

Heritage Advisory Committee

AGENDA



Thursday, April 20, 2017

12:00 pm

Knox Mountain Meeting Room (#4A)

City Hall, 1435 Water Street

Pages

1. Call to Order

THE CHAIR WILL CALL THE MEETING TO ORDER:

- (a) The purpose of this Meeting is to consider certain Development Applications as noted on this meeting Agenda.
- (b) The Reports to Committee concerning the subject development applications are available on the City's website at www.kelowna.ca.
- (c) All representations to the Heritage Advisory Committee form part of the public record.
- (d) As an Advisory Committee of Council, the Heritage Advisory Committee will make a recommendation of support or non-support for each application as part of the public process. City Council will consider the application at a future date and, depending on the nature of the file, will make a decision.

2. Applications for Consideration

2.1 1983 - 1985 Knox Crescent, HAP17-0005 - Sheldon & Heather Upshaw

3 - 16

To make a recommendation regarding the Heritage Alteration Permit for the form and character of an addition to the single family dwelling.

2.2 4629 Lakeshore Road, HRA17-0001 - City of Kelowna

17 - 112

To restore the two historical buildings onsite through a Heritage Revitalization Agreement (HRA) that would allow for some commercial uses and the addition of one new 2,200 sq. ft. (footprint) commercial building on the subject property.

3. Minutes

113 - 116

Approve Minutes of the Meeting of March 16, 2017.

4. Update - Council Decisions

5. **Next Meeting**

May 18, 2017

6. **Termination of Meeting**

REPORT TO COMMITTEE



Date: April 20, 2017

RIM No. 0940-60

To: Heritage Advisory Committee

From: Community Planning Department (TB)

Application: HAP17-0005 **Owner:** Sheldon Bruce Upshaw
Heather Dale Upshaw

Address: 1983 - 1985 Knox Crescent **Applicant:** Sheldon Bruce Upshaw

Subject: Heritage Alteration Permit

Existing OCP Designation: S2RES – Single/Two Unit Residential

Existing Zone: RU1c – Large Lot Housing with Carriage House

Heritage Conservation Area: Abbott Street

Heritage Register: Not Included

1.0 Purpose

To make a recommendation to Staff regarding the Heritage Alteration Permit for the form and character of an addition to the single family dwelling.

2.0 Proposal

2.1 Background

The single storey bungalow was constructed in 1948 and there have been no major additions or renovations to the dwelling since that time. The dwelling currently features gables opened toward the street, horizontal siding, and a flush front entrance.

The applicant applied in 2016 to rezone the subject property to RU1c – Large Lot Housing with Carriage House, as well as add a second storey addition to the main dwelling. The Heritage Advisory Committee reviewed the application on October 20, 2016 and recommended support with some minor changes such as horizontal siding and multi-paned windows. Due to construction constraints, the applicant has revised the addition to a single storey and applied for a new Heritage Alteration Permit for the revised design. The carriage house is currently under construction.

2.2 Site Context

The property is identified as Late Vernacular Cottage in the Abbott Street & Marshall Street Heritage Conservation Areas Design Guidelines. The dominant style for the block is also Late Vernacular Cottage and there are no Heritage Registered properties on Knox Crescent.



Figure 1: Site Context

The streetscape of Knox Crescent is predominantly 1 storey or 1 ½ storey single family dwellings. Mature trees and vegetation are common on the block, and front yard setbacks range from approximately 4.5m to 9.0m. Many of the homes feature gables that are opened toward the street with stucco, horizontal siding, and cedar shingles.



Figure 2: 1965 Knox Crescent and 1969 Knox Crescent



Figure 3: Immediately adjacent neighbour at 1981 Knox Crescent

2.3 Project Description

The proposed addition to the single family dwelling is a single storey expansion to the side (east) and rear to provide increased living space on the main floor. The single storey addition maintains the established streetscape, height, and massing of the majority of the other homes on the block. The addition also includes a covered front verandah, with a portico style entrance. The gables are open toward the street and there are no proposed dormers. Horizontal hardie board siding is proposed with hardie board cedar shake siding on the gables and stone elements on the columns of the verandah. The proposed front yard setback is 8.175m which is consistent with several other properties on the block. The addition preserves two mature trees on site and there is no additional landscaping or fencing proposed. All parking is on the rear of the lot.

The addition was designed such that the carriage house which is currently under construction would still meet all of the zoning requirements for height and site coverage without triggering a variance.

Subject Property Map: 1983-1985 Knox Crescent



2.4 Zoning Analysis Table

Zoning Analysis Table		
CRITERIA	RU _{1c} ZONE REQUIREMENTS	PROPOSAL
Development Regulations		
Maximum Height	9.5 m / 2.5 storeys	5.32 m / 1 storey
Minimum Front Yard	4.5 m	8.175 m
Minimum Side Yard (south)	2.0 m	2.5 m
Minimum Side Yard (north)	2.0 m	2.1 m
Minimum Rear Yard	7.5 m	>7.5 m

3.0 Heritage Advisory Committee Comments

Staff are seeking a recommendation from the Heritage Advisory Committee regarding the Heritage Alteration Permit for the form and character of an addition to the single family dwelling.

Report prepared by: Trisa Brandt, Planner I

Approved for Inclusion: Terry Barton, Urban Planning Manager

Attachments:

Schedule A – Heritage Guidelines
 Applicant Rationale
 Plans & Drawings
 Photos

SCHEDULE A – Heritage Guidelines



1 **Subject:** 2 HAP17-0005, 1985 Knox Crescent

1.0 Heritage Conservation Area Guidelines (Kelowna Official Community Plan Chapter 16)

Objectives:

- Maintain the residential and historical character of the Marshall Street and the Abbott Street Heritage Conservation Areas;
- Encourage new development, additions and renovations to existing development which are compatible with the form and character of the existing context;
- Ensure that change to buildings and streetscapes will be undertaken in ways which offer continuity of the 'sense-of-place' for neighbours, the broader community; and
- Provide historical interest for visitors through context sensitive development.

Consideration has been given to the following guidelines as identified in Chapter 16 of the City of Kelowna Official Community Plan relating to Heritage Conservation Areas:

HERITAGE CONSERVATION AREA	YES	NO	N/A
Site Layout and Parking			
Are established front yard setbacks maintained within 10% of neighbouring building setbacks?	✓		
Are parking spaces and garages located in the rear yard?	✓		
Are established building spacing patterns maintained?	✓		
Does the carriage house complement the character of the principal dwelling?	✓		
Are accessory buildings smaller than the principal building?	✓		
Building Massing			
Is the established streetscape massing maintained?	✓		
Is the massing of larger buildings reduced?			✓
Roof Forms, Dormers and Chimneys			
Is the roof pattern in keeping with neighbouring buildings?	✓		
Are skylights hidden from public view?			✓
Are high quality, low maintenance roofing materials being used?	✓		

HERITAGE CONSERVATION AREA	YES	NO	N/A
Are the roofing materials similar to traditional materials?	✓		
Are the soffit, overhang and rain water drainage features in keeping with the building's architectural style?	✓		
Do secondary roof elements have a similar pitch as the principal roof?	✓		
Are chimneys in keeping with the building's architectural style?			✓
Cladding Materials			
Are low maintenance building materials being used?	✓		
Are the building materials similar to traditional materials?		✓	
Are exterior colours in keeping with the traditional colours for the building's architectural style?	✓		
Doors and Windows			
Are established window placement, style and window-to-wall area ratios maintained?	✓		
Are established door placement, style and door-to-wall area ratios maintained?	✓		
Is the main entrance a dominant feature visible from the street?	✓		
Is the main entrance in keeping with the building's architectural style?	✓		
Are the door and window design details consistent with the building's architectural style?		✓	
Landscaping, Walks and Fences			
Are existing healthy mature trees being retained?	✓		
Is the front yard landscaping consistent with neighbouring properties?	✓		
Is street facing fencing or screening landscaping no more than 1 m in height?			✓
Privacy and Shadowing Guidelines			
Are there clear sightlines from the street to the front yard and dwelling?	✓		
Does the building location minimize shadowing on the private open space of adjacent properties?	✓		

2.0 Abbott Street & Marshall Street Heritage Conservation Areas Development Guidelines

2.1 Third Civic Phase Architectural Styles (approx. 1933-1945)

The third civic phase spans from the end of the Great Depression, about 1933, and continues to the end of World War II, 1945. This period is noted for a declining interest in traditional styles in favour of smaller, less ornately detailed housing development. The dominant styles of this period are the Late Vernacular Cottage and the 'forward looking' Moderne architecture. However, well-to-do members of Kelowna's leading civic and commercial families continued to build large homes of more traditional style.

Late Vernacular Cottage Characteristics

- Less fanciful feel to the architecture
- Flush gable verges
- Stucco or horizontal siding
- Up to 2 storey massing
- Clustered vertical window sashes
- Asymmetrical façade design
- Flush front entrance
- Minor decorative detailing
- Gable roof forms
- Wood or interlocking asphalt shingle
- Side or rear yard parking

LETTER OF RATIONELLE
1985 KNOX CR

As some of you might know this application comes right after approval of a previous plan. As we began to get the Truss plans for the approved plan it became painfully obvious to us that due to some complicated engineering the plan became undesirable to build. The reason being is that we would have to open up the basement floor to put in new footings in 3 places to carry the load of the 2nd floor. We are in the area where lake water could seep up through the new openings and cause a myriad of concerns that we are not prepared to deal with, as they could be a financial burden that would put the whole project in jeopardy. So our only option is to go back to the drawing board and submit a new design.

The present house has been a nice little home on the block for over 65 years but the time has come for it to be upgraded and given new life. Its effective age in its present stage is limited. Since times and lifestyles have changed so much in 65 years the size and configuration of the house is now functionally obsolete. An upgrade in size and materials will allow it to look better on the lot and more fitting with the immediate neighbors which have also been modernized.

The plan is to give it an Original Style and feel with a 3/4 length porch reminiscent of the early days of this area where sipping tea on the front veranda was a regular occurrence. Where neighbors shared the value of a pleasant neighborhood.

The proposed addition will not look like an add on, but rather an originally built Character home maintaining the charm of yesteryear. This is why updating the rooflines is so essential. The proposed plan maintains much of the of original plan by repurposing some of the existing rooms and adding an extension of the original blueprint seamlessly with out having to take much of the old house to the landfill. Even the old roof trusses, ship lap, original doors, existing wood frame windows, plumbing, electrical, original garage "barn doors" and some lighting will be maintained for character and to be environmentally friendly.

The proposed lot plan includes retaining 90% of the existing flora including a large 65 year old Maple Tree, and a fully mature Cherry Tree. The plans have worked around these instead of looking at them as obstacles. For the area this is one of the larger lots and will absorb these changes with out feeling cramped. The amount of space between the 2 buildings is pleasantly large for a 2 dwelling lot.

The addition of a 3 car Garage with a 2 bedroom suite above, will provide new off street parking. Much needed quality rental space for hospital workers or downtown employee's will also be created. Both are within walking distance. The proposed Carriage house will share much of the character of the main house in its styling but will definitely share the same color pallet and materials. As there is a Carriage house

to the south and a new Garage to the north the proposed carriage house will fit right in. This will aid in helping out with Kelowna's housing crunch with minimal impact on its infrastructure.

GENERAL NOTES
 ALL WORK SHALL BE EQUAL IN ALL RESPECTS TO GOOD BUILDING PRACTICES.
 WRITTEN DIMENSIONS TAKE PRECEDENCE OVER SCALED DRAWINGS.
 THESE PLANS ARE FOR THE SOLE PURPOSE OF CONSTRUCTION ONLY. THEY MAY NOT BE USED FOR REPEAT CONSTRUCTION OR SOLD TO OTHERS FOR SUCH PURPOSES. THE DESIGN CONTAINED HEREIN IS TO BE A GUIDE ONLY AND CAN BE SUBJECT TO CHANGE AT ANY TIME. PROTOCOL HOME PLANNING & DESIGN ITS EMPLOYEES OR PRINCIPALS WILL NOT BE HELD LIABLE FOR ANY CHANGES DUE TO UNFORESEEN CIRCUMSTANCES IN CONSTRUCTION. BUILDING CODES OR ENGINEERING THAT MAY AFFECT THE ORIGINAL DESIGN OR ANY OTHER CONDITION THAT MAY AFFECT THE OVERALL BUILDING OF THIS OR ANY OTHER RELATED STRUCTURES ON THESE DRAWINGS.

R1-H LARGE LOT HOUSING

LEGAL DESCRIPTION

LOT 2
 PLAN 2767
 1985 KNOX CRESCENT
 KELOWNA BRITISH COLUMBIA

SITE COVERAGE

PRINCIPAL DWELLING (FOOTPRINT) 17883 m² (1925sf)
 VERANDA (@ DWELLING) 1524 m² (166sf)
 NEW GARAGE (FOOTPRINT) 8992 m² (968sf)
 NEW DECK (@ GARAGE) 30 m² (324sf)

TOTAL 31400 m² (3383sf)

LOT AREA = 789 m² (8494sf)

31400 m² / 789 m² = 40%
 ALLOWABLE COVERAGE = 40%

CARRIAGE HOUSE ALLOWANCES:

CARRIAGE HOUSE NET AREA: 6856 m² (738sf)
 PRINCIPAL DWELLING NET AREA: 35766 m² (3850sf)
 (LOWER MAN)

6856 m² / 35766 = 19%
 ALLOWABLE: 75% NET FLOOR AREA OF PRINCIPAL DWELLING

ACCESSORY DEVELOPMENT ALLOWANCES:

LOT AREA = 789 m²
 ACCESSORY BLDG AREA = 8992 m² (968sf)

8982 m² / 789 m² = 11%
 ALLOWABLE COVERAGE (OF ALL ACCESSORY BLDGS) = LESSER OF 14% OR 90 m² (968sf)

ALL MAJOR STRUCTURAL COMPONENTS & RELATED SUPPORTS AND CONNECTIONS TO BE ENGINEER REVIEWED & CERTIFIED AS REQUIRED BY MUNICIPAL AUTHORITY HAVING JURISDICTION AND THE LATEST VERSIONS OF BOTH THE NATIONAL AND BC BUILDING CODES & AMENDMENTS THEREON.

ALL DWELLINGS ARE TO BE VERIFIED ON SITE BY BUILDING CONTRACTOR. LOCATIONS OF POST BEARING PADS & BEARING WALL FOOTINGS TO BE CONFIRMED & THESE LOCATIONS TO BE DETERMINED TO BE ADEQUATE WITH PROPER BEARING ON SUBSTRATE & POTENTIAL LATERAL SHIFT DUE TO VIBRATION AND / OR EARTH MOVEMENT. GEO-TECHNICAL SURVEY TO BE CONFERRED TO VERIFY SUBSTRATE CONDITIONS REQUIRED.

