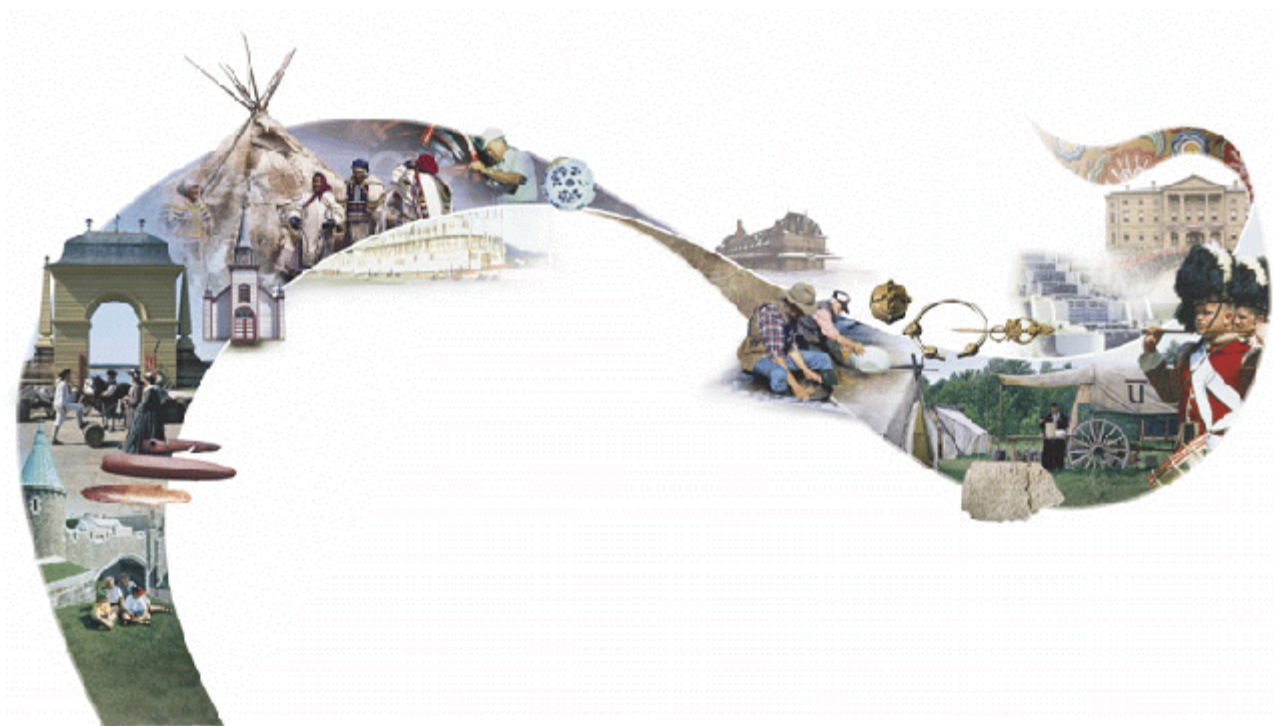


Guide to the Preparation of Commemorative Integrity Statements

Approved February 2002



Images on the front cover photo montage: Fortifications of Québec, P. St-Jacques, 1994; Spearheads at Port au Choix, A. Cornellier, 1989; Fortress of Louisbourg, Parks Canada; Hay River Mission Sites, P. Sawyer, 1996; Arvia'juaq and Qikiqtaarjuk, Parks Canada, 1994; Sault Ste. Marie Canal, Parks Canada, 1980; S.S. *Klondike*, F. Cattroll, 1982; Plate at Grassy Island, Parks Canada; Petroglyph at Kejimikujik, Parks Canada, 1981; McAdam Railway Station, P. Sawyer, 1992; Dawson Historical Complex, J. Butterill, 1996; L'Anse aux Meadows artifacts, A. Cornellier, 1988; Bar U Ranch, J. Wiebe, 1999; Castle Hill artifact, A. Cornellier, 1988; 78th Highlanders at Halifax Citadel, Nova Scotia Marketing Agency; Rideau Canal - Ottawa Locks, B. Morin, 1995; Province House, J. Sylvester; Lower Fort Garry silk work, Parks Canada, 1982.

© Her Majesty the Queen in Right of Canada, 2002

Cat: R64-251/2002E

ISBN: 0-662-31608-8

Cette publication est aussi disponible en français

Table of Contents

1.0 Introduction to the <i>Guide</i>	1
1.0.1 What is a National Historic Site?	1
1.1 The Concept of Commemorative Integrity	1
1.1.1 Why was the Concept of Commemorative Integrity Developed?	1
1.1.2 What is Commemorative Integrity?	2
1.2 The Commemorative Integrity Statement (CIS)	2
1.3 Why prepare a CIS?	2
1.3.1 The CIS and Parks Canada's Planning and Reporting Cycle	3
1.4 Preparing for the Development of a Site's CIS	4
1.5 What Geographic Area Should be Included in the CIS?	4
1.6 Who is Involved in the Preparation of a CIS?	5
1.7 What's the Format for a CIS?	5
 2.0 Instructions for the Preparation of Commemorative Integrity Statements	 7
2.1 Introduction	7
2.1.1 Overview	7
2.1.2 National Historic Sites Program Objectives	7
2.1.3 Commemorative Integrity	7
2.1.4 <i>Cultural Resource Management (CRM) Policy</i>	7
2.2 Designation and Context	8
2.2.1 Designation	8
2.2.2 Commemorative Intent	9
2.2.2.1 Definition	9
2.2.2.2 Preparing the Statement of Commemorative Intent	9
2.2.3 Designated Place	9
2.2.3.1 Definition	9
2.2.3.2 Preparing the Description of Designated Place	9
2.2.4 Historic and Geographic Context	10
2.2.4.1 Historic Context	10
2.2.4.2 Geographic Context	10
2.3 Resources Directly Related to the Reasons for Designation as a National Historic Site	10
2.3.1 Introduction	10
2.3.1.1 Definition	10
2.3.1.2 Identifying Resources Directly Related to the Reasons for Designation	11
2.3.2 Historic Value	11
2.3.2.1 Definition	11
2.3.2.2 Describing Historic Values	12

