

CALGARY HISTORIC RESOURCE

# Evaluation System Handbook



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Publishing Information

Title

Calgary Historic Resource Evaluation System Handbook

Author

The City of Calgary and Calgary Heritage Authority

Status

Approved

Printing Date

July 2017

Additional Copies

The City of Calgary

Records & Information Management (RIM)

Inspection & Permit Services

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2017-1020

SR 17-00329797

# Calgary Historic Resource Evaluation System Handbook

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## Overview

*Historic preservation is about values. We preserve historic resources because they have value to our community – aesthetic, historic, scientific, cultural, social, natural or spiritual qualities that make a place important or significant for past, present or future generations.*

– *The Calgary Heritage Strategy, 2008*

A key tool for managing historic resources in Calgary is the Inventory of Evaluated Historic Resources ('Inventory'). The Inventory is a list of historic resources that have been evaluated by the Calgary Heritage Authority ('CHA') and have been formally acknowledged to have significant heritage value. The Inventory is continually expanding as more potential historic resources are researched and evaluated.

The CHA evaluates potential historic resources for inclusion on the Inventory using the Calgary Historic Resource Evaluation System. The system is made up of worksheets and an evaluation form with a Statement of Significance (SOS).

This handbook outlines how a resource is evaluated in a way that meets CHA standards. It outlines how to do the required research and how to complete the worksheets and evaluation form. It is not intended as an in-depth guide for how to conduct research, but does touch upon some of the research requirements.

This Handbook is intended for:

- professional consultants, hired by The City to research potential resources;
- volunteer researchers who are willing and able to meet the standards of the CHA; and
- members of the CHA - it is included in the CHA orientation package.

This handbook will describe the Inventory and what merits inclusion, the evaluation process, the required research and how to complete each section of the evaluation form.

### Contact information

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## 1. The Inventory

The Inventory is a list of historic resources, including, but not limited to: buildings, structures, archeological sites, cultural landscapes, and parks that the CHA has evaluated and formally acknowledged to have significant heritage value. Alberta's Historic Resources Act and the CHA define a historic resource specifically as:

*...any work of nature or of humans that is primarily of value for its palaeontological, archaeological, prehistoric, historic, cultural, natural, scientific or esthetic interest including, but not limited to, a palaeontological, archeological, prehistoric, historic or natural site, structure or object.*

To determine heritage value, the CHA uses a set of nine criteria approved by City Council. Some resources are significant to a community or neighbourhood, while some resources are significant to the entire city and even beyond.

Calgary's Historic Resource Evaluation System uses a date of 25 years before the present to determine eligibility for inclusion on the Inventory, but there may be exceptions for newer resources that have exceptional merit.

All properties listed on the Inventory also appear on the online version of the Inventory: Discover Historic Calgary.

### What the Inventory is

**The Inventory identifies resources that have been formally recognized by the CHA as possessing heritage value.**

**These resources:**

- May be eligible for incentives for the purpose of conservation.
- Are flagged on The City's permit system. Permits affecting resources on the Inventory are reviewed by City Heritage staff.

Information on the Inventory resources is available online, providing a helpful tool for researchers, reporters, students, policy makers and others interested in Calgary's history.

### What the Inventory is not

**The Inventory does not:**

- Offer legal protection (e.g. Municipal Historic Resource designations).
- Prevent demolition

However, it is a pre-requisite for legal protection. In Calgary, legal protection requires support from the owner of the historic resource.

### What is the CHA?

The CHA is a volunteer board appointed by City Council. The CHA is responsible for:

- Evaluating potential heritage sites and maintaining the Inventory of Evaluated Historic Resources.
- Advising Council on all matters relating to heritage resources in Calgary.
- Promoting public awareness of Calgary's heritage.

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## Criteria of Significance

What do we mean by 'significant'?

The CHA uses nine criteria to describe the values that contribute to the historic significance of the resource:

- |                      |                        |                       |
|----------------------|------------------------|-----------------------|
| 1. Activity Value    | 4. Person/People Value | 7. Construction Value |
| 2. Event Value       | 5. Design Value        | 8. Landmark Value     |
| 3. Institution Value | 6. Style Value         | 9. Symbolic Value     |

Each potential historic resource must meet **at least one** of the criteria in order to be listed on the Inventory. A resource may be considered significant to a community or to the city as a whole.

If a resource possesses merit at a city-wide level for at least one of the nine criteria, it becomes a City-Wide Historic Resource.

*Note: For complete definitions of the criteria, see the worksheets.*

## Criteria of Integrity

The resource must also have integrity. That is, resources on the Inventory must not have had major changes that have destroyed their essential character.

The criteria used to determine integrity are:

- |             |                |                |
|-------------|----------------|----------------|
| 1. Location | 3. Environment | 5. Workmanship |
| 2. Design   | 4. Materials   | 6. Association |

Keep in mind that sometimes changes to a historic resource over time become valuable in their own right.

For buildings—especially private buildings—you may not be able to access the interior. In these cases, only the exterior features of the building will be considered in the evaluation and it will be noted that the condition of the interior is unknown.



A resource with high integrity



A resource with poor integrity

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## Examples of significant resources

- 1. Activity Value:** The Bridgeland–Riverside Vacant Lot Garden is the only existing garden directly associated with the significant activity of gardening through the Vacant Lots Garden Club in Calgary.
- 2. Event Value:** The Stampede Corral is directly associated with the Calgary Stampede. It is one of the oldest remaining buildings in Stampede Park, and was one of the first buildings constructed in the Stampede’s post-Second World War modernization.
- 3. Institution Value:** The Ranchman’s Club is significant as Calgary’s oldest and most prestigious private club.
- 4. Person Value:** The Nellie McClung House is directly associated with this nationally-significant author, reformer and politician because she lived here between 1923 and 1933.
- 5. Design Value:** The Calgary Tower is a rare example of an unconventional, original design in Calgary.
- 6. Style Value:** The Sales Residence is an early, rare, and intact example of the “Free Classic” Queen Anne Revival style in Calgary.
- 7. Construction Value:** The Grain Exchange Building was Calgary’s first skyscraper, representing an advance in construction technology.
- 8. Landmark Value:** The Eau Claire Smokestack is a neighbourhood landmark due to its unique form and industrial character in an otherwise commercial area.
- 9. Symbolic Value:** Memorial Drive commemorates the soldiers who died in the First World War.