95s Carriage House Regulations

1 (b) A Carriage House Shall Not Be Higher Than The Existing Principal Dwelling Unit on The Same Property as Measured To The Mount of Each Roof. Additionally, The Highest Point of a Carriage House Shall Not Be Higher Than The Highest Point of The Existing Dwelling Unit.

Height of Proposed Carriage House Roof Mount = 4.54m
 Height of Proposed Existing Dwelling Unit Renovation Roof Mount = 5.15m

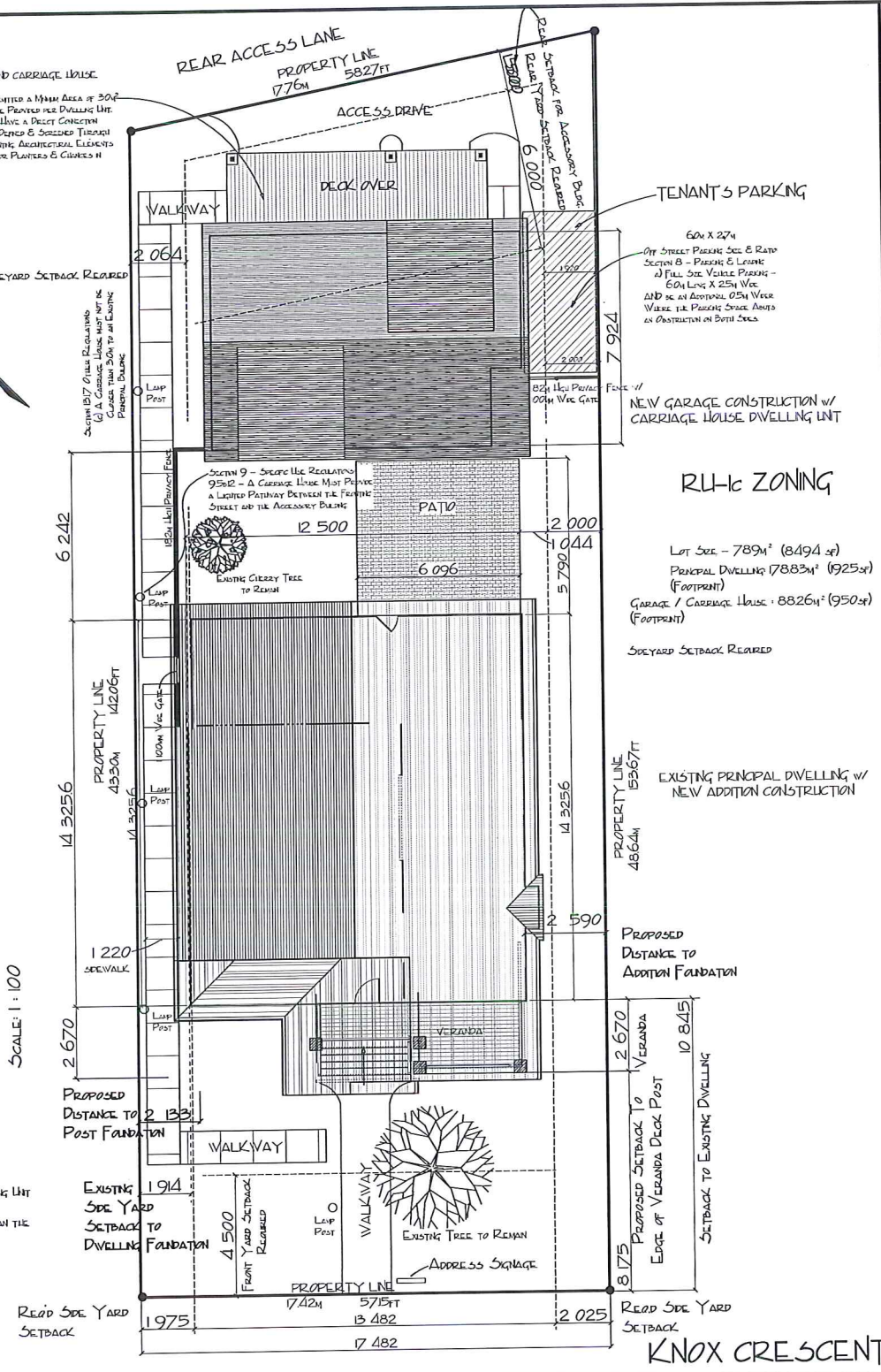
Highest Point of Proposed Carriage House Roof = 6.45m
 Highest Point of Proposed Main Dwelling Renovation = 6.80m

SECTION 95 SECONDARY SITE AND CARRIAGE HOUSE

95s II Where a Carriage House is Permitted a Minimum Area of 30% of Private Open Space Shall be Provided for the Dwelling Unit. The Private Open Space Shall Have a Direct Connection to the Habitable Space and be Defined & Separated Through Use of Landscaping Such as Planting Architectural Elements Such as Trellises Low Fences or Planters & Clusters of Grass Elements.

SITE PLAN

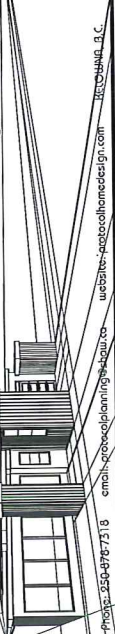
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SITE PLAN

Drawn By: CLC.
 Checked By: SEAN UPSHAW
 Drawing Number: PT164-01 of 11

PROTOCOL Home Planning & Design



NOTE:
 GENERAL CONTRACTOR IS RESPONSIBLE FOR VERIFICATION OF ALL BUILDING REQUIREMENTS AND COMPLIANCE TO B.C. BUILDING CODE REQUIREMENTS. ALL STRUCTURAL COMPONENTS TO BE ENGINEER DESIGNED OR VERIFIED FOR COMPLIANCE TO INTERNATIONAL BUILDING CODES. ALL LOADS FOR THE PROPOSED LOCATION OF THE BUILDING, SITE CONDITIONS TO BE TESTED AND APPROVED ACCORDING TO LOCAL BUILDING AUTHORITY REQUIREMENTS. SUBSTRATE STABILITY AND PROPER PERFORMANCE SHALL BE VERIFIED BY THE GENERAL CONTRACTOR TO PROVIDE A POSITIVE SLOPE TO DRAIN AND GROUND WATER DRAINAGE.

R1-H ZONING

Lot Size - 789 m² (8494 sf)
 Principal Dwelling: 17883 m² (1925 sf) (Footprint)
 Garage / Carriage House: 8826 m² (950 sf) (Footprint)
 Sideyard Setback Required

EXISTING PRINCIPAL DWELLING w/
 NEW ADDITION CONSTRUCTION

PROPOSED DISTANCE TO ADDITION FOUNDATION

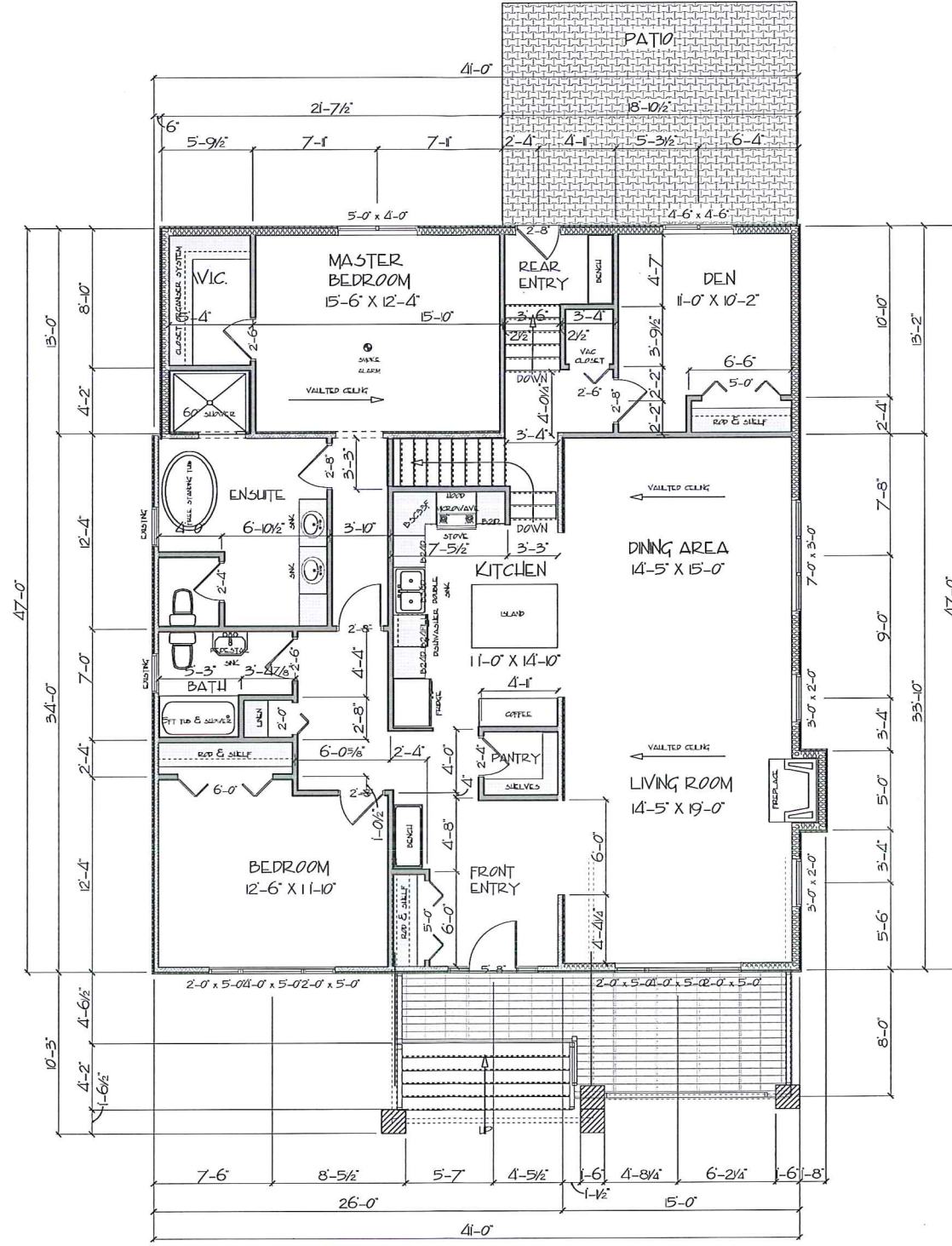
KNOX CRESCENT

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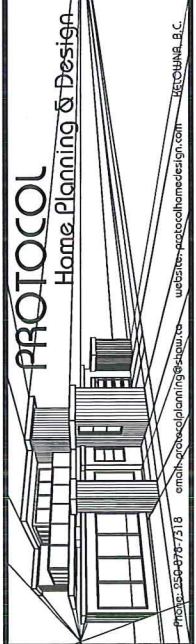
MAIN FLOOR PLAN - 1925 SF (178.83M²)
 (VERANDA - 166 SF (15.42M²))
 SCALE: 1/4" = 1'-0"

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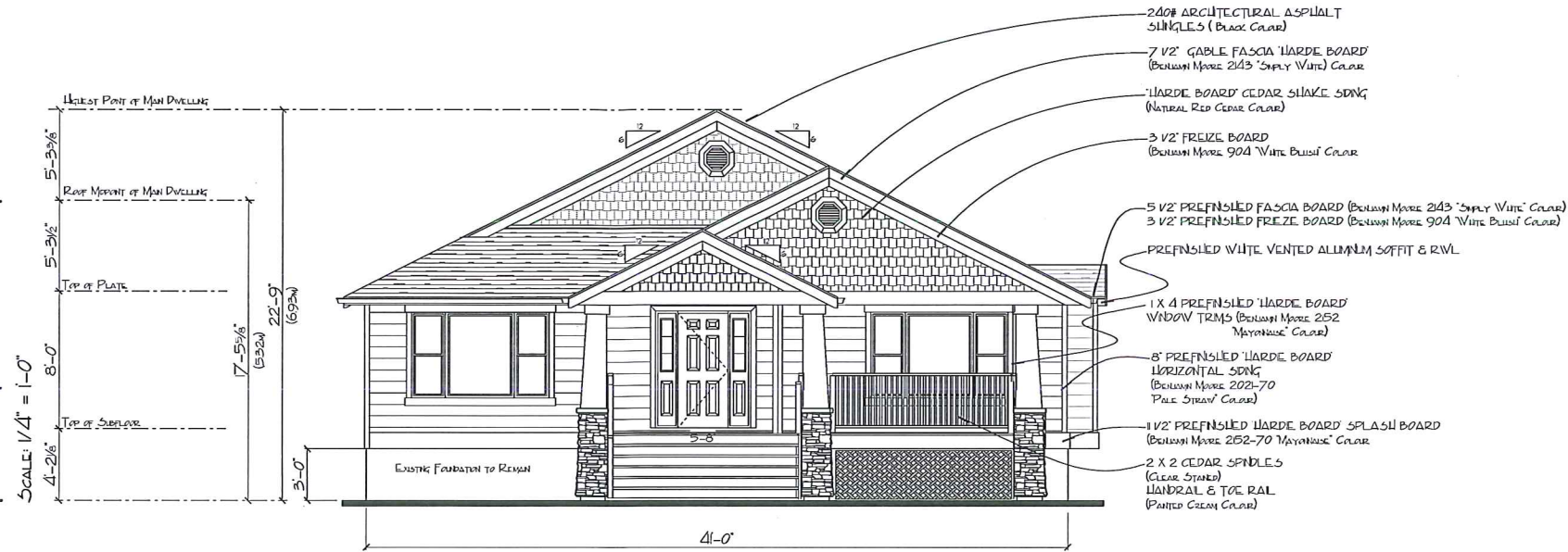
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MAIN FLOOR LAYOUT	
Approved By:	CLC.
Drawn By:	CLC.
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Date:	15 MAR. 2017
Checked By:	JJ & S LP SJLAW
Drawing Number:	PT12- of 11
1985 KNOX CRESCENT	

