data

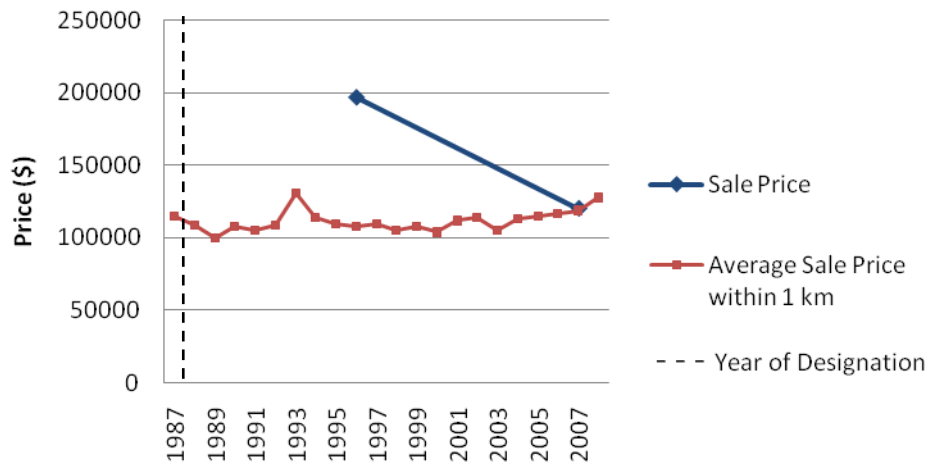
Thunder Bay - Waverly Park - Property 1



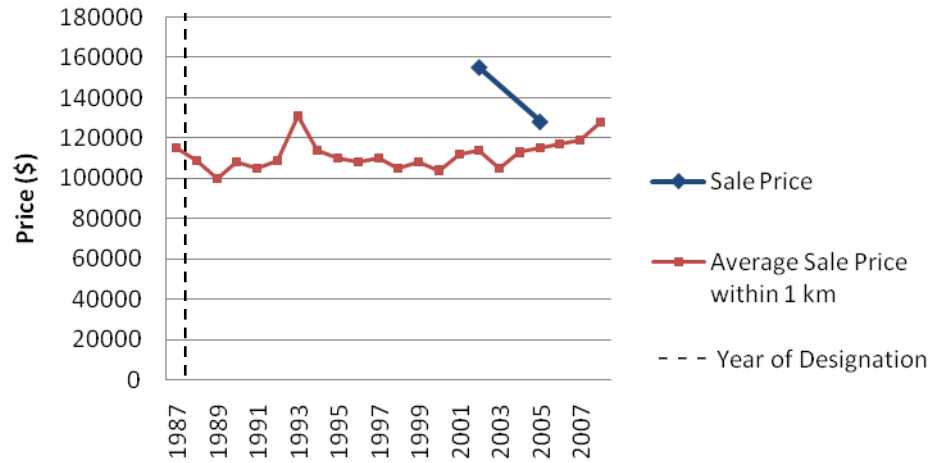
Thunder Bay - Waverly Park - Property 2



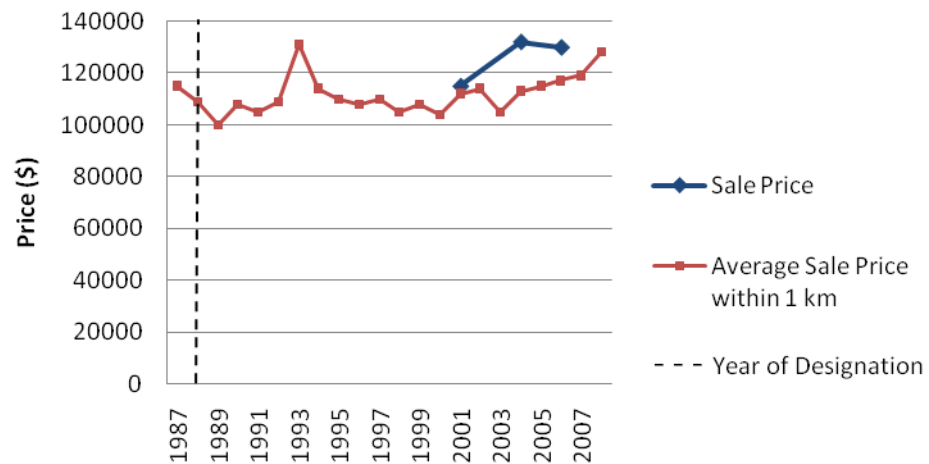
Thunder Bay - Waverly Park - Property 3



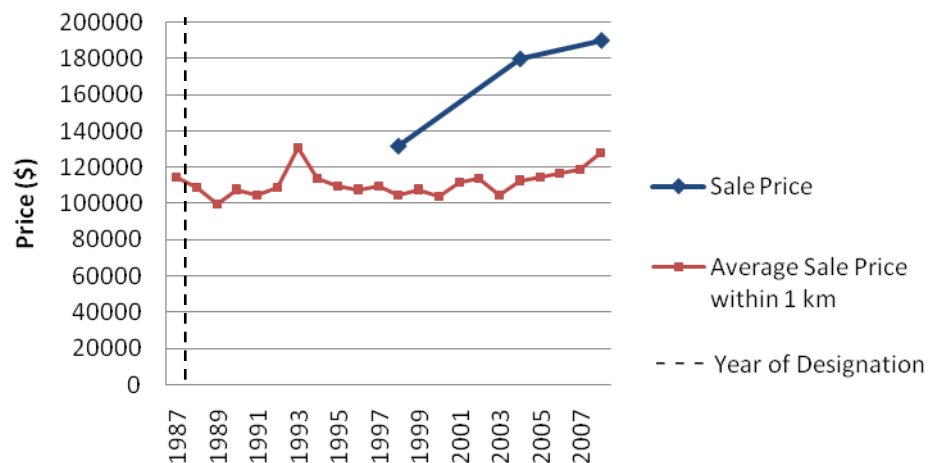
Thunder Bay - Waverly Park - Property 4



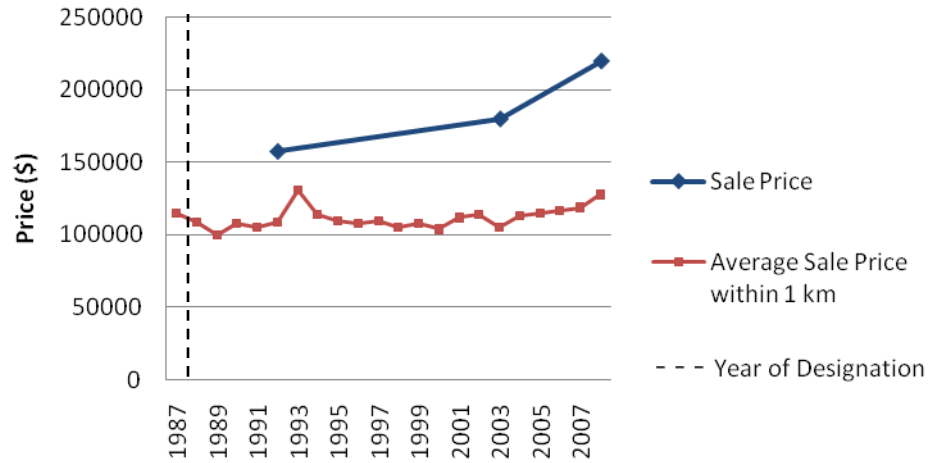
Thunder Bay - Waverly Park - Property 5



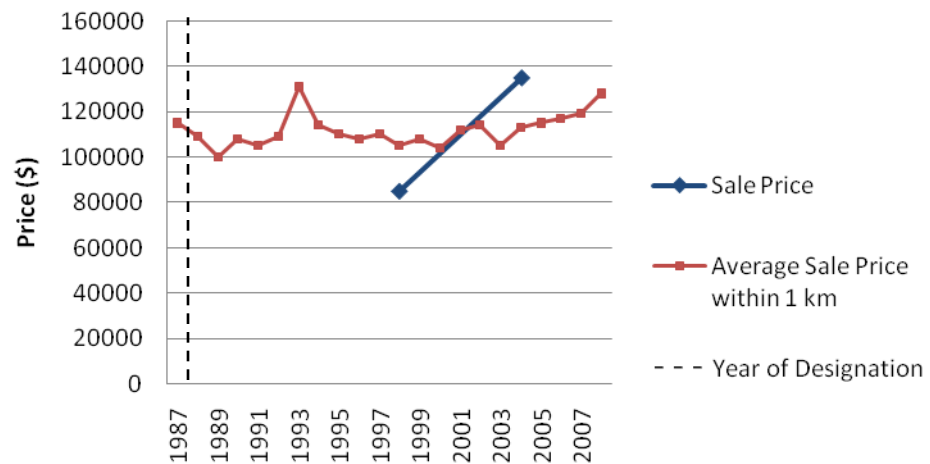
Thunder Bay - Waverly Park - Property 6



Thunder Bay - Waverly Park - Property 7



Thunder Bay - Waverly Park - Property 8



Appendix C

Summary of Key Stakeholder Interviews

Heritage Conservation District Name: Waverly Park Heritage Conservation District

Month(s) of Interviews: April 2009

Number of People Interviewed: 2

Question	Summary of Answer
1. How are you involved in the HCD?	<ul style="list-style-type: none"> • Member of the Municipal Heritage Committee (1) • Owns property in the district (1)
2. How did the HCD come about?	<ul style="list-style-type: none"> • n/a
3. In your opinion how has the HCD designation been accepted?	<ul style="list-style-type: none"> • It is not disputed, but at the same time it is not of primary interest to most people (1) • Many people outside the district do not know about the designation. They know the area is significant, but not that there is a formal recognition of its importance (1) • The City (through tourism perhaps) and the Heritage Committee might consider further marketing of the area (1) • Pretty well accepted (1) • Unique area (1)