2.3.3 Objectives for Cultural Resources	13
2.3.3.1 Writing Desired Outcomes as CIS Objectives	13
2.4 Effective Communication of the Reasons for Designation as a National Historic Site	15
2.4.1 Introduction	15
2.4.1.1 Definition	15
2.4.1.2 Describing Reasons for Designation	15
2.4.2 Context Messages	16
2.4.2.1 Definition	16
2.4.2.2 Describing Context Messages	16
2.4.2.3 This is a National Historic Site	16
2.4.3 Objectives for Effective Communication	16
2.4.3.1 Identifying Objectives for Effective Communication	17
2.5 Resources, Values and Messages Not Related to the Reasons for Designation as a National Historic Site	17
2.5.1 Resources and Values Not Related to the Reasons for Designation	18
2.5.1.1 Identifying Resources Not Related to the Reasons for Designation ..	18
2.5.1.2 Identifying Values Not Related to the Reasons for Designation	18
2.5.1.3 Objectives for Resources and Values Not Related to the Reasons for Designation	18
2.5.2 Messages Not Related to the Reasons for Designation	19
2.5.2.1 Identifying Messages Not Related to the Reasons for Designation	19
2.5.2.2 Objectives for Messages Not Related to the Reasons for Designation	19
2.6 Appendices	19

Guideline No. 1 - Glossary

Guideline No. 2 - CRM Policy and the Commemorative Integrity Statement

Guideline No. 3 - Process, Roles and Approvals for Developing Commemorative Integrity Statements

Guideline No. 4 - Templates

Guideline No. 5 - Frequently Asked Questions

Guideline No. 6 - Developing the Statement of Commemorative Intent

Guideline No. 7 - Designated Place

1.0 Introduction to the *Guide*

This *Guide* and associated *Guidelines* are designed to provide guidance in the preparation of a Commemorative Integrity Statement (CIS) for a national historic site. The objective is to provide all the information necessary to those responsible for preparing these statements. This includes owners of national historic sites, local, regional and national interest groups who become involved in CIS preparation and Parks Canada personnel. The *Guide* and *Guidelines* were prepared in consultation with experienced practitioners.

This *Guide* and *Guidelines* form the basis on which CISs for sites administered by Parks Canada and others will be reviewed for approval.

This tool has two parts. The *Guide* contains the basic information for preparing statements. It is supported by the *Guidelines*, which contain additional information for those who require more detail or have particular issues that they wish to address.

The *Guide* and *Guidelines* are intended to allow users to prepare CISs in a consistent manner that effectively reflects the resources, values and messages of a site. At the same time, wider understanding of what is required simplifies the process, ensuring that statements done in compliance with the *Guide* and *Guidelines* are developed and reviewed more quickly. As the *Guide* and *Guidelines* provide the basis for approval, adherence to these ensures that a statement will be more easily and quickly approved.

1.0.1 What is a National Historic Site?

A national historic site is a place that has been designated by the Minister of Canadian Heritage on behalf of the federal government as being a place of national historic significance. The Historic Sites and Monuments Board of Canada (HSMBC) is appointed by the federal government to provide advice to the Minister concerning designation of sites. See Guideline No. 1 - *Glossary*, for a fuller description of the term national historic site.

1.1 The Concept of Commemorative Integrity

1.1.1 Why was the Concept of Commemorative Integrity Developed?

The concept of commemorative integrity was developed for the 1990 *State of the Parks Report*, as a framework to evaluate and report on the health and wholeness of national historic sites.

The *Parks Canada Agency Act* (1998) states that it is in the national interest to ensure the commemorative integrity of national historic sites.

Commemorative integrity and CISs have resulted in a more systematic and comprehensive identification and consideration of all heritage values, demonstrating that the inclusion of one value need not be at the expense of another.

1.1.2 What is Commemorative Integrity?

Commemorative integrity refers to the condition

or state of a national historic site when the site is healthy and whole. This is the desired state for a national historic site.

To help understand the term, it is useful to look at the two words ‘commemorative’ and ‘integrity’. The word ‘commemorative’ refers to why this place is a national historic site. ‘Integrity’ refers to health, wholeness and honesty.

A national historic site possesses commemorative integrity when:

- c the resources directly related to the reasons for designation as a national historic site are not impaired or under threat,
- c the reasons for designation as a national historic site are effectively communicated to the public, and
- c the site’s heritage values (including those not related to the reasons for designation as a national historic site) are respected in all decisions and actions affecting the site.

These three bulleted statements are commonly referred to as the ‘three elements’ of commemorative integrity. References to these elements appear throughout this *Guide*.

Resources directly related to the reasons for the site’s designation are level 1 resources as defined in Parks Canada’s *Cultural Resource Management (CRM) Policy*.

Resources that are not related to the reasons for designation as a national historic site are defined as level 2 in the *CRM Policy*.

1.2 The Commemorative Integrity

Statement (CIS)

A CIS is a document which defines what is meant by commemorative integrity for a particular national historic site. It provides a baseline for planning, managing, operating, reporting and taking remedial action.