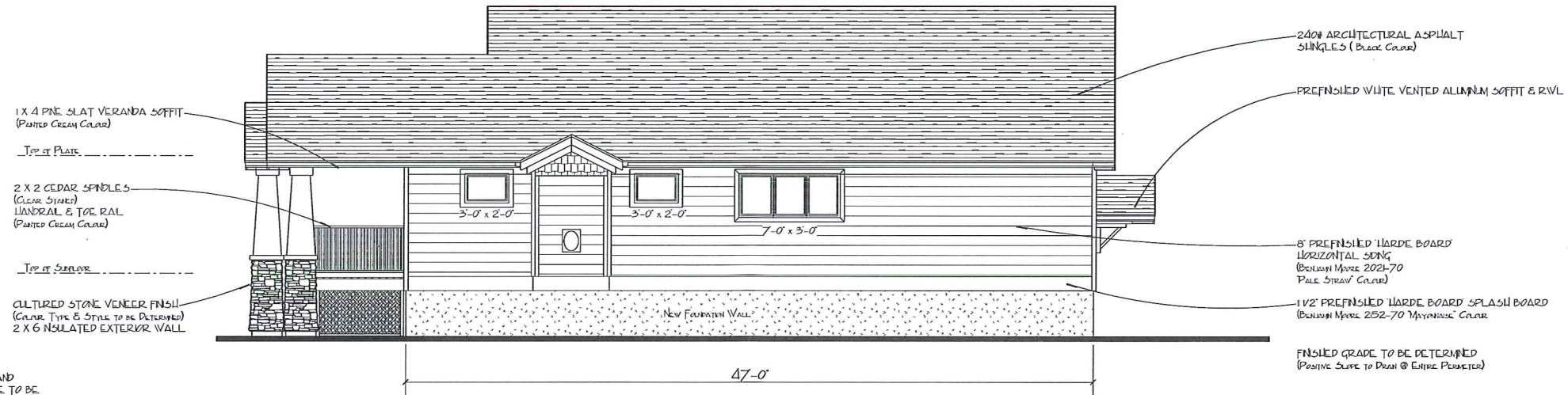
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FRONT ELEVATION



RIGHT SIDE ELEVATION

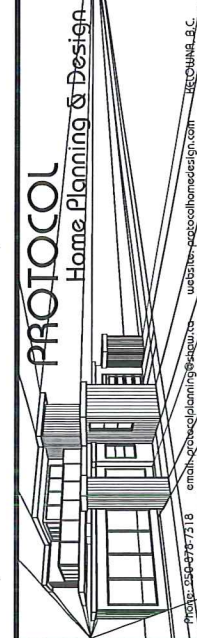
SCALE: 1/4" = 1'-0"



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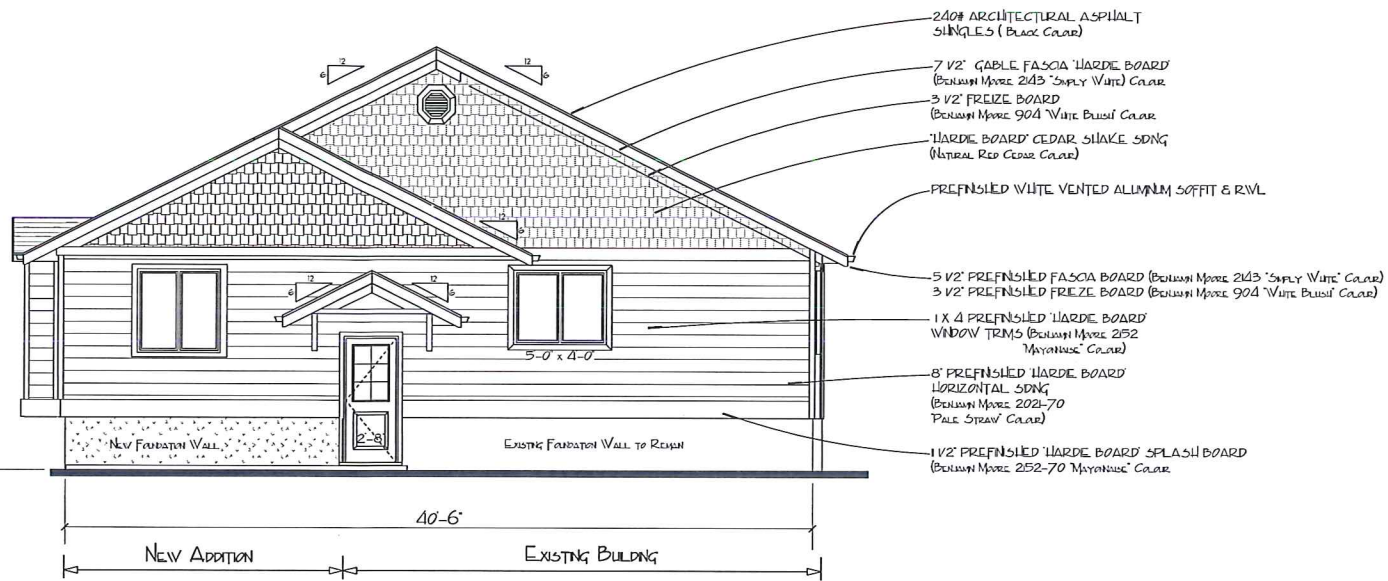
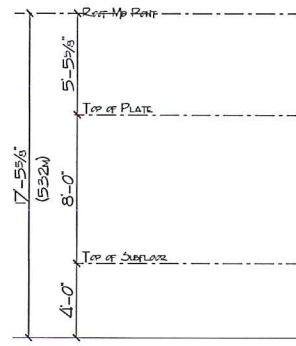
ELEVATIONS	
Drawn By: CLC.	Checked By: JI & S LP/SLAW
Approved By:	Drawing Number: PT12- of 11
Scale: AS SHOWN	1985 KNOX CRESCENT
Date: 15 MAR. 2017	



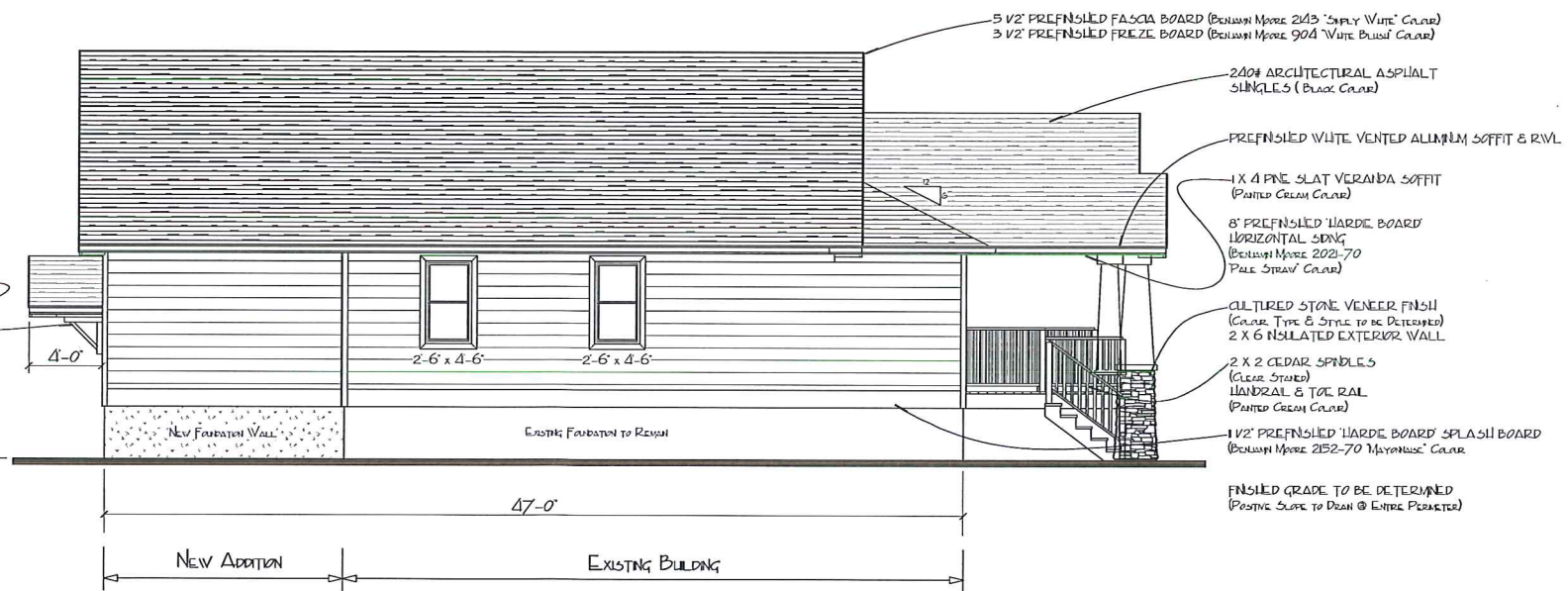
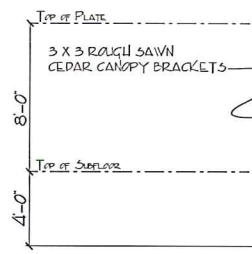
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REAR ELEVATION
 SCALE: 1/4" = 1'-0"



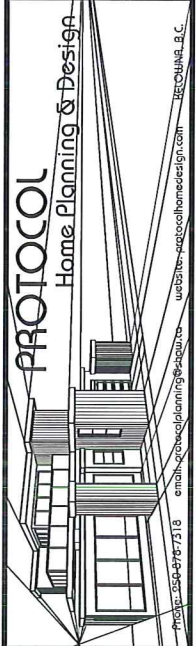
LEFT SIDE ELEVATION
 SCALE: 1/4" = 1'-0"



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ELEVATIONS	
Drawn By: CLC	Approved By:
Checked By: J & S LP/SLAW	Scale: A.S. SLOWN
Drawing Number: PT172- of 11	Date: 15 MAR 2017
	1985 KNOX CRESCENT



NOTE:
 OWNER, CONTRACTOR IS RESPONSIBLE FOR VERIFICATION OF ALL BUILDING MEASUREMENTS AND COMPLIANCE TO LOCAL BUILDING REGULATIONS. ALL STRUCTURAL COMPONENTS TO BE ENGINEER DESIGNED OR VERIFIED FOR COMPLIANCE TO NATIONAL AND LOCAL BUILDING CODES REGARDING FOUNDATION, STRUCTURE, ROOFING, MECHANICAL, ELECTRICAL AND PLUMBING. LOCATION OF THE BUILDING, SITE CONDITIONS TO BE DETERMINED AND ACCORDING TO LOCAL BUILDING AUTHORITY REGARDING SUBSTRATE STRENGTH AND PROST PENETRATION FOR THE PROPOSED BUILDING. FINISH GRADE TO BE DETERMINED BY CONTRACTOR TO PROVIDE A POSITIVE SLOPE TO DRAIN AND GRADING WITHIN PERMITS.



REPORT TO COMMITTEE



Date: April 21, 2016
RIM No. 0940-60
To: Heritage Advisory Committee
From: Community Planning Department (AC)
Application: HRA17-0001 **Owner:** City of Kelowna
Address: 4629 Lakeshore Rd **Applicant:** Worman Resources Inc.
Subject: Heritage Revitalization Agreement

Existing OCP Designation: S2RES – Single / Two Unit Residential
Existing Zone: P3 – Parks and Open Space
Heritage Register: Included

1.0 Purpose

To restore the two historical buildings onsite through a Heritage Revitalization Agreement (HRA) that would allow for some commercial uses and the addition of one new 2,200 sq. ft. (footprint) commercial building on the subject property.

2.0 Proposal

2.1 Background

The Surtees Property is a City owned parcel of significant historical value for the Okanagan, featuring two historical buildings that visually communicate what Kelowna was like in the early part of the 1900's. The Surtees Barn is said to be one of the most up-to-date barns in the area for its time, and the Surtees Homestead (also known as the Ritz Cafe) is believed to be the City's first 'house of ill repute'. Both buildings are identified on the City's Heritage Register and have been under ownership of the City since July of 2002. See 'Schedule D' for a full history of the property as identified by the applicant's heritage consultant.

In December 2009, City Council directed staff to proceed with the development of a Heritage Asset Management Strategy. At that time, the Surtees Property was identified as a top priority for potential adaptive re-use. In response to Council's direction, staff met with community stakeholders to receive input on a proposed re-use approach. Based on the information received at the stakeholder meeting, a Request for Expressions of Interest (RFEOI) was issued in July, 2012. The RFEOI was a high-level public call for ideas with the intent of casting a wide net without requiring proponents to invest the time and energy associated with a detailed proposal. The City received four responses regarding the RFEOI; however, upon staff review of the responses it was determined that none of them met the City's criteria or expectations.

In the fall of 2015, a potential partnership opportunity with Worman with regards to the redevelopment of the Surtees Property in a manner that meets the heritage preservation objectives of the City was brought to the attention of Staff. The City and the applicant agreed to the concept of a long-term lease over the lands within in the Surtees Property in exchange for restoration of the two significant heritage assets currently in disrepair. See 'Attachment B' to read the applicant's development rationale and collaboration efforts with City Staff.



Historic front facade (west elevation) of Surtees House at 4629 Lakeshore Road.



Archival photo showing south elevation of Surtees Barn with cross of church in the background (top; date unknown); photo showing existing condition of Surtees Barn, as viewed from southwest, with St. Andrew's Church in the background.

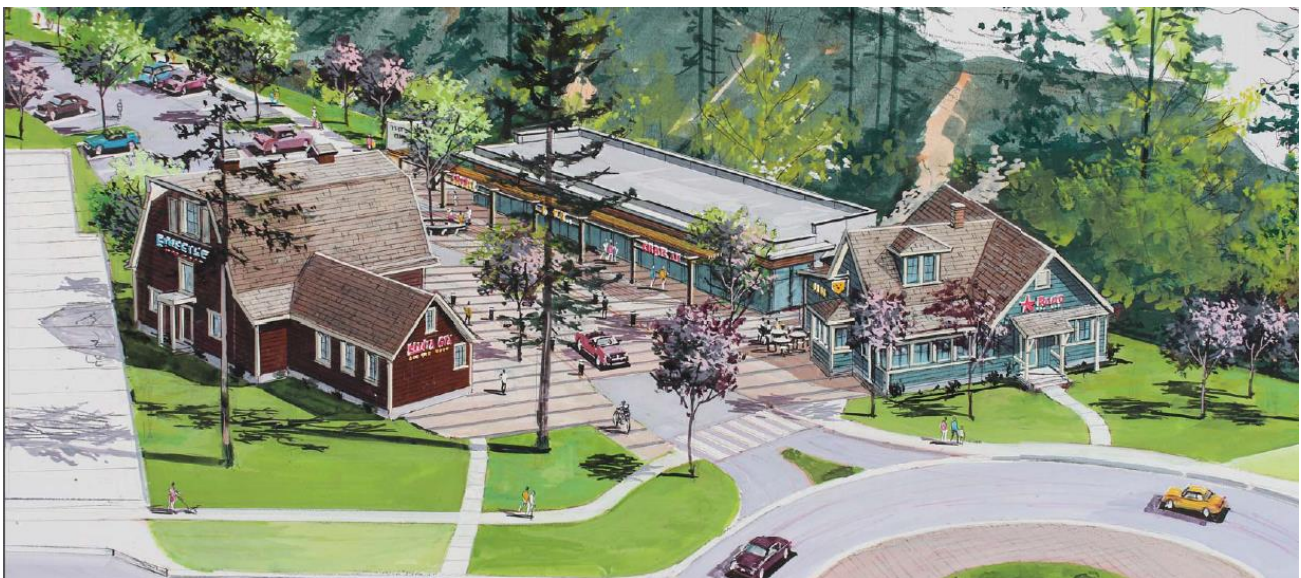
2.2 Project Description

The restoration of the Subject Property will assure the buildings' adaptive re-use as a community benefit, consistent with the heritage-related policies identified in the City of Kelowna's Official Community Plan. The Surtees Property is currently zoned P3 (Parks and Open Space). The Subject Lands will not be re-zoned. All future land uses of the Subject Lands will conform to the Heritage Revitalization Agreement ("HRA"). The land uses and development regulations for the HRA were based on the typical neighbourhood commercial uses as well as typical park uses. The parking requirements were based on site conditions and the needs of both park (trail head) demand and the future commercial demand. A Heritage Designation Bylaw has been contemplated in order to add the 'Surtees House & Barn' to the provincial 'Protected Heritage Buildings' list but no decision has been confirmed regarding the designation.

