HERITAGE STRATEGY

city of **kelowna**

UPDATED JULY 2015

DONALD LUXTON & ASSOCIATES inc.

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City of Kelowna

1. EXECUTIVE SUMMARY

Situated in historic orchard and wine country, the City of Kelowna's unique heritage character includes enclaves of historic buildings and houses, a rich agricultural history and strong links to the development of the orchard industry, evident in remnants of buildings and cultural landscapes. The City of Kelowna has commissioned this Heritage Strategy in order to identify, maintain and protect its valuable community heritage resources during a time of rapid growth and development. The Strategy was conducted by Donald Luxton & Associates Inc. in consultation with City staff, the Community Heritage Commission, community stakeholders and residents, and outlines a prioritized strategy for the development of Kelowna's heritage conservation initiatives for the next ten years, to run from 2007 to 2016.

The Strategy answers key questions about the existing situation, defines a community vision for heritage, and recommends an Action Plan for implementation.

The Strategy asks and answers five key questions:

- Where is Kelowna now?
- Where does Kelowna want to go?
- How will Kelowna get there?
- What resources does Kelowna need to get there?
- How do we know whether Kelowna got there?

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Throughout the course of the project there was extensive community and stakeholder consultation, including a stakeholder Visioning session, a Community Visioning workshop and a public open house. As a result, the following vision was developed in conjunction with the community:

Vision: Heritage Strategy 2007 - 2016

Kelowna will be a viable and strong community that balances growth with support for the protection of our distinctive and authentic natural, cultural and built heritage assets through: diverse partnerships; heritage incentives; and integrated and innovative approaches to heritage conservation, community development and public awareness.

The Plan recommends the adoption of eight key strategies, with supporting actions, that are proposed for implementation over a ten-year period.

Heritage Planning
1. Continue to preserve and protect significant heritage resources through the use of protection tools and heritage planning initiatives.
2. Enhance the City's capacity to manage heritage resources.
3. Explore protective mechanisms for other potential heritage neighbourhoods.
4. Develop a program of ongoing monitoring and renewal of the Heritage Program.

Heritage Information
5. Continue to identify the City's significant cultural landscapes, archaeological and built heritage resources.

Heritage Communication
6. Continue to raise public awareness and appreciation of the City's heritage resources.

Heritage Partnerships
7. Enhance partnerships between the City and all aspects of the City's heritage, to achieve a more inclusive approach to heritage.
8. Seek to coordinate alliances between heritage and cultural tourism.

2. INTRODUCTION

Belgo House, 1590-1640 Belgo Road

2.1 BACKGROUND

Kelowna also has a significant history that extends back to approximately 8,400 years ago when aboriginal groups moved north following the melting of glaciers in the warmer Early Holocene. The Native communities, in this traditional territory of the Okanagan Interior Coast Salish, were primarily semi-sedentary, settling for the winter months in subterranean structures known as pit houses. Subsisting primarily on salmon, deer, berries and roots, the communities were generally resource rich, storing surpluses in storage pits, and trading food for prestige items from Northwest Coast communities. First contact with non-Natives was made in the 1700s with traders from the Hudson's Bay Company. The first documented contact was in 1805 at Fort Kamloops and by 1811, the Brigade Trail, established by fur trader David Stuart of the Pacific Fur Company cut directly through traditional Okanagan territory. Typical to trading forts, many Okanagan Native groups set up their summer camps to trade in close vicinity to the forts. In 1859, the first European settlement occurred in Kelowna. Father Charles Marie Pandosy, Father Richard and Brother Surel, of the Missionary Oblates of Mary Immaculate, founded the Okanagan Mission, on what is now Benvoulin Road. Pandosy also planted the first apples and grapes in the region.

Access to the Okanagan was improved with the completion of the Canadian Pacific Railway in 1885 and the Kettle Valley Railway in 1910. The lines did not yet extend into Kelowna, ending at Penticton or Okanagan Landing. During this period, the population steadily increased, with families settling into large tracts of land to farm. In 1891, large parcels of land were purchased by Sir John Campbell Hamilton Gordon, 7th Earl and 1st Marquess of Aberdeen and Temair, Canada's Governor General from 1893 to 1898, in order to establish orchards. Lord Aberdeen was also responsible for building the well-known heritage site Guisachan House in 1891, where he spent vacations with his wife, Lady Aberdeen, and family on several short trips to the area. Beginning in 1893, transportation routes were improved with sternwheelers, the first of which was the S.S. Aberdeen (named after Lady Aberdeen), which docked occasionally at the foot of Collett Road. In addition, a stage coach ran between the Okanagan Mission and downtown Kelowna, departing daily at 10am and returning at 3pm. Kelowna, by now a successful farming community, was officially incorporated in 1905, with a population of 600. The town received its first electricity in 1909.

During the First World War, the Kelowna area was able to send 1,000 soldiers overseas. Post-war 1920s were marked by a boom in agriculture and subsequent population increase. This boom was accelerated by the extension of the railway into Kelowna with the Canadian Northern Railway in 1925. The town expanded rapidly, and schools, banks, churches, and commercial stores were built during this time. Acreages were planted in orchard, hay or pasture. Tobacco was also grown in limited commercial quantities. With the railways intact, fruits were readily shipped to the Coast. 1939 was marked by the outbreak of the Second World War, and men, and later many women from Kelowna were sent overseas, while their spouses continued to farm and care for their families. A Resettlement Committee, headed up by Kelowna native, W.A.C. Bennett, was established to deal with the issue of making available homes and land for returning veterans. This program was very successful in Kelowna and spurred another boom to the area. During this period, the town was modernized to further adapt to the automobile; a floating bridge–the largest in the Commonweath–was built in 1958, and Kelowna's first airport, the Ellison Field Air Terminal opened in 1960. The Coquihalla Highway, which opened in 1986, further closed the gap between the coast and Kelowna.

Today, Kelowna is the economic centre of the Central Okanagan. Several successful industries drive the City's economy including the forestry, fruit tree and winery industries. Tourism initiatives, the light industrial sector, and the manufacturing of boats and oil field equipment are also steadily growing in size and importance. Agriculture is still very important to the City, as evidenced in the number of farms, and road-side produce and flower stands. The City currently has one First Nations community, the *nsyilxcen* speaking Westbank First Nation, which is one of seven member bands under the umbrella Okanagan Nation Alliance in the Okanagan area. The Westbank First Nation, located on the west side of Okanagan Lake, has recently enacted a First Nation Self-Government Act in 2005, allowing self-government and regulation of their 5,306 acre reserves.

Brent's Grsit Mill House

The Strategy asks and answers five key questions:

- Where is Kelowna now?

  This section identifies the strengths and weaknesses of the current management of heritage issues, and defines future opportunities.

- Where does Kelowna want to go?

  This provides the vision for the future direction of heritage resource management.

- How will Kelowna get there?

  This identifies possible means of achieving this vision for heritage resource management.

- What resources does Kelowna need to get there?

  This determines the information and resources required to implement the Heritage Strategy.

- How do we know whether Kelowna got there?

  This identifies methods for evaluating and monitoring the effective implementation of the Heritage Strategy over time

2.2 HERITAGE CONSERVATION IN KELOWNA
WHERE IS KELOWNA NOW?

There has been growing community interest for creating a new action plan for the protection and management of Kelowna's heritage resources in a time of immense population and development growth. It is evident that the City values its historical roots as shown by the consistent reference in policy statements to the importance of recognizing and protecting its natural, built and cultural heritage. The City is fortunate to have a Council commitment to heritage conservation, as well as strong support and awareness by the local community. Heritage awareness and support in Kelowna has been steadily on the rise and has been invaluable in creating a solid base of community support to take the next step in updating the Heritage Strategy.

Heritage conservation at the City level commenced in the 1970s. Some of the more significant accomplishments are summarized below:

HERITAGE INITIATIVES 1978 - 1994

Year	Heritage Initiative	Description
1978	Establishment of the Heritage Advisory Committee	Council committee involved in site designation, re-development permits and heritage zones, Heritage Resource Inventory, redevelopment of Guisachan House
1983	Heritage Resource Inventory	Inventory of significant heritage resources in City, limited to built heritage
1985	Heritage Strategy	
1983	Municipal Designation of three sites	Laurel Packinghouse, Benvoulin Church and Ethel Street Residence/Gift Shop
1991	Establishment of Kelowna Heritage Foundation	Creation of a registered society that considers grants to heritage property owners and education/awareness projects with annual budget allocation from the City
1992-93	Inner City Sector and Rutland Sector Heritage Tree Inventories	A one-time inventory of significant trees on City and private property identified by resident nomination and catalogued by a consultant
Ongoing	Support for City-owned heritage buildings and the Kelowna Museum	Budget for restoration, management and operations

In 1994, the City commissioned a Heritage Strategy by Ann Holtz, Judy Oberlander Preservation Consultants Inc. and Sue Morhun, and "Working Together: A Heritage Strategy for Kelowna" was completed the same year. During the consultation process, a Vision to 2004 was established:

Vision for the Heritage Strategy 1994 - 2004

A desire for a livable, vibrant and viable community of distinctive neighbourhoods which reflects sensitive growth through a sense of ownership, balance and harmony and where heritage conservation is integrated into everyday life.

The 1994 Strategy's main objectives were to develop a community development process, educate clients, participants and users, and build lasting partnerships during the initiative, begin a public information initiative, build success through achievable, bite-sized realistic goals. Under the guidance of the ten-year 1994 Strategy, the City has achieved the following heritage programs and initiatives:

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HERITAGE INITIATIVES 1994 - PRESENT

Year	Heritage Initiative	Description
1995	Heritage Management Plan	Model of how to manage and protect heritage resources
Rev. 191998	Tree Protection Bylaw No. 8014	A bylaw to regulate the removal of protected trees in Natural Environment/Hazardous Condition Development Permit Areas.
2002	Development of two Heritage Conservation Areas	Abbott Street and Marshall Street
1997	Establishment of Heritage Register (approximately 200 sites)	Replaced Heritage Resource Inventory (1983)
2001	Heritage Procedures Bylaw No. 7776	Procedures for Heritage Alteration Permits (HAP), Heritage Designation Bylaws, Heritage Conservation Covenants, (HCC) Heritage Revitalization Agreements (HRA), Heritage Alteration Permits (HAP) and inclusion on the City's Heritage Register
2001	Integration of Heritage into the Official Community Plan (OCP Chapter 16)	Heritage Policies, Heritage Conservation Area Designations and Development Guidelines
2001	Establishment of Community Heritage Commission	New advisory committee to Council for heritage matters.
2003-2006	Statements of Significance	Documentation of Heritage Register sites through Statements of Significance for inclusion on the Canadian Register of Historic Places
2004	Heritage Building Tax Incentive Program Policy	Tax incentive program for preservation of commercial, industrial, and institutional buildings on the City's Heritage Register
Ongoing	Heritage information on the City Website	Adaptive Re-use Guidelines for Residential Heritage Buildings, information and applications for HRA's, HCA's, HCC's, Heritage Bylaws, OCP, Heritage Register (no photos), Heritage Commission Terms of Reference, and Heritage Tax Incentive Program

These policies and initiatives establish an integrated and directed framework for a heritage program in Kelowna, including heritage designation and policies, the Heritage Register and heritage incentives. In terms of staffing, one Planner Specialist has been tasked to oversee heritage processes, with dedication of approximately 1/3 time to heritage.

2.2.1 Volunteer Heritage Committees

Although the City bears the responsibility for land use planning and heritage program administration, a great deal of heritage education and awareness is undertaken by volunteers. The following groups are integral to the conservation of heritage in Kelowna.

http://www.city.kelowna.bc.ca/CM/Page85.aspx

http://www.kelownaheritagefoundation.com/

http://www.okheritagesociety.com/

http://www.okanaganhistoricalsociety.org/

- **Community Heritage Commission (CHC):**
  The current CHC, established by City Council in 2001, has continued the work of the previous Heritage Advisory Committee, established in 1978, which was an advisory body for the designation of the first heritage sites in Kelowna (Laurel Packinghouse, Benvoulin Church and Ethel Street Residence/Gift Shop) and the establishment of the Heritage Resource Inventory. The current CHC, under direction from City staff, conducted the research necessary to create a Heritage Register of sites in Kelowna in 1997. The CHC is also responsible for advising City Council on heritage related matters including development proposals affecting heritage properties; municipal designation of buildings, structures and sites; adaptive re-use of heritage buildings and on-going community heritage management initiatives. The Commission consists of seven members including one representative from each of the Kelowna Museums Society, the Okanagan Historical Society and the Central Okanagan Heritage Society. Four members are appointed from the city at large. Up to two members of Council may be appointed as non-voting liaison members. Members are appointed by Council for three year terms.