*Note: A resource can be insignificant for one criteria, yet still be significant for others.*



**Mussey-Harris Co. Warehouse  
(1912)**



**Bridgeland/Riverside Vacant Lot Garden (c. 1930)**



**Eau Claire Smokestack (1947)**

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## Before you begin:

Doing all of the research and documentation for the evaluation process takes time.

- Read through the worksheets; make sure you understand the Criteria of Significance and its definitions.
- Based on what you already know, does the resource that you are investigating meet at least one of the criteria in a significant way? If not, reconsider proceeding with the evaluation process.
- On balance, does the resource meet the Criteria of Integrity? If not, reconsider proceeding with the evaluation process.

## 2. The evaluation process

### The evaluation process is made up of two parts:

1. The worksheets, which will help you collect and organize the necessary information.
2. The evaluation forms, where you will present your research and conclusions in a clear, consistent way.

### Each evaluation follows the same process:

1. Preliminary consideration about the merit of the resource using the significance and integrity criteria.
2. Consulting with Heritage staff for approval in proceeding with an evaluation and assistance with historic title search.
3. Conducting research.
4. Completing the worksheets and evaluation form
5. Review of worksheets and evaluation form by Heritage staff.
6. Review of the evaluation form by CHA and a decision made about adding the property to the Inventory.



Cecil Hotel (1911); Calgary Public Library



Ogdon Federal Elevator (1914)



Rundle Ruins/General Hospital #2 (1899)



## 3. Conducting research: *what comes first?*

### Sources

Some of the main sources for researching resources in Calgary are listed below. Gather as much information as you can at each location. Get to know The City Heritage staff and the archivists and resource staff at the libraries and archives. They are there to assist. There are also a number of online resources, some of which are listed below.

#### 1. City heritage staff

Information and advice

Current map

Historic title search

#### 2. The Glenbow Museum Library and Archives (Glenbow)

Henderson's Directories

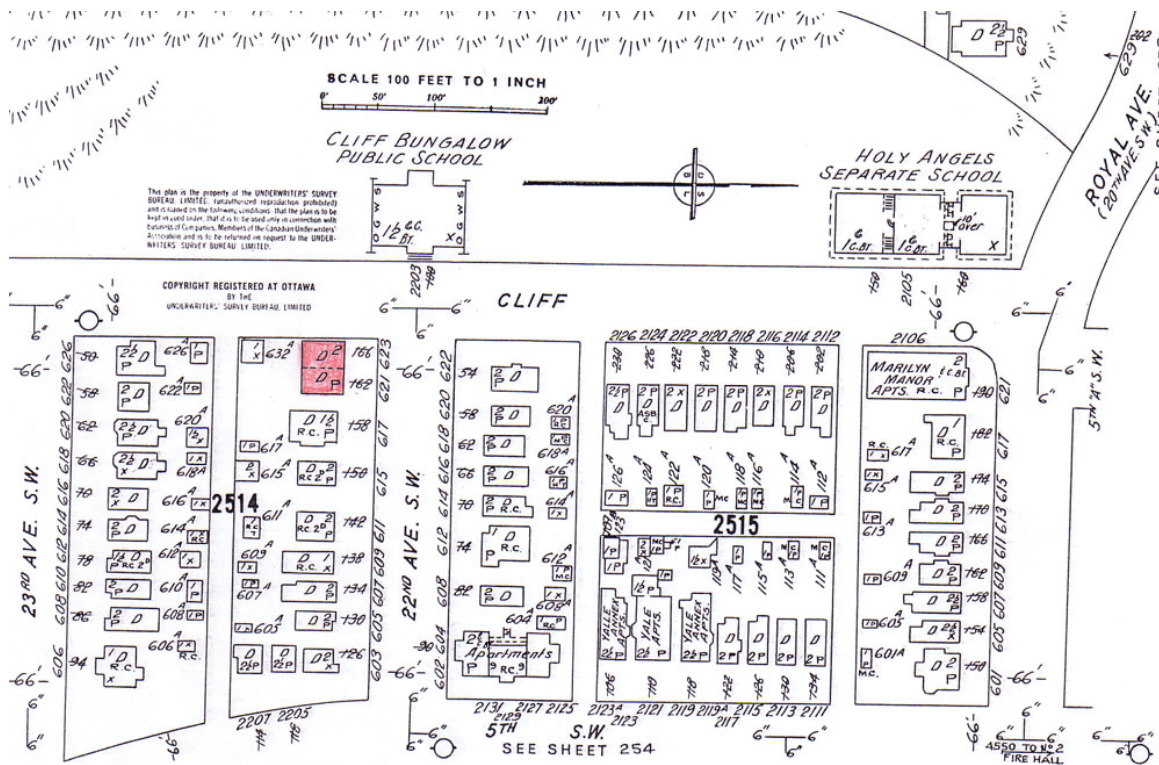
Historical maps

Fire Insurance maps

Biographical dictionaries, or "Who's Who in Alberta"

Clipping files

Fonds relating to institutions or individuals relevant to the resource



Example of Fire Insurance Map

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## 3. The Local History Room at the Calgary Public Library (Library)

Local histories  
Clipping files  
Books on architecture  
Walking tours  
Some Henderson's Directories

## 4. The City of Calgary Archives (City Archives)

Building permits  
Tax assessment records  
Fonds relating to City departments  
Fire Insurance maps  
Clipping files

## 5. Online resources

[A guide to researching building history.](#)

### Archival photographs

- The City Archives, searchable at [Images Canada](#)
- [The Glenbow's collection](#) - search under the street name, neighbourhood, significant person or event as well as the resource name.
- [The Alberta Heritage Survey Program](#)
- [Archives Society of Alberta](#)

### Aerial photos

- Our Future Our Past - you will need the legal description to find the map sheet number. Physical copies are available at the Map Library at University of Calgary.

### Local histories

- [Our Future Our Past](#)
- Google and other search engines. Remember that not all information on the internet is accurate. Wikipedia is not an authoritative source.