As part of the HRA, the applicant has provided a Conservation Plan that demonstrates how the character defining elements of the improvements will be preserved. This work has been completed with the assistance of a registered heritage planner (See Schedule 'D'). Further, as part of the HRA, the applicant with the assistance of the registered heritage planner, is required to provide regular updates to the City to ensure conformance to the Conservation Plan during construction.

All improvements of the buildings on the Subject Lands will be the responsibility of the applicant. The interior layout of the heritage buildings will be determined by the applicant, and the exterior heritage restoration of the existing buildings will be consistent with the Statement of Significance as set out in the City of Kelowna Heritage Register, in the Heritage Revitalization Agreement, and according to best practices as set out in the *Standards and Guidelines for the Conservation of Historic Places in Canada (Parks Canada, Second Edition, 2010)*. The HRA will allow for the relocation of the existing Surtees Barn and Homestead on the subject property as this facilitates the necessary site access and programming of the public realm.

In order to make the overall project financially viable, the HRA will also allow for the construction of one additional commercial building on the subject property. The new building will be limited to a site footprint of no greater than 2,200 square feet, in a location that complements the locations of the Surtees Barn and Homestead as well as the natural landscape.



The initial design goals of the overall project wanted to keep the heritage buildings as the primary features. As a result, the new building is located behind the heritage buildings and the height is kept to a single storey in order to not be visually dominant. Further, the design choice of the new commercial building did not try to mimic the existing architecture and rather chose to create a juxtaposition of styles on site. This design choice is consistent with the best practices guidelines relating to heritage redevelopment. One of the significant architectural elements incorporated into the new commercial building is inspired by an agricultural arbor. This arbor follows a long, linear design that mimics rows of orchards. This enhances the lineal pathway and creates an invitation to explore further into the future park. The shallow depth of the new building was also important to ensure a wide corridor through the park. The size and location of future signage has been identified for on the heritage buildings and the signage must meet the sign bylaw for the new commercial building. However, as per OCP policy, Staff have added a condition within the HRA stating all signage must be non-illuminated and non-animated. To clarify, non-illuminated signs does not prohibit external lighting of the sign.

The City has agreed to build the roundabout at the corner of Lakeshore Road and Collet Road. This improvement is critical for the following reasons:

- Transportation safety for people turning left from Collett Road onto Lakeshore Road and turning left from Lakeshore Road into the Surtees Property;
- Pedestrian safety for people crossing Lakeshore Road to either Collett Road or the existing commercial and restaurant areas;
- Financial viability of the proposed redevelopment of the Subject Lands; and,
- Continued viability of the neighbouring commercial and restaurant areas as the roundabout allows much easier access to the existing areas by reducing the need for people to have to turn left from the west side of Lakeshore onto the road.

The remainder of the Surtees Property will continue to be owned and operated by the City of Kelowna, and will serve as a staging area for the future Bellevue Creek linear park. The vision for the park is to construct a continuous off-road trail along the creek corridor for approximately 6.1 km starting at Okanagan Lake, continuing to the city limits with connections beyond to Myra-Bellevue Provincial Park. The parking area east of the Subject Lands will act as a trail head access for people wishing to park their vehicles and walk west to Okanagan Lake or east to Woodhaven Regional Park as well as additional parking for both the Surtees Lands and 4619 Lakeshore Road. The applicant will be required to guarantee public access from 6:00am – 11:00pm (or as otherwise stipulated in Bylaw No. 10680).

2.3 Community Planning

Community Planning is seeking input from the Heritage Advisory Committee on the following components:

1. Does the value of restoring the existing heritage structures support increasing the allowable commercial use on the subject property?
2. Should a Heritage Designation Bylaw be pursued for the two heritage structures?
3. Are the proposed uses and development regulations identified in the HRA appropriate?
4. Is the signage plan appropriate?
5. Form and Character considerations regarding the proposed new building on site.

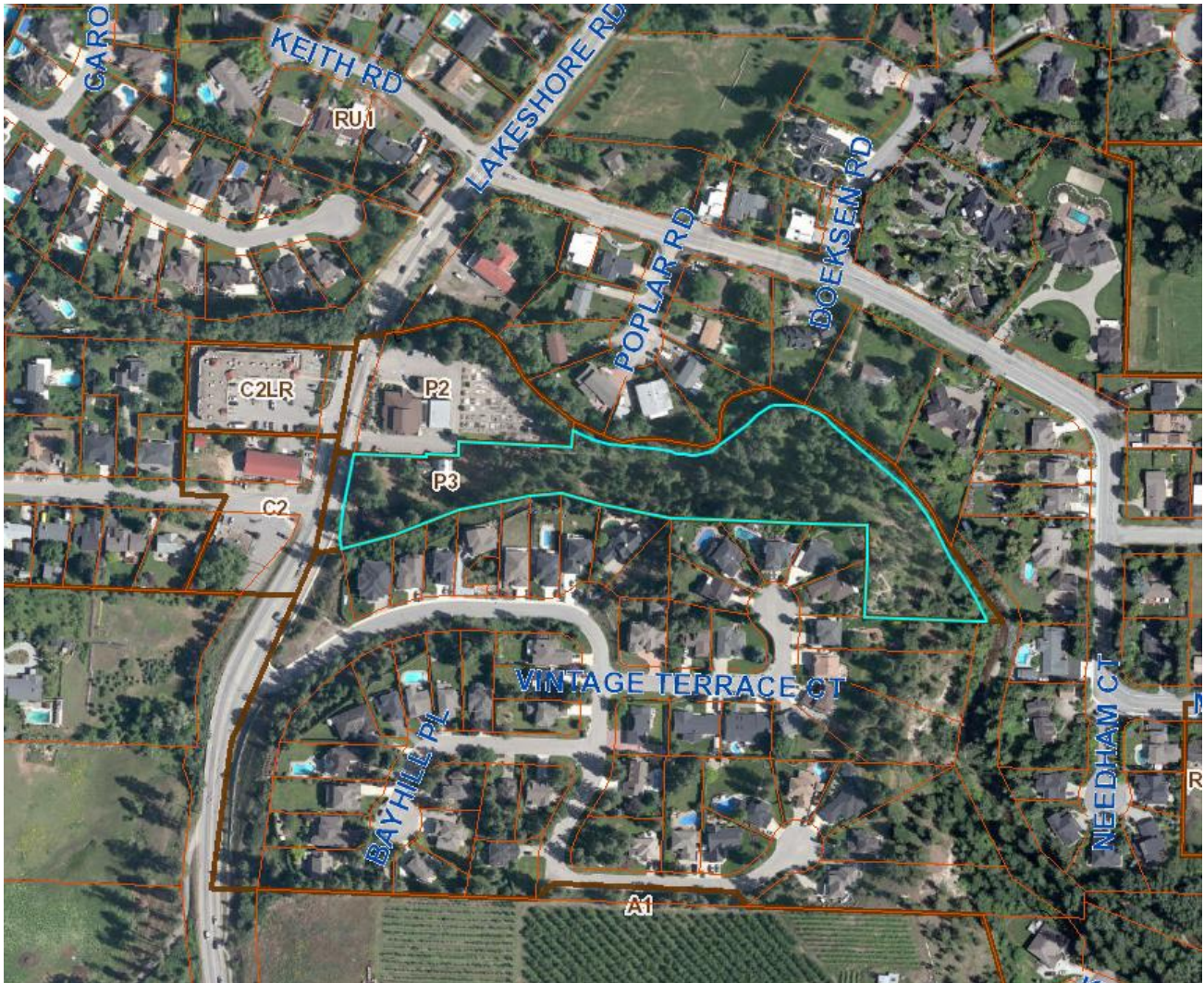
2.4 Site Context

The subject property is zoned P₃ – Parks and Open Space and is designated Park in the Official Community Plan (OCP). The property is within the Core Area east of the City Centre and within a Character Neighbourhood Development Permit Area. The City is the owner of the subject property (Surtees Property).

The property is in a boutique commercial area surrounded by residential neighbourhoods. Specifically, the adjacent land uses are as follows:

Orientation	Zoning	Land Use
North	P ₂ – Educational & Minor Institutional	Church
East	C ₂ – Neighbourhood Commercial	Commercial
South	RU ₁ – Large Lot Housing	Single Family Dwellings
West	RU ₁ – Large Lot Housing	Single Family Dwelling

Subject Property Map: 4629 Lakeshore Rd



3.0 Discussion of Relevant Policies

3.1 Official Community Plan (OCP)

Chapter 5 – Development Process

Objective 5.7: Identify and conserve heritage resources.

Policy 2 Heritage Designation:¹ Encourage owners of properties listed in the Kelowna Heritage Register and identified as significant to voluntarily provide long-term heritage protection to their properties through the use of a Heritage Designation Bylaw.

Policy 3 Heritage Revitalization Agreements:² Consider the adaptive reuse of heritage buildings appropriate within any future land use designation, provided that a Heritage Revitalization Agreement is negotiated with the City and provided that the project meets the criteria established for sensitive neighbourhood integration.

Chapter 9 - Heritage Policies

Objective 9.2 Identify and conserve heritage resources.³

Chapter 14 – Signs

Where signage is proposed for buildings with historical character or heritage significance (i.e. Listed on the Heritage Register, with Heritage Designation and/or located in the Abbott Street and Marshall Street Heritage Conservation Areas) that signage should use design inspiration from historical influences (e.g. non- illuminated and non-animated).⁴

Report prepared by: Adam Cseke, Planner II

Approved for Inclusion: Terry Barton, Urban Planning Manager

Attachments:

Attachment 'B' Applicant Rationale
Schedule 'A' Heritage Revitalization Agreement (HRA)
Schedule 'B' HRA attached drawings
Schedule 'C' HRA Landscape Plan
Schedule 'D' Heritage Consultant Report (Luxton Report)

¹ City of Kelowna, Official Community Plan Chapter 5, Objective 5.7, Policy 2

² City of Kelowna, Official Community Plan Chapter 5, Objective 5.7, Policy 3

³ City of Kelowna, Official Community Plan Chapter 9, Objective 9.2

⁴ City of Kelowna, Official Community Plan Chapter 14, Policy 17.4



ATTACHMENT **B**

This forms part of application

HRA17-0001

Planner
Initials **AC**



Development Rationale

**Re: Surtees House and Barn
4629 Lakeshore Road**

This application for the Surtees Property at 4629 Lakeshore is an excellent example of like-minded people working towards a common goal. The first step was Council making it a priority to come up with creative ways to save heritage assets. Staff then took that direction and began exploring options. We were fortunate to be approached for our input. We met on site and wandered around a beautiful site on a rainy day and looked at two very dilapidated buildings. Although it was difficult to see through the existing state of disrepair, ideas began to percolate. What, if any, viable business plan could we put together to justify the large costs associated with the rehabilitation of these buildings. As a fan of adaptive reuse, we really wanted to come up with something that would allow new uses for these historic buildings. The inside of the barn is particularly spectacular! The next step was to meet with the Parks Department and discuss their goals and objectives for the site and ensure that these could be met. Access to the site also needed to be considered so multiple discussions were undertaken with the Transportation Department to review and finalize a practical solution. This also led to discussions amongst the adjoining neighborhoods, especially the Collett Road area as it is the most affected. We also consulted heritage planners to get their input and advice. This application is a collaboration of all this input, bundled up into what we believe is a result which we can all be proud of.

From this collaboration, the number one priority on everyone's list was rehabilitation of the two heritage buildings. To do this the right way, we had discussions with several people in Kelowna who have a keen interest in heritage. All advice was that the leading expert on heritage in BC (and possibly western Canada) is Donald Luxton. His company was retained and the report is attached for in-depth information. There are two main areas of focus in the report. The first is location. Priority should be given to keep the buildings on their original lot. This is obviously straightforward as we are not moving the buildings off site. The intent is to move the buildings slightly to facilitate the new access road. The house will be moved slightly south, while the barn will move to the west. The orientation to each other will remain almost identical. The second focus was maintaining each of their character defining elements as listed in the report. The fortunate thing about the structures is that they both have very usable floor plans including window and door placement. The only substantial change will be the removal of 2 small "newer additions" from the house. There was a poorly built addition to the south side of the house that will be removed to allow for the relocation of the house to the south. There is also a very small addition to the rear of the home that will be removed. Beyond those 2 structural changes, there will be very little change to the exterior of the buildings. On the barn, where there are sliding doors or doors that aren't watertight, we will be updating these. One example is the sliding doors high up in the hay loft; these will be retained in an open position and a clear window will be put in place. This will also have the added benefit of allowing people to see into the amazing roof structure

P. 250.762.0040

F. 250.762.0550



ATTACHMENT B

This forms part of application

HRA17-0001

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Initials

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from outside. As we move through the rehabilitation of these buildings, we will work within the guidelines and recommendations included in the Donald Luxton report.

Parks Department goals and objectives were communicated through initial meetings, followed up with a planning session. The goals were 1) ensure a park feel, 2) ensure a way to convey that this will be a trailhead, 3) maintain a farm like feel, and 4) celebrate the buildings as part of this setting. All of these priorities have been incorporated into the design. Every effort was made to identify and maintain as many existing trees as possible, specifically the older more mature fir and pine trees located next to Lakeshore. We also hope to collaborate with the heritage community to create 2 heritage themed information panels within the new plaza area.

Transportation Department wanted to ensure this project could achieve a safe access and that any solution would benefit the overall road network. This is obviously a difficult location given the nearby school zone and the amount of traffic that comes down the hill each day. The preferred solution will be a roundabout design which has been incorporated into our site planning. This project also contributes financially towards the cost of this roundabout.