- **Kelowna Heritage Foundation (KHF):**
  The Kelowna Heritage Foundation was established as a registered non-profit society in 1991 to encourage the preservation of heritage buildings in Kelowna and to further public awareness of the significance of heritage resources. The foundation receives an annual allocation of $20,000 from the City, and is empowered to do fundraising, which is used to provide financial support for the restoration of residential, commercial, institutional, industrial and agricultural properties within the City of Kelowna, and to conduct heritage conservation seminars and workshops. The Kelowna Heritage Foundation provides grants to heritage building owners for a portion of the expenses incurred in restoration work related to the exterior of their buildings. The Foundation also provides grants to groups or individuals who advance the knowledge and appreciation of the historical and cultural background of the Kelowna area and has downloadable Walking and Driving Heritage Tours of Kelowna on their website.

- **Central Okanagan Heritage Society (COHS):**
  The Central Okanagan Heritage Society is a not-for-profit society formed in 1982 dedicated to the education and conservation of heritage within the Regional District of the Central Okanagan. They are involved in the management of three major sites in the city: Guisachan Heritage Park (owned by the City of Kelowna), Benvoulin Heritage Park (owned by COHS) and Brent's Grist Mill Park (owned by the City of Kelowna). They are currently working to restore the 1871 Brent's Grist Mill buildings and will manage the site once it has been rehabilitated.

- **Okanagan Historical Society (Kelowna Branch) (OHS):**
  The Okanagan Historical Society is one of the oldest societies in British Columbia dedicated to the preservation of local history. Incorporated in 1925, the society has published a book each year except during the Great Depression and World War II. A parent body of the OHS and the Knights of Columbus jointly manage the Father Pandosy Mission.

- **Friends and Residents of the Abbott Street Heritage Conservation Area Society (FRAHCAS):**
  A neighbourhood association dedicated to the maintenance of houses in the HCA and compliance to the Heritage Conservation Area Development Guidelines.

- **Kelowna South-Central Association of Neighbourhoods (KSAN):**
  A neighbourhood association involved in enhancing the quality and preserving the character of the residential neighbourhoods in the South-Central area of the downtown.

2.2.2 Heritage Institutions

A number of heritage institutions also contribute to the heritage program in Kelowna. The majority of heritage initiatives are developed, managed and administered by community museums and heritage groups through the City's Parks, Recreation & Culture Department.

- **Kelowna Museum (Kelowna Museums Society):**
  The Kelowna Museums Society is a non-profit organization dedicated to the promotion of a greater interest and awareness of the military, agricultural, wine-producing and cultural heritages of the Okanagan Region through collection, preservation, exhibition and interpretation.

  Since 1936 as a community interest and since 1951 as a registered society, the Kelowna Museum has provided the region's residents and visitors with on-going interpretation of the Okanagan and beyond. The Museum holds the City Archives and a large collection of First Nation artifacts and the Ethnography Gallery offers visitors a chance to explore collections from Central and South America, Asia, Oceania and Africa. Other Museum initiatives include:

  The British Columbia Orchard Industry Museum: In the early 1980s the Museum took over restoration of the historic Laurel Packinghouse, a fitting tribute to the thousands of pioneers who worked in the fruit-packing industry. By 1985, plans to open the Orchard Museum in the Laurel were initiated, and on May 5, 1989 this new specialty museum was officially opened to the public. Since 1989 the Museum has hosted thousands of visitors and brought a greater understanding of the region to hundreds of thousands more through its traveling exhibitions and programs.

  The British Columbia Wine Museum & VQA Wine Shop: Located in the Laurel Packinghouse, this museum explores the history of BC's wine industry in the Okanagan. Opened in 1996, the Wine Museum operates a specialty VQA shop in partnership with the BC Wine Institute.

- **Okanagan Military Museum:**
  This museum displays artifacts from the 20th century wars. It is now affiliated with the Kelowna Museums Society.

- **Father Pandosy Mission:**
  In 1860, Father Charles Pandosy founded the first non-Native settlement in the Okanagan Region. Four original Mission buildings remain at the site, and a number of heritage buildings have been added through the years.

http://www.kelownamuseum.ca/

http://www.okmilmuseum.ca/

http://www.okanaganhistoricalsociety.org/pandosy_mission.html

2.2.3 Strengths and Weaknesses:

Kelowna has a well-developed and managed heritage program that requires only minor tweaks to evolve with the changing City climate. Kelowna has both strengths and weaknesses that lead to potential opportunities outlined later in the Strategy.

STRENGTHS

- Kelowna has a rich and vibrant built and natural history that has left a tangible legacy of heritage resources

- The community has invested in and is committed to the conservation of Kelowna's heritage

- Planning documents have been prepared such as the Heritage Strategy (1994) and the Heritage Management Plan (1995)

- A Community Heritage Commission has been established

- The Abbott Street and Marshall Street Heritage Conservation Areas have been established

- Grants for heritage home owners and education/awareness projects are available through the Kelowna Heritage Foundation

- The City has a broad range of heritage tools – such as Heritage Procedures Bylaw, Heritage Building Tax Incentive Program, Heritage Register

- City and community heritage groups have been established such as the Community Heritage Commission, the Kelowna Heritage Foundation, KSAN and FRAHCAS

- Designated Cultural District fosters

WEAKNESSES

- Current development pressures have placed heritage structures at risk

- There is a lack of communication and co-ordination between heritage and different interest groups such as tourism, First Nations, and heritage property owners

- There is a greater need for heritage education, public awareness and emotional attachment to Kelowna's history

- There are no tax incentives for heritage homeowners and the level of heritage grants are low – and the cost of construction is rising rapidly

- There are traffic concerns in the Heritage Conservation Areas

- Heritage policies are not integrated with sustainability planning

- The Heritage Register does not recognize some categories of heritage resources such as natural and cultural landscapes and should be updated

- There are difficulties managing/funding City owned heritage properties (City staffing and budget issues)

- Lack of guidelines and funding for City to accept and manage heritage

2.3 THE HERITAGE STRATEGY

The City of Kelowna identified the need to update the 1994 Heritage Strategy in the 2004 Kelowna Strategic Plan to respond to the current requirements of the rapidly growing city. City staff and the CHC identified the preparation of a Heritage Strategy as a priority item for 2007. Donald Luxton & Associates Inc. were retained as the consultant to assist in developing the Strategy.

The purpose of this Heritage Strategy is twofold: to provide an updated focus on the City's policies, regulations and procedures with a community-based approach for planning and management of the City's heritage program; and to highlight opportunities for new initiatives and partnerships. The Strategy synthesizes information gathered from City residents, community stakeholders, community groups, the CHC, City Staff and Council and seeks to promote a shared vision for community conservation efforts. In order for this plan to be successful, a consensus needs to be reached on what elements of the existing community-based heritage program require fine-tuning and how more effective heritage initiatives and awareness can be delivered with the assistance of community partnerships. The City will base the success of the heritage program, in part, on the degree of coordination and cooperation that can be achieved among community stakeholders through facilitation and coordination.

The Kelowna Heritage Strategy responds to Kelowna's community values and current situation. This Strategy outlines a prioritized plan for the management of community heritage conservation policies for the next ten years. It answers key questions about the existing situation, defines a community vision for heritage conservation, and recommends an action plan for implementation.

Work on the Strategy began in November 2006. Donald Luxton & Associates Inc. reviewed background material and conducted the following meetings (see **Appendix A** for further details):

- November 21, 2006: Interdepartmental Staff Workshop, and a Heritage Stakeholder Visioning Session
- January 15, 2007: Community Visioning Workshop
- February 13, 2007: Public Open House
- February 28, 2007: First Draft
- March 20, 2007: Final Draft
- March 26, 2007: Presentation to Kelowna City Council
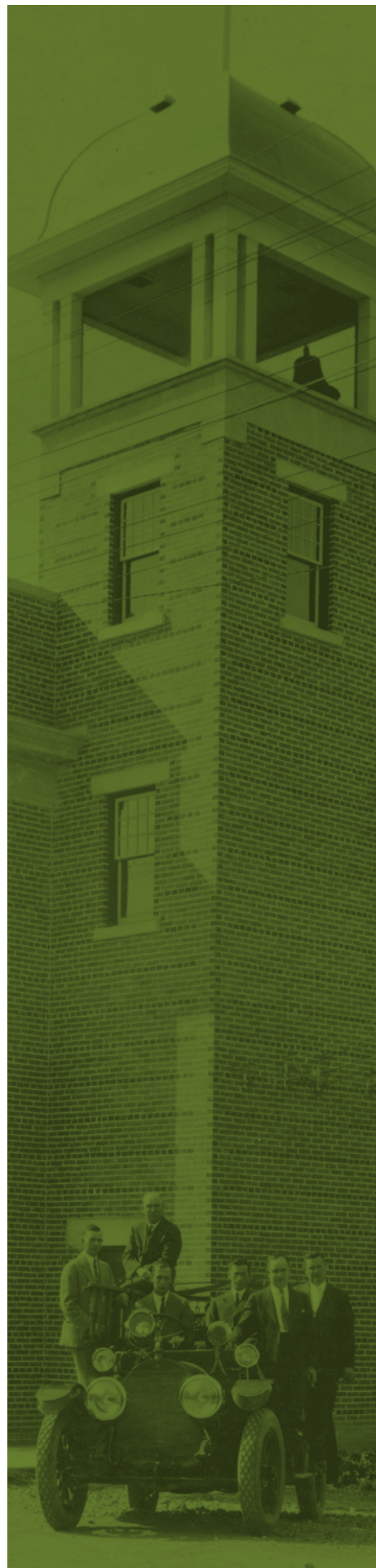
- Heritage conservation allows a community to retain and convey a sense of its unique history.

- A coordinated approach to heritage planning can take advantage of partnership opportunities with senior levels of government, and engage the private and volunteer sectors.

- Heritage initiatives have a strong positive impact on developing complete communities and creating a vibrant culture of creativity and innovation.

- The preservation of historical sites supports other public objectives such as sustainability, tourism development and education.

- Heritage conservation is now inextricably linked with tourism, and many regional examples show the success of this approach. Cultural and heritage-based tourism is now the fastest growing segment of the burgeoning tourism industry.

- Flexible heritage planning can assist owners in retaining historic resources.

- Other benefits of strong heritage policies include creating distinctive neighbourhoods, preserving cultural heritage, and providing community identity and pride.

Kelowna Construction Crew

2.4 THE BENEFITS OF COMMUNITY HERITAGE

Heritage conservation has many potential cultural, social and economic benefits. Conserving heritage allows a community to retain and convey a sense of its history, and provides aesthetic enrichment, education as well as opportunities to promote sustainability. Heritage resources help us understand where we have come from so that we can appreciate the continuity in our built environment from past to present to future. Historic buildings become landmarks and touchstones for the community. Key landmark buildings, cultural landscapes, and heritage homes all add to the vibrancy and character of Kelowna.

There is a widely-held perception that protecting heritage property reduces property values. Studies have shown that this is not so; Professor Robert Shipley of the University of Waterloo looked at almost 3,000 properties in 24 communities across Ontario between 1998 and 2000. He found that heritage designation could not be shown to have a negative impact on property values. In fact there appears to be a distinct and generally robust market in designated (protected) heritage properties. They generally perform well in the market, with 74% doing average or better than average. The rate of sale among designated properties is as good or better than ambient market trends. Moreover, the values of heritage properties tend to be resistant to downturns in the general market.

