



# Heritage Register Evaluation Criteria

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## EVALUATION CRITERIA

This document outlines the evaluation criteria and submission requirements for requested additions and removals from the Kelowna Heritage Register (KHR). City staff will use evaluation results to inform a recommendation for action including inclusion or removal from the KHR.

**The objective of this evaluation is to answer the following two questions:**

- **Is this or isn't this place a heritage resource in Kelowna?**
- **If so, what is its relative level of heritage value?**

In terms of heritage policy, the [Kelowna Heritage Strategy](#) (Section 2.5) identifies several community values related to heritage and can be used to provide high-level context for KHR evaluations. Community values were determined through engagement with key stakeholders, community members, and City staff, with the goal of providing a common vision for heritage conservation. Community values include, but are not limited to:

- 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

In summary, the natural, cultural, and built heritage of Kelowna help to define the identity of the community, give it distinct character, and contribute to the residents' quality of life

## SUBMISSION REQUIREMENTS

Evaluations for additions and removals from the Kelowna Heritage Register must be completed (or supervised) by a BCAHP<sup>1</sup> registered professional and include the following:

1. **Photo:** identify the heritage resource.
2. **Research findings:** outline the basic facts related to the heritage resource (legal description, construction date, neighbourhood<sup>2</sup>, historic name(s), original and other significant owners / tenants / users, architect / builder, occupation state, heritage status, recipient of a grant from the City of Kelowna Heritage Grants Program (CoKHGP)<sup>3</sup>, etc.).
3. **Historic brief (1-page suffice):** provide a fact-based, objective brief that describes the location of the heritage resource (including the local and block context), architecture, materials, design tradition, names, uses, historic patterns, associated people and/or events, and other relevant historical information. If a resource is being assessed for removal from the KHR, address any information to justify this here such as irreversible interventions or occurrences which could have negatively impacted the previously perceived or assessed heritage value of this place.
4. **Assessment (see Table 1, page 5):** evaluate the heritage resource's contextual, historic, aesthetic, social, and spiritual heritage values. Additionally, evaluate the site's authenticity, integrity, current risk, and public/community concern. Score the resource out of 10 points.
5. **Preliminary observed Character Defining Elements (see Table 2, page 7):** make a general, preliminary statement about the condition of the heritage resource (this is NOT a structural assessment but a preliminary assessment of the conservation potential or salvageability of the site) by listing the initially observed Character Defining Elements of the heritage resource that support the information provided in the historical brief. This can include original or added components, renovations, alterations, additions, landscape, accessory structures, uses, names and interior elements that represent its heritage values. Include preliminary observations about the condition of any of the elements.
6. **Conclusion:** summarize whether the resource has low, common, more than common, or high heritage value and why, as well as whether it is an unsuitable, good, or excellent candidate for the Heritage Register and/or for conservation. \*Note, planning, development and construction advice or opinions are outside the scope of this evaluation.
7. **Sources:** list the research sources used to complete the assessment.
8. **Current Photos:** All four sides of the property in high resolution.
9. **Archival Photos:** if available.

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<sup>1</sup> BCAHP is the BC Chapter of the national Canadian Association of Heritage Professionals.

<sup>2</sup> Contact [lsanbrooks@kelowna.ca](mailto:lsanbrooks@kelowna.ca) if neighbourhood clarification is required.

<sup>3</sup> For more information on the CoKHGP, please contact the program manager and administrator, Lorri Dauncey at [ldauncey.cohs@telus.net](mailto:ldauncey.cohs@telus.net)

### Table 1. Assessment

Evaluate the heritage resource’s contextual, historic, aesthetic, social, and spiritual heritage values. Additionally, evaluate the site’s authenticity, integrity, current risk, and public/community concern/awareness. A resource should score up to a maximum of 10 points generally allocated as below. However, if the resource has especially strong value in one of the categories of assessment, it can be given more than two points, up to a maximum of five per value, at the assessor’s discretion, as long as the resource doesn’t accumulate over 10 points. Under comments, give the Kelowna-specific or site-related rationale for your score.

Heritage Value	Criteria	Score	Comments
<b>Context</b>	Contribution to or evidence of a cohesive streetscape, grouping, district, historical use, development pattern, historic period. This could include being surviving evidence of former historical use, development pattern, historic period.  And/or has landmark qualities	/2	
<b>Tangible</b>	Strong or extensive enough surviving CDEs, or evidence through archival resources, to illustrate the essence of its story and/or features, unusual material or distinguishing feature/s could add value here  Authenticity and integrity of the resource to be addressed here	/2	
<b>Intangible</b>	Associated with locally, regionally or nationally noteworthy people, events, institutions, businesses, traditions or practices	/2	
<b>Landscape Context</b>	Cultural landscape, landscaping features (built and/or planted)	/2	
	<b>Subtotal heritage values</b>	<b>/8</b>	