The surrounding community feedback was that the project enhances their neighbourhood. Of particular concern was improving the access to and from Collett Road, both pedestrian and vehicle. As part of a linear path that will eventually extend from the lake all the way to Crawford, it was important that the site ensure easy access for those users across Lakeshore Road and through the site as part of this linear path.

From our side, as the “funding” partner in this equation, we obviously had to figure out how to make this financially viable. As a community builder, our priority, right from our first introductory meeting on site, was to enhance the site and not have to develop the site to its maximum density for it to be viable. Early on though it was obvious that to make the project viable we were going to need to add some density to the site. The MOU contemplated a new building with 4,200 sq. ft. (2,100 sq. ft. per floor). As we went through the design process, it became clear that a 2-storey building would overwhelm the heritage buildings. To keep the heritage buildings as the primary feature, we decided to propose only a single-storey building of 2,100 sq. ft.. Rather than designing something that would attempt to mimic the existing buildings, the architecture chosen creates a juxtaposition. This follows the best practices relating to heritage redevelopment guidelines. The other new architectural element incorporated into the new building is inspired by an agricultural arbor. This arbor follows a long, linear design that mimics rows of orchards. This enhances the lineal pathway and creates an invitation to explore further into the future park. The shallow depth of the new building was also important to ensure a wide corridor through the park.

The opportunity to save and enhance these heritage buildings is both an honour and a privilege. Our hope is that through this collaborative approach to the site design we have created a project that will shine, both today and far into the future.

P. 250.762.0040

F. 250.762.0550

SCHEDULE "A"
HERITAGE REVITALIZATION AGREEMENT

THIS AGREEMENT dated as of the ___ day of _____, 2017

BETWEEN:

City of Kelowna, a Municipal Corporation having offices at 1435 Water Street, Kelowna, British Columbia V1Y 1J4

(herein called the "CITY")

OF THE FIRST PART

AND: JEM HTB Properties Inc. of 401 – 590 KLO Road, Kelowna, British Columbia, V1Y7S2

(herein called the "LEASEE")

OF THE SECOND PART

WHEREAS a local government may, by bylaw, enter into a Heritage Revitalization Agreement with the Leasee of property identified as having heritage value, pursuant to Section 610 of the *Local Government Act*;

AND WHEREAS the Leasee has interest in certain real property on which is situated a building of heritage value, pursuant to the City's Heritage Register, which property and building are located at 4629 Lakeshore Road, Kelowna, BC and legally described as:

Parcel Identifier: 025-433-997
Lot A, Section 25 Township 28, SDYD, Plan KAP71341

(herein called the "Heritage Lands")

AND WHEREAS the Leasee has presented to the City a proposal for the use, development and preservation of the Heritage Lands and has voluntarily and without any requirement by the City, entered into this agreement pursuant to Section 610 of the *Local Government Act*;

AND WHEREAS a local government must hold a Public Hearing on the matter before entering into, or amending, a Heritage Revitalization Agreement if the agreement or amendment would permit a change to the use or density of use that is not otherwise authorized by the applicable zoning of the Heritage Lands and for these purposes Section 464 through 470 of the *Local Government Act* apply;

AND WHEREAS within thirty days after entering into, or amending, a Heritage Revitalization Agreement the local government must file a notice in the Land Title Office in accordance with Section 594 of the *Local Government Act* and give notice to the Minister responsible for the *Heritage Conservation Act* in accordance with Section 595 of the *Local Government Act*;

NOW THEREFORE in consideration of the mutual promises contained in this agreement and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties agree as follows:

SCHEDULE "A" HRA₁**1.0 Heritage Revitalization**

- 1.1 The parties agree that the Heritage Lands have heritage value, deserving of protection and conservation and the Leasee specifically agrees to maintain, preserve and protect the heritage character of the buildings located on the Surtees Property in accordance with attached Schedule "AA".
- 1.2 The parties agree that the Heritage Lands may, notwithstanding Zoning Bylaw No. 8000 including the provision identified in the P₃ – Parks and Open Space zoning on the Heritage Lands, be developed under the following regulations:

HRA₁₇-0001 Regulations	
CRITERIA	Parameter
Permitted Uses	
Principal Uses	(a) animal clinics, minor (b) breweries and distilleries, minor (c) child care centre, major (d) child care centre, minor (e) community garden (f) community recreation services (g) food primary establishment (h) liquor primary establishment, minor (i) parks & open space (j) participant recreation services, indoor (k) participant recreation services, indoor (l) personal service establishments (m) private clubs (n) public libraries and cultural exhibits (o) retail liquor sales establishment (p) retail stores, convenience (q) retail stores, general
Secondary Uses	(a) agriculture, urban (b) amusement arcades, minor (c) home based businesses, minor (d) residential security/operator unit
Development Regulations	
Max commercial FAR	0.3
Max Residential FAR	0.2
Max Site Coverage	40%
Max Height	10.5 m or 2 ½ storeys
Setbacks	n/a
Parking Regulations	
Parking for Commercial	17 stalls required
Parking for Public (Trail Head spaces)	13 stalls
Other Regulations	
Specific Rules	a) Drive-in and drive-thru food services are not a permitted form of development
Notes	
Definitions and meaning of words are extracted from City of Kelowna Zoning Bylaw No.8000 as amended from time to time.	

SCHEDULE "A" HRA1

- 1.3 The parties agree that, except as varied or supplemented by the provisions of this agreement, all bylaws and regulations of the City and all laws of any authority having jurisdiction shall apply to the property and commercial business.
- 1.3.1 To clarify Bylaw No. 10515 Development Cost Charges will not apply to any of the restored buildings onsite and will only apply to the one (1) new commercial building permitted through this agreement.
- 1.4 Where a Heritage Alteration Permit is required, the discretion to approve, refuse, or revise such permit is delegated by Council to the Director of Community Planning.
- 2.0 Conservation and Maintenance of Existing Development.**
- 2.1 The leasee agrees not to alter the exterior of the heritage buildings or heritage character other than as described in Schedule "B" pursuant to a Heritage Alteration Permit issued by the City, and in accordance with this agreement.
- 2.2 The leasee agrees to maintain the exterior of the Heritage Buildings (barn and house) on the Heritage Lands in general accordance with the Heritage Report labelled "Surtees House & Barn, 4629 Lakeshore Road" prepared by Donald Luxton and Assoc. (dated March 2017) attached hereto as Schedule "D". The interior layout of the heritage buildings will be determined by the Leasee, subject to BC Building Code requirements.
- 2.3 If original features must be replaced, the new material shall be similar or identical to the original. Where original features were removed through earlier renovations or alterations and the replacements were not in keeping with the original style of the building, any subsequent replacement of these features shall complement the building's heritage style.
- 3.0 Proposed Development**
- 3.1 The parties agree that no more than one (1) new commercial building with a foot print of no more than 2,200 square feet and a total gross building area of no more than 4,400 square feet. The building character of this new building is to contrast with the existing heritage buildings in a manner that provides a strong juxtaposition between the two forms. The building is to confirm to provincial building codes. Such new development is attached hereto as Schedule "B".
- 3.2 The Leasee agrees to undertake and maintain appropriate landscaping on the subject property in general accordance with the landscape plan attached hereto as Schedule "C" and forming part of this agreement.
- 3.3 The Leasee agrees to undertake and maintain an internal road network as required for vehicle circulation and associated parking areas. The road network should be able to accommodate future parking expansion requirements by the City for the Bellevue Creek linear park. A combination of asphalt and concrete or concrete pavers shall be used to create an aesthetically pleasing road network. All pedestrian crossings over the road area shall be combined with traffic calming measures such as raised crossings and signage to ensure pedestrian safety. This road network will be in accordance with the landscape plan attached hereto as Schedule "C".
- 3.4 The Leasee agrees to undertake and maintain public (pedestrian and vehicular) access from Lakeshore Road to the future trail head for the Bellevue Creek Linear Park. This access network will be in accordance with the landscape plan attached hereto as Schedule "C". The Leasee will be required to guarantee public access from 6:00am – 11:00pm (or as otherwise stipulated in Bylaw No. 10680). The Leasee acknowledges that the Subject Lands will be encumbered with a Statutory Right of Way guaranteeing public access to the site in a manner agreed upon between the City and Leasee.
- 3.5 It is the goal of the City and Leasee to preserve the natural state of the site. The City understands that due to the development and the associated road right of way, some trees will need to be

SCHEDULE "A" HRA1

removed. All efforts shall be made by the Leasee to minimize the site impact in order to protect the trees and hillside vegetation. There is a registered covenant (KT71699) on title to protect the existing hillside and associated vegetation.

- 3.6 As part of this agreement it is understood that the Leasee will require signage on each of the buildings including the Heritage Buildings. All signage will conform to City of Kelowna Sign Bylaw # 8235. For the Heritage Buildings signage will be limited to the approximate size and locations as described within Schedule "B". All signage on the property must be non-illuminated and non-animated.

4.0 Damage or Destruction

- 4.1 In the event that no more than 75% of the Heritage Building is damaged, the parties agree as follows:

a) The Leasee may repair the Heritage Building in which event the Leasee shall forthwith commence the repair work and complete same within one year of the date of damage;

OR, in the event that the Heritage Building is destroyed,

b) The City may, by bylaw, and after conducting a Public Hearing in the manner prescribed by Sections 464 through 470 of the *Local Government Act*, cancel this agreement, whereupon all use and occupation of the Heritage Lands shall thenceforth be in accordance with the zoning bylaws of the City and in accordance with all other bylaws or regulations of the City or any other laws of authority having jurisdiction.

5.0 Breach

- 5.1 In the event that the Leasee is in breach of any term of this Agreement, the City may give the Leasee notice in writing of the breach and the Leasee shall remedy the breach within 30 days of receipt of the notice. In the event that the Leasee fails to remedy the breach within the time allotted by the notice, the City may, by bylaw and after conducting a Public Hearing in the manner prescribed by Sections 464 through 470 of the *Local Government Act*, cancel this Agreement whereupon all use and occupation of the Heritage Lands shall thenceforth be in accordance with the zoning bylaws of the City and in accordance with all other bylaws or regulations of the City or any other laws of authority having jurisdiction.

6.0 Amendment

- 6.1 The parties acknowledge and agree that this Agreement may only be amended by one of the following means:

a) By bylaw with the consent of the parties provided that a Public Hearing shall be held if an amendment would permit a change to use or density of use on site or;

b) By Heritage Alteration Permit (HAP), issued pursuant to Section 617 of the *Local Government Act*.

7.0 Representations

- 7.1 It is mutually understood and agreed upon between the parties that the City has made no representations, covenants, warranties, promises or agreements expressed or implied, other than those expressly contained in this Agreement.

8.0 Statutory Functions

- 8.1 Except as expressly varied or supplemented herein, this Agreement shall not prejudice or affect the rights and powers of the City in the exercise of its statutory functions and responsibilities including, but not limited to, the *Local Government Act* and its rights and powers under any

SCHEDULE "A" HRA1

enactments, bylaws, order or regulations, all of which, except as expressly varied or supplemented herein, are applicable to the Heritage Lands.

9.0 Inurement

9.1 This Agreement inures to the benefit of and is binding upon the parties hereto and their respective heirs, executors, administrators, successors and assigns.

10.0 Other Documents

10.1 The Lessee agrees at the request of the City, to execute and deliver or cause to be executed and delivered all such further agreements, documents and instruments and to do and perform or cause to be done and performed all such acts and things as may be required in the opinion of the City to give full effect to the intent of this Agreement.

11.0 Notices

11.1 Any notice required to be given pursuant to this Agreement shall be in writing and shall either be delivered mailed by registered mail as follows:

(a) To the City:

City of Kelowna
1435 Water Street
Kelowna, B.C. V1Y 1J4

ATTENTION: City Clerk

(b) To the Lessee:

JEM HTB Properties Inc.
401 – 590 KLO Road
Kelowna, BC
V1Y7S2

Or, to such other address to which a party hereto may from time to time advise in writing

12.0 No Partnership or Agency

12.1 The parties agree that nothing contained herein creates a relationship between the parties of partnership, joint venture or agency.

IN WITNESS WHEREOF this Agreement has been executed by the parties hereto on the day and year first above written.

CITY OF KELOWNA
By its authorized signatories

Mayor

City Clerk

JEM HTB Properties Inc.
By its authorized Signatories

Shane Worman

In the presence of:

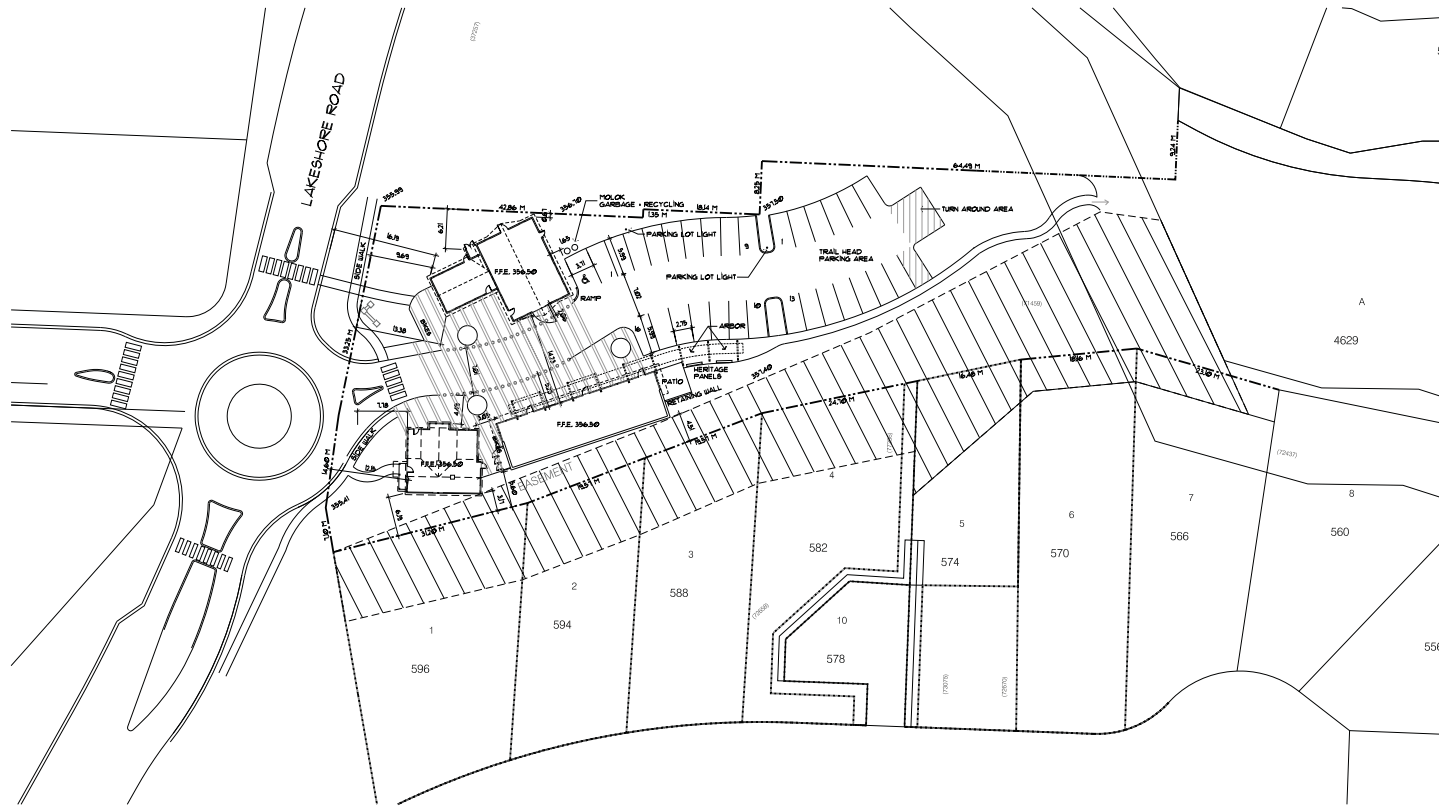
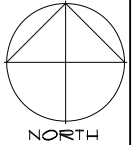
Witness (print name)