### Municipal, provincial and federal historic sites

- [Alberta Register of Historic Places](#)

## 6. Other

Canadian Archatectural Archives, University of Calgary  
  
Interviews with people associated with the resource

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## Strategy

You'll find your task is much easier if you do your research in the following order:

### Step 1: Contact City Heritage Staff

They will provide you with a map showing the resource and the historic land title search. They will also provide advice about whether the evaluation is worth pursuing, based on the resource's significance and integrity.

### Step 2: Do a site visit

The site visit will give you a feel for the context, the integrity of the resource, and what elements contribute to the value of the resource (the character-defining elements).

Take lots of photographs. You will refer to them later, especially when you write the description and the character-defining element sections for the SOS portion of the evaluation form. **See section 7 for photo documentation guidelines.**

Take detail photos of the portions of the property that you may need to refer back to later in the process, such as windows, siding, etc.

If someone asks what you are doing, tell them, and refer them to City Heritage staff for more information.

### Step 3: Review the historic land title search

The historic land title search provides the legal description and record of ownership of the property, including how often it changed hands, and if it was subdivided or amalgamated with other properties.

Every time a property changes hands, the previous title registration certificate is cancelled. Each certificate includes the number of the previous certificate. Earlier certificates may include more than one property.

The date the title was registered is not always the same date the property changed hands. Sometimes the new owner did not register the new property until months or even years after the sale.

For more information, see [An Introduction to Alberta Land Titles](#).

### Step 4: Get the context

Check the Glenbow Museum and the Local History Room at the library for community histories, walking tours and newspaper clippings about the neighbourhood. This will give you an idea of how the resource fits into the general history of the neighbourhood and city.

## No trespassing

Do not go onto private property without the property owner's permission, not even to get a closer look or to take a photograph. Stay on the sidewalk or in the alley or adjacent public space.

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## Make a paper trail

Keep copies of your notes and all of the documents and websites from which you derive specific information so you can provide it in the “sources” section of the evaluation form.

## Step 5: Check the Henderson’s Directory listings

Henderson’s Directories (directories) are an annual listing of the building occupants in Calgary, listed by address. They include an alphabetical listing of people’s names and occupations. The directories will indicate approximately when the resource was developed and what was there before it.

The directories are available in several places, but the most complete collection in hard copy (not microfilm) is at the Glenbow. Some years (especially later years) are available in hard copy at the library. Also, many years are available [online](#).

**List the occupant, if applicable, for each of the first three years after the building was constructed and every five years after that, as well as any other key dates.**

Compare occupants’ names to the names on the title to see whether or not the property was rented or owner-occupied.

This directory was not a legal publication thus spelling errors were common.

## Step 6: Look for the Fire Insurance Map at the Glenbow or City Archives

For buildings, the Fire Insurance Maps record the original building footprint and the materials used in construction. The maps give an accurate view of the subject resource context at a particular time.

They are helpful in determining development dates and identifying later changes to the resource (e.g. additions or demolitions).

Editions for only a few years in the first half of the twentieth century are available.

## Step 7: Look for the building permit at City Archives

You will need the legal description at the time of the resource’s construction.

The building permit register lists the name of the owner and sometimes the name of the builder.

This will give you a fairly accurate development date.

Not all resources will have building permits. Building permits exist for 1903–13 and 1947–70 (with gaps).

City Heritage staff may be able to pull development and building permits from the mid 1970s onwards from the Planning & Development records centre. These can be useful to identify changes to a building that are to be noted in the Statement of Integrity section of the evaluation form.

## 4. Conducting research: *what comes first?*

The worksheets are a tool to help you consider and organize the evidence about what aspects of the property have significance and why. The worksheets help the researcher methodically consider each of the Criteria of Significance and Criteria of Integrity. The worksheets can be completed in bullet form; they are primarily for the benefit of the researcher and are not used by the CHA or City staff.

### 4.1 Evaluation criteria

The worksheets are organized into sections according to the nine Criteria of Significance:

#### Pass it on

The worksheets are not the final product. They remain on file, but the CHA relies on the evaluation form alone to make its decision about each potential Inventory property. Make sure you transfer all of the important information from the worksheets onto the evaluation form.

**CALGARY  
HISTORIC RESOURCE  
CRITERIA WORKSHEETS**

**CRITERIA OF SIGNIFICANCE WORKSHEETS** April 2010 version

<b>Resource Name</b>	
<b>Address</b>	

**1. Activity**

A resource must be directly associated with an activity that has made a **significant contribution** to the broad pattern of municipal history. Activities include occupations, pursuits, and leisure practices of a few or many local individuals that were continuous and commonplace or ordinary, i.e. not celebratory.

An historic resource must meet one of the following qualifiers in order to be associated with an activity.

**The activity is significant to the history of the city of Calgary**

**The activity is significant to the history of the neighbourhood or community**

If the activity is not significant to the history of the city or community and/or is slightly associated with this historic resource, then this resource is not significant for this criterion.

a) Summary

What is the significant activity that is directly associated with this resource?

Is/Was the activity important to the whole city or the community and/or the neighbourhood? How?

b) Description of how the activity relates to the resource

c) Notes

d) Activity Qualifiers

City-wide – the resource is directly associated with an activity that made or marked a significant contribution to the Calgary’s History.  
 Neighbourhood and/or Community – the resource is directly associated with an activity that made or marked a significant contribution to the neighbourhood and/or community history  
 N/A

1. Activity Value
2. Event Value
3. Institution Value
4. Person/People Value
5. Design Value
6. Style Value
7. Construction Value
8. Landmark Value
9. Symbolic Value

The worksheets include a definition of each of the Criteria of Significance to guide you.

Each worksheet section will help you consider and outline the direct association between each resource and the Criteria of Significance evaluation. For example, for Person, the fact that a former resident’s daughter had William Aberhart as a teacher is a loose and indirect association, and not enough to make the house significant for its association with a person/people.

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## 4.2 Filling in the blanks

*Note: Most resources will only be significant for a few of the Criteria of Significance. Put N/A for the Criteria of Significance that are not relevant to the resource.*

Each of the Criteria of Significance sections of the worksheet includes four sub-sections.

a) Summary

What is the significant activity that is directly associated with this resource?
Is/Was the activity important to the whole city or the community and/or the neighbourhood? How?