A CIS should describe the place, its resources, values, objectives and messages in a way that reflects the richness of the national historic site. It should present pertinent information only, not the detail that would be found in planning documents

(such as a management plan, business plan, marketing plan or other functional plan), or inventories (site object catalogue, site plans or records).

For Parks Canada administered sites, the CIS must be approved by the Director General for the national historic sites program as well as the Field Unit Superintendent.

A CIS is meant to be valid over a period of at least twenty years. If the Minister approves changes to a site’s Designated Place or the reasons for designation as a result of recommendations by the HSMBC **after** the CIS has been approved, the statement will need to be amended accordingly.

1.3 Why prepare a CIS?

A CIS is required for each national historic site which falls under Parks Canada’s administration. The CIS is also used as the primary basis for planning under the National Historic Sites of Canada Cost-Sharing

Program.

Owners of national historic sites not eligible for cost-sharing have also recognized the value of a CIS. CISs have been prepared for numerous non-Parks Canada administered sites.

A CIS guides site management by:

- c identifying what is most important about a site relative to the national historic designation and, for Parks Canada sites, ensuring that matters relating to national significance, including resources and messaging, are the highest management priority.
- c ensuring that there is a focus on the "whole", and not just the individual resources.
- c providing the fundamental document to guide management planning and preparation of a conservation and presentation plan (for the National Historic Sites of Canada Cost-Sharing Program), which detail specific actions to be carried out.
- c enunciating a set of heritage values and objectives which can be used in analysing and evaluating the impact of development and adaptive re-use proposals on a site or nearby property.
- c providing the basis for design guidelines for development which may take place within or nearby and which may have an impact on the national historic site.

- c giving direction on heritage messages for marketing plans and programs.

1.3.1 The CIS and Parks Canada's Planning and Reporting Cycle

As the statement of core values for a national historic site, the CIS is integral to all planning and reporting for sites administered by Parks Canada. Several pieces of legislation provide a context for CIS development.

The CIS is directly linked to the management plan. Parks Canada's *Guide to Management Planning* states that "Ensuring commemorative integrity is the core objective of a national historic site management plan. The commemorative integrity statement, as the site-specific analysis of what constitutes a state of commemorative integrity at a particular national historic site, is fundamental to any management plan." The management plan, in turn, guides the actions laid out each year in business plans.

The CIS is the basis for evaluating the success of the management plan, by establishing whether the actions in the last plan have helped to ensure commemorative integrity.

Whether the site is in a state of commemorative integrity is also evaluated against the CIS. The results of this evaluation contribute to the next management plan and to the *State of Protected Heritage Areas Report*, Parks Canada's accounting to parliament on the health of national historic sites.

1.4 Preparing for the Development of a

Site's CIS

A clear understanding of Parks Canada's *CRM Policy* is the best preparation for developing a CIS. The policy can be found in *Parks Canada Guiding Principles and Operational Policies*, pp. 99-115, which is on the Parks Canada web-site www.parkscanada.pch.gc.ca

A solid understanding of the history of the site and its resources is also required before starting the CIS.

Guideline No. 3 - *Process, Roles and Approvals for Developing Commemorative Integrity Statements* provides details about the process of CIS development.

Commemorative integrity is the *CRM Policy* tailored to a specific national historic site. A series of questions directly related to the *CRM Policy* has been developed for managers and those responsible for preparing a CIS. See Guideline No. 2 - *CRM Policy and the Commemorative Integrity Statement*.

These questions are intended to:

- Help managers assess the readiness of a site for a CIS exercise. (Have all resources been inventoried and evaluated? Are records and inventories relating to cultural resources, including basic data, records of decisions, actions taken and heritage recording, up to date?).
- Provide a focus for review at the end of each section of the CIS to ensure that nothing has been overlooked. (Are cultural resources valued within the relevant context? Is the significance of the site communicated effectively? Were all resources given initial consideration as potential cultural resources?).
- Link the site's everyday operations to the *CRM Policy*.

These questions can also be used in planning and management of the site. The primary goal for Parks Canada managers of national historic sites is to ensure commemorative integrity and the application of cultural resource management principles and practice, in compliance with the *CRM Policy*.

1.5 What Geographic Area Should be Included in the CIS?

A CIS is usually written for a specific geographic area. The extent of the geographic area which is covered by the CIS needs to be considered carefully and should be guided by the following:

- The CIS must include all of the Designated Place (i.e., the place designated as being of national historic importance). Where the Designated Place is larger than the administered property, the CIS also includes those parts of the Designated Place which lie outside the property.
- Where the size of the administered property is so large that it overwhelms the

Designated Place, consideration should be given to decreasing the area included in the CIS. For example, the whole of the University of Toronto would not be included in a CIS for Annesley Hall National Historic Site of Canada (NHSC).

- For national historic sites not under Parks Canada's administration, the scope of the CIS should be determined in consultation with Parks Canada. It must include the Designated Place but may be larger where appropriate.

1.6 Who is Involved in the Preparation of a CIS?

Preparing a CIS for a site must be done by a multi-functional team. This includes appropriate specialists/experts (see below), other individuals who are knowledgeable about the site, and representatives from the site's management and operations. Different sites may require different specialists.

Specialists/experts include:

- archaeologists
- architects
- architectural historians
- curators
- heritage presentation specialists
- historians
- landscape architects
- material culture specialists
- underwater archaeologists
- planners

Opportunities for stakeholder input should be encouraged.

The owner(s) of all lands being considered must be consulted in preparing the CIS. This is particularly important where the Designated Place is not all contained within one property.

In cases where the site is not operated by the owner, the operator should also be involved.

In some instances, specialists may not participate directly in preparing the CIS but will be involved in a review and advisory capacity.

The CIS should be prepared in consultation with someone knowledgeable about the requirements and the process.