Witness (Signature)

Address

Occupation





SITE PLAN
SCALE: 1" = 30'-0"

PROJECT DATA	
CIVIC ADDRESS: 4629 LAKESHORE ROAD, KELOWNA, BC	
LEGAL DESCRIPTION: LOT A, PLAN 71341, DL, O.D.Y.D.	
CURRENT ZONING: P3	
BUILDING AREA	
EXISTING BARN MAIN FLOOR =	2,025 SQ.FT. (188.1 SQ.M.)
EXISTING BARN SECOND FLOOR =	1,415 SQ.FT. (131.5 SQ.M.)
EXISTING HOUSE MAIN FLOOR =	1,242 SQ.FT. (115.4 SQ.M.)
NEW CRU MAIN FLOOR =	2,090 SQ.FT. (194.2 SQ.M.)
TOTAL NET BUILDING AREA = 6,772 SQ.FT. (629.2 SQ.M.)	
PARKING	
COMMERCIAL SPACES PROVIDED	17 STALLS
TRAIL HEAD SPACES PROVIDED	13 STALLS

SCHEDULE B

This forms part of application
HRA17-0001

Planner Initials **AC**



City of Kelowna
COMMUNITY PLANNING

SURTESS HERITAGE PARK
4629 LAKESHORE ROAD, KELOWNA

SCALE: 1" = 30'-0" **SITE PLAN**

DATE: MARCH 8, 2017



DRAWING No. **A0**



OUTLAND DESIGN
LANDSCAPE ARCHITECTURE

206 - 1889 Spall Road
Kelowna, BC V1Y 4R2
T (250) 868-9270
www.outlanddesign.ca



PROJECT TITLE
SURTEES PROPERTY

Kelowna, BC

DRAWING TITLE
**CONCEPTUAL
LANDSCAPE PLAN**

ISSUED FOR / REVISION	
1	17.03.10 Review
2	17.03.13 Review
3	
4	
5	

PROJECT NO	17-012
DESIGN BY	FB
DRAWN BY	NG
CHECKED BY	FB
DATE	MAR 13, 2017
SCALE	1:200

SEAL



DRAWING NUMBER

L1/1

ISSUED FOR REVIEW ONLY
Copyright Reserved. This drawing is the property of Outland Design
Landscape Architecture Limited and shall not be reproduced,
resold, or lent out without permission.

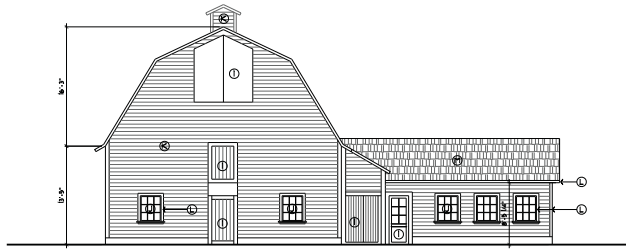


SCHEDULE C

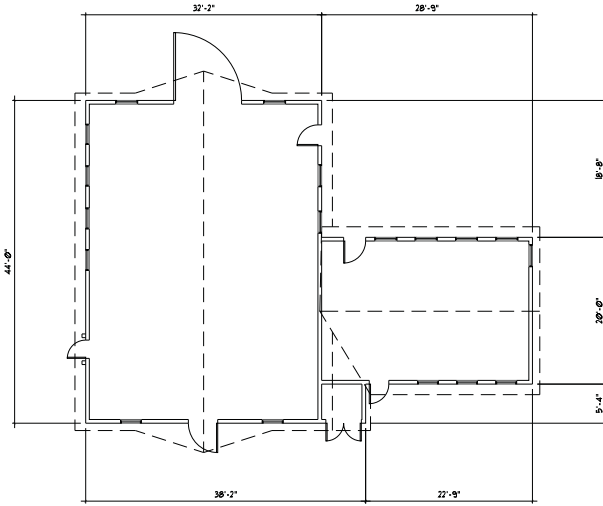
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HRA17-0001

Planner Initials **AC**

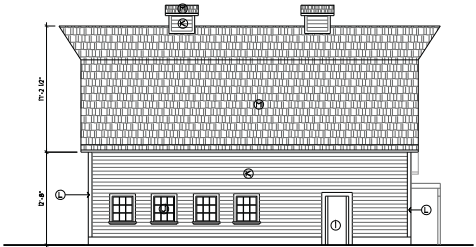
City of Kelowna
COMMUNITY PLANNING



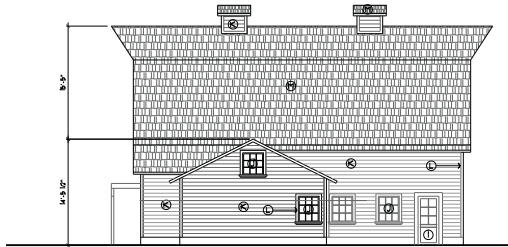
EXISTING RED BARN - NORTH ELEVATION
SCALE: 1/8" = 1'-0"



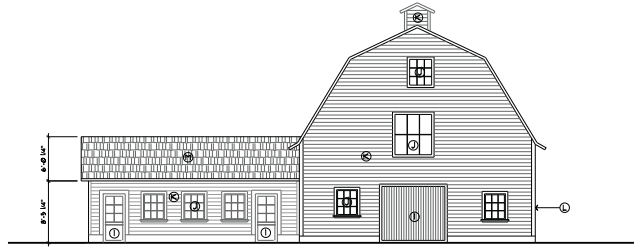
EXISTING RED BARN - FLOOR PLAN
SCALE: 1/8" = 1'-0"



EXISTING RED BARN - EAST ELEVATION
SCALE: 1/8" = 1'-0"



EXISTING RED BARN - WEST ELEVATION
SCALE: 1/8" = 1'-0"



EXISTING RED BARN - SOUTH ELEVATION
SCALE: 1/8" = 1'-0"

LEGEND:

- Ⓐ PRECAST CONCRETE INSULATED PANELS
- Ⓑ STUCCO
- Ⓒ PRE-FINISHED METAL FLASHING
- Ⓓ WOOD CANOPY FEATURE
- Ⓔ PRE-FINISHED EXTRUDED ALUM. WINDOW OR DOOR
- Ⓕ METAL WOOD DOOR - FRAME, PAINTED
- Ⓖ 4" X 6" STEEL CANOPY FRAME, PAINTED BLACK
- Ⓗ METAL PANEL ROOFING, BLACK
- Ⓘ EXISTING WOOD DOOR - FRAME, PAINTED
- Ⓚ EXISTING WOOD WINDOW, PAINTED
- Ⓛ EXISTING WOOD SIDING, PAINTED
- Ⓜ EXISTING WOOD TRIM, PAINTED
- Ⓝ CEDAR SHINGLES
- Ⓟ ROUGH SAUN, HORIZONTAL WOOD SIDING
- Ⓠ EXPOSED GLULAM BEAM, PAINTED

SCHEDULE B

This forms part of application
HRA17-0001

Planner Initials AC

City of **Kelowna**
COMMUNITY PLANNING



SURTRESS HERITAGE PARK 4629 LAKESHORE ROAD, KELOWNA	
SCALE: 1/8" = 1'-0"	EXT'G RED BARN
DATE: MARCH 8, 2017	
	DRAWING No. AI



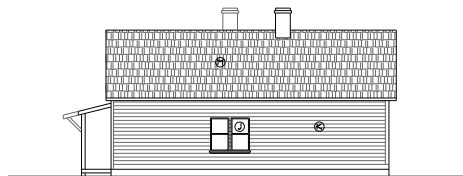
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SCALE: 1/8" = 1'-0"



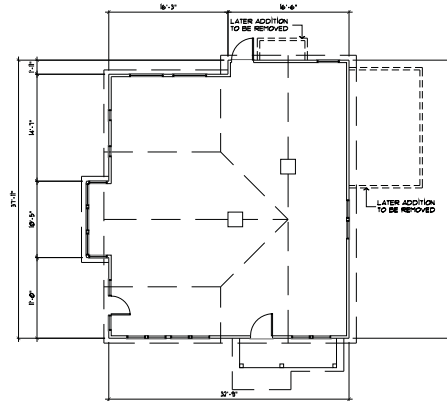
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SCALE: 1/8" = 1'-0"



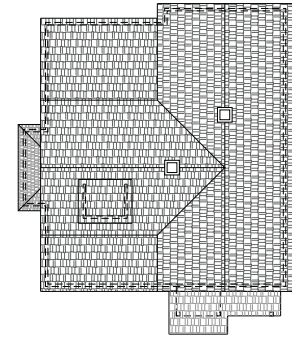
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SCALE: 1/8" = 1'-0"



EXISTING WHITE HOUSE - SOUTH ELEVATION
SCALE: 1/8" = 1'-0"



EXISTING WHITE HOUSE - FLOOR PLAN
SCALE: 1/8" = 1'-0"



EXISTING WHITE HOUSE - ROOF PLAN
SCALE: 1/8" = 1'-0"

SCHEDULE B

This forms part of application
HRA17-0001

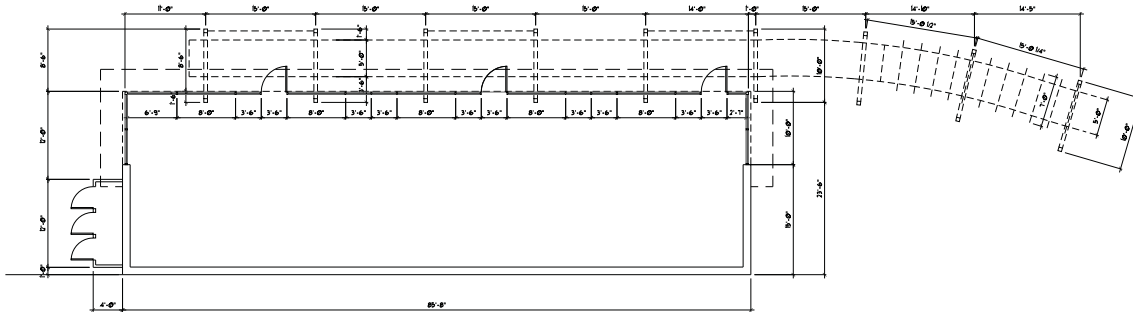
Planner Initials **AC**

City of Kelowna
COMMUNITY PLANNING

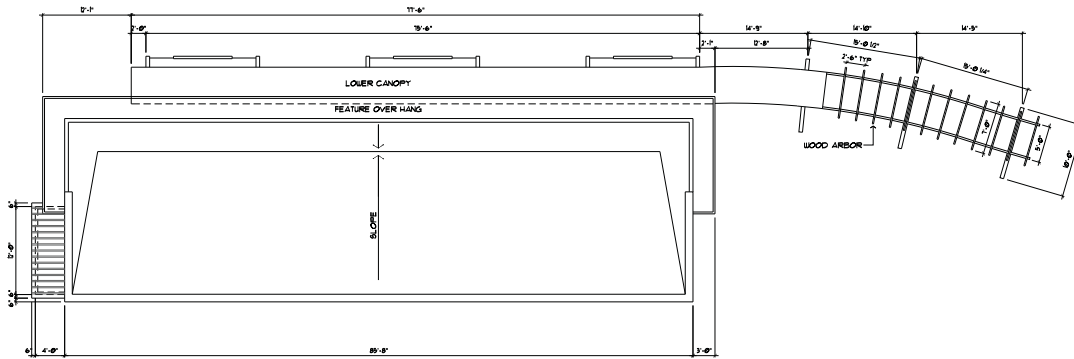
LEGEND:

- Ⓐ PRECAST CONCRETE INSULATED PANELS
- Ⓑ STUCCO
- Ⓒ PRE-FINISHED METAL FLASHING
- Ⓓ WOOD CANOPY FEATURE
- Ⓔ PRE-FINISHED EXTRUDED ALUM. WINDOW OR DOOR
- Ⓕ METAL WOOD DOOR - FRAME, PAINTED
- Ⓖ 4" X 6" STEEL CANOPY FRAME, PAINTED BLACK
- Ⓗ METAL PANEL ROOFING, BLACK
- Ⓘ EXISTING WOOD DOOR - FRAME, PAINTED
- Ⓚ EXISTING WOOD WINDOW, PAINTED
- Ⓛ EXISTING WOOD SIDING, PAINTED
- Ⓜ EXISTING WOOD TRIM, PAINTED
- Ⓝ CEDAR SHINGLES
- Ⓟ ROUGH SAUN, HORIZONTAL WOOD SIDING
- Ⓠ EXPOSED GLULAM BEAM, PAINTED

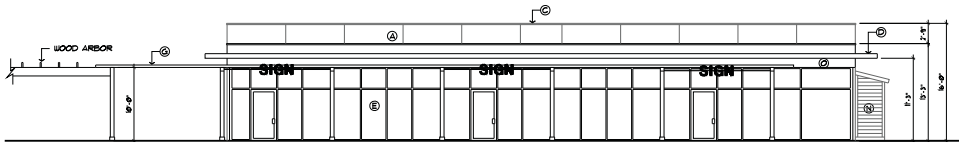
SURTESS HERITAGE PARK 4629 LAKESHORE ROAD, KELOWNA	
SCALE: 1/8" = 1'-0"	EXT'G RED BARN
DATE: MARCH 8, 2017	
	DRAWING No. A2