- a) Summary – Identify how the Criteria of Significance is directly associated with the resource. Was it important to the whole city, community or neighbourhood? How did it contribute? Note that community can also mean an ethnic, cultural or professional group, as well as a geographic location.

b) Description of how the activity relates to the resource

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- b) Description – Describe how the criteria relate to the resource. You can cut out irrelevant information later when you transfer the information to the evaluation form.

c) Notes

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- c) Notes – Use this space to organize your research, with notes from site visits, newspaper clippings, interviews, community histories and other sources. Remember that you will need to transfer all important information to the summary form. This is also where you can include information that is interesting, but not always key (e.g. that the resident's daughter was taught by William Aberhart).

d) Activity Qualifiers

<input type="checkbox"/> City-wide – the resource is directly associated with an activity that made or marked a significant contribution to the Calgary's History.
<input type="checkbox"/> Neighbourhood and/or Community – the resource is directly associated with an activity that made or marked a significant contribution to the neighbourhood and/or community history
<input type="checkbox"/> N/A

- d) Qualifiers – Decide if the resource is directly associated with the criteria on a city-wide or neighbourhood and/or community level, or if it is not associated with this criteria.

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## 4.3 Criteria of Integrity worksheet

CALGARY HISTORIC RESOURCE CRITERIA WORKSHEETS	
<b>CRITERIA OF INTEGRITY WORKSHEET</b>	
Statement of Integrity	
Does the resource maintain sufficient overall integrity to convey its significance?	
1. LOCATION	Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>
Location is the place where an historic resource was constructed or the site where an historic activity or event occurred.	
2. DESIGN	Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>
Design is the combination of elements that create the form, plan, space, structure and style of a resource.	
3. ENVIRONMENT	Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>
Environment is the physical setting of an historic resource. Whereas location refers to a specific place, environment refers to the character of the place in which a resource played its historic role.	
4. MATERIALS	Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>
Materials are the physical elements that were combined or deposited during a particular period(s) or time frame and in a particular pattern or configuration to form an historic resource.	
5. WORKMANSHIP	Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>
Workmanship is the physical evidence of the crafts of a particular culture or people during any given period in history. It is important because it can provide information about technological practices and aesthetic principles.	
6. ASSOCIATION	Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>
Association is a <i>direct link</i> between an historic resource and a significant historical theme, activity or event, or an institution or person.	
2005 Provincial Master Plan Theme (please select one)	<input type="checkbox"/> Prehistoric Alberta <input type="checkbox"/> Fur Trade <input type="checkbox"/> Aboriginal Life <input type="checkbox"/> Resource Development <input type="checkbox"/> Transportation <input type="checkbox"/> Agricultural Development <input type="checkbox"/> Urban Development <input type="checkbox"/> Politics and Government <input type="checkbox"/> Health <input type="checkbox"/> Work and Leisure <input type="checkbox"/> Spiritual Life <input type="checkbox"/> Business and Industry <input type="checkbox"/> Law Enforcement <input type="checkbox"/> Military <input type="checkbox"/> Education <input type="checkbox"/> Sports <input type="checkbox"/> Intellectual Life <input type="checkbox"/> The Face of Alberta

### Architectural Style Tip

If you are evaluating a building, please choose one of the 40 predominant architectural styles found in Calgary, listed on the worksheet. If you need help, check the resources list at the end of this booklet first, or contact City Heritage staff.

The purpose of this part of the worksheet is to identify how much the resource has changed from its original form.

The Statement of Integrity is a short statement consisting of one or two paragraphs describing the major changes associated with the six Criteria of Integrity. It can be in paragraph form or organized by each of the six criteria.

### Example:

Statement of Integrity	The exterior of house retains an unusually high degree of integrity. Major changes are limited to addition of the vertical boards that form a porch balustrade. The condition of the interior is unknown.
------------------------	---

## A word about the audience

Remember that your work will be available to the public and may be used by a wide variety of people, including Heritage Planners, community members, City Council and the media. Your research and documentation will be subject to scrutiny and must be consistent, credible and professional.

## 5. Evaluating and reporting your research: the evaluation form

The CHA uses the evaluation form to determine if the resource should be included on the Inventory. It is divided into two sections: description and significance. Use the information that you have gathered in the worksheets to complete each section.

**The most important section of the entire Evaluation Form is the Statement of Significance (SOS). Write it first. The SOS is covered in Section 5.3 of this Handbook.**

### 5.1 Description

The description summarizes information such as: name, location, style, etc. and summarizes which values (Criteria of Significance) are associated with the resource.

- A. Resource name:** In most cases, the resource name is usually the original name of the resource or takes its name from the first owner, if applicable. The CHA will make a final determination of the appropriate name.
- B. Alternate names:** If the building has changed names or if it is commonly known by a different name, list the name(s) here.
- C. Address:** Use the current street address that is used by The City. Check [calgary.ca/myproperty](http://calgary.ca/myproperty) to find the address.
- D. Community district:** Give the name of the community that is used by The City. Check [calgary.ca/myproperty](http://calgary.ca/myproperty) to find the community name
- E. Legal description:** Give the legal description in the form of Plan ; Block ; Lot.
- F. Year of construction:** If you could not find a specific year, use a circa date, based on your research.
- G. Architectural style:** Choose one style from the list in the Criteria of Significance worksheets. If you require assistance, check with City Heritage staff.
- H. Architect:** If not known or applicable, write N/A.
- I. Builder:** This means the carpenter/contractor, not for whom it was commissioned. If not known or applicable, write N/A.
- J. Use type:** Choose the resource use type based on the Purpose Groups from [Canada's Historic Places Register](#)