The Vancouver Heritage Foundation completed a research project in 2005 comparing the assessed value of Heritage Register, designated heritage and non-heritage properties in four Vancouver neighbourhoods. The study demonstrated that between 1999 and 2005 the Heritage Register and designated heritage houses increased in value almost the same rate (42.1% & 42% respectively), while non-heritage houses increased at a slightly slower rate (39%). The Victoria Heritage Foundation has been tracking market values and assessments of 142 heritage houses designated prior to 1988. Between 1988 and 1999 the tax assessments for these houses increased 26% faster than the norm for the City, resulting in an increased return in property taxes for the City.

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2.5 COMMUNITY VALUES AND VISION
WHERE DOES KELOWNA WANT TO GO?

Determining the shared values of the community was an essential part of the Heritage Strategy process. The consultants worked with key stakeholders, community members and City staff to develop a common vision for heritage conservation, which could act as a basis for the decision-making process.

A number of predominant community values emerged from the program of community consultation (See Appendix A):

- The unique cultural and natural landscapes and built heritage of Kelowna are highly valued.
- Distinctive heritage neighbourhoods are valued by the community, particularly the Abbott Street and Marshall Street neighbourhoods.
- There is a high level of interest in building alliances between tourism and heritage.
- The history and presence of the First Nations is highly valued.
- Heritage conservation of buildings and landscapes at a time of rapid development and population growth is highly valued.

The natural, cultural and built heritage of Kelowna define the identity of the community, give it distinct character, and contribute to the residents' quality of life. The Heritage Strategy respects these cherished community values, and embeds them in its recommendations. Through various stakeholder and community meetings and workshops, the following vision was developed for Kelowna's heritage program:

Proposed Vision: Heritage Strategy 2007–2016

Kelowna will be a viable and strong community that balances growth with support for the protection of our distinctive and authentic natural, cultural and built heritage assets through: diverse partnerships; heritage incentives; and integrated and innovative approaches to heritage conservation, community development and public awareness.

2.6 MISSION STATEMENT- HOW DO WE GET THERE?

As an outcome of the community consultation and other research undertaken for this study, a Mission Statement was developed, that supports the implementation of the Vision for heritage management:

Mission Statement: Heritage Strategy 2007–2016

The City of Kelowna will take a proactive approach to managing its heritage program more effectively, developing more heritage tools including incentives for the conservation of cultural/natural landscapes and commercial, industrial and built heritage, and fostering new partnerships and alliances with tourism initiatives, other local communities and organizations.

3. STRATEGIES AND ACTIONS

WHAT RESOURCES DO WE NEED TO GET THERE?

The Heritage Strategy recommends the following eight high-level strategies that fulfill the Mission Statement and realize the Vision. They have been developed based on background research and stakeholder, resident and City consultation.

St. Michael's Church

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STRATEGIES

Heritage Planning

1. Continue to preserve and protect significant heritage resources through the use of protection tools and heritage planning initiatives.
2. Enhance the City's capacity to manage heritage resources.
3. Explore protective mechanisms for other potential heritage neighbourhoods.
4. Develop a program of ongoing monitoring and renewal of the Heritage Program.

Heritage Information

5. Continue to identify the City's significant cultural landscapes, archaeological and built heritage resources.

Heritage Communication

6. Continue to raise public awareness and appreciation of the City's heritage resources.

Heritage Partnerships

7. Enhance partnerships between the City and all aspects of the City's heritage, to achieve a more inclusive approach to heritage.
8. Seek to coordinate alliances between heritage and cultural tourism.

ACTIONS

For each Strategy, this plan proposes specific Actions, which are the principal initiatives required to realize each of the eight Strategies. Each Action is then prioritized as a component of the City's heritage planning and management activities. Measures for success for the Planning, Information, Communication and Partnership strategies are identified in Section 4.2. This Implementation Plan identifies who should be responsible for each Action, the magnitude of the resources that are required and the proposed timeline for completion. The timeline is based on Immediate (0-1 years), Short (1-2 years), Medium (2-5 years) and Long (5-10 years). The Strategy will therefore assist staff in developing annual work programs, and in determining annual budget requirements.

The Strategy confirms the role of the Community Heritage Commission (CHC) in the City's heritage planning and management activities, and identifies the importance of community, First Nations and government and tourism partnerships in achieving the key heritage objectives.

PRESERVE AND PROTECT HERITAGE RESOURCES

Continue to preserve and protect significant heritage resources through the use of protection tools and heritage planning initiatives.

Main Street c.1912 [BC Archives],

1.1 **Extend and expand the range of heritage conservation incentives for commercial properties listed on the Kelowna Heritage Register, including development, financial, and administrative incentives.**
These may include:
- Accelerating processing for heritage development permits
- Zoning relaxations, such as reducing front-, rear-, and side-yard setbacks, permitting land uses not scheduled in the zoning bylaw, and permitting additional height and density
- Building Code equivalencies
- Negotiating density bonuses and density transfers
- Revitalization provisions of the Community Charter

1.2 **Increase annual budget for heritage grants for Heritage Register homeowners.**
This may include:
- Increasing the annual contribution to Kelowna Heritage Foundation
- Encouraging fundraising by Kelowna Heritage Foundation
- Exploring potential for tax incentives for improvements to residences on the Heritage Register (under the provisions of the Community Charter)

1.3 **Continue to develop revenue sources to assist with funding the conservation of heritage resources.**
This may include:
- Annual budgets for ongoing heritage program initiatives, management and operations
- Applications to the funding programs offered by the senior levels of government including the Historic Places Initiative and the BC Heritage Branch
- Encouraging not-for-profit groups to apply to the BC Heritage Legacy Fund
- Applications to the BC Heritage Legacy Fund for City heritage projects

MANAGE HERITAGE RESOURCES
Enhance the City's capacity to manage heritage resources.

2.1   Adopt a City Heritage Stewardship Policy.
- Promote stewardship policies for the management of heritage resources and promote heritage awareness within all City departments.
- Protect City-owned properties on the Kelowna Heritage Register from demolition.
- Develop conservation plans for City-owned heritage sites including appropriate levels of intervention.
- Develop guidelines under which the City would accept ownership of additional heritage properties.

2.2   Explore the potential for external associations to identify, improve and manage heritage resources on behalf of the City.

2.3   Ensure that the respective processes of the various municipal departments whose responsibilities overlap with heritage management matters are compatible and fully integrated with each other.
- Integration of Planning & Development Services and Recreation, Parks & Cultural Services heritage-related activities/responsibilities.
- Review building and development codes and rezoning practices to evaluate how they impact heritage resources and determine how they need to be changed to incorporate a vision for heritage conservation.

2.4   Review City staffing levels and budget for heritage planning and management.
- Review current staffing levels with respect to what staff are being asked to accomplish.
- Review staffing levels and mandates for heritage in other Canadian cities the same size as Kelowna.
- Assess the current budget allocation for heritage planning and management with respect to what staff are currently being asked to accomplish and this Heritage Strategy.

2.5   Adopt the Parks Canada Standards and Guidelines.
- The City should officially adopt the Parks Canada Standards and Guidelines for the Conservation of Historic Places in Canada to guide rehabilitation, preservation and restoration work affecting any identified heritage resource. The Standards and Guidelines are being adopted across Canada as the framework for management of historic resources.

2.6   Facilitate heritage workshops for staff, the Community Heritage Commission, the Kelowna Heritage Foundation and Council on a regular basis in order to increase their understanding of heritage management theory and practice.
- Explore other volunteer associations with financial resources to facilitate workshops.

2.7   Update heritage policies in the Official Community Plan as required.

EXPLORE OTHER POTENTIAL HERITAGE NEIGHBOURHOODS

Explore protective mechanisms for other potential heritage neighbourhoods.

Kelowna Post Office

3.1 Explore protective mechanisms to preserve selected heritage neighbourhoods.

- Other potential heritage areas that have been identified include the 200 Block of Bernard Avenue, the North End and Lawrence Avenue. There are a number of ways in which the specific heritage character of each area could be preserved and enhanced, including:
- Heritage Conservation Area bylaws
- Heritage zoning
- Other potential sympathetic zoning and tools that promote heritage conservation

3.2 Implement protective mechanisms in heritage neighbourhoods.

- Once a significant area and a protective tool has been determined by Staff, the CHC and residents, proceed with development of heritage character statements, conservation and maintenance standards and/or development guidelines
- Build awareness among Kelowna property owners of the potential benefits of protection for a heritage neighbourhood

MONITOR HERITAGE PROGRAM

Develop a program of ongoing monitoring and renewal of the heritage program.

Kelowna Fire Hall [Kelowna Museum Archives]

4.1   Monitor the implementation of the strategies and actions outlined in the Heritage Strategy.

- Once updated policies, procedures and regulations are established, it is necessary to continue to monitor the heritage management program to ensure its ongoing effectiveness.
- Ensure that new inter-governmental programs, such as the Historic Places Initiative, are being integrated with municipal policies and procedures, providing new opportunities for community-based heritage incentives.

4.2   Initiate a cyclical re-examination of the Heritage Strategy.

- Review results, effectiveness and direction of the Heritage Strategy on an annual basis.
- It is recommended that a thorough review be undertaken every ten years to ensure the Strategy remains relevant and useful.
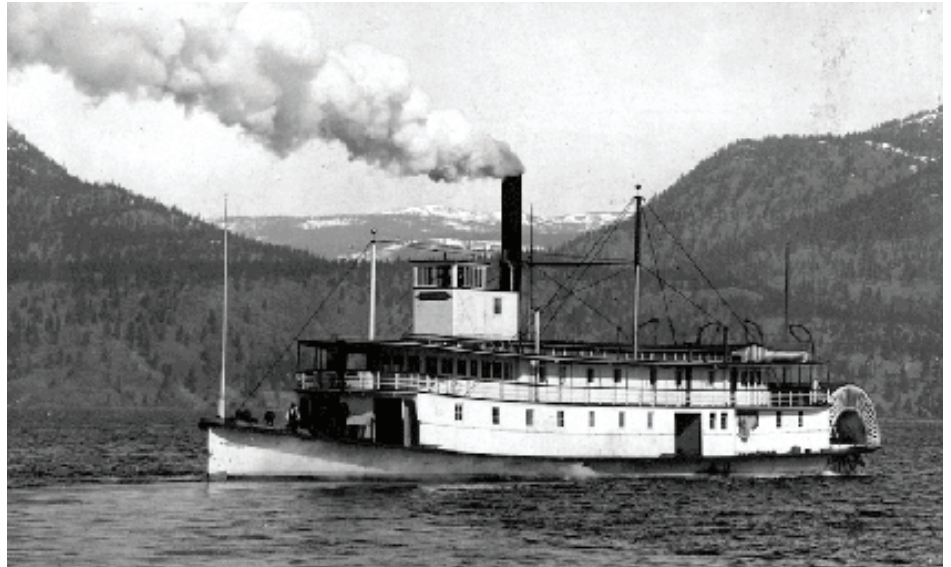
ACTIONS

UPDATE HERITAGE REGISTER

Continue to identify the City's significant cultural/natural landscapes, archaeological and built heritage resources.

S.S. Aberdeen, 1894 [BC Archives]

5.1 Review current Heritage Register and Heritage Tree Inventories.
- Review and update the Heritage Register on an annual basis.
- Investigate the value of the Heritage Tree Inventories and whether to update, start fresh, or if there is a better mechanism for recognizing significant trees in the community.
- Identify cultural/natural landscapes, such as significant cliffs, historic orchards and archaeological sites, and add them to the current Heritage Register.

5.2 Create an online heritage resource database on the City of Kelowna website with links to the Canadian Register of Historic Places.

5.3 Continue to prepare Statements of Significance as per the Canadian Register of Historic Places for Heritage Register properties.
- Review the merits of the current Heritage Register format to determine whether all records should be updated to align with the CRHP format to streamline preparing records.
- Cost-sharing funds are available from the BC Heritage Branch to update Heritage Register documentation to CRHP standards.

5.3 Continue to preserve and make available the City's archival records and material.
- Review the efficiency of the City's current records management policy.
- Explore ways and funding options to make archival information more readily accessible (enhanced services, online access)

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RAISE PUBLIC AWARENESS

Enhance the City's capacity to manage heritage resources.