The CIS should include the names, positions and organizations of those involved in its preparation as an appendix.

1.7 What's the Format for a CIS?

The CIS is a document intended for managers and decision-makers. It provides relevant information in a clear, succinct style, using plain language and bullet format to list resources, values, the messages that flow from these values, and objectives.

Following the standard format ensures consistency, both in the statements themselves and in follow-up monitoring. It builds on the experience of managers and owners from across the country, presenting diverse information in a cohesive and coherent manner.

The format for a CIS is shown in Guideline No. 4 - *Templates*. The CIS is presented in six sections:

- **Introduction.** This includes the site's background, the national historic sites program objectives, and information on commemorative integrity and the CIS.
 - **Designation and Context.** This section contains the historic and geographic context, the site's Statement of Commemorative Intent and description of Designated Place, along with information about the designation.
 - **Resources Directly Related to the Reasons for Designation as a National Historic Site.** This contains details on the site as a whole and individual resources that relate to the reasons for designation. It includes a description of the resources, the historic values for each cultural resource or resource category and objectives for managing the resources.
 - **Effective Communication of the Reasons for Designation as a National Historic Site.** This identifies the reasons for the site's designation and objectives for ensuring these are communicated effectively.
 - **Resources, Values and Messages Not Related to the Reasons for Designation as a National Historic Site.** This section contains additional information on resources, values and messages which are important but not related to the reasons for designation, and objectives for their protection and presentation.
 - **Appendices.** Each CIS should contain the following:
 - all HSMBC recommendations and records of decision from minutes, and approved plaque texts.
 - a map of the national historic site showing Designated Place and geographic context (here or in the Designated Place section of CIS).
 - a list of CIS team members including their position and organization.
- Other appendices may be added as required.

2.0 Instructions for the Preparation of Commemorative Integrity Statements

This section of the *Guide* is organized in the same way as a Commemorative Integrity Statement (CIS), dealing with the introduction, designation and context, and the three elements of commemorative integrity. For material which is to be used *verbatim* in the CIS, reference is made to Guideline No. 1 - *Glossary*.

2.1 Introduction

This section should be divided into four parts:

- Overview
- National Historic Sites Program Objectives
- Commemorative Integrity
- *Cultural Resource Management Policy*

2.1.1 Overview

This section should be brief (no longer than 10 lines). The overview should provide an understanding of the site and its designation as a national historic site.

It should explain:

- why it is important
- where it is located
- who currently owns/manages it
- what was designated
- when it was designated

2.1.2 National Historic Site Program Objectives

These objectives provide the context in which a CIS is undertaken. The objectives are to be quoted directly from Guideline No. 1 - *Glossary*.

2.1.3 Commemorative Integrity

This section should include the definition of commemorative integrity and the definition of a CIS. This information is to be taken directly from Guideline No. 1 - *Glossary*. Depending on the national historic site or the particular circumstances under which a CIS is written, it may be appropriate to include information on the benefits of doing a CIS. Refer back to section 1.3 - *Why prepare a CIS?*.

2.1.4 Cultural Resource Management (CRM) Policy

This section should include a discussion of management under the *CRM Policy*, including the following points:

Cultural resource management is an integrated and holistic approach to the management of cultural resources. It applies to all activities that affect cultural resources, including the care taken of these resources and the promotion of public understanding and enjoyment of them. The objective is to manage cultural resources in accordance with the principles of value, public benefit, understanding, respect and integrity.

Parks Canada's *CRM Policy* defines cultural resources as places or human works that have been determined to have historic value. Cultural resources include those directly related to the reasons for the site's national significance and those not related but which possess historic value.

The *Policy* is the basis for management of

cultural resources by Parks Canada. Other owners of national historic sites are encouraged to apply the principles and practice from the *CRM Policy*.

Effective cultural resource management practice is based on:

1. an up-to-date inventory of resources;
2. an evaluation of resources to determine which are to be considered as cultural resources and what it is that constitutes their historic value;
3. consideration of historic value in actions affecting conservation and presentation. Most, if not all, operational activities have an impact on conservation or presentation;
4. monitoring and review to ensure that conservation and presentation objectives continue to be met effectively.

A CIS sets out the results of the first two points above in order to facilitate the third and fourth.

The objectives in a CIS specify that the site should be managed in accordance with the principles and practice of the *CRM Policy*. In addition to the principles and practice, management under the *CRM Policy* means:

- cultural resources and their values are inventoried and evaluated, and these records are kept up to date;
- there are no uses or threats that reduce the potential for long-term conservation and future understanding and appreciation of the cultural resources;

- any modification to the site or its cultural resources is based on sound knowledge and respect for the historic values of the resources and is preceded by adequate research, recording, and investigation;
- conservation measures are based on direct, rather than indirect evidence, follow the path of least intrusive action, and are clearly recorded;
- any new work at or adjacent to the site is sensitive in form and scale to the site and its associated resources;
- monitoring and review systems are in place to ensure the continued survival of the cultural resources with minimum deterioration;
- reproductions and reconstructions are marked in such a way as not to be confused with the originals they are intended to represent;
- the historic value of the resources is fully considered and integrated into the planning, conservation, presentation and operational programs.

2.2 Designation and Context

This section should contain specific information relating to:

- Designation
- Commemorative Intent
- Designated Place
- Historic and Geographic Context

2.2.1 Designation

This section should present information relating to designation as a national historic site. It is

based on the HSMBC minutes and plaque texts. It should be clear from this presentation how the Statement of Commemorative Intent and Designated Place were derived. Since Fall 1999, the HSMBC has explicitly identified commemorative intent and Designated Place.

The text of all of the HSMBC's recommendations and all plaque inscriptions should be appended to the CIS in an appendix.