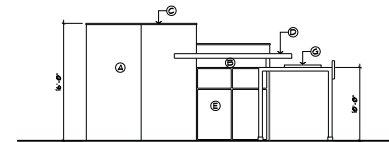
NEW CRU - FLOOR PLAN
SCALE: 1/8" = 1'-0"



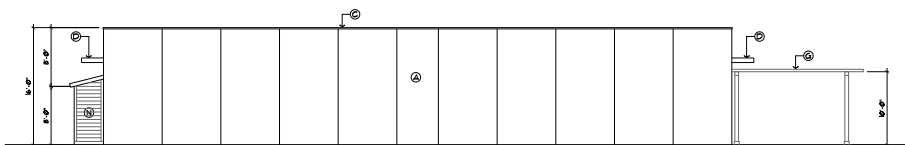
NEW CRU - ROOF PLAN
SCALE: 1/8" = 1'-0"



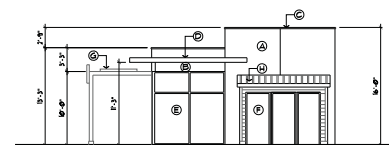
NEW CRU - NORTH ELEVATION
SCALE: 1/8" = 1'-0"



NEW CRU - EAST ELEVATION
SCALE: 1/8" = 1'-0"



NEW CRU - SOUTH ELEVATION
SCALE: 1/8" = 1'-0"



NEW CRU - WEST ELEVATION
SCALE: 1/8" = 1'-0"

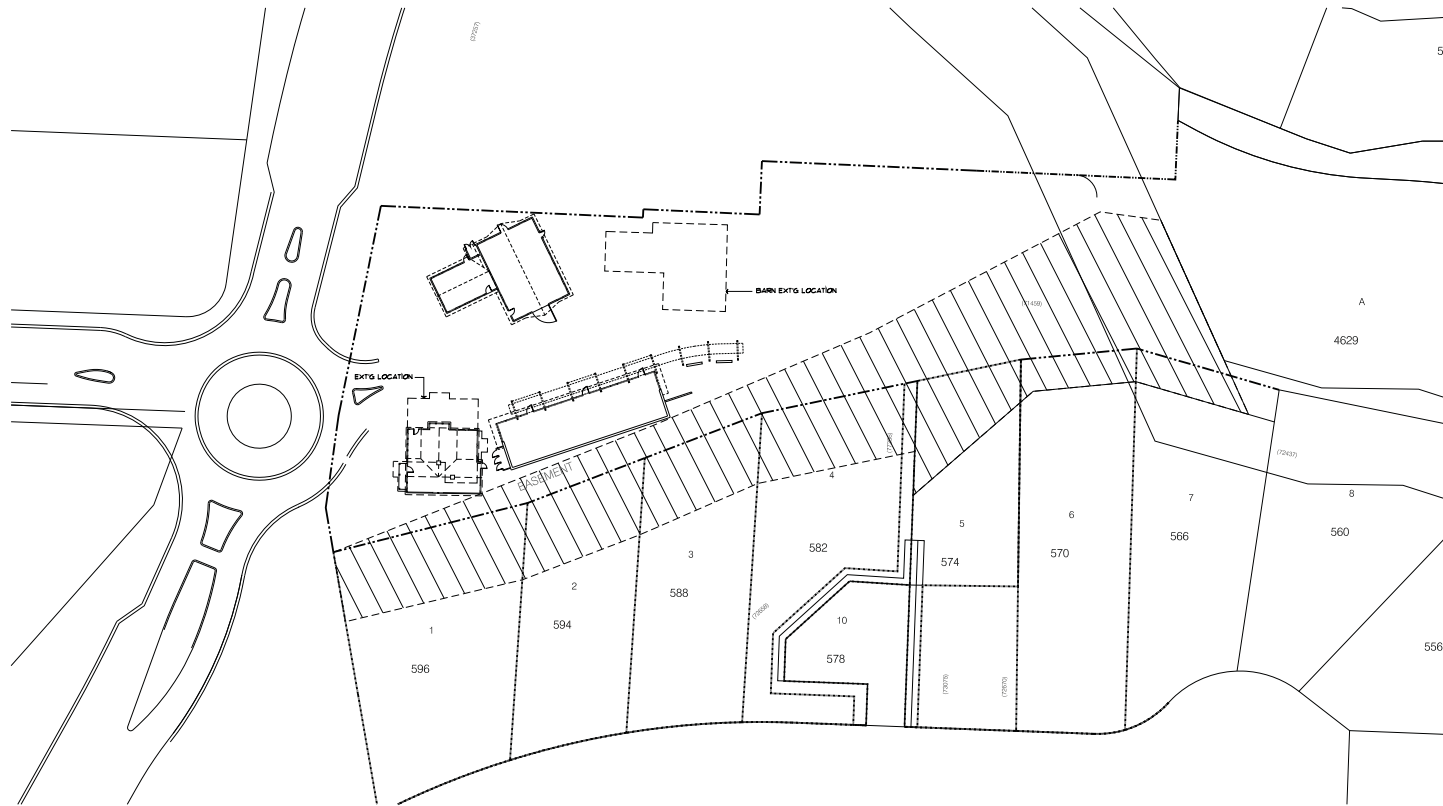
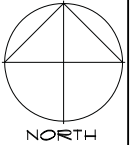
SCHEDULE B

This forms part of application
HRA17-0001

Planner Initials **AC**

LEGEND:	
Ⓐ	PRECAST CONCRETE INSULATED PANELS
Ⓑ	STUCCO
Ⓒ	PRE-FINISHED METAL FLASHING
Ⓓ	WOOD CANOPY FEATURE
Ⓔ	PRE-FINISHED EXTRUDED ALUM. WINDOW OR DOOR
Ⓕ	METAL WOOD DOOR - FRAME, PAINTED
Ⓖ	4" X 6" STEEL CANOPY FRAME, PAINTED BLACK
Ⓗ	METAL PANEL ROOFING, BLACK
Ⓙ	EXISTING WOOD DOOR - FRAME, PAINTED
Ⓚ	EXISTING WOOD WINDOW, PAINTED
Ⓛ	EXISTING WOOD SIDING, PAINTED
Ⓜ	EXISTING WOOD TRIM, PAINTED
Ⓝ	CEDAR SHINGLES
Ⓟ	ROUGH SAUN, HORIZONTAL WOOD SIDING
Ⓠ	EXPOSED GLULAM BEAM, PAINTED

SURRESS HERITAGE PARK 4629 LAKESHORE ROAD, KELOWNA	
SCALE: 1/8" = 1'-0"	NEW CRU
DATE: MARCH 8, 2017	
	DRAWING No. A3



RELOCATION PLAN
SCALE: 1" = 30'-0"

SCHEDULE B

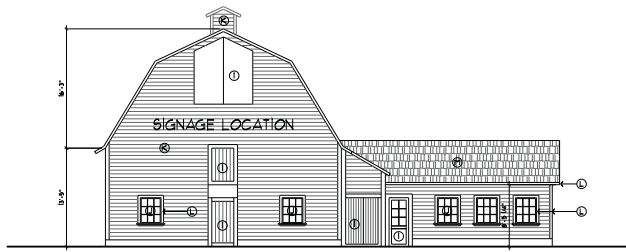
This forms part of application
HRA17-0001

Planner Initials AC

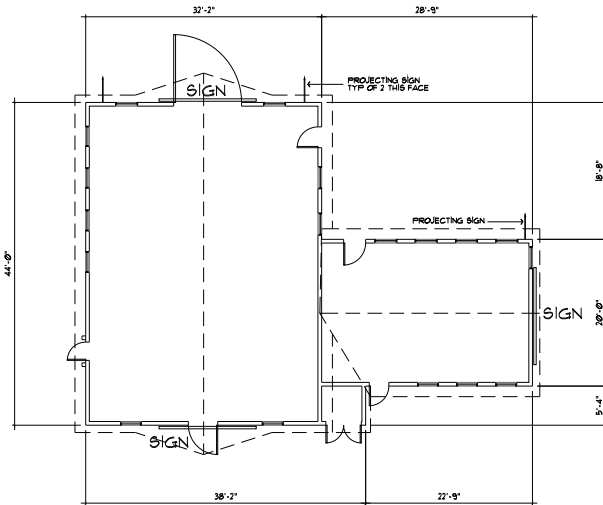


City of Kelowna
COMMUNITY PLANNING

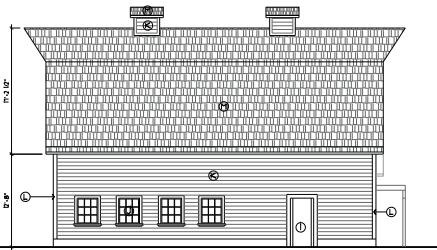
SURTESS HERITAGE PARK 4629 LAKE SHORE ROAD, KELOWNA	
SCALE: 1" = 30'-0"	RELOCATION PLAN
DATE: MARCH 8, 2017	
	DRAWING No. R0



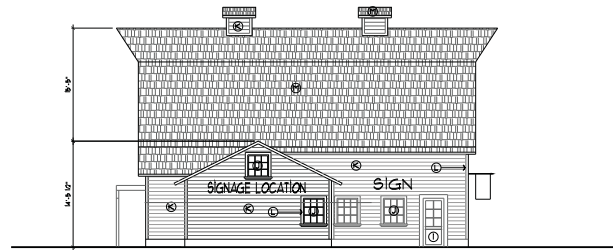
EXISTING RED BARN - NORTH ELEVATION
SCALE: 1/8" = 1'-0"



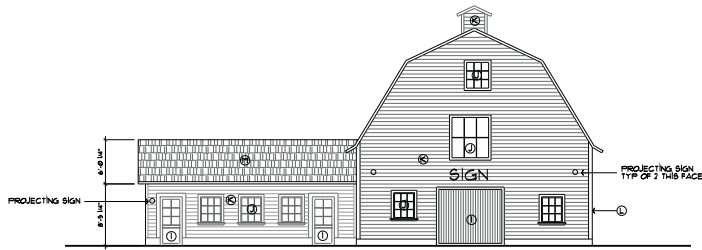
EXISTING RED BARN - SIGNAGE PLAN
SCALE: 1/8" = 1'-0"



EXISTING RED BARN - EAST ELEVATION
SCALE: 1/8" = 1'-0"



EXISTING RED BARN - WEST ELEVATION
SCALE: 1/8" = 1'-0"



EXISTING RED BARN - SOUTH ELEVATION
SCALE: 1/8" = 1'-0"

SIGNAGE PLAN

LEGEND:

- Ⓐ PRECAST CONCRETE INSULATED PANELS
- Ⓑ STUCCO
- Ⓒ PRE-FINISHED METAL FLASHING
- Ⓓ WOOD CANOPY FEATURE
- Ⓔ PRE-FINISHED EXTRUDED ALUM. WINDOW OR DOOR
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- Ⓛ EXISTING WOOD SIDING, PAINTED
- Ⓜ EXISTING WOOD TRIM, PAINTED
- Ⓝ CEDAR SHINGLES
- Ⓟ ROUGH SAUN, HORIZONTAL WOOD SIDING
- Ⓠ EXPOSED GLULAM BEAM, PAINTED

SCHEDULE B

This forms part of application
HRA17-0001

Planner Initials **AC**

City of Kelowna
COMMUNITY PLANNING

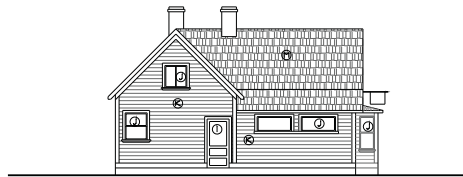
SURTRESS HERITAGE PARK 4629 LAKESHORE ROAD, KELOWNA	
SCALE: 1/8" = 1'-0"	EXT'G RED BARN
DATE: MARCH 8, 2017	
	DRAWING NO. SIGN 1



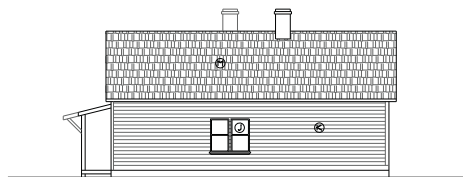
EXISTING WHITE HOUSE - NORTH ELEVATION
SCALE: 1/8" = 1'-0"



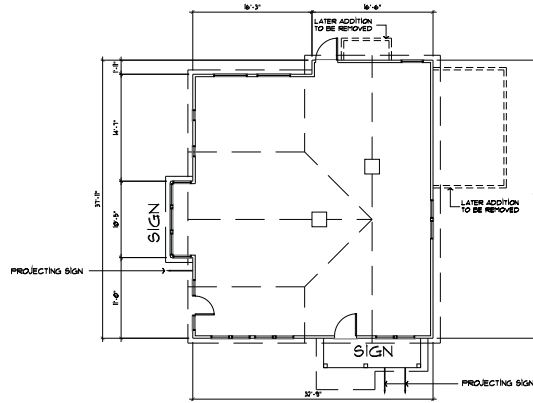
EXISTING WHITE HOUSE - (FRONT) WEST ELEVATION
SCALE: 1/8" = 1'-0"



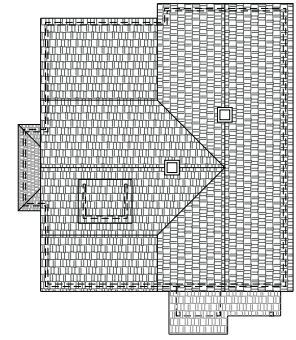
EXISTING WHITE HOUSE - (REAR) EAST ELEVATION
SCALE: 1/8" = 1'-0"



EXISTING WHITE HOUSE - SOUTH ELEVATION
SCALE: 1/8" = 1'-0"



EXISTING WHITE HOUSE - SIGNAGE PLAN
SCALE: 1/8" = 1'-0"



EXISTING WHITE HOUSE - ROOF PLAN
SCALE: 1/8" = 1'-0"

SIGNAGE PLAN

LEGEND:

- Ⓐ PRECAST CONCRETE INSULATED PANELS
- Ⓑ STUCCO
- Ⓒ PRE-FINISHED METAL FLASHING
- Ⓓ WOOD CANOPY FEATURE
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- Ⓘ EXISTING WOOD DOOR - FRAME, PAINTED
- Ⓡ EXISTING WOOD WINDOW, PAINTED
- Ⓢ EXISTING WOOD SIDING, PAINTED
- Ⓣ EXISTING WOOD TRIM, PAINTED
- Ⓤ CEDAR SHINGLES
- ⓖ ROUGH SAUN, HORIZONTAL WOOD SIDING
- ⓗ EXPOSED GLULAM BEAM, PAINTED

SCHEDULE B

This forms part of application
HRA17-0001

Planner Initials **AC**

City of Kelowna
COMMUNITY PLANNING

SURRESS HERITAGE PARK 4629 LAKESHORE ROAD, KELOWNA	
SCALE: 1/8" = 1'-0"	EXT'G RED BARN
DATE: MARCH 8, 2017	
	DRAWING NO. SIGN 2