6.1 Continue to update or enhance heritage information on the City's website.

This may include:
- Adding images/maps to the Heritage Register and linking to 'Visitor' section of the website
- Identification of cultural/natural landscapes
- Links to more websites of community, neighbourhoods and other heritage organizations, including the Canadian Register of Historic Places
- Periodic reports on heritage activities

6.2 Continue to encourage and support special events and initiatives that educate, commemorate, and build emotional attachment.

This may include, but is not limited to:
- The Okanagan Spring and Fall Wine Festivals
- Garden tours
- Cherry and Apple Fairs
- Heritage Week activities
- Heritage Awards
- Heritage plaques and interpretation
- Museum programs
- Heritage-related events, lectures, tours and workshops
- Events at City-owned heritage properties
- Encouraging First Nations to host/co-host events on their history
- Heritage neighbourhood tours

6.3 Continue to explore ongoing opportunities to work with the local media to promote awareness of local history and heritage issuesr.

6.4 Provide technical assistance to owners of properties on the Community Heritage Register.

This may include:
- Public workshops
- Design input
- Information on trades and suppliers
- Detailed information on the availability and application of heritage incentives
- Explore opportunities to work with volunteer associations

ACTIONS

ENHANCE PARTNERSHIPS

Enhance partnerships between the City and all aspects of community heritage, to achieve an inclusive, community-based approach to heritage.

Kelowna Great War Memorial, 1926 [BC Archives]

7.1   Partner with senior governments to achieve heritage preservation initiatives.
- Explore grants and funding opportunities.

7.2   Seek to strengthen existing relationships with community organizations, and coordinate joint initiatives and alliances with other community organizations and agencies.

Other community organizations may include:
- Tourism groups (see Strategy 8)
- Heritage property owners and neighbourhood associations
- Environmental associations
- Local service clubs
- Downtown Kelowna Association
http://www.downtownkelowna.com/

7.3   Initiate dialogue with the Kelowna School District #23 and UBC Okanagan to encourage educational programs that involve local heritage.

This may include:
- Special projects involving web-based research
- Development of heritage curricula packages for grade school
- Community outreach programs based on local history

7.4   Seek the participation of local First Nations in the heritage management program.
- Create joint initiatives that will increase the awareness and understanding of the Westbank First Nations in Kelowna.

- Invite a First Nations representative to join the Community Heritage Commission.

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STRATEGY 8:

HERITAGE PARTNERSHIPS

8.1   **Explore partnerships between heritage and cultural tourism organizations.**

These include community organizations such as:

- Tourism Kelowna:
  http://www.tourismkelowna.com/

- Okanagan Cultural Corridor:
  http://www.okanaganculturalcorridor.com/

- Thompson Okanagan Tourism Association:
  http://www.totabc.com/

- Lake Country Chamber of Commerce:
  http://www.lakecountrychamber.com/

- Aboriginal Tourism Association of BC:
  http://www.aboriginalbc.com/

- British Columbia AgriTourism:
  http://www.agritourismbc.org/

Penticton House, 1858 Abbott Street

ACTIONS

4. IMPLEMENTATION STRATEGY

The next stage of the Strategy looks at what resources are required to implement the Actions outlined in the previous section. It was developed in consultation with heritage stakeholders, the Community Heritage Commission, City staff and residents. The timeline is based on Immediate (0-1 years), Short (1-2 years), Medium (2-5 years) and Long (5-10 years) implementations. Please see Appendix B for additional funding incentives for the implementation of new heritage initiatives.

1. PRESERVE AND PROTECT HERITAGE RESOURCES	TIME LINE	LEAD ROLE	COST	COMMENTS
1.1 Extend and expand the range of heritage conservation incentives for commercial properties listed on the Kelowna Heritage Register, including developmental, financial, and administrative incentives.	SHORT	City Staff	Staff time to undertake, or contract and manage consultant work.	Consistent with policy 16.1.2 in the OCP. Policy research and analysis is required for code equivalencies, density bonusing/transfers, revitalization provisions in Community Charter, etc.
1.2 Increase annual budget for heritage grants for Heritage Register homeowners.	IMMEDIATE	KHF with assistance from CHC and Staff	$50,000 per year	Recommendation for 2008 annual budget to increase from $20,000 to $50,000 through increased allocation and fund-raising efforts. Explore other funding opportunities with Heritage Legacy Fund of BC and BC 2008.
1.3 Continue to develop revenue sources to assist with funding the conservation of heritage resources.	ONGOING	Staff	Staff Time	Consistent with policy 16.1.1 in the OCP. Grant writing and analyze budget requirements for City-owned heritage property maintenance and management.

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View of Main Street, c.1915
[BC Archives]

2. MANAGE HERITAGE RESOURCES	TIME LINE	LEAD ROLE	COST	COMMENTS
2.1 Adopt a City Heritage Stewardship Policy.	SHORT	Staff	Staff Time	Funding opportunities from Provincial government. Review guidelines for accepting new sites.
2.2 Explore potential for external associations to identify, improve and manage heritage resources on behalf of the City.	SHORT	Staff, in consultation with COHS and KHF	Staff Time	
2.3 Ensure that the respective processes of the various municipal departments whose responsibilities overlap with heritage management matters are compatible and fully integrated with each other.	SHORT	Staff	Staff Time	Workshops and meetings within City.
2.4 Review City staffing levels and budget for heritage planning and management.	IMMEDIATE	Staff	Staff Time	Use Appendix D as a base for this analysis. Increase staffing if required. 2008 Budget request.
2.5 Adopt the Parks Canada Standards and Guidelines	IMMEDIATE	Staff	Staff Time	
2.6 Facilitate heritage workshops for staff and Council, the CHC and the KHF on a regular basis in order to increase their understanding of heritage management theory and practice.	SHORT		Staff Time	Access existing City funding for employee training and conferences, and in-house library resources. Explore HSBC funding for workshops.
2.7 Update heritage policies in the Official Community Plan as required.	ONGOING	Staff	Staff Time	

3. EXPLORE OTHER POTENTIAL HERITAGE NEIGHBOURHOODS	TIME LINE	LEAD ROLE	COST	COMMENTS
3.1 Explore protective mechanisms to preserve selected heritage neighbhourhoods.	MEDIUM	CHC and Staff	Staff Time	200 Block Bernard Avenue, North End and Lawrence. Public consultation required.
3.2 Implement protective mechanisms in heritage neighbourhoods.	MEDIUM	CHC and Staff	Staff Time	

Kelowna Yacht Club, 1955 [BC Archives]

4. MONITOR HERITAGE PROGRAM	TIME LINE	LEAD ROLE	COST	COMMENTS
4.1 Monitor the implementation of the strategies and actions outlined in the Heritage Strategy.	ONGOING	Staff	Staff Time	Need to develop criteria to measure.
4.2 Initiate a cyclical re-examination of the Heritage Strategy.	LONG	Staff	Staff Time	Ten year cycle.

5. UPDATE HERITAGE REGISTER	TIME LINE	LEAD ROLE	COST	COMMENTS
5.1 Review current Heritage Register and Heritage Tree Inventories.	ONGOING	CHC/ Staff/ Council	Staff Time	Provincial funding available. Explore potential timing of updates.
5.2 Create an online heritage resource database on the City of Kelowna website with links to the Canadian Register of Historic Places.	MEDIUM	Staff	Staff Time	Potential funding from Heritage Legacy Fund of BC.
5.3 Continue to prepare Statements of Significance as per the Canadian Register of Historic Places for Heritage Register properties.	ONGOING	Staff	Current Funding	Provincial funding available as sites identified.
5.4 Continue to preserve and make available the City's archival records and material.	ONGOING	Kelowna Museum	Kelowna Museum and Staff time at minimum	Would require a partnership to explore options.

6. RAISE PUBLIC AWARENESS	TIME LINE	LEAD ROLE	COST	COMMENTS
6.1 Continue to update or enhance heritage information on the City's website.	ONGOING	Staff	Staff time	Funding opportunities available.
6.2 Continue to encourage and support special events and initiatives that educate, commemorate, and build emotional attachment.	ONGOING	Staff, CHC, COHS and KHF	Staff time	Funding opportunities with BC Arts Council (Arts Now) and BC 2008.
6.3 Continue to explore ongoing opportunities to work with the local media to promote awareness of local history and heritage issues.	ONGOING	CHC/ Staff and volunteer groups	Staff time	
6.4 Provide technical assistance to owners of properties on the Community Heritage Register.	ONGOING	KHF	N/A	Explore funding available from Heritage Legacy Fund of BC.

7. ENHANCE PARTNERSHIPS	TIME LINE	LEAD ROLE	COST	COMMENTS
7.1 Partner with senior governments to achieve heritage preservation initiatives.	ONGOING	Staff/CHC	Staff time	Access existing City funding for Employee training and conferences offered by the Government.
7.2 Seek to strengthen existing relationships, and coordinate joint initiatives and alliances with other community organizations and agencies.	ONGOING	CHC and Staff	Staff time	
7.3 Initiate dialogue with Kelowna School District #23 and UBC Okanagan to encourage school programs that involve local heritage.	LONG	CHC and Staff	Staff time	
7.4 Seek the participation of local First Nations in the heritage management program.	MEDIUM	Staff and CHC	Staff time	

8. BUILD ALLIANCES WITH TOURISM	TIME LINE	LEAD ROLE	COST	COMMENTS
8.1 Explore partnerships between heritage and cultural tourism organizations.	ONGOING	CHC and Staff	Staff time	Funding opportunities from Provincial or Federal government.

Kelowna's Floating Bridge, 1976
[BC Archives]

4.1 PRIORITIZED WORK PLAN

IMMEDIATE PRIORITIES (0-1 YEARS)

- 1.2 Increase annual budget for heritage grants for Heritage Register homeowners.
- 2.4 Review City staffing and annual budget for heritage planning and management with respect to what needs to be accomplished, and how similar cities of the same size compare.
- 2.5 Adopt the Parks Canada national Standards and Guidelines.

SHORT TERM PRIORITIES (1-2 years)

- 1.1 Extend and expand the range of heritage conservation incentives for commercial properties listed on the Kelowna Heritage Register, including developmental, financial, and administrative incentives.
- 2.1 Adopt a City Heritage Stewardship Policy.
- 2.2 Explore potential volunteer associations who can manage overload of heritage properties owned by the City.
- 2.3 Ensure that the respective processes of the various municipal departments whose responsibilities overlap with heritage management matters are compatible and fully integrated with each other.
- 2.6 Facilitate heritage workshops for staff and Council, the CHC and the KHF on a regular basis in order to increase their understanding of heritage management theory and practice.

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MEDIUM PRIORITIES (2-5 years)

- 3.1 Explore protective mechanisms to preserve selected heritage neighbourhoods.
- 3.2 Implement protective mechanisms in heritage neighbourhoods.
- 5.2 Create an online heritage resource database on the City of Kelowna website with links to the Canadian Register of Historic Places.
- 7.4 Seek the participation of local First Nations in the heritage management program.

LONG TERM PRIORITIES (5-10 years)

- 4.2 Initiate a cyclical re-examination of the Heritage Strategy.
- 7.3 Initiate dialogue with the Kelowna School District #23 and UBC Okanagan to encourage school programs that involve local heritage.

ONGOING PRIORITIES

- 1.3 Continue to develop revenue sources to assist with funding the conservation of heritage resources.
- 2.7 Continue to update heritage policies in the Official Community Plan as required.
- 4.1 Monitor the implementation of the strategies and actions outlined in the Heritage Strategy.
- 5.1 Review current Heritage Register and Heritage Tree Inventories.
- 5.3 Continue to prepare Statements of Significance as per the Canadian Register of Historic Places.
- 5.4 Continue to preserve and make available the City's archival records and material.
- 6.1 Continue to update or enhance heritage information on the City's website.
- 6.2 Continue to encourage and support special events and initiatives that educate, commemorate, and build emotional attachment.
- 6.3 Continue to explore ongoing opportunities to work with the local media to promote awareness of local history and heritage issues.
- 6.4 Provide technical assistance to owners of properties on the Community Heritage Register.
- 7.1 Partner with senior governments to achieve heritage preservation initiatives.
- 7.2 Seek to strengthen existing relationships and coordinate joint initiatives and alliances with other community organizations and agencies.
- 8.1 Explore partnerships between heritage and cultural tourism organizations.