2.2.2 Commemorative Intent

2.2.2.1 Definition

Commemorative intent refers to the reasons for designation as a national historic site as determined by the Ministerially-approved recommendations of the HSMBC to the Minister.¹ Commemorative intent is derived from HSMBC documents.

The definition of Commemorative Intent, contained in Guideline No. 1 - *Glossary*, is to be included as part of the CIS.

2.2.2.2 Preparing the Statement of Commemorative Intent

Each CIS will contain a Statement of Commemorative Intent. The Statement of Commemorative Intent provides the answer to the question "When and for what reason was this place designated as a national historic site?"

The preparation of the Statement of

Commemorative Intent is carried out by Parks Canada staff following the procedures outlined in Guideline No. 3 - *Process, Roles and Approvals for Developing Commemorative Integrity Statements* and Guideline No. 6 - *Developing the Statement of Commemorative Intent*.

2.2.3 Designated Place

2.2.3.1 Definition

Designated Place refers to the place designated by the Minister of Canadian Heritage on the recommendation of the HSMBC. Information on what constitutes the Designated Place for a particular national historic site is drawn from the minutes of the HSMBC. The definition of Designated Place is to be included as part of the CIS.

2.2.3.2 Preparing the Description of Designated Place

The Designated Place for a national historic site must be described in the CIS to ensure a clear understanding of what was designated by the Minister. The Designated Place is a geographically definable location which is circumscribed by boundaries. A map of the site should be included as part of the CIS (either in the Designated Place section or as an appendix) showing the Designated Place clearly. A notional circle around the administered site is not sufficient.

The preparation of the description of Designated Place is carried out by Parks Canada staff following the procedures outlined in Guideline No. 3 - *Process, Roles and Approvals for Developing Commemorative Integrity Statements* and Guideline No. 7 - *Designated Place*.

¹ Recommendations were not formally approved as a matter of course by the Minister until the passage of the *Historic Sites and Monuments Act* of 1953. Pre-1953 HSMBC deliberations were not framed as recommendations but rather as "moved" and "carried". These have been accepted as designations unless explicitly rejected by the Minister or senior departmental officials.

2.2.4 Historic and Geographic Context

2.2.4.1 Historic Context

This section should provide the historic context for the site. It should be concise, no more than a page in length. It is an overview to assist the reader in understanding:

- the nature of the site during the period or periods for which it is commemorated. A description of the site in historical times is particularly important for those designations which refer to a specific time frame or are associated with a specific event. Note that the site in historical times will not necessarily correspond with the Designated Place.
- the evolution of the site. Most sites have evolved over time. This section provides information relating to the site's evolution, use and the individuals associated with it.

2.2.4.2 Geographic Context

In many cases the geographic context of the site should be discussed. This should be included when it is important to an understanding of the site's national significance, for example when the HSMBC decision refers to areas around the site or when the site's importance relates to its geographic setting.

Geographic context should be kept to the minimum necessary to ensure an understanding of the site's national historic significance. This section should also include direct and explicit links between this site and other places that are integral to its national historic significance. For example, the geographic context of a fur trade site would identify sources of supply, as well as intermediate and end-markets.

A map should be included, either in this section or as an appendix, to assist in understanding the geographic context.

2.3 Resources Directly Related to the Reasons for Designation as a National Historic Site

2.3.1 Introduction

This section should contain details on the resources - the whole and the parts of the whole - which are directly related to the reasons for designation. Under the *CRM Policy*, these are known as level 1 resources.

The CIS must list and describe all resources which have been evaluated as resources directly related to the reasons for designation as a national historic site. This section must also include a description of the historic values of these resources.

The section on values must be followed by a section outlining the conditions necessary to ensure that the resources are not impaired or under threat, which provides guidance on the management of the site. It is here that what is meant by "not impaired or under threat" is defined in the context of the specific site.

2.3.1.1 Definition

As stated in the *Glossary*, ***resources directly related to the reasons for designation as a national historic site*** include:

- the Designated Place.
- *in situ* cultural resources within the administered place that have a direct relationship with the reasons for designation. In rare cases, the HSMBC has specifically identified resources which

relate to or have national historic significance, in which case, these are the only *in situ* cultural resources recorded in this section.

- cultural resources identified in the HSMBC minutes as contributing to the national significance of the Designated Place, including resources outside the Designated Place.
- objects which have a direct relationship to the commemorative intent and to the site. These may be located either within or outside the Designated Place.

2.3.1.2 Identifying Resources Directly Related to the Reasons for Designation

The CIS should identify the resources directly related to the reasons for designation as a national historic site.

Where the list of these resources is extensive it can be summarized in this section with the full list of cultural resources in an appendix. Groups of resources that share values may be treated together.

The evaluation of resources, including the identification of values, is done by a multi-disciplinary team. This ensures that a variety of perspectives is represented, a degree of consistency is achieved and that determination of value does not rely solely on one specific function or aspect.

The Designated Place should be considered first, followed by its historic values. In cases where the Designated Place is a single feature, a building or archaeological site for example, the values should be dealt with under Designated Place. A separate section on

buildings and structures or on archaeological sites may not be needed.

The balance of the resources which are directly related to the reasons for designation should be categorized by type in the same way as in the *State of Protected Heritage Areas Report* with sections on:

- Landscapes and Landscape Features.
- Buildings and Structures.
- Archaeological Sites.
- Objects.

In cases where there are resources or values directly related to the reasons for designation which do not fit the categories above, they should be described under an appropriate heading.

2.3.2 Historic Value

Integral to commemorative integrity is an understanding of historic value. If the owner/manager does not know “where value lies”, it is impossible to manage cultural resources appropriately or to achieve commemorative integrity. Knowing what the values are, or where value lies, is fundamental to stewardship.

