



## WHY USE VALUES-BASED MANAGEMENT?

**IN MANY COMMUNITIES**, heritage conservation has taken place outside of regular land-use planning activities. Typically, this has been the case because the understanding of why historic places matter to a community is not strong; decision makers cannot justify public spending on places they don't consider "heritage" in the traditional sense of the word.

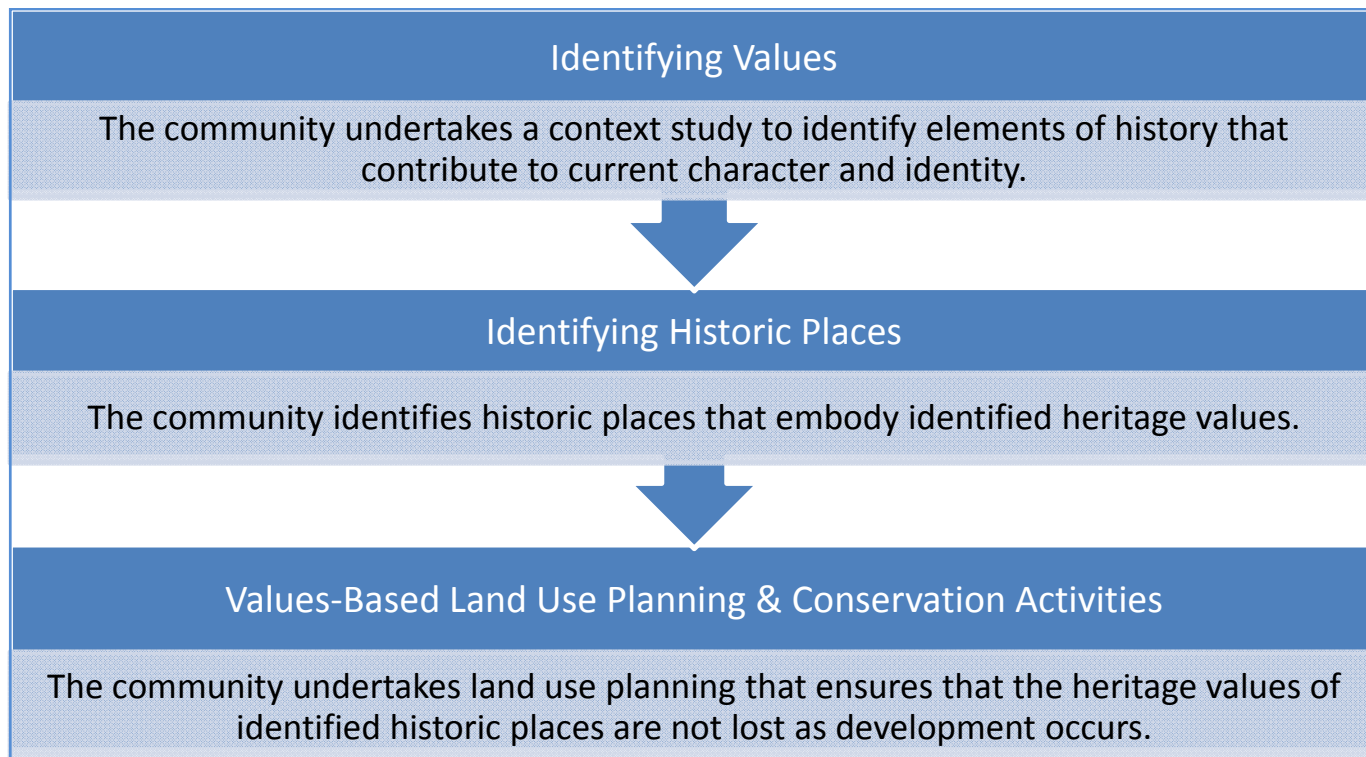
Best practice for heritage conservation planning in Canada – and British Columbia – follows a values-based approach to the stewardship and management of historic places. This approach allows the community to clearly articulate why historic places matter, and ensures confidence that identified heritage values remain for present and future generations. Historic places are no longer recognized, protected, and conserved based on just their architectural superiority or historical associations. Instead, a values-based approach considers all aspects of a community's development and evolution over time. It allows conservation of historic places to be an activity relevant to all members of a community, rather than an activity only understood by heritage "experts". Understanding what a community values in terms of its heritage allows for a stronger justification for ensuring that historic places remain as a community develops and changes over time.

This management process uses heritage values to guide decision making about historic places. Heritage values are defined as the historic, aesthetic, spiritual, social, cultural, and scientific significance or importance of a place for past, present, or future generations. When beginning a values-based management system, it is best to have an understanding of the heritage values of the community as a whole before trying to understand the significance of individual places. The context study develops this big-picture understanding of why citizens care about the character and identity of the community, and how that has been shaped over time.

Heritage conservation planning is a land-use decision-making process that takes into consideration the embodiment of values in a community's historic places. It integrates the conservation of historic places and community development, so that the two are seen as one activity, rather than processes that occur on opposite ends of a spectrum. Context studies are designed to honour how a community evolved over time, and how distinctive events and eras of history have shaped what the community is today. By undertaking a context study, the community recognizes that the significant elements of its past (as seen in its historic places) need not be sacrificed in order for development and change to continue.

Generally, values-based management for heritage conservation planning follows the path outlined in Figure 1. Values are identified by a broad group of community members, historic places that represent those values are identified, and then land-use decision making and conservation activities for those places can occur.