HOW WILL KELOWNA KNOW THAT IT GOT THERE?

Ongoing monitoring and evaluation is important to ensure the most efficient work plan for implementing Kelowna's heritage initiatives. Tracking progress, effectiveness and costs should be done at the end of each year for each heritage initiative. This could be undertaken as part of a year-end report by City staff.

A set of performance measures should be developed to evaluate outcomes. Annual progress could then be measured against the recommendations of the ten-year Action Plan, and adjustments made to each following year's work plan.

4.2 ONGOING REVIEW

Suggested performance measures for ongoing monitoring and evaluation include:

HERITAGE PARTNERSHIPS MEASURES OF SUCCESS:
- Improved information for tourists about local history and heritage sites
- Increased cultural tourism
- Increased private sector investment in tourism development
- Increased employment and economic opportunities
- Increased community pride
- Increased involvement of First Nations

HERITAGE COMMUNICATION MEASURES OF SUCCESS:
- More heritage information readily available
- Heritage information provided in different formats
- Local media engaged in heritage issues
- Better coordination among community groups with similar mandates
- Increased emotional attachment and pride in community

HERITAGE INFORMATION MEASURES OF SUCCESS:
- Improved understanding and appreciation of local heritage resources
- More information available about local history and heritage
- Better coordination among groups with an educational mandate
- Increased public volunteerism

HERITAGE PLANNING MEASURES OF SUCCESS:
- Increased public and volunteer participation in the heritage management program
- City heritage policies and programs well linked to community-minded approach to heritage management program
- Public satisfaction with community planning
- Improved local government process for processing heritage permit applications
- Improved conservation and management of City owned buildings
- Improved tax base through restored heritage sites
- Increased legal protection for more heritage resources
- Improved environmental protection for significant natural/cultural landscapes and heritage features
- Community pride in restored heritage sites
- Increased interest in community in preserving heritage houses/commercial properties due to increased funding options
- Improved synergy between departments in City

Review Actions:
- At the end of the calendar year, each heritage initiative should be monitored and assessed. Progress should be measured against the ten-year Action Plan, and adjustments made to the following year's work plan.
- Heritage Register information should be updated every year.
- At the end of 2016, the City's heritage goals, priorities and initiatives should again be thoroughly re-assessed, and a new ten-year Action Plan prepared.

ACKNOWLEDGEMENTS

Kelowna City Council
- Mayor Sharon Shepherd
- Councillor Colin Day
- Councillor Andre Blanleil
- Councillor Robert Hobson
- Councillor Norm Letnick
- Councillor Brian Given
- Councillor Michele Rule
- Councillor Carol Gran
- Councillor Barrie Clark

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APPENDIX A:
COMMUNITY VALUES

Work on the Strategy began in November 2006. Donald Luxton & Associates Inc. reviewed background material and conducted the following meetings.

- November 21, 2006: Interdepartmental Staff Workshop and Heritage Stakeholder Visioning Session

- January 15, 2007: Community Visioning Workshop

- February 13, 2007: Public Open House

- February 28, 2007: First Draft

- March 26, 2007: Council Presentation

GROUP 1 VISION:
A community that maintains / balances and encourages / supports our distinctive and authentic natural and human heritage assets through active involvement and integrated approaches to heritage conservation, community development and public awareness.

A.1 INTERDEPARTMENTAL WORKSHOP AND VISIONING SESSION

On November 21, 2006 the City hosted an Interdepartmental Workshop and Visioning Session facilitated by Donald Luxton. The Interdepartmental Meeting was attended by nine staff members. The Visioning Session was attended by sixteen community stakeholders and Councillors. Participants were grouped and asked to create a ten-year vision for heritage management in Kelowna. Their ideas may be summarized as:

- Heritage Register update
- Further incentives for residential and commercial property owners
- Partnerships with tourism and other non-heritage groups
- Recognition of heritage beyond built heritage to include cultural and natural features/landscapes

These concepts formed the basis for the Vision Statement for heritage management in Kelowna.

A summary of the group's work is below:

Visioning Session
November 21, 2006
Kelowna Heritage Strategy
City of Kelowna
Donald Luxton & Associates Inc.

The Visioning Session was a success!

1. Existing Vision (from 1994 Heritage Strategy)

Long Range Vision: Toward the Year 2004

A desire for livable, vibrant and viable community of distinctive neighbourhoods which reflects sensitive growth through a sense of ownership, balance and harmony and where heritage conservation is integrated into everyday life.

2. Break-out Groups
Develop a new Vision for heritage Conservation in Kelowna.

Group 1
Elements of Heritage
- Natural environment/history
- Human environment / history
- Inclusion
- Accessible
- Action/involvement
- Expanded appreciation of distinctive neighbourhoods
- Authentic /integrity
- Preservation/conservation
- Vibrant/distinctive/livable/integrated

Group 2
Visioning to 2016

Heritage Strategy updates should connect to OCP review cycle (5 year reviews)

Issues:
- Development Pressure
- Heritage Structures at risk
- Density infill
- Who we were - helps understand who we are and strengthens the community
- Culture connection review underway right now
- More integration of Heritage
- Caretakers of heritage need recognition - or money
- Tree fruit importance
- Linear connections - "greenways"
- Waterways are our history - wetlands, natural shorelines - and public access to these
- Need to identify and protect and conserve what is important. Adaptive reuse is important
- Public education / appreciation / awareness
- Representative era

Group 3
A desire for a livable vibrant and viable community that values and preserves all aspects of its natural and built heritage through:
- strengthening the heritage network
- increasing and maintaining community awareness through education
- advocating for increased financial incentives and support

Group 4
Key Principles of a new vision
- Make it relevant - connecting heritage to daily life
- Create a sense of shared ownership
- Education
- Partnerships - culture, tourism, heritage
- Living Heritage - treat the city as if we are building the heritage of to-morrow
- Connect the past to the future in terms of lives, peoples, economics
- Diversity
- Heritage beyond the built form - waterscape, iconic features, agriculture, streets, signs
- Look to other examples but be authentic
- Build emotional attachment

A.2 COMMUNITY VISIONING WORKSHOP

On January 15, 2007 the City hosted a public Community Visioning Workshop to discuss pertinent issues regarding heritage in Kelowna. Groups were formed to come up with a Vision for the next ten years. Their ideas and a summary of feedback forms are summarized below:

Community Workshop
January 15, 2007
Kelowna Heritage Strategy
City of Kelowna
Donald Luxton & Associates

GROUP 2 VISION:
Kelowna will be a vibrant and healthy community that balances growth and heritage stewardship.

CURRENT VISION:
A desire for livable, vibrant and viable community of distinctive neighbourhoods which reflects sensitive growth through a sense of ownership, balance and harmony and where heritage conservation is integrated into everyday life.

GROUP 1 VISION:

In 5-10 years, Kelowna will recognize, promote, maintain and enhance its authentic, tangible and intangible heritage.

GROUP 1 MISSION:

- Promotion - fostering partnerships and community pride, festivals and events
- Recognize history of Kelowna in names/naming
First Nations language - traditional
- Property tax break to heritage home owners
Incentives for conservation and restoration
Awareness of existing programs
- Interpretive signage - i.e. waterfront, greenways,
- New technology to entertain and educate
- Connect organizations through one website (Tourism)

GROUP 1 OUTCOMES:

- Increased community pride
- Increased heritage building homes
- Connected heritage networks and communities
- Increased tourism
- Increased reorganization of people and stories
- Increased publications - i.e. coffee table book

Break-out Groups:

Develop a new Vision for heritage Conservation in Kelowna.

Group 1

- Public awareness and education
- Tourism to tie heritage to socio-economic situation
- Walking and driving tour brochures
- Cultural District and wine tour opportunities
- Opportunity with Olympics - world media stories
- Bring heritage homeowners together
- What qualifies as a "heritage building"
- Intangible heritage
- Natural Heritage - hillsides, grasslands, lakefront, creeks
- Stories of landscape / people
- First Nations
- Heritage resource clearinghouse/library - city reference
- Street calming - neighbourhoods
- Recognition of neighbourhoods

Group 2

- Heritage committee funded by Kelowna taxes
- Increase awareness and profile of heritage
- Significant natural features identified and preserved
- Education on heritage in Kelowna
- Preserve agricultural resources and water resources
- Policies that encourage sustainable development, support built and natural heritage
- Changes today to preserve current downtown heritage inventory - down zoning to 2 stories
- Implementation of downtown plan and heritage
- Improve current heritage areas
- Improve access to heritage info on internet and develop and enhance web delivery
- Be a vibrant heritage home owners preservation society - for implement of preservation - increase resources
- Update tree inventory - including private property
- Preservation and/or adaptive re-use of industrial heritage
- Enact tax incentives for Heritage designation for all heritage properties - not only revenue properties.
- Heritage conservation in Bernard, Lawrence and North end.
- Increase tax incentives for residential use of commercial building in downtown.
- Notice provided to neighbouring homes within 100 metres of applications for demolition of heritage registered properties within Kelowna.

Group 3

1. Get partnerships developed between:
   - City - Cultural District
   - Community heritage commission
   - Museum society
   - Heritage society
   - Historical society

- Neighbourhood association
- Public-at-large
- Tourism media - brochure etc.

2. Funds to assist, tax incentives can be used to generate awareness and preservation.

3. Heritage community that attracts a positive profile - a benefit to entire community.

Group 4
VISION:
- More distinctive neighbourhoods/conservation
- Create value for owner of property i.e. tax breaks, protecting a neighbourhood or property
- Creating awareness
- Increased coordination within groups i.e. special department within city / or increase resources to an existing group
- Preservation of lands
- Adaptive re-use
- Quality restoration

MISSION:
- Support property owners
- Streamline approach

OUTCOME:
- Awareness: Plaques / info
- More publicity
- Know tax incentives, grants, etc, and make this more public
- Incorporated history into tourism.

Group 5
VISION:
- Creating heritage awareness
- Sidewalk plaques and signage
- Heritage signage in heritage areas furniture, streetlights
- Traffic calming
- Complete registry of all homes in Kelowna - outside heritage areas
- Tax incentives
- Additional heritage streets i.e. Lawrence, Bernard
- Amalgamating societies
- Zoning security
- Greater Heritage protection
- Sustainable heritage conservation
- Compatible with existing heritage character - carriage houses, infills, additions
- City staff as advocates of heritage
- No highrises in city park - no loss of beach front park.

OUTCOME:
- More livable city
- Increased tourism

Group 6
VISION:
- Strengthen support for building on the register
- Provide incentives for preservation

MISSION:
- Workshops
  how to workshop
  introduce craftsmen
- More funding from source

OUTCOME:
- Appreciation of our past our architecture
- Awareness and enthusiasm

Heritage Workshop Feedback Form
January 15th, 2007
Donald Luxton & Associates Inc.

1. *What do you value most about Kelowna's cultural heritage?*
    - The fact that it tells us about the past. If a society isn't reminded about where we come from, it will lose its way in the future and lack direction.
    - The landscape i.e. sandy beaches, lake hillsides/ridges and horticulture
      The buildings - mid 1860s to present
      The people (stories)
      The food and clean air
    - The heritage homes and buildings
    - I value heritage building like Benvoulin Heritage Church and the Laurel. I value institutions like the museums and historic sites. I value the non-profit organizations who work on behalf of heritage. I value heritage homes and neighbourhoods and lastly oral heritage - the stories.
    - Early pioneers and founders (original) of town site.
    - City Parks - Strathcona, Wardlaw and Knowles House and Park, Guisachan, Benvoulin and Grist Mill
      200 Block of Bernard Avenue - hopefully more restoration can be done
      Designated Heritage Conservation Areas - surviving orchards

2. *What is most important to you for Kelowna to achieve for heritage in the next five to ten years? / What does success look like to you?*
    - The retention of the heritage buildings downtown!! The retention and protection of heritage houses. The protection of trees in the Heritage Tree Inventories.
    - Stop building demotions without public review process and authorizations
      Down zone 2 blocks of Barnard Avenue to 2 storeys from 6 storeys
      Expand conservation areas to include Bay Avenue, North and ad Bernard/Lawrence Avenues.
    - Protect heritage buildings
      Heritage building improved and showcased and NOT torn down but left intact and restored.
    - There are a lot of good individuals and groups. Often working in isolation. A coordinated approach. One central clearing house for heritage related issues. This work could either be undertaken by the City of contracted out an organization like COHS.
    - Creating valve in terms of funding and usage for heritage owners as incentives to preservation.
    - Changing attitudes of planners and City Council to appreciate what's left in the city. Encourage adaptive re-use being more sensitive to surrounding neighbour's roads and streetscapes. More traffic calming to Abbott Street conservation as well as Lawrence.