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## SUMMARY

August 2009 Version

Resource:  City Wide  
 Community

File #

<b>A</b>	<b>1. Description</b>		
<b>B</b>	<b>Resource Name</b>		
<b>B</b>	<b>Alternate Names</b>	<b>C</b>	
<b>B</b>	<b>Address</b>		
<b>D</b>	<b>Community District</b>		
<b>D</b>	<b>Legal Description</b>	<b>E</b>	
<b>F</b>	<b>Year of Construction</b>		
<b>F</b>	<b>Architectural Style</b>	<b>G</b>	
<b>H</b>	<b>Architect</b>		
<b>H</b>	<b>Builder</b>	<b>I</b>	
<b>J</b>	<b>Use Type</b>	<input type="checkbox"/> Archaeological <input type="checkbox"/> Commerce <input type="checkbox"/> Community <input type="checkbox"/> Defence <input type="checkbox"/> Education <input type="checkbox"/> Food Supply <input type="checkbox"/> Government	<input type="checkbox"/> Health and Research <input type="checkbox"/> Industry <input type="checkbox"/> Leisure <input type="checkbox"/> Mixed Use <input type="checkbox"/> Religion, Ritual and Funeral <input type="checkbox"/> Residence <input type="checkbox"/> Transport
<b>K</b>	<b>Original Use</b>		
<b>L</b>	<b>City Owned</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>L</b>	<b>Criteria of Significance</b> <small>(see attached worksheets)</small>	Activity <input type="checkbox"/> City Wide <input type="checkbox"/> Community <input type="checkbox"/> NA Event <input type="checkbox"/> City Wide <input type="checkbox"/> Community <input type="checkbox"/> NA Institution <input type="checkbox"/> City Wide <input type="checkbox"/> Community <input type="checkbox"/> NA Person/People <input type="checkbox"/> City Wide <input type="checkbox"/> Community <input type="checkbox"/> NA Style <input type="checkbox"/> City Wide <input type="checkbox"/> Community <input type="checkbox"/> NA Design <input type="checkbox"/> City Wide <input type="checkbox"/> Community <input type="checkbox"/> NA Construction <input type="checkbox"/> City Wide <input type="checkbox"/> Community <input type="checkbox"/> NA Landmark <input type="checkbox"/> City Wide <input type="checkbox"/> Community <input type="checkbox"/> NA Symbolic Value <input type="checkbox"/> City Wide <input type="checkbox"/> Community <input type="checkbox"/> NA	
<b>M</b>	<b>2005 Provincial Master Plan Theme</b> <small>(please select one)</small>	<input type="checkbox"/> Prehistoric Alberta <input type="checkbox"/> Fur Trade <input type="checkbox"/> Aboriginal Life <input type="checkbox"/> Resource Development <input type="checkbox"/> Transportation <input type="checkbox"/> Agricultural Development <input type="checkbox"/> Urban Development <input type="checkbox"/> Politics and Government <input type="checkbox"/> Health	<input type="checkbox"/> Work and Leisure <input type="checkbox"/> Spiritual Life <input type="checkbox"/> Business and Industry <input type="checkbox"/> Law Enforcement <input type="checkbox"/> Military <input type="checkbox"/> Education <input type="checkbox"/> Sports <input type="checkbox"/> Intellectual Life <input type="checkbox"/> The Face of Alberta

**K. Original use:** What was the first use of the resource?

**L. City-owned:** Is the resource owned by The City of Calgary or is it private property?

**M. Criteria of Significance:** Check all that apply. Make sure that these values have been outlined in the SOS and the summary in section 2.

**N. Provincial Master Plan themes:** Choose the one theme from this list that most closely aligns with the resource.

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O	<b>Context Image</b>	
	Title	
	Description	
	Source	
	Date	
	Copyright	
P	<b>Contemporary Image</b>	
	Title	
	Description	
	Source	
	Date	
	Copyright	
Q	<b>Historic Image</b>	
	Title	
	Description	
	Source	
	Date	
	Copyright	
R	<b>Map</b>	
	Title	
	Description	
	Source	
	Date	
	Copyright	

- O. Context image:** Include your photograph showing the resource in its context of the surrounding buildings or area. Ensure the context image shows some of the surrounding buildings and streetscape.
- P. Contemporary image:** A direct photograph of the resource. If this is a building, the photograph must be of the entire front façade. You may include photos of specific details or other elevations under the additional photographs section
- Q. Historic image:** Not all resources will have historic images. If you cannot find one, put N/A.
- R. Map:** Heritage Planning will provide you with the map.

# Calgary Historic Resource Evaluation System Handbook

## 5.2 Significance

This section outlines specifically why the resource should be included on the Inventory. What is it about this resource that is significant or meaningful to a community's history or to Calgary's history as a whole?

The most important section of the entire evaluation form is the SOS. You may choose to write the SOS first. The SOS is covered in section 6.3 of this handbook.

### 2. Significance

A	<b>Summary</b>	This site is significant because....
B	<b>Era of Development</b> (please select one)	Development Era <input type="checkbox"/> Pre 1850 <input type="checkbox"/> 1850 to 1874 (Pre Settlement) <input type="checkbox"/> 1875 to 1884 (Frontier) <input type="checkbox"/> 1885 to 1905 (Railway/Early Settlement) <input type="checkbox"/> 1906 to 1913 (Pre WW I Boom, Age of Optimism) <input type="checkbox"/> 1914 to 1918 (WW I) <input type="checkbox"/> 1919 to 1929 (Post WW I to Stock Market Crash) <input type="checkbox"/> 1930 to 1939 (Depression) <input type="checkbox"/> 1940 to 1945 (WW II) <input type="checkbox"/> 1946 to 1956 (Oil Boom) <input type="checkbox"/> 1957 to 1982 (Modern) <input type="checkbox"/> 1983 onward
C	<b>Dates</b>	As well as the year of completion other significant dates are:
D	<b>Integrity</b>	Does the resource retain sufficient integrity to convey significance? <input type="checkbox"/> Yes <input type="checkbox"/> No
E	<b>Classification</b>	<input type="checkbox"/> City Wide Historic Resource (important for the whole of Calgary) OR <input type="checkbox"/> Community Historic Resource (important for the whole of a particular neighbourhood or community)
F	<b>Designation</b>	Federal <input type="checkbox"/> Yes <input type="checkbox"/> No Provincial <input type="checkbox"/> Yes <input type="checkbox"/> No Registered <input type="checkbox"/> Yes <input type="checkbox"/> No Municipal <input type="checkbox"/> Yes <input type="checkbox"/> No
G	<b>Evaluation Author and Contact Information</b>	
H	<b>Date Evaluated by CHA Committee</b>	
I	<b>Date Approved by CHA</b>	

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- A. Summary:** A summation of why the resource is significant. It succinctly and explicitly summarizes the values (Criteria of Significance) identified in the SOS. Each Criteria of Significance associated with the resource should be outlined in a separate summation no more than three sentences in length. At the end of each summation, place in brackets what Criteria of Significance applies and whether it has community or city-wide value.