A sound understanding of historic value also allows decision-makers to determine what is appropriate or inappropriate. It provides the foundation for ensuring that proposals, projects and other initiatives are built on the principles of cultural resource management. Where proposals are generated externally, knowing where value lies makes it possible to assess impact on the cultural resource and its historic values.

Clear, thorough, and precise articulation of each resource’s values is critical to the success

of a CIS.

2.3.2.1 Definition

Historic value is a value or values assigned to a resource, whereby it is recognized as a cultural resource. These values can be physical and/or associative.

2.3.2.2 Describing Historic Values

Historic values should be clearly stated for each cultural resource or group of resources, avoiding duplication while still capturing the reasons for the importance of the resource.

The *CRM Policy* principles identify a number of key aspects of historic value which should be considered when evaluating resources:

- ***Qualities and features which relate to the resource's national historic significance.*** For example,² at the Basilica of St. John the Baptist, in St. John's, one of the reasons for designation relates to the building's Lombard Romanesque Revival architecture. This value includes the features of the Basilica design which characterize the Lombard Romanesque Revival style, such as the use of the round arch, the two tier arcade, the smooth wall surfaces, the twin bell towers with pyramidal roofs, the interior classically inspired features and the detailing.
- ***The resource in its context.*** For example, one of the values for the Gulf of Georgia Cannery's cannery building is the physical relationship of the building to navigable water, which is central to its

historic function.

- ***The whole and its parts.*** For example, Red Bay is valued for its association with 16th century Basque whaling activities. The shore stations are valued for their association with processing whales (for example flensing and rendering), even though they do not individually capture the breadth of the whole.
- ***The evolution of the resource over time, not just its existence at a single moment in time.*** For example, one of the values for the Oil Drum Shed at the Gulf of Georgia Cannery is that it illustrates the changes in the fishing industry over time. It also demonstrates the industrial role of the Gulf of Georgia Cannery building in particular, especially the development of fish oil products during and after the Second World War.
- ***The interaction of nature and human activities.*** For example, Kitwanga Fort was designated in part for the presence of an 18th century Gitwangak hill top fort. The natural hill itself should be valued for the strategic defensive position it provided for the site.
- ***Viewsapes and viewsheds.*** For example, in recommending the Former Provincial Lunatic Asylum in Saint John for designation, the HSMBC noted the importance of the varied and attractive vistas, such as the unobstructed view from the building to the Reversing Falls. When articulated as values, view planes should be specific about where they are and what they contain. Views often include features that are not, in themselves, evaluated as

² All examples used in this document are consistent with the direction in the *Guide* and *Guidelines*. They may not be identical to existing CISs.

resources in the CIS.

- ***Continued or traditional uses.*** For example, the Banff Springs Hotel is of value for its continued use as a hotel. Continuity of use is often a powerful value, particularly at non-museological sites.

Values can be physical (where value is reflected in a specific tangible feature of the resource) and/or associative (where value is reflected in its connection with a theme, person or event of historic importance). Associative value is also known as symbolic value. Physical and associative values should not be separately identified when listing them in the CIS.

A physical description or a short history of a resource is not adequate as a description of values.

A resource may possess historic values both related to the reasons for designation and unrelated to those reasons. Both types of values can be dealt with in this section of the CIS. However, the presentation of the values must distinguish between the two types. Generally, this is easily done by identifying and listing values directly related to the reasons for designation together followed by those that are not related.

Guideline No. 2 - *CRM Policy and the Commemorative Integrity Statement* provides a useful list of questions relating to identification of historic values.

2.3.3 Objectives for Cultural Resources

Clearly stated objectives for safeguarding and communicating historic values are fundamental to each CIS. Objectives serve as an essential

bridge between the identification of historic values and planning, managing, and reporting on a national historic site.

Objectives in the CIS express the desired state of the site, its resources and their historic values. Objectives describe the ideal field conditions sought through management. Evaluating whether these conditions are met serves as the basis for identifying necessary policies and actions.

The objectives provide a framework for management activities and performance indicators for measuring the state of a site's commemorative integrity.

2.3.3.1 Writing Desired Outcomes as CIS Objectives

A set of objectives should be prepared for each of the three elements of the CIS. These should focus on results rather than efforts, and condition rather than strategies. The objectives should be designed for the long term, setting the stage for performance measurement of commemorative integrity without reference to specific timelines.

Certain objectives apply to all sites, as they are criteria essential to the definition of commemorative integrity. Other objectives will be site-specific, depending on individual circumstances. Every objective should relate to one or more values.

The following outcome objectives should be the same for all national historic sites. These are standard for all resources and should be stated only once at the end of this section of the CIS:

The resources (Designated Place, landscapes and landscape features,

buildings and structures, archaeological sites, objects) will not be impaired or under threat when:

- ***the resources and their associated values are respected.*** The term respect has several meanings. In the case of resources in good condition, respect means the resources and associated values are maintained so that there is no deterioration. In the case of resources not in good condition, respect means efforts to enhance the condition of the resources and associated values are based on the historic values of the resources. This outcome places attention on the state of the resource itself.
- ***management decisions are based on adequate and sound information and are made in accordance with the principles and practice of the CRM Policy.***
- ***the resources and their associated values are not lost, impaired or threatened from natural processes, for example erosion and decay, within or outside of the site.***
- ***the resources and their associated values are not lost, impaired or threatened from human actions within or outside of the site.*** This objective places attention on the human-induced threats which could adversely affect the resource's integrity. There are four sources of human threat:
 - < human-induced natural threat (e.g., pollution, fire).
 - < external human threat (e.g., adjacent property development which has an adverse impact).
 - < internal human threat from use (e.g., vandalism, excessive wear and tear from overuse).
 - < internal human threat from inappropriate management (e.g., on-site development which has an adverse impact).
- ***the historic values of the resources are communicated to visitors and stakeholders.***