<p><b>Additional considerations:</b></p> <p>The resource may receive up to an additional two points if it is at risk, and/or of public concern as per Kelowna’s stated community value “Heritage conservation of buildings and landscapes at a time of rapid development and population growth is highly valued”. While these aspects of the place's current situation are not heritage values per se, they could augment its overall contextual value to the City of Kelowna and to its inclusion on the Heritage Register. <b>Each consideration below could score 2 points if the risk or concern is high, but together they must not score more than 2.</b></p>			
<p><b>Risk</b></p>	<p>The site is at risk of damage, destruction, loss, sale/redevelopment or other factors.</p> <p>Public awareness and/or concern around this heritage resource asking for acknowledgement or intervention</p> <p>Half a point or more could be allocated if the resource is not protected by heritage designation, or if more recent area zoning allows for or encourages a different use, form or density than that of the resource.</p>	<p>/2</p>	
<p><b>Public awareness/ concern</b></p>	<p>Public awareness and/or concern around this heritage resource asking for acknowledgement or intervention. This might be determined for example through statements or mentions in local media, from local neighbourhood organizations or in Council reports.</p>	<p>/2</p>	
<p><b>TOTAL Score Significance</b></p>		<p><b>/10</b></p>	

## Score Significance

### Score Guidance and Analysis

- 0 = no value evident
  - 0.5 = minimal value evident
  - 1 = partial value evident
  - 1.5 = good value evident
  - 2 = strong value evident
- 3 = rare/outstanding representation of this value  
4 to 5 = although does not well represent other or most other values, this resource has outstanding significance under this criteria

### Total Score Significance

- 0 to 3 = **Low** heritage value
- 4 to 6 = **Moderate** heritage value
  - 4 to 5 = **Common** heritage value
  - 5 to 6 = **More than common** heritage value
- 7 to 10 = **High** heritage value

### Table 2. Character Defining Elements

Surviving (and missing, if known)

Note: This is a quick gauging exercise, not a Statement of Significance.

<b>Character Defining Element</b>	<b>Preliminary Observed General Condition (Poor/fair/good/excellent)</b>	<b>Conservation Potential (preservable, restorable, rehabilitatable)</b>

## EXAMPLE

Please see the sample tables below. They have been filled out *in blue* for the C.B. Ghezzi House, located at 2089 Pandosy Street.

**Table 1. Assessment**

Evaluate the heritage resource's contextual, historic, aesthetic, social, and spiritual heritage values. Additionally, evaluate the site's authenticity, integrity, current risk, and public/community concern/awareness. Score the resource out of 10 points.

Heritage Theme	Criteria	Score	Comments
<b>Context</b>	Contribution to or evidence of a cohesive streetscape, grouping, district, historical use, development pattern, historic period  And/or has landmark qualities	1.5/2	<i>Part of an early streetscape made up of single-family homes, both modest and large, from the first four decades of the 20th century</i>
<b>Tangible</b>	Strong or extensive enough surviving CDEs, or evidence through archival resources, to illustrate the essence of its story and/or features, unusual material or distinguishing feature/s could add value here  Authenticity and integrity of the resource to be addressed here	2/2	<i>The house has not been altered significantly from its original design or material</i>
<b>Intangible</b>	Associated with locally, regionally or nationally significant people, events, traditions or practices	3/2	<i>Associated with the Ghezzi family, Italian immigrants to the Okanagan and partners in the <u>first ever winery in BC</u> in association with W.A.C Bennett</i>
<b>Landscape Context</b>	Cultural landscape, landscaping features (built and/or planted)	0/2	<i>None evident</i>
	<b>Subtotal heritage values</b>	<b>6.5/8</b>	
<b>Risk</b>	The site is at risk of damage, destruction, loss, sale/redevelopment or other factors.	0.5/2	<i>The building is not legally protected against demolition</i>

	Half a point or more could be allocated if the resource is not protected by heritage designation, or if more recent area zoning allows for or encourages a different use, form or density than that of the resource.		
<b>Public awareness/ concern</b>	Public awareness and/or concern around this heritage resource asking for acknowledgement or intervention. This might be determined for example through statements or mentions in local media, from local neighbourhood organizations or in Council reports.	0/2	
<b>TOTAL Score Significance</b>		7/10	

Total: 7/10, Total Score Significance: *more than common heritage value*

**Score Guidance and Analysis**

- 0 = no value evident
  - 0.5 = minimal value evident
  - 1 = partial value evident
  - 1.5 = good value evident
  - 2 = strong value evident
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 4 to 5 = although does not well represent other or most other values, this resource has outstanding significance under this criteria

**Total Score Significance**

- 0 to 3 = **Low** heritage value
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- 7 to 10 = **High** heritage value

Table 2. Character Defining Elements

Character Defining Element	Condition (Poor/fair/good/excellent)	Conservation Potential (preservable, restorable, rehabilitatable)
<i>Vernacular wood-frame gabled house</i>	<i>Good</i>	<i>All of the above</i>
<i>Original wood windows and front door, 1940s window and door trim with backband moulding typical of the era</i>	<i>Good</i>	<i>Preservable</i>
<i>Side gable roof with front gabled entrance projection</i>	<i>Good</i>	<i>Preservable</i>
<i>Revival style elements - English Cottage style, 1940s stucco, arched porch opening, oval window at gable, end-wall chimney</i>	<i>Good. End-wall chimney has been stuccoed and painted, this could be restored</i>	<i>Preservable and restorable</i>
<i>Continuous residential use</i>		<i>Preservable and potential for rehabilitation with the addition of a coach house</i>

### Conclusion

*The building at 2089 Pandosy Street contributes to the illustration of a local development pattern in the neighbourhood; is valued as a long-term, well maintained family home associated with the Ghezzi family - key multi-generational leaders in the local Italian community and partners in Calona Wines, BC's first winery and the pioneer business which set the course for the Okanagan wine industry, followed by a provincial wine industry. The path to conservation is straightforward. This building has above common/high heritage value, including provincial significance and is thus a good candidate for conservation.*