<b>Summary</b>	<p>This site is significant because...</p> <p>The West End Telephone Exchange Building possesses activity value as it delivered telephone service to the community for almost three decades, playing an important role in the city's telecommunications system development. (Activity Value, City Wide Significance)</p> <p>The building was the home from 1938 until at least 1991 of the American Woman's Club, a significant organization in Calgary for its philanthropic and civic improvement activities. (Activity Value, City Wide Significance)</p> <p>The West End Telephone Exchange Building is a rare and well maintained example of Romanesque Revival architecture in the community. (Style Value, Community Significance)</p> <p>The structure's innovative double-wall construction is a rare example of how buildings employed new construction methods to meet the needs of emerging technologies. (Construction Value, City Wide Significance)</p>
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- B. Era of development:** Choose one from the list. If the resource was developed in one era and has substantially changed in another era, use the earlier date for this section and put the other dates in the next section.
- C. Dates:** Other significant dates may include major alterations or additions, the dates of a significant person's association with the resource, or the dates of a key event. Keep this section brief and limited to major occurrences
- D. Integrity:** The answer should be yes for the CHA to place the resource on the Inventory. If the answer is *no*, the CHA may choose not to include the resource on the Inventory. Typically a site will not be researched in the first place if the answer is *no*.
- E. Classification:** Suggest whether the resource is a community or city-wide historic resource. If the resource is identified with any of the Criteria of Significance at a city-wide level, the resource becomes a City Wide Historic Resource.
- F. Designation:** Check to see if the resource has already been designated at the municipal, registered, provincial or federal levels. You can check the [Alberta Register of Historic Places](#) to find this.
- G. Evaluation author and contact information:** Add your name (or firm). An email or phone number is sufficient for contact information.
- H. Date evaluated by CHA committee:** Leave blank.
- I. Date approved by CHA:** Leave blank.

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J	<b>Additional Images</b>	
	Title	
	Description	
	Date	
	Source	
	Copyright	
K	<b>Preliminary Statement of Significance</b>	
L	<b>Historical Title Search</b>	
M	<b>Henderson's Directory Search</b>	
N	<b>Additional Sources</b>	

**J. Additional images:** Include up to six additional images, which may be contemporary or historic photos or drawings. Details and or interior photos can be grouped into one cell.

**K. Statement of Significance:** See 5.3.

**L. Historical title search:** Enter the information from the Certificates of Titles provided by Heritage Planning. List owners from historic to most recent and include the date the title was registered. Do not include the name of the current owner; instead, list the date that the current owner is registered on title and reference as *current owner*. If handwritten portions of a title are illegible use [?] to denote where information is incomplete.

<b>Historical Title Search</b>	2 June 1910—The Canadian Pacific Railway Company 26 October 1912—Louisa Hor[?]man of Calgary (widow) 12 April 1920—Lucy B. Sine of Calgary 10 February 1925—City of Calgary (tax recovery) 24 January 1929—Albert E. Aikenhead of Calgary (physician and surgeon) 20 June 1955—Graham Courtice and Trust Company (executors of the will of Albert Earl Aikenhead (deceased)) 13 October 1977—Current owners
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**M. Henderson’s Directory Search:** List occupants from historic to most recent, including the name and occupation of every occupant for each of the first three years after construction, and **every five years** after that. For apartment buildings, list only the names and occupations for the first year but review other years. If there were important changes in unit make-up, occupancy or other significant dates, include the listings for those years as well.

<b>Henderson’s Directory Search</b>	1929 [FIRST LISTING] - 1955 - Aikenhead Dr A[lbert] E (of Calgary Associate Clinic) 1955 - Mrs B(lanche; widow Dr A E 1960, 1965, 1970, 1975 - Wood Stephen H (barrister of Allen McKimike & Assoc) 1978 -vacant 1990 – Dex Video
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**N. Additional sources:** List other sources (books, interviews etc.) where you obtained information specific to the resource and annotate in parentheses what unique information was derived from that source (e.g.: modifications to building, club activities & membership, etc.). Use MLA style for your citations.



Upton Residence (1908)

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## 5.3 Writing the Statement of Significance (SOS)

Calgary's Heritage Evaluation System uses a values-based approach to consider the significance of a resource using a set of nine criteria. The SOS is the heart of the evaluation form. It is where you will provide clear, concrete value statements about how and why the resource is significant in relation to the Criteria of Significance, along with supporting evidence.

The SOS has three parts: description, heritage value and character-defining elements.

**Each section of the SOS must not exceed 4,000 characters, including spaces.**

- A. Description:** Three to five sentences outlining the basic physical features of the resource. Include basic information about form, style, appearance, context, date of construction and construction material (as applicable). This is not the section to explain why the resource has value or describe aspects of its history. Think of this section as providing a "snapshot" description.

<b>Description</b>	The 1910 West End Telephone Exchange Building is a long, rectangular, one-storey, gable-front building of solid red-brick construction with sandstone detailing. Its symmetrical Romanesque Revival front façade features a Roman-arched central entrance, surmounted by a gabled parapet. It is located on a residential street in the Beltline community.
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- B. Heritage value:** This is the historic, aesthetic, scientific and social values that a historic resource possesses, as per the Criteria of Significance.

Make clear, concrete statements about **why** the resource is significant (as per the values you've selected) and support those statements with additional information

The purpose of this section is not to give a comprehensive, chronological or narrative history of the resource. Why is it valuable? Ensure this section is readable and interesting.

### Help! How to write a good SOS

The most important section of the SOS is the heritage value section. It must be accurate, concise and make a clear argument as to **why** the resource is significant.

- Use information and ideas from your completed worksheets to identify why the resource is significant according to the criteria.
- Remember to include background information that supports the value statements, not provide a chronological history.
- Do not get sidetracked by interesting yet ultimately irrelevant information.