Examples of site-specific outcome objectives, to be used as necessary, **could** include the following:

- ***new and evolving uses of the Designated Place respect its heritage-defining values.*** (This would apply at the Winnipeg Exchange District, for instance, which continues to be a vibrant business and social setting).
- ***partners and 3rd parties respect the resources and significance of place which make it a national historic site.*** (This would be appropriate at a site like Battle of the Windmill, which is operated by a third party).
- ***the fort is maintained as a ruin.*** (At Fort St. Joseph, the HSMBC defined the state in which the resource is to be managed. The CIS must define this ruined state in terms of physical and associative values – for example, form and appearance, contribution to sense of place).
- ***the Designated Place is not threatened by river erosion.*** (This objective should be used at sites like York Factory, where this

has been identified as a significant and long-term threat).

The statements within quotes below are **not** considered outcome objectives. These statements represent management activities, which may help to ensure commemorative integrity. The statements in italics represent the desired outcomes. These should be used as objectives in the CIS.

- “heritage impact assessment is conducted prior to development.” This is a management prescription toward achieving the following outcome:
 - < *the resources and their associated values are managed according to the principles of value, public benefit, understanding, respect, and integrity.*
- “all objects have been identified and inventoried.” A more appropriate objective would be:
 - < *the resources and their associated values are managed according to the principles of value, public benefit, understanding, respect, and integrity.*“
- “The principles of the *CRM Policy* are applied to all contracts, leases, licensing concessions, agreements, partnerships, or other management tools.” The outcome should be:
 - < *partners and 3rd parties respect the cultural resources and significance of place which make it a national historic site.*

As the building tool for long-range planning and reporting, the CIS should include the more

strategic outcomes, leaving the management actions to the management and business plans.

2.4 Effective Communication of the Reasons for Designation as a National Historic Site

2.4.1 Introduction

Protection is only one part of commemorative integrity. As the *National Historic Sites Policy* states (p. 78), “Protection and presentation are fundamental to commemoration, since without protection there can be no historic site to be enjoyed, and without presentation there can be no understanding of why the site is important to our history and, hence, to all Canadians.”

This section of the CIS should identify the reasons for designation which must be communicated in order for the public to understand why the site is important. This section should also identify any additional essential information required to ensure the understanding of these reasons. It provides guidance, through objectives, on the effective communication of these messages.

2.4.1.1 Definition

The reasons for designation express, in the form of messages, why this place was designated a national historic site.

2.4.1.2 Describing Reasons for Designation

The reasons for designation are derived from the Statement of Commemorative Intent. In most situations there will be one message for each of the reasons contained in the Statement of Commemorative Intent.

For example, there are two points in the SOCI

for Skoki Ski Lodge NHSC:

Skoki Ski Lodge was designated a national historic site in 1992. The reasons for designation, as derived from the 1992 HSMBC minute, are:

- *it is constructed in the Rustic Design Tradition, and;*
- *it is associated with tourism development and outdoor recreation in the national parks.*

Therefore, there are two reasons for designation for this site:

- ***Skoki Ski Lodge is constructed in the Rustic Design Tradition.***
- ***Skoki Ski Lodge is associated with tourism development and outdoor recreation in the national parks.***

2.4.2 Context Messages

2.4.2.1 Definition

Context messages are those messages that are essential to understanding the reasons for designation of the site. For example, one cannot appreciate the national historic significance of Skoki Ski Lodge without understanding what is meant by the Rustic Design Tradition. This is an essential context message.

2.4.2.2 Describing Context Messages

Context messages should be included with each reason for designation where they are needed to understand these reasons.

While context messages are essential to understanding the reasons for designation, they are not reasons for national significance.

Context messages should always be written in full sentences and not as topic headings or

phrases.

The following example illustrates the relationship between the reasons for designation and context messages:

The reason for designation for Sulphur Mountain Cosmic Ray Station NHSC is:

The Sulphur Mountain Cosmic Ray Station played a role in the Canadian contribution to the International Geophysical Year 1957-58.

This reason for designation is further explained by the following context messages:

- *International Geophysical Year was an international project of concentrated, coordinated exploration of the earth and its cosmic environment.*
- *Cosmic ray research was an important part of the International Geophysical Year.*
- *Canadian scientists made an important contribution to that research.*
- *The Sulphur Mountain Cosmic Ray Station was the most important Canadian station.*

2.4.2.3 This is a National Historic Site

Those who come in contact with national historic sites need to understand the concept of national historic site designation in order to fully appreciate the site's importance.

Consequently, there is a standard context message relating to the designation.

The designation of Sulphur Mountain Cosmic Ray Station as a national historic site is explained by the following standard context message:

- ***Sulphur Mountain Cosmic Ray***

Station is a national historic site, a place designated by the Government of Canada as a site of importance to all Canadians because of its national historic significance.

2.4.3 Objectives for Effective Communication

This section should describe the objectives for the effective communication of the reasons for the site's designation.

In the second element of commemorative integrity, the audience to be reached is defined as the *public*. This includes on-site and virtual visitors, as well as stakeholders. The audience also includes the site stewards: owners, managers and staff.

Effective communication means that the overall heritage presentation program for a site, in terms of all methods used to reach the public, conveys the reasons for the site's designation. It also implies that those who experience heritage presentation understand these reasons. It is not sufficient to merely present the reasons for designation to the public; efforts must be made to ensure the public understands them. The success of heritage presentation programming should be monitored to ensure its effectiveness.