3. What do you think are the top issues for heritage currently?

- Sustainable development that incorporates heritage resources both natural and built. Tax breaks and other monetary incentives to make it financially worthwhile for individuals to restore/retain heritage homes!
- Lack of public awareness
  Need more staff support including building permit department and real estate dept.
  Increase budgets and incentive programs to protect/commemorate heritage.
- Lack of funding for restoration and preservation.
- The preservation and adaptive re-use of heritage buildings.
  Having a clear path and direction in this current construction boom. Supporting those who work in heritage - be they organizations, businesses and home owners, with tax incentives by law support, grants, technical and moral support.
- Funding renovations and improvements on buildings.
- Co-operation between neighbourhood associations from planner and Council. Money - like Luxton to encourage keeping significant building and city areas before everything is torn down.
  Try to emphasize tourist value of heritage - old is beautiful.

4. *What do you think Kelowna needs in order to be successful?*
- A potential commitment at the municipal level to conserve and value heritage buildings. A public education program to illustrate the social and economic value of preserving built, natural and cultural sites.
- Secured heritage buildings through more voluntary designations.
  More significant private open space conservation covenants
  Interpretation and information (signage) of history and areas
- Promote heritage to tourists
  Stop destroying heritage home and buildings - stronger stance taken to prevent this happening.
  Keep the transients out of the Heritage District and reduce crime.
- Plan the work and work the plan
  This workshop is a great first stop. The Heritage Strategy - excellent and needed.
  Deciding on the best approach to "Work the Plan" City of contracted to a community based organization.
- Tax dollars allotted to renovations and improvements to buildings.
- Less emphasis on big box stores - cuts out small business and loss of these businesses in our neighbourhoods.
  City is becoming a traffic nightmare - 2 crossing needed.
  Do not have 1-way streets - ruining neighbourhoods - become speed roads.

5. *What else to you want to tell us about getting direction for heritage programs? Please identify and explain.*
- I would like to reinstate the importance of SUBSTANTIAL monetary incentives to the owner s of heritage homes and other buildings - even those without a revenue producing component that is the KEY!!
- Start-up funding to form a Heritage Homeowner Preservation Society.
- Plaques on designated heritage buildings so people can read them while walking in Abbott Street Conservation Area or downtown.
- Encourage awareness or grants for renovations of older homes.
  Education in schools in order to bring more appreciation.
  Work with owners of the 1st Block of Bernard to restore store fronts
  Play up tourism value of walking and sightseeing this old neighbourhood.

6. *Do you have any comments or suggestions about today's workshop?*
- Very well organized, although given the inclement weather it would have been nice if participants to have known that it was in the in the Rehearsal Room, as there was a lot of unnecessary walking in slippery/cold conditions.
- Short but sweet, appreciated, well-attended
  Needs follow-through to implement new ideas.
- It was a great workshop. Should have more of them.
- I would like to have seen a majority of Councillors attending. Would like Councillors to hear 1st hand information about a growing discontent for infill densification and traffic.

A.3 PUBLIC OPEN HOUSE

On February 13, 2007 the City hosted a public Open House at the Laurel Packinghouse. Display panels provided the Vision, and recommended strategies and actions of the draft Heritage Strategy. The Open House was well-attended: 26 people signed the sign-in sheet, with approximately 30 people attending overall between 4 pm and 7 pm. Participants were asked to review the recommendations of the Heritage Strategy and provide comments on a questionnaire. All comments received were positive. Participants also provided their comments on the proposed prioritization of the Strategies and Actions, and these comments were considered in the development of the Strategy.

Open House Feedback Form
February 13th, 2007
Donald Luxton & Associates
11 forms summarized

1. Do you support the proposed community Vision for the Heritage Strategy?

   - Strongly support - 9
   - Support - 2
   - Do not support - 0
   - Comments - Most rules are only guidelines. There should be heritage LAWS which are enforced with severe penalties.
   - There is very little Heritage (Buildings, Trees, environment) in Kelowna so we need to preserve everything we have got including Collett House. Losing the Post Office is a disgrace as well as other grand homes on Pandosy

2. Do you support the proposed strategies for City of Kelowna heritage management?

   - Strongly support - 9
   - Support - 2
   - Do not support - 0
     - Comments Protect the Collett house as shown in the picture in Strategy 8 panel.
     - We need a city planning staff member who is responsible for heritage and whose job is at least 50% time commitment to this area.

3. What strategies do you feel are the most important for Kelowna?

   - Highest Priority - 1 (3 votes), 2 (1), 3 (1), 6 (2), Adoption by Council with funding attached, Communication to citizens to enlarge awareness, Tax relief for maintaining a significant building, City staff designated to heritage
   - Second Priority - 1 (1 votes), 2 (2), 4 (1), 5 (1) Full time heritage planner, more money, make heritage areas high priority, Bernard-Lawrence area designated,
   - Third Priority - 1 (1 vote), 3, (2), 6 (1), 7 (1), Heritage communication
     - Comments - Pay attention to the capacity Kelowna can take - growth seems to be demolishing the natural beauty of what once was 'countryside'. So where was the vision? Why wasn't

Kelwona Garden, c.1920s [BC Archives]

4. DO you have any comments or suggestions about today's open house?

   • Planning and study appear to have been thoroughly done
   • Panel 2 - Strengths - Where is COHS - not included and is an influential and effective group.
   • Could have had a table and chairs for sitting, writing, discussing. It was good otherwise.
   • Donald Luxton & Assoc. did a good report
   • Excellent presentation but the presentation might have contained the material architecture for the attendees
   • Well presented info
   • Very good

5. Please tell us about your own interest in our community's heritage. Are you: (check all that apply)

   • A Heritage Register / protected heritage property / Heritage Conservation Area owner/ occupant? 5
   • A property owner? 7
   • A business owner? 1
   • A long-time resident (>5 years)? 10
   • A new resident (< 5 years)? 0

6. Do you have any comments or suggestions about today's workshop?

   There are houses on Fuller, Clement, Stockwell that are almost as old as mine, mine is 103 years old on Pandosy. They are not in the registers. Could they be put on?
   My house, 2127 Pandosy is flanked by landlord-owned couldn't care-less houses, i.e. 2121 Pandosy, 2131 Pandosy and the houses which back onto the alley entrance. One was in a fire 2 yrs ago. The garage door still not fixed - a complete mess and 6-plex beside not monitored by the landlord. It's disheartening to be taking a priding in my house and have the squatters around. If you can help, great.

APPENDIX B:
FUNDING OPPORTUNITIES

APPENDIX B: FUNDING OPPORTUNITIES

Entity	Grant	Granting Institution	For	Amount	Description	Applications Due	More Information
Federal	Catalyst Program	Arts Now	*Heritage organizations (Non-profit), local government*	Not specified	Investment for initiatives undertaken by heritage organizations - alone or in partnership - to build their organizational and/or artistic capacity	June	Program under review but may resume 2007. http://www.2010legaciesnow.com/Content/ArtsNow/2006/Catalyst.asp
Federal	Innovation Program	Arts Now	*Heritage organizations (Non-profit), local government*	Not specified	Investment for initiatives undertaken by heritage organizations and communities, alone or in partnership, to create new opportunities for people to engage in sustainable and transformative arts and cultural activities	June	Program under review but may resume 2007. http://www.2010legaciesnow.com/Content/ArtsNow/2006/Innovations.asp?langid=1
Federal	New Media Research and Development Initiative	Canadian Culture Online	*Heritage organizations*	Not specified	To advance digital cultural content	May 1	www.canadianheritage.gc.ca/ccop-pcce
Federal	Partnerships Fund	Canadian Culture Online	*Heritage organizations*	Not specified	To assist partnerships between organizations via the internet	Fall	www.canadianheritage.gc.ca/ccop-pcce
Federal	Community Memories Program	Canadian Heritage Information Network (CHIN)	*Museums*	Not specified	To develop online local history exhibits	Annual Call for Proposals	Toll-free: 1 800 520-2446
Federal	ArtsPOD	Centre for Sustainability	*Heritage organizations (Non-profit)*	Up to $10,000	To assist long-term organizational stability	March 2	http://www.centreforsustainability.ca/programs/ArtsPOD.html
Federal	Aboriginal Housing	CMHC	*First Nations*	Not specified	Programs and services to help house First Nations in Canada	Not specified	http://www.cmhc-schl.gc.ca/en/prfias/index.cfm
Federal	Residential Rehabilitation Assistance Program (RRAP)	CMHC	*Heritage home owners*	Not specified	A number of projects to aid low-income residents to live in affordable housing	Not specified	http://www.cmhc-schl.gc.ca/en/prfias/index.cfm
Federal	Canadian Arts and Heritage Sustainability Program	Department of Canadian Heritage	*Non-profit heritage associations*	Not specified	To aid sustaining non-profit associations or funding endowment or specific projects.	Not specified	http://www.pch.gc.ca/progs/pcapc-cahsp/index_e.cfm
Federal	Canadian Memory Fund	Department of Canadian Heritage	*Federal Institutions*	Full amount	To provide funding to display key Canadian collections online	Annual Call for Proposals	www.canadianheritage.gc.ca/ccop-pcce
Federal	Celebrate Canada!	Department of Canadian Heritage	*Private or public sector*	Not specified	To provide funding for multiple Canadian holiday celebrations	February 28	http://www.canadianheritage.gc.ca/special/canada/index_e.cfm
Federal	Gateway Fund	Department of Canadian Heritage	*Projects in association with First Nations or Ethnocultural communities*	Not specified	To further develop cultural content for the internet	Annual Call for Proposals	www.canadianheritage.gc.ca/ccop-pcce
Federal	Movable Cultural Property Grants Program	Department of Canadian Heritage	*Museums, archives*	Tax incentives	To provide tax incentives to encourage Canadians to donate or sell objects to heritage institutions	No date	www.canadianheritage.gc.ca/progs/mcp-bcm/mcp_e.cfm
Federal	Museums Assistance Program (MAP)	Department of Canadian Heritage	*Museums*	Not specified	Financial assistance to museums	November 1	http://www.pch.gc.ca/progs/pam-map/index_e.cfm
Federal	Young Canada Works	Department of Canadian Heritage	*Museums, general cultural heritage sector*	Not specified	Partial funding of university students for summer heritage work	February 28	http://www.pch.gc.ca/special/ycw-jct/html/welcome_e.htm
Federal	Commercial Heritage Properties Heritage Incentive Fund	Parks Canada	*Heritage commercial property owners*	No specified	Designed to award financial incentives to eligible commercial historic places listed on the Canadian Register of Historic Places	Anytime	Program is currently not accepting applications. See website for more information. http://www.pc.gc.ca/progs/plp-hpp/itm1-/plp-hpp2c7_E.asp