4. In your experience what are the HCD management processes in place and how do they work?	<ul style="list-style-type: none"> • There is a process for monitoring alterations to designated properties (1) • Through the Planning Department applications for alteration/demolition of heritage properties are flagged, and brought to the Heritage Advisory committee for consideration before a permit is granted. There is an opportunity to meet with the applicant and tour the site if necessary. An automatic waiting period is put in place to allow time for consideration (1) • This now applies to properties on the Heritage Register as well (1) • It is not always possible to track changes to sites, and this can be frustrating for the committee members (1) • Lots of promises but nothing done (1)
5. In your experience what is the process for applications for alterations?	<ul style="list-style-type: none"> • Application goes to staff, who write a report (1) • Report goes to the committee (1) • Committee makes recommendations to Council (1)
6. Is there a communication process set up for the HCD?	<ul style="list-style-type: none"> • City wide public forum held two months ago about designation process in general (1) • Mail outs (1) • Website (1) • No distinct markings for the district (1)
7. In your opinion, what are the issues that are unique to the HCD and how have they been	<ul style="list-style-type: none"> • Very important to strike a balance between acknowledging and recording history and properties and dealing with economic realities (1) <ul style="list-style-type: none"> - Committees need some teeth to be able to have a voice and intervene or mediate when necessary • Grants are needed because by designating properties we are creating expectations, but are not offering assistance. On the other hand if you buy a house you are expected to maintain it. Again the issue of balance comes in to play (1) <ul style="list-style-type: none"> - Grants might make designation a more serious decision because then the

managed?	<p>expectation is there that you are going to maintain a certain standard of repair</p> <ul style="list-style-type: none"> - There needs to be a win win situation
8. What are similar non designated areas?	<ul style="list-style-type: none"> • A number of sites were identified in an earlier study including: (1) • East End area – number of buildings torn down, but important in the history of the city • Vicars Park in the South Ward • Downtown Fort William • Bay Street area
9. Other comments	<ul style="list-style-type: none"> • When buildings are demolished it is difficult to remember them. There is a loss of continuity. Recently a number of lots including a street were amalgamated for the construction of a new shopping centre. It involved the demolition of three properties, two of which had some historical significance to the neighbourhood. (1) • Would be nice to have financial help (1)