2.4.3.1 Identifying Objectives for Effective Communication

The objectives for the effective communication of the reasons for designation will read as follows:

The reasons for designation as a national historic site are effectively communicated to the public when:

- *the overall heritage presentation experience conveys the reasons for designation as a national historic site.*
- *visitors and the site stewards understand the reasons for designation as a national historic site.*
- *management decisions are based on adequate and sound information and are made in accordance with the principles and practice of the CRM Policy.*

Site-specific objectives relating to messaging may be needed. These can be added as required. The objectives should be prepared in accordance with section 2.3.3 - *Objectives for Cultural Resources*.

An example of a site specific messaging objective is:

- *visitors appreciate and understand differing contemporary views and later interpretations of the history and events associated with the site's national historic significance* (This should be used at a site like Batoche, where history and events are complex or disputed).

Site-specific objectives should be written as goals, **not** as management activities which may lead to the goal. Instead of writing "a heritage communication strategy is developed and implemented," the objective should be that *visitors understand the reasons for designation as a national historic site.*

2.5 Resources, Values and Messages Not Related to the Reasons for Designation as a National Historic Site

Some resources, values and messages are not related to the reasons for designation. This section should contain information on these.

In applying the first element of commemorative integrity, emphasis is clearly on resources directly related to reasons for designation as a national historic site and their values. However, the *CRM Policy* applies to all cultural resources, as well as significant ecosystem features.

A CIS is developed to assist managers/owners in managing all the resources for which they have responsibility. The overall stewardship of a national historic site is called into question and commemorative integrity is threatened if resources not related to the reasons for designation are not managed in accordance with the *CRM Policy*.

The following should be included in this section of the CIS:

- resources not related to reasons for designation (both cultural and natural), with their values and objectives.
- any other values of the site not related to the reasons for designation, with their objectives.
- messages not related to reasons for designation, with their objectives.

2.5.1 Resources and Values Not Related to the Reasons for Designation

2.5.1.1 Identifying Resources Not Related to the Reasons for Designation

Section 2.2.2.1 of the *CRM Policy* states that “Parks Canada will establish and apply criteria to determine which resources under its jurisdiction are of this type. A resource may be included in this category by virtue of its

historical, aesthetic or environmental qualities. Criteria will also give consideration to factors such as regional or local association; or provincial, territorial or municipal designations.”

The identification of cultural resources not related to reasons for designation is done by a multi-disciplinary team. This ensures that a variety of perspectives are represented and a degree of consistency is achieved. This team should include representatives from all cultural resource management functions, but must have the requisite information and specialists on what is being evaluated.

The team evaluating the resources will give consideration to the evaluation done by others such as provincial, territorial or municipal designations.

Classified or Recognized Federal Heritage Buildings will automatically be considered as resources in this category, unless they meet the requirements that have been described for resources directly related to the reasons for designation as a national historic site, as per the *CRM Policy*.

With the exception of the evaluation of federal heritage buildings, there are no national evaluation guidelines for resources which fall into this category.

Natural ecosystem features of special significance as outlined in section 1.1.7 of the *CRM Policy* should also be described here.

Any resource not related to the reasons for designation, but part of the area for which the CIS is being written, should be included in this section of the CIS. In cases where such resources are numerous, they should be

presented in a way which does not overwhelm the resources directly related to the reasons for designation as a national historic site.

2.5.1.2 Identifying Values Not Related to the Reasons for Designation

This section is used to identify those heritage values that are important for the site and have not already been dealt with elsewhere in the CIS.

2.5.1.3 Objectives for Resources and Values Not Related to the Reasons for Designation

The CIS should include a set of objectives for resources and heritage values not related to the reasons for designation. The standard objectives which are used for resources directly related to the reasons for designation, described in section 2.3.3.1, should be used.

2.5.2 Messages Not Related to the Reasons for Designation

2.5.2.1 Identifying Messages Not Related to the Reasons for Designation

This section should contain any messages not related to reasons for designation which are to be communicated at the site. All messages should be expressed in full sentences.

These messages must include:

- a message about the family of national historic sites.
- a message linking the site to other national historic sites related to it thematically or geographically.
- a message about related national historic designations of people or events.
- a message about international, provincial or municipal designations relating to the site.

- at sites administered by Parks Canada, a message stating that these sites belong to all Canadians.

2.5.2.2 Objectives for Messages Not Related to the Reasons for Designation

The following objectives should be the same for all national historic sites. These are standard for all messages and should be stated only once:

The messages not related to the reasons for designation as a national historic site are effectively communicated to the public when:

- *part of the heritage presentation experience conveys the messages not related to the reasons for designation as a national historic site.*
- *the messages not related to the reasons for designation as a national historic site and their presentation do not overwhelm or detract from the presentation and understanding of the site's national historic significance.*
- *visitors understand the messages not related to the reasons for designation as a national historic site.*
- *management decisions are based on adequate and sound information and are made in accordance with the principles and practice of the CRM Policy.*

2.6 Appendices

In an attempt to keep the CIS focused, information which is not essential to understanding commemorative integrity for a

site should be in an appendix. For example, if those preparing a CIS feel that additional details about the site's history should be included to help the reader, a separate appendix can be added. There are several appendices, however, which are essential.

The CIS should have the following material appended to it:

- *All HSMBC minutes and plaque texts* which are relevant to the designation, Designated Place and commemorative

intent exclusive of *the Secretary's Report*, and *Chair's Report*.

- *Map of the national historic site* showing Designated Place and geographic context (may be included in the body of the CIS).
- *List of CIS team members* including their position and organization.

Other information may be included in the appendices, such as a list of resources and their level according to the *CRM Policy*.