**Value statement: Symbolic Value – Community Significance**

**Supporting information**

**Supporting information - context**

**Supporting information**

**Value statement: Style Value – Community Significance**

**Supporting information**

## **Heritage Value:**

The Upton Residence symbolizes the earliest suburban development of the Sunnyside neighbourhood and is one of the very earliest remaining houses in the Sunnyside community.

The house was built in 1908 when Sunnyside was sparsely populated, shortly after the area's subdivision in 1906-07. In 1907 the area was annexed by Calgary and began its transition from ranch and farm use into a suburban neighbourhood. The Upton Residence stood as one of a small number of houses in the Sunnyside community until the rickety Bow Marsh Bridge connecting the area to downtown was replaced in 1909. The introduction of streetcar service to the vicinity in 1909, as well as the economic boom (1909-13), accelerated development in Sunnyside.

The modest character of the property recalls Sunnyside's development as a working-class residential area. Prone to flooding at the time, the area was characterized as inexpensive to build. The house was constructed by tinsmith, Frederick Upton., who owned and occupied the house until 1911. It then became a rental property until 1951, attracting travellers (salesmen), clerks and a variety of other working-class residents.

The Upton Residence is also valued as an excellent and rare example of an Edwardian Cottage-style (Builder's Cottage) residence in the community. Modest in size and detail, the square, wood-frame house retains a high level of integrity featuring a characteristic hipped roof, narrow-width lapped siding and open, front porch. Notable detailing includes decorative, scroll-cut window casings and a front window hood with scroll-cut brackets. Such houses were easily and quickly built from a package of materials, which prompted many owners to build them themselves.



**C. Character-defining elements:** A technical description of the original, historical and significant physical features of the resource including specific architectural, design, construction, landscape and contextual features. For a building, some commonly required features to mention (and group) may be:

- Form, scale and massing (e.g. two-story, rectangular, side hall plan)
- Roof – form, materials and details (e.g. hipped roof with lower cross gable and exposed, decorative purlins)
- Materials – construction and exterior materials (e.g. wood-frame, common-bond brick veneer)
- Windows (fenestration) – window materials and profile (e.g. four-over-four, wooden-sash windows)
- Ornamental features
- Interior
- Landscape/context
- Additional separate bullet points of other features that do not don't fit the above groupings

When a building is more complex, the interior can be described in its own section of bullets. When multiple buildings exist on a site, each building should have its own list of character-defining elements.

## Staying in character

The character-defining elements may be used as a management tool by heritage planners, property owners, architects and developers. A good way to approach this section is to imagine that the resource could be redeveloped/renovated: *what are the main features that should be respected for a resource to retain its character?*

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## Character-defining elements include, but are not limited to:

- One-and-one-half storey rectangular plan with raised central entrance; front porch; two-storey front extension including first-storey bay window; slight side extension;
- Pitched side-gable roof with higher pitch over part of rear, front multi-sided dormer, front cross-gable, lower side cross gable over extension; deep open eaves with exposed support beams, extended rafter ends;
- Wood-frame construction clad in fieldstone (porch walls), wood lap siding with corner boards, shingles; concrete foundation;
- Fenestration, including multi-pane sash-over-sash wood windows with one large glass pane, in pairs and groupings; single-pane and multi-pane wood casement windows, some in pairs; wood storm windows;
- Three-part paneled tiger oak front doorway assembly; each part with one large upper pane and four (door) or two (sidelights) higher panes; transom lights over each section;
- Three exterior red-brick chimneys in stretcher bond with pointed concrete caps;
- House set at an angle on a double-sized corner lot; deep set-back within mature landscaping that includes grass-planted lawn, hedges, large trees; and
- Fieldstone perimeter retaining wall, pillars, and stairway walls; wrought-iron gate decorated with curlicues and spikes; owner's initials ("F.W.") and date of construction ("19" and "12") set in three mosaic stone panels within front masonry.



Window detail, Nellie McClung House (1907)



Soffit/eave detail, Sommerville Duplex (1912)

## 6. Statement of Significance style guidelines

Generally the Statement of Significance (SOS) should follow the Canadian Press (CP) Stylebook. The following are some common names, titles and abbreviations that should be consistent when writing an SOS:

- Second World War not World War II
- \$450 million and \$50-million project not \$450 million dollars and \$50-million-dollar project
- Months are always written out in full when they are not part of a specific date. In precise dates, Jan., Feb., Aug., Sept., Oct., Nov. and Dec. are always abbreviated: Jan. 1 not Jan. 1st. Convocation was held Nov. 17, 2006. The Peace Camp lasted through January 1991. The days of the week are never abbreviated.
- Titles, designations of sex and marital status (Mr., Mrs., Miss, Ms) should be omitted, unless specified by the individual or called for by the situation.
- First name or initial and last name should be used. Then use surnames after the first reference: "Marnie Spears" becomes "Spears" in subsequent sentences.
- First names may be used on second reference for children and youths under 18.
- Refer to a married couple by their first names and then their last name: Jason and Erin Lee. When they do not share the same last name: Jane Smith and Erin Michaels, a married couple.
- To distinguish between persons of the same last name on second reference, repeat first names or note the relationship when appropriate. For parent-child association you may use "the elder" and "the younger"
- When it is appropriate to use academic titles they should be used in a parallel and consistent manner. "Dr. Smith and Prof. Jones" or "J. Smith and H. Jones" not "Dr. Smith and H. Jones."
- Titles such as Dr., Capt., Prof., Lieut. are abbreviated, if they come before names, on first reference but are written out in descriptive passages: Dr. Ron Anderson. Prof. Daniel VanHeyst. Capt. Hiram McMillan; The professor stood at the front of the class.
- Abbreviate the titles of legal corporations: Cargill Inc., Ford Motor Co. of Canada Ltd. Spell out words like company when they are not part of a corporate entity: The Canadian Opera Company, the Company of Young Canadians
- Geographical abbreviations take periods, others do not. The RCMP have several offices in the N.W.T. HMCS Calgary ran aground on the south coast of P.E.I. The U.S. and the U.K. are members of the UN.
- Spell out a number above 10 at the start of the sentence: Thirty to 40 men were waiting when the sun rose. Spell out numbers in figures of speech: The Ten Commandments or a ten-gallon hat but, except it's the Dirty '30s and the Roaring '20s.
- Numerals are used in numbers with fractions and decimals: He fired a .30-calibre revolver at a target 9.5 centimetres by 7.2 centimetres; and in decisions, votes & scores: the Oilers beat Leafs 6-5; the court ruled 5-4. Percentages are shown as two words: Two per cent, 12 per cent, 1.3 per cent.
- Numerals are used in ages when they stand after a name. Bruce, 3, had two sisters, five and seven.