APPENDIX B: FUNDING OPPORTUNITIES

Entity	Grant	Granting Institution	For	Amount	Description	Applications Due	More Information
Provincial	Community Heritage Context Planning	Heritage Branch	*Local Government, First Nations, Post-secondary Institutions*	up to $10,000	To assist in preparing Heritage Strategy, heritage policies for the OCP, Heritage Register, Archaeological Overview	Anytime - but projects completed by March 31	http://www.tsa.gov.bc.ca/heritage_branch/planning_programs/planning_programs.htm
Provincial	Community Heritage Registers Program	Heritage Branch	*Local Government*	up to $20,000	Supports development of Heritage Registers by the local government.	Anytime - but projects completed by March 31	http://www.tsa.gov.bc.ca/heritage_branch/planning_programs/planning_programs.htm
Provincial	Conservation and Feasibility Planning Program	Heritage Branch	*Local governments, First Nations bands, registered non-profit societies, school districts, post-secondary institutions, provincial crown corporations and regional health authorities*	up to $10,000	Supports conservation or feasibility plans for historic places	Anytime - but projects completed by March 31	http://www.tsa.gov.bc.ca/heritage_branch/planning_programs/planning_programs.htm
Provincial	Implementation Planning Program	Heritage Branch	*Local Government, First Nations, Post-secondary Institutions*	up to $20,000	Supports preparation of plans to achieve priorities identified in Heritage Strategy	Anytime - but projects completed by March 31	http://www.tsa.gov.bc.ca/heritage_branch/planning_programs/planning_programs.htm
Provincial	Strategic Planning Program	Heritage Branch	*Local Government, First Nations, Post-secondary Institutions*	up to $10,000	To assist with developing Heritage Strategy	Anytime - but projects completed by March 31	http://www.tsa.gov.bc.ca/heritage_branch/planning_programs/planning_programs.htm
Provincial	Heritage Legacy Fund	HSBC	*Any heritage project*	Up to $10,000 for heritage awareness and up to $25,000 for conservation projects	To provide funding for community based initiatives	Anytime	http://www.heritagelegacyfund.ca/
Provincial	Heritage Society of BC (HSBC) Grants	HSBC	*Anyone involved in heritage*	Up to $2,000	To provide funding for Heritage Workshops	Anytime	http://www.heritagebc.ca/
Provincial	BC2008 - Spirit Squares	Ministry of Tourism, Sport and the Arts	*Outdoor plaza in a community*	Not specified	To provide funding to revive outdoor public spaces	February	http://www.spiritsquares.gov.bc.ca/program_description.html
Provincial	BC2008 - Towns for Tomorrow	Ministry of Tourism, Sport and the Arts	*Small towns in need of a capital project*	up to $400,000	To provide cost share funding to build new capital projects such as museums in small towns	February	http://www.townsfortomorrow.gov.bc.ca/program_description.html
Private	Various	Bronfman Foundation	Heritage organizations (Non-profit), organizations	Not specified	Various grants to aid heritage projects	Open	http://www.bronfmanfoundation.org/index.html
Private	n/a	The Land Conservancy	*Heritage sites*	Not specified	A charitable Land Trust that purchases and conserves heritage and natural sites	Not specified	http://www.conservancy.bc.ca/index.asp?section=home
Private	Sustainable Tourism Grant	Transat	*Heritage sites or tourism*	Up to $50,000	To start-up, implement or maintain a sustainable-tourism project.	May 18, 2007	http://www.transat.com/en/
Private	BC Arts Renaissance Funds - Endowment Match Program	Vancouver Foundation	*Non-profit heritage associations*	Up to $350,000 per year matched funding	An endowment and development fund to assist non-profit arts and culture organizations to build permanent endowment funds by providing matching grants	Anytime	http://www.vancouverfoundation.bc.ca/GrantInformation/BCRF/BCRF.shtml

APPENDIX C:
HERITAGE CONSERVA-
TION IN CANADA

C.1 HISTORIC PLACES INITIATIVE

In 2000, the Department of Canadian Heritage and Parks Canada began a wide-ranging series of consultations on the best means to preserve and celebrate Canada's historic places. These consultations have resulted a broad based strategy, the **Historic Places Initiative**, which is the most important federal heritage conservation proposal in Canada's history. As of May 2, 2001, the Federal Government made the financial commitment to fund the development of these initiatives. These rapidly evolving initiatives may have significant implications for a number of the heritage resources in Kelowna.

The Historic Places Initiatives (HPI) is a national partnership consisting of a number of interrelated elements. This includes a number of initiatives including a national heritage register called the Canadian Register of Historic Places (CRHP), comprehensive conservation standards and guidelines for historic places, and a certification process for project approval. The CRHP is a searchable database containing listings of historic places of local, provincial, territorial and national significance. An historic place may be a structure, building, group of buildings, City, landscape or other type of significant place in Canada. Canadian Register listings will eventually include grain elevators, theatres, churches, gardens, fortresses, archaeological sites and heritage districts, among many other places, representing the breadth of historic places found in Canada. The purpose of the CRHP is to identify, promote and celebrate historic places in Canada. It also provides a valuable source of easily accessible and accurate information for government authorities, land use planners, developers, the tourism industry, educators, researchers, heritage professionals and the public.

Another integral part of HPI is the development of *Standards and Guidelines for the Conservation of Historic Places in Canada*. This recently completed document, prepared by Parks Canada to serve as the federal standard for the treatment of heritage resources, has been adopted by the Province of Alberta. A Project Certification Process has been designed to ensure that the incentives are awarded to eligible historic places and that the work that is undertaken complies with approved standards. The 2005 federal budget renewed the government's commitment to HPI for another five years of funding.

APPENDIX D: HERITAGE CONSERVATION IN BRITISH COLUMBIA

D.1 PROVINCIAL ENABLING LEGISLATION

Prior to 1994 there were two provincial Acts that most directly enabled municipal heritage conservation initiatives, the *Heritage Conservation Act* and the *Municipal Act*. These two Acts, and a number of others, were amended through the *Heritage Conservation Statutes Amendment Act 1994*. In addition to existing procedures, the 1994 changes to the Municipal Act enabled municipalities to better integrate heritage conservation activities into the mainstream of development and community planning, defining new procedures for more powerful regulations (Heritage Conservation Areas, Community Heritage Commissions, heritage site maintenance standards, tree protection, etc.) and heritage incentives (tax exemptions, an expanded legal protection toolkit, consolidated approvals for heritage rehabilitation work, etc.)

Heritage tools are referenced in a number of other provincial acts, such as the *Land Titles Act* (which enables covenants to be registered on land titles), but the majority of the tools the municipality is liable to use in the conservation of heritage resources are now enabled under the revised *Local Government Act*.

LOCAL GOVERNMENT ACT

Under the *Local Government Act*, a legal framework and foundation is provided for the establishment and continuation of local governments to represent the interests and respond to the needs of their communities. Local governments are enabled with the powers, duties and functions necessary for fulfilling their purposes, including stewardship of its public assets, and the flexibility to respond to the different needs and changing circumstances of their communities. The municipality is empowered to regulate zoning, control subdivisions, building by-laws, maintenance and occupancy by-laws, and a number of other regulatory controls, based on an Official Community Plan.

Most of the tools that the municipality will use to provide incentives and regulations for the heritage program are enabled under this Act, and the municipality does not need to pass additional bylaws to take advantage of them. The legislative tools available to the municipality are summarized in **Appendix D.2: Heritage Conservation Toolkit**. Further information on the 1994 legislation is available in a provincial publication, "*Heritage Conservation: A Community Guide.*"

HERITAGE CONSERVATION ACT

The purpose of this Act is to encourage and facilitate the protection and conservation of heritage property in British Columbia. This Act is most relevant when dealing with archaeological issues, the management of which remains a provincial jurisdiction. The province may enter into a formal agreement with a first nation with respect to the conservation and protection of heritage sites and heritage objects that represent the cultural heritage of the aboriginal people who are represented by that first nation. Owners of identified archaeological sites are required to conform to provincial requirements.

COMMUNITY CHARTER

The *Community Charter* came into effect in 2004, and provides municipalities with a framework for local activities and services. This legislation applies to all municipalities whose core powers were previously found in the *Local Government Act*, and replaces the tradition of prescriptive legislation with enabling legislation that allows municipalities to be innovative in meeting the needs of their communities. The *Charter* gives municipalities broad powers to regulate activities within their communities, including tax initiatives for revitalization.

AGRICULTURAL LAND COMMISSION

The provincial Agricultural Land Commission (ALC) is an independent Crown agency dedicated to protecting the scarce supply of agricultural land that is important to the current and future needs of British Columbia. The *Agricultural Land Commission Act* sets the legislative framework for the establishment and administration of the agricultural land preservation program. The ALC encourages the establishment and maintenance of farms, to provide a basis for a sustainable economy and a secure source of food. The Commission also conducts land use planning with local communities and government agencies, and adjudicates applications for the use of land in the Agricultural Land Reserve (ALR). It is responsible for administering the *Agricultural Land Commission Act* and the *Soil Conservation Act*. In addition, a *Farm Practices Protection (Right to Farm) Act* was passed in 1995/1996.

The Agricultural Land Reserve (ALR) is a provincial zone in which agriculture is recognized as the priority use. Farming is encouraged and non-agricultural uses are controlled. The ALR covers approximately 4.7 million hectares. It includes private and public lands that may be farmed, forested or vacant land. In total, the ALR comprises those lands within B.C. that have the potential for agricultural production. The Agricultural Land Reserve takes precedence over, but does not replace other legislation and bylaws that may apply to the land. Local and regional governments, as well as other provincial agencies, are expected to plan in accordance with the provincial policy of preserving agricultural land.

The *Farm Practices Protection (Right to Farm) Act* is complimentary to the ALR farm land preservation program. This Act, which came into effect in 1995, gave local government better tools for managing growth, and moved land use planning for agriculture into the mainstream. Farmers were given the right to farm in the ALR and on land zoned for farm use. The Act protects farmers that are using normal farm practices from nuisance lawsuits and nuisance bylaws of local governments. The Act also establishes a process to resolve concerns and complaints.

The Agricultural Land Commission has demonstrated an increased willingness to negotiate over heritage issues. This is a positive indication that the Commission will consider proposals to save heritage structures as long as there is only minor impact on agricultural production.

D.2 HERITAGE CONSERVATION TOOLKIT

The Heritage Conservation Toolkit lists the legislative tools available before, during and after a permit application is made. For further information please refer directly to the relevant legislation (Revised Statutes and Consolidated Regulations of British Columbia). Web Site: http://www.qp.gov.bc.ca/statreg/

TOOLS THAT NEED TO BE IN PLACE BEFORE NEGOTIATION:

- **Official Community Plan (Local Government Act)**
  Sets out the municipality's intent for development. States overall goals for heritage conservation and can also include heritage area designations.

- **Zoning and Development Bylaws (Local Government Act)**
  Outline the existing general requirements for site development.

- **Development Permit Controls (Local Government Act)**
  Give specific requirements for areas designated as Development Permit Areas.

- **Heritage Conservation Areas (Local Government Act)**
  The municipality can define special areas in the OCP to provide long-term protection to distinct heritage areas.

- **Community Heritage Register (Local Government Act)**
  The municipality can establish an official listing of properties defined as having heritage character or heritage value. This can act as the basis for the offering of incentives.

- **Heritage Zoning (Local Government Act)**
  A zoning schedule can be tailored to preserve the character of a heritage site or area.

- **Community Heritage Commission (Local Government Act)**
  Allows for an expanded terms of reference for the existing Commission, and the establishment of new commissions for other purposes.

- **Heritage Procedures Bylaw (Local Government Act)**
  The municipality can enact a Bylaw that establishes the municipality's procedures and guidelines for heritage conservation. This bylaw may also delegate authority to an officer or authority for the negotiation of heritage issues.

- **Heritage Site Maintenance Standards (Local Government Act)**
  The municipality can enact a 'Heritage Site Maintenance Standards Bylaw,' that establishes the municipality's minimum requirements for the care and maintenance of legally protected heritage properties.

- **Reservation and Dedication of Municipal Property (Local Government Act)**
  The municipality can commit to the long-term protection of public property. Although previously enabled, there is new scope added to this tool.

- **Administrative Procedures:**
  o   Priority Routing
      The municipality can institute a policy of expediting applications involving identified heritage resources.
  o   Heritage Awareness Programs
      The municipality can continue to make the public aware of the importance heritage resources through education programs.

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- o Commemoration and Interpretation
  The municipality can provide for commemoration and/or interpretation of historic sites or buildings. This is not the equivalent of designation.
- o Complementary Public Works
  The municipality may commit to public works that complement the character of heritage sites or areas.