**Figure 1: Values Based Management Process**



The context study typically covers the first two steps of the values-based management process. The following workshop activity section further explains the importance of these two steps in establishing a values-based foundation for the development of a community heritage planning program. Often, context study reports also address the third step in the process, by providing recommendations on actions and conservation tools that a community can implement to ensure that historic places are a viable part of the community’s growth and development.

The context study processes ideally involves opportunities for community members and stakeholders to provide content for the final context study report. At a minimum, this community consultation can happen as a one-day workshop. The primary purpose of this day-long workshop is to have participants identify their community’s heritage values. That is, they are asked a series of questions to allow them to identify the significant qualities of the community’s evolution over time that contribute to making the community what it is today.

The questions used in the context study workshop process are developed by using a thematic framework that allows all elements of the community’s evolution to be explored and considered by participants.

## **THEMATIC FRAMEWORK**

The Contextual Study of a community’s development and evolution over time is an important component of the development of a long-term historic place conservation planning program. By understanding the qualities of life, events, people, and periods of development, growth, and change that make the community what it is today, decision makers can have a better understanding of what the community values and why those places should be conserved. Developing a contextual understanding of the community comprises more than simply identifying historic places. First, a thematic framework must be

identified in order to create a basis of understanding of the significant aspects of the community's history that the community values.

A thematic framework is a way to organize or define history to identify and place sites, persons and events in context<sup>1</sup>. A useful thematic framework tool that can be used to guide context studies is the Parks Canada model which was first established in 1981. The Parks Canada process identifies five key areas of relevance into which all places of historic significance can be categorized. These five themes are:

- ❖ Peopling the Land
- ❖ Developing Economies
- ❖ Governing Canada
- ❖ Building Social and Community Life
- ❖ Expressing Intellectual and Cultural Life

These themes can be adapted to create a thematic framework tailored to any community. It is important to understand that themes must be relevant to all people, places, and times in a community's evolution. For example, hunting may be a subtheme related to Developing Economies for a community. While different groups may value hunting for different reasons, and have hunted in different ways at different times, it is a common thread that has always been relevant to the people who live (and have lived) in this place. A true theme will resonate with all periods of a community's history, and with all of the inhabitants of that community over time.

## WORKSHOP FORMAT

The format of the workshop includes two parts:

1. Identifying community heritage values.
2. Heritage Asset/ Historic Place Mapping

Both of these activities help to establish a values-based foundation for the development of a community heritage planning program.

Identifying community heritage values – Participants are assigned to random groups, and asked to answer a series of questions related to the five contextual themes on large pieces of paper on the walls of the workshop rooms. The five theme questions were:

1. Why did, and do, people live here?
2. How and why is the community's historic and current economic development important to its heritage?
3. How and why is the community's historic and current role as an administrative centre significant?
4. What is, and has been, special about the social and community life here?
5. What is unique about the community's expressions of intellectual and cultural life over time?

Participants may also be asked to answer the question "why is heritage conservation important to the community?" The result of this exercise can be a series of statements related to each question; statements that begin to build an understanding of what it is about the community's history and quality of life through all of its periods of development that people value today.

The second part of this exercise is a "ranking" process. Participants are given a series of "dot" stickers and asked to spend time reading all of the responses at each of the six question stations. They are then

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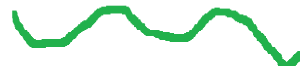
<sup>1</sup> <http://www.pc.gc.ca/eng/docs/r/system-reseau/sec2.aspx>

asked to place their dots (five per question) by the statements that they felt best captured the essence of that theme in terms of the community’s heritage. They are allowed to place all of their dots on one statement, or distribute them as they please among a number of statements.

Mapping – The second exercise allows participants to visually represent on maps the physical places in the community that embody the heritage of each theme. Large maps should be set up at each theme station, along with instructions on how to mark the maps for different types of places. Participants can mark areas, specific places, transportation routes or corridors, or views with the following markings.



Use to identify areas of heritage value.



Use to identify transportation routes relevant to heritage values.



Use to identify specific places of heritage value.



Use to identify views which are important for retaining and understanding heritage values.

The purpose of the mapping exercise is to ensure that the places that the community identifies as part of its heritage are grounded in identified community heritage values. Rather than simply stating that a place is important because it is old, or because it has specific historic associations, the community can identify a place as a part of their heritage because it is representative of a specific aspect of the community’s history, quality of life, or development over time.

## PROCESSING THE INFORMATION

Once the workshop is complete, the information should be compiled and synthesize to create clear statements of the community’s heritage values. The input given for each theme should be analyzed, and written up in such a way so as to ensure that the values statements with the greatest number of “dot” votes are the most strongly articulated in the final report. Each theme should have a clear statement articulating the community’s values related to each heritage topic. The maps can be digitized to create electronic versions of the physical place information provided by participants; mapping results can even be integrated into a local government’s GIS mapping tools, if the resources to do so exist.

## OUTCOMES AND OUTPUTS

The results of the Context Study process should be a report designed to guide heritage conservation planning at the local government level. While the key purpose of the final report document is to provide a clear and concise record of the community’s heritage values at a particular point in time, it should also be seen as a document intended to inform land use planning and policy decision making.

The context study report may include information on different types of heritage conservation planning and regulation tools available to local governments through the *Local Government Act*. It may also provide basic recommendations on which steps the local government can take in the short, long, or medium terms in order to develop their heritage conservation program. The context study is not designed to take the place of a more in-depth planning tool such as a strategic plan, however. It should be written as an informative document that builds the local government’s decision makers’ understanding of the types of actions they can take to ensure that historic places remain intact while development of the community takes place.