An exception to the CP style is with addressing. To be consistent with The City of Calgary addressing standards and to help cut down on character count, use:

- Numbered street names are not spelled out, abbreviate the quadrants without periods, avenues and the like are abbreviated in specific addresses, but not in general addresses: 1352 Norfolk DR, 1005 85 AV, 135 Albert CT, the 1300 block of Norfolk Drive, the crash took place on Crowfoot Trail in Calgary's northwest, the bridge spanned between 4 and 6 Avenues.

## 7. Photo documentation guidelines

As a part of completing a Historic Resource Evaluation, you will be required to take photographs on-site that will be used by the Calgary Heritage Authority and The City of Calgary for a variety of purposes, online and offline. These guidelines will help ensure that your work is suitable for the widest range of use. For questions beyond the scope of this guide, please contact Heritage Planning directly.

The goal of evaluation photography is always to visually describe a historic resource, providing detail that cannot be captured in any other way.

### Camera and gear

A wide variety of cameras, equipment and software can be used to provide acceptable results. Use whatever tools are most comfortable to you, as long as the images meet submission guidelines. Important items to keep in mind:

- Different resources will have different challenges associated with photographing them. Visiting a site multiple times may be required to capture it fully.
- Indoor photography can require the use of flash, a tripod, and colour correction to ensure consistent quality.

### Procedure

Evaluation photographs prioritize clarity over creativity, but can and should be attractive, well-composed images. Take as many photos as necessary to fully document the resource – paying particular attention to what you assign as character-defining elements. If granted access to be on-site by the property owner, inquire if there are particular places or subjects they do not want photographed. Where possible, ask permission to move personal items that may be obscuring aspects of the resource (non-historic furniture, clutter), avoid pets or people in your images or blur them in post-production.

### Submission guidelines

At the conclusion of an evaluation contract, a final edited image set must be submitted alongside the Evaluation document. Photographs need to conform to the following standards:

- JPEG files with a minimum resolution of 1600x1200 pixels at 300dpi
- Straight and level with subject, unless otherwise appropriate
- Minimized obstruction, glare or other inconsistencies
- Accurate labels for each image, noting compass direction (e.g. North elevation, entrance hallway, etc.)
- Enough photographs to fully represent the resource, including:
  - Each exterior building face (elevation); if impossible, front and rear at minimum
  - Contextual images of the structure along the street
  - Descriptive photographs of the form and details of the building (windows, doors, porches, balconies, roof structures, etc.)

### Copyright

Photographs are to be provided with a royalty-free, irrevocable, worldwide, non-exclusive licence to use, disclose, reproduce, modify license and distribute.

## 8. Submitting your Heritage Evaluation Form

Now that you have completed the worksheets and the summary form, City staff will review and will likely request revisions or edits, before it goes to the CHA for evaluation. If under contract, refer to it to determine when the evaluation form and accompanying research is due. Make sure you include the following:

- Completed Evaluation Form in **Word** format (not PDF)
- A separate folder with digital copies of all photographs.
- Copies and transcriptions of all supporting research etc. in **digital form** (scanned):
  - Land titles
  - Building permit(s)
  - Fire Insurance Map(s)
  - Newspaper clippings
  - Website print-outs
  - Notes, including interview notes
  - Criteria of Significance worksheets
  - All other materials mentioned in the additional sources section

## 9. Additional resources

To learn more about how to conduct research on historic places in Calgary, consult The City of Calgary publication, [A Guide to Researching Building History](#).

### **Architecture - Canada**

Ennals, Peter. *Homeplace: The Making of the Canadian Dwelling over Three Centuries*.

Gowans, Alan. *The Comfortable House: North American Suburban Architecture, 1890-1930*.

Gowans, Alan. *Looking at Architecture in Canada*. Kalman, Harold. *A Concise History of Canadian Architecture*.

Kalman, Harold. *A History of Canadian Architecture, [volumes 1 and 2]*

Maitland, Leslie. *The Queen Anne Revival Style in Canadian Architecture*.

Ricketts, Shannon. *A Guide to Canadian Architectural Styles*.

### **Architecture – Alberta**

Boddy, Trevor. *Modern Architecture in Alberta*.

*Calgary : A Decade of Heritage*. Calgary Information Centre, Planning and Building Dept.

*Calgary Modern 1947-1967* / edited by Geoffrey Simmins.

Dennis, Thelma. *Albertans Built: Aspects of Housing in Rural Alberta to 1920*.

Cuniffe, Richard. *Calgary in Sandstone*.

Guimond, Pierre S. *Calgary Architecture: The Boom Years, 1972-1982*.

Judd, Hilda. *House Research: The Architects, 1910-1922*.

McGinnis, Janice P. Dickin. *Reports on Selected Buildings in Calgary*.

Melnyk, Bryan Peter. *Calgary builds: The Emergence of an Urban Landscape, 1905-1914*.

*Practice of Architecture and Construction in Calgary, 1900-1940: A General Compilation of Research Material to Establish Architects and Designers...* / prepared by Lorne G. Simpson and Marianne L. Fedori.

Soby, Trudy. *Be It Ever So Humble*.

Soby, Trudy. *A Walk Through Old Calgary*.

Stamp, Robert. *Suburban Modern: Postwar Dreams in Calgary*.

Treacy, Robert M. *Sandstone, Brick and Wood: A Collection of Calgary Pioneer Homes and Histories*.

Utas, Gregory P. *Calgary Architecture, 1875 –1915*

Wetherell, Donald Grant. *Homes in Alberta: Buildings, Trends and Design 1870-1967*.

White, Anthony G. *Architecture of Calgary, Alberta, Canada: A Selected Bibliography*.