TOOLS AVAILABLE DURING NEGOTIATION:
- • Financial Incentives
  - o Financial Assistance (Local Government Act)
    Direct monetary grants can be offered in exchange for heritage conservation.
  - o Tax Incentives/Exemption (Local Government Act)
    Full or partial tax exemptions for up to ten years can be offered.

- • Development/Zoning Incentives
  - o Heritage Revitalization Agreements (Local Government Act)
    This is potentially the most useful new conservation tool, and has been widely used by other municipalities. This allows for a voluntary negotiated agreement, which may vary bylaw and permit conditions. If use and density are not varied, a Public Hearing is not required. This is considered a form of legal protection.
  - o Heritage Conservation Covenants (Land Titles Act)
    Allows for the negotiation of a contractual agreement with the owner, that is then registered on the Land Title. This may not vary siting, use or density. This is considered a form of legal protection.
  - o Building Code Equivalencies
    Buildings identified on an inventory or Heritage Register are eligible for building code equivalencies under the BC Building Code.
  - o Heritage Density Bonuses (Local Government Act)
    Increases in density, although previously available, may now be achieved more easily through a Heritage Revitalization Agreement.
  - o Transfer of Density (Local Government Act)
    Although previously enabled, may now be expedited through negotiated agreements.
  - o Development Variance Permits (Local Government Act)
    Allow for development requirements to be varied or waived.
  - o Heritage Designation (Local Government Act)
    This tool is now enabled under the Local Government Act, and provides long-term protection and demolition control. Designation is generally negotiated in exchange for development incentives. This is considered a form of legal protection.
  - o Heritage Alteration Permits (Local Government Act)
    Once a Heritage Conservation Area is established, HAPs may be required for subdivision, additions, new construction or alteration of an existing building. May also be used to allow changes to legally protected heritage property.
  - o Tree Protection (Local Government Act)
    Although previously enabled, there are now new procedures that streamline the ways in which the municipality can protect and maintain significant identified trees.

TOOLS AVAILABLE IF NEGOTIATION BREAKS DOWN:
- • Temporary Heritage Protection (Local Government Act)
  A resource can be temporarily protected through the withholding of permits and approvals, or protection orders and bylaws. The resource must be listed on a Heritage Register, and a Heritage Procedures Bylaw must be in place. Specific time periods apply, and this protection cannot be indefinitely extended.

- • Heritage Designation (Local Government Act)
  See above for details; if the resource is of sufficient community value, the municipality may enact an involuntary designation; this will make the municipality liable for compensation.

- **Heritage Inspection (Local Government Act)**
  The municipality can order heritage inspections to assess heritage value and conservation needs.

- **Heritage Impact Assessment (Local Government Act)**
  The municipality can order an assessment to be prepared at either owner or municipal expense to predict the impact of a proposed development on adjacent heritage resources.

- **Relocation**
  When it is not possible to save a structure on its original site, it may be desirable to move it to another location to ensure its preservation. Costs may be borne either by the developer or the municipality.

- **Documentation**
  When it is not possible to save a structure, it may be desirable to document it before demolition. Costs may be borne either by the developer or the municipality.

- **Salvage**
  When it is not possible to save a structure, it may be desirable to salvage artifacts or portions of the structure before demolition.

Further information on these tools may be found in *Heritage Conservation: A Community Heritage Guide*, or through reference to the appropriate legislation.

D.3 MUNICIPAL BEST PRACTICES

A number of other municipal heritage programs in British Columbia and Alberta were reviewed to determine the different levels of municipal responses to heritage management, and to review what program components were most effective.

NANAIMO, BC

Population: 73,000
Staff: One Heritage & Community Planner
Advisory Body: Community Heritage Commission
Tools: Heritage Register; Municipal heritage designations; Heritage Management Plan; Downtown Heritage Conservation Area; Heritage Building Design Guidelines
Incentives: Heritage Façade Improvement Grant Program; Downtown Residential Tax Exemption Program
Heritage Awareness: Virtual Heritage Tour (City website); walking tour brochures

- The **Nanaimo Community Heritage Commission** is a volunteer group, appointed by Nanaimo City Council, to provide advice and recommendations on issues associated with the protection and conservation of heritage buildings, sites and areas within the city.
- The **virtual heritage walk** compliments the City's existing on-line heritage building database and allows the viewer to explore the City's heritage buildings in a virtual setting. Produced by a local interactive immersion and 3D object imaging firm, the 360 degree image technology used in the virtual walk provides a unique and engaging introduction to Nanaimo and its heritage buildings.
- The **Downtown Residential Conversion Tax Exemption Program** has two main goals one is to encourage new residential units; the other is to preserve heritage buildings in the Downtown Core.
- Facade Improvement Grant's (F.I.G.s) through the City's **Heritage Facade Improvement Grant Program** is coordinated and funded by the Downtown Nanaimo Partnership and the City of Nanaimo and is designed to encourage rehabilitation and enhancement of historic buildings, as well as to promote economic growth and investment in the Downtown Core. Grants cover up to 50% of external building improvement or conservation costs, to a maximum of $10,000 per building face fronting on a street. The most common improvements completed under the program include awning upgrades, new signage, painting, and window conservation. In order to be eligible for a grant, the building must be recognized by the City as having historic value.

SAANICH, BC

Population: 109,661 (2003)
Staff: One Municipal Planner, with responsibility for heritage
Advisory Body: Arts Culture, and Heritage Advisory Committee
Tools: Community Heritage Register (Inventory (1991) adopted as a Register; currently being updated); Municipal heritage designations; Exterior Restoration Guidelines
Incentives: House Grants Program (administered by the SHF)
Heritage Awareness:

- The purpose of the **Arts Culture, and Heritage Advisory Committee** is to advise Council and recommend policies on community arts, culture and heritage promotion, including services, facilities and specific community interests.
- The **Saanich Heritage Foundation** is a registered non-profit society that promotes the preservation, maintenance and restoration of buildings, structures and land located in the Municipality of Saanich which have been designated as Municipal Heritage Sites by the Municipal Council.
- Owners of heritage-designated residences in the Municipality of Saanich may be eligible for assistance with the cost of preserving or restoring the exterior. The House Grants Program may cover a portion of these costs, subject to the Saanich Heritage Foundation (SHF) priorities and the availability of funds.
- Offers a list of exterior restoration principles for homeowners and contractors

CENTRAL SAANICH, BC

Population: 15,348 (2001)
Staff: One Community Services Planner, with responsibility for heritage
Advisory Body: Community Heritage Commission
Tools: Municipal heritage designations
Heritage Awareness: Heritage walking tour brochure (Mount Newton Cross Road Heritage Walk)

- The primary goals of the **Heritage Commission** are to preserve the City's heritage and raise public awareness on heritage issues. The Commission advises Council and municipal staff on heritage issues related to structures, properties and roadways that are considered to be of historical significance. The Commission is consulted when demolition or alteration permits are requested for historically significant structures, or heritage alteration permits are required for renovations to Designated Heritage Sites.

PRINCE GEORGE, BC

Population: 72,406
Staff: Leisure Services Department responsible for heritage
Advisory Body: Community Heritage Commission
Tools: Municipal heritage designations; Heritage Strategy (2006)
Heritage Awareness: Prince George Regional Heritage Fair; walking tours

- The Mission of the **Prince George Community Heritage Commission** is "To protect, conserve and interpret the heritage resources within the City by supporting, encouraging, and facilitating their proper conservation, maintenance and restoration". This body is made up of volunteer residents and community leaders, advises Council on any issue related to heritage conservation. They also can undertake heritage education and awareness including raising funds for support of such activities and promoting the conservation of historic photos and heritage artifacts as public art.
- Currently, the City's OCP includes consideration for heritage conservation. The City's Heritage Strategy was completed in 2006.
- The City has two designated heritage buildings and an incomplete Heritage Inventory.

APPENDIX E: REFERENCES

E.1 DEFINITIONS

Character-Defining Elements
The materials, forms, location, spatial configurations, uses and cultural associations or meaning that contribute to the *heritage value* or a *historic place*, which must be retained in order to preserve its heritage value.

Community Heritage Commission
A commission or board appointed by a municipal Council for the purposes of advising a local government on heritage matters or undertaking other activities authorized by a local government.

Conservation
All actions or processes that are aimed at safeguarding the character-defining elements of a cultural resources so as to retain its heritage value and extend its physical life. This may involve "*Preservation*," "*Rehabilitation*," "*Restoration*," or a combination of these actions or processes. Reconstruction or reconstitution of a disappeared cultural resource is not considered as conservation.

Cultural Landscape
Living landscapes, changing as the culture, climate and natural surroundings change within and around them. The character of the landscape thus reflects the values of the people who have shaped it, and who continue to live in it.

Guidelines
Statements that provide practical guidance in applying the Standards for the Conservation of Historic Places. They are presented as recommended and non-recommended actions.

Heritage
Heritage is a broad term that refers to all that is inherited from the past. It therefore includes the built environment, those buildings and works of the past, sites of historic events, historic skills, behaviours and patterns of life. A community's heritage encompasses its entire environmental inheritance.

Heritage Advisory Board
See Community Heritage Committee/Commission.

Heritage Character
This means the overall effect produced by traits or features that give property or an area a distinctive quality of appearance dating from an earlier period.

Heritage Value
The aesthetic, historic, scientific, cultural, social or spiritual importance or significance for past, present or future generations. The heritage value of a historic place is embodied in its character-defining materials, forms, location, spatial configurations, uses and cultural associations or meanings.

Historic Place
A structure, building, group of buildings, City, landscape, archaeological site or other place in Canada that has been formally recognized for its heritage value.

Historic City
An historic City or conservation area denotes a neighbourhood unified by an architectural style and/or historical development.

Interpretation
This is any communication process designed to reveal the characteristics, meanings and
relationships of a community's built heritage to the public through reference to objects, artifacts, landscapes, and structures or persons.

Intervention
Any action, other than demolition or destruction, that results in a physical change to an element of a historic place.

Maintenance
Routine, cyclical non-destructive actions necessary to slow the deterioration of a historic place. It entails periodic inspection; routine, cyclical, non-destructive cleaning; minor repair and refinishing operations; replacement of damaged or deteriorated materials that are impractical to save.

Minimal Intervention
The approach which allows functional goals to be met with the least physical intervention.

Natural Heritage

Natural sites, features, or formations or precisely delineated natural areas of outstanding universal value from the point of view of science, conservation or natural beauty.

Preservation

The action or process of protecting, maintaining, and/or stabilizing the existing materials, form and integrity of a historic place or of an individual component, while protecting its heritage.

Recording

Heritage recording is the process of documenting an illustrating what is significant or valuable about a historic structure. The results of the recording should be a clear, accurate and concise report, containing drawings, photographs and written analysis of the historic structure. The action of recording or documenting a heritage resource is an integral part of the preservation process. Not only does it necessitate a thorough scientific analysis of the building, but it also ensures that an archival reference will be created that describes the resource in detail, despite the fate of the building in the future.

Rehabilitation

The action or process of making possible a continuing or compatible contemporary use of a historic place or an individual component, through repair, alterations, and/or addition, while protecting its heritage value.

Renovation

This is a generic term used to describe various levels of intervention including remodeling, recycling and rehabilitation. It refers to the improvement of existing buildings or neighbourhoods.

Restoration

The action or process of accurately revealing, recovering or representing the state of a historic place or of an individual component, as it appeared at a particular period in its history, while protecting its heritage value.

Revitalization

Revitalization is a term that describes the process of economic, social, physical and cultural redevelopment of an area or street.

Standards

Norms for the respectful conservation of historic places.

FEDERAL GOVERNMENT

Canadian Register of Historic Places
http://www.historicplaces.ca

Standards and Guidelines for the Conservation of Historic Places in Canada
http://www.pc.gc.ca/docs/pc/guide/nldclpc-sgchpc/index_E.asp

PROVINCE OF BRITISH COLUMBIA

Heritage Branch, Ministry of Tourism, Sport & the Arts
http://www.tsa.gov.bc.ca/heritage_branch/

Heritage Society of British Columbia
http://www.heritagebc.ca/homepage.htm

Heritage Legacy Fund of British Columbia
http://heritagelegacyfund.ca/