WOOD SIDING:
"PENDRELL RED" #VC-29



WINDOW SASH:
"OXFORD IVORY" #VC-1



**WINDOW, DOOR, CORNER TRIM,
 FASCIA, SOFFIT AND OTHER TRIMS:**
"OXFORD IVORY" VC-1



ROOF:
CEDAR SHINGLES

SCHEDULE B

This forms part of application
 # HRA17-0001

Planner
 Initials AC



WORMAN
 WORMAN HOMES | WORMAN COMMERCIAL

EXTERIOR FINISHES

**4629 LAKESHORE ROAD, KELOWNA, BC
 "BARN"**

PROJECT NO: 4629

MARCH 10, 2017



WOOD SIDING:

"PENDRELL VERDIGRIS" #VC-22



WOOD WINDOW FRAMES & SASHES:

"HASTINGS RED" #VC-30



**WINDOW, DOOR, CORNER TRIM,
FASCIA, SOFFIT AND OTHER TRIMS:**

"OXFORD IVORY" VC-1



ROOF:

CEDAR SHINGLES



DOORS:

STAINED AND VARNISHED

SCHEDULE B

This forms part of application
HRA17-0001

Planner Initials **AC**



City of **Kelowna**
COMMUNITY PLANNING



WORMAN
WORMAN HOMES | WORMAN COMMERCIAL

EXTERIOR FINISHES

4629 LAKESHORE ROAD, KELOWNA, BC
"HOUSE"

PROJECT NO: 4629

MARCH 10, 2017



**WINDOW FRAMES, METAL ARCHES,
SLOPED ROOFING & METAL FLASHING**
BLACK METAL



PRECAST CONCRETE PANELS:
NATURAL CONCRETE



WOOD ELEMENTS:
"MEDIUM WALNUT"

SCHEDULE B

This forms part of application

HRA17-0001



City of
Kelowna
COMMUNITY PLANNING

Planner
Initials

AC



WORMAN
WORMAN HOMES | WORMAN COMMERCIAL

EXTERIOR FINISHES

4629 LAKESHORE ROAD, KELOWNA, BC
"NEW BUILDING"

PROJECT NO: 4629

MARCH 10, 2017



SURTEES HOUSE & BARN

4629 LAKESHORE ROAD, KELOWNA, BC

CONSERVATION PLANS

MARCH 2017

SCHEDULE **D**

This forms part of application

HRA17-0001

Planner
Initials **AC**



Schedule D includes the whole report (64 pages)

DONALD LUXTON
AND ASSOCIATES INC



TABLE OF CONTENTS

1. INTRODUCTION.....	1
2. HISTORIC CONTEXT.....	2
3. STATEMENTS OF SIGNIFICANCE.....	10
4. CONSERVATION GUIDELINES.....	13
4.1 Standards & Guidelines.....	13
4.2 Conservation References.....	14
4.3 General Conservation Strategy.....	15
4.4 Sustainability Strategy.....	17
4.5 Alternate Compliance.....	18
4.6 Site Protection & Stabilization.....	18
SURTEES HOUSE CONSERVATION PLAN	
5. CONSERVATION RECOMMENDATIONS.....	22
5.1 Site.....	22
5.1.1 Relocation.....	22
5.2 Overall Form, Scale, and Massing.....	24
5.3 Foundation.....	27
5.4 Exterior Wood-Frame Walls.....	28
5.5 Roof.....	30
5.5.1 Chimneys.....	31
5.6 Fenestrations.....	32
5.6.1 Windows.....	32
5.6.2 Doors.....	34
5.7 Exterior Colour Schedule.....	34
5.8 Interior.....	35
5.8.1 Walls & Ceilings.....	35
5.8.2 Staircase.....	37
5.8.3 Fireplace.....	37
6. MAINTENANCE PLAN.....	38
6.1 Maintenance Guidelines.....	38
6.2 Permitting.....	38
6.3 Routine, Cyclical and Non-Destructive Cleaning.....	38
6.4 Repairs and Replacement of Deteriorated Materials.....	39
6.5 Inspections.....	39
6.6 Information File.....	39
6.7 Exterior Maintenance.....	40

SURTEES BARN CONSERVATION PLAN

7. CONSERVATION RECOMMENDATIONS 44

 7.1 Site 44

 7.1.1 Relocation 44

 7.2 Overall Form, Scale, and Massing 49

 7.3 Foundation 49

 7.4 Exterior Wood-Frame Walls 51

 7.5 Roof 53

 7.5.1 Monitor Vents 53

 7.6 Fenestrations 56

 7.6.1 Windows 56

 7.6.2 Doors 57

 7.7 Exterior Colour Schedule 57

8. MAINTENANCE PLAN 59

 8.1 Maintenance Guidelines 59

 8.2 Permitting 59

 8.3 Routine, Cyclical and Non-Destructive Cleaning 59

 8.4 Repairs and Replacement of Deteriorated Materials 60

 8.5 Inspections 60

 8.6 Information File 60

 8.7 Exterior Maintenance 61

APPENDIX A: 64



Photos of the Surtees House & Barn [Ursula Surtees Collection]

1.0 INTRODUCTION

HISTORIC NAME: Surtees House and Barn
CIVIC ADDRESS: 4629 Lakeshore Road, Kelowna
ORIGINAL OWNER: A.B. Carle
OTHER OWNERS: James H. Baillie (1910); John Coutts Surtees & Ursula Margaret Surtees (1978)
CONSTRUCTION DATE: House circa 1910, Barn circa 1927

The Surtees House & Barn, located at 4629 Lakeshore Road, comprise a site important for its long-term association with the settlement of the Okanagan Mission area, for its ownership by notable local figures, and as significant examples of vernacular architecture.

The house was built circa 1910, and is the oldest building that survives in the area. Notably, the site was part of the local response to the Soldier's Settlement Scheme. The barn was built circa 1927, and is linked to the social and economic development of Okanagan Mission in the 1920s and 1930s. The barn is significant as one of the few surviving early agricultural outbuildings in the area. The site was prominent for a number of years as a point of interpretation of Kelowna's First Nations and pioneer history.

The site is now proposed for redevelopment by Worman Commercial, in partnership with the City of Kelowna. It includes the relocation of the heritage assets within the Surtees Property site, the restoration of the exterior of the Surtees House & Barn, and the rehabilitation of the interior spaces to accommodate their adaptive re-use for commercial and retail purposes. A contemporary, detached infill building is also being proposed on site as part of the redevelopment scheme.

The Surtees House & Barn Conservation Plans are based on Parks Canada's *Standards & Guidelines for the Conservation of Historic Places in Canada*, and outlines the preservation, restoration, and rehabilitation that will occur as part of the proposed redevelopment.

2.0 HISTORIC CONTEXT

THE OKANAGAN MISSION

Salish First Nations groups first inhabited the area known as Okanagan Mission. In 1859, Father Charles Marie Pandosy, of the Missionary Oblates of Mary Immaculate, founded the first white settlement in the Okanagan Valley on what is now Benvoulin Road. Pandosy built the first school for settlers and native children, and planted the first apples and grapes. Unlike other early settlements in British Columbia at the turn of the century, Pandosy's Mission did not rely on fur trading or gold mining as its primary resource, but sustained itself through agriculture. Significantly, this was the first permanent non-native settlement in the interior apart from the forts of the Hudson's Bay Company.

In 1884, as a satellite of the Pandosy Mission, a Roman Catholic Church and a large school were built in Okanagan Mission. It was not until the first decade of the twentieth century, however, that Okanagan Mission experienced significant population growth. This was the time of the Great Western boom, when settlers – lured by a booming economy fuelled by the promise of the completion of the Panama Canal – arrived in droves seeking land and opportunities. During this decade, settlers arrived, purchased land, and set up homes. Simultaneously, the landscape of Okanagan Mission changed, evolving from rangelands and swamps, to agricultural land such as orchards and hay meadows. This period is also noted as the heyday of the Bellevue Hotel (demolished in 1954), which was started in 1908 by J.H. Baillie. The Bellevue Hotel, which was located at the intersection of Collett and Bellevue Roads, was originally built by Gifford R. Thomson as a family house with an orchard. After purchasing the house, Baillie converted it into a hotel, and began promoting it as the centre of the Okanagan Mission townsite. Concurrently, the construction of the Kettle Valley Railway, which began in 1910, attracted many of its workers to the area. Several tents, which were set up behind the hotel, served as temporary accommodation for the KVR workers.

The construction of the St. Andrew's Anglican Church in 1911, which functioned as an outstation of the parish of Kelowna, is indicative of Okanagan Mission's growth. A two-room school house was built west of the Bellevue Hotel in 1917. The First World War, however, resulted in a population decline as many of Okanagan Mission's men went overseas to serve. By 1920, there was a renewed interest in agricultural activities. Acreages in the Okanagan Mission were plentiful in orchard, hay or pasture. Tobacco was also grown in limited commercial quantities. Okanagan Mission and the surrounding area prospered from expanded transportation links in the 1920s. A sternwheeler landed at the CPR dock at the foot of Collett Road. In addition, a stage-coach ran between Okanagan Mission and downtown Kelowna, departing daily at 10 am and returning at 3 pm. The population increased again in 1925, after the completion of the Canadian National Railway, which linked Vernon and Kelowna.

HISTORY OF THE SURTEES HOUSE & BARN

The pre-emptor of this site was Gifford Rutter Thompson, who acquired the land in 1905 from the Crown. In 1910 it was sold to A.B. Carle, who sold in turn to J.H. Baillie, who held the property for just one year.

Baillie (died 1956) played a significant role in the development of the Okanagan Mission. He arrived in Okanagan Mission in 1903. The following year he bought two large blocks of land and subdivided them. Baillie then proceeded to build a cottage opposite the school on Swamp Road. In 1906, he took over as postmaster for the Okanagan Mission. Two years later, in 1908, he was operating the Bellevue Hotel and a real estate office. Baillie donated the land for St. Andrew's Church, which adjoins the Surtees property.





Bellevue Hotel and the Okanagan Mission settlement, looking west towards the Lake. [KMA1606 (above), KMA2707 (below)]

HISTORIC CONTEXT

Baillie sold this property to the South Kelowna Land Company in 1911, and it is unknown if Baillie or the Company built the original building on the site, which is the earliest part of the house. It appears to have been constructed in 1910 and was used as the Ritz Café, run by two local women and a place of some notoriety.

An acute shortage of accommodation was brought on at the end of World War One by the return of soldiers from overseas. In December 1918, the federal government authorized the Soldiers' Settlement Act to provide twenty-five million dollars in loans to the provinces for housing initiatives for returning veterans, the first significant public sector initiative to promote homebuilding. As housing was a provincial responsibility at the time, these measures had to be instituted under the War Measures Act. The federal housing guidelines defined the scheme's

objectives as providing housing to those in greatest need. In March 1919, British Columbia passed the B.C. Better Housing Act to take advantage of the new federal programmes. This property was acquired by the Soldiers' Settlement Board in 1920, and settled by Allen Surtees circa 1924. Allan Surtees made substantial additions to the building at that time for use as his residence.

The site was subsequently sold to Edward Coelen (1896-1978) in 1942, who then sold in 1961 to Glenn and Verna Coe. John Surtees and his wife, Ursula Surtees, later purchased the property. After John's death in 1980, Ursula retained the property until 1993. This property, and adjacent businesses, were a hub of activity during the time of Ursula's residence, utilized for both Pioneer and First Nation programming.



Corner view of the Surtees House. [Ursula Surtees Collection]



Front facade of the Surtees House (top) and northwest corner of the historic house, partially showing bay window at north elevation (bottom). [Ursula Surtees Collection]

HISTORIC CONTEXT

The Surtees House & Barn are additionally valued for their connection with a Scottish noble family, the Marjoribanks, and the Surtees family. English-born Allen Villiers Surtees married Ishbel Agnes Marjoribanks (1897-1939) in Kelowna of 1921. Together they bought the former Ritz Café and surrounding land circa 1924. Ishbel Agnes was the daughter of Coutts Marjoribanks (1860-1924), the 2nd son of Lord Sir Dudley Coutts Marjoribanks of Tweedmouth, and brother of Lady Aberdeen (née Ishbel Maria Marjoribanks). Coutts Marjoribanks operated the Aberdeen's two farms in the Okanagan, including Coldstream, a 13,000-acre ranch near Vernon, and Guisachan, a 480-acre ranch in the Okanagan Valley, named after the family's estate in Scotland.

Ishbel Agnes inherited two large sums of money from her grandfather, Dudley Coutts Marjoribanks, who owned shares in the Hudson's Bay Company and the Kelowna oil wells. One of these inheritances facilitated the construction of the Surtees Barn circa 1927, and another went towards investing in the Three Gables Hotel in Penticton (built 1931). Ishbel Agnes and Allen Surtees had only one child, named John (1922-1980), who later owned the property.

Following the barn's construction, Allen Surtees imported the finest dairy cattle from the Channel Islands, U.K. and started his dairy farm, named Greenways. In 1927, the Surtees provided work for Thomas Apsey (1870- 1943), from Devon U.K. and his wife Elizabeth (1884-1967) from Perth, Scotland. In addition, Allen served on many agricultural and dairy committees. The Surtees, who had rights to Bellevue creek, put a small pump in and watered not only their own lawn but also the shrubs and lawn of the neighbouring St. Andrew's Church. The Surtees also donated a piece of land between the creek and the north side of the church. Both Ishbel Agnes and Allen were devoted to their community and invested time and money to help the area prosper in the 1930s when economic troubles persisted.



Photos showing Surtees Barn in the background, as viewed from the southeast corner. [Ursula Surtees Collection]

The Surtees Barn is noted for the various purposes it served over the years. When the Surtees owned it, the local riding club had their dances there. In subsequent years, the barn became a popular workspace for artists. Both Walter Dexter (born 1931) and Bob Kingsmill, two renowned British Columbia potters, utilized the barn as a workshop. Similarly, painters Don Li-Leger (born 1948) and Gwen Lamont (1909-1979), both used the barn as a workspace. Barbara Keller (died 1986), widow of General Rod Keller, Commander in Chief of the 2nd Canadian Division in World War II, ran an antique shop out of the main portion of the barn.

HISTORY OF OKANAGAN MISSION HOUSE & BARN

“Allen Villiers Surtees purchased the land from J.H. Baillie who had purchased it from the original pre-emptor. Prior to his purchase, a small building known as the Ritz Café was operated by two “ladies” who catered to all appetites. It was close to the Bellevue Hotel and the landing stage at the Mission and trade was good. One lady named Stella had her own way of dealing with the hot weather and could often be spied lying in the adjacent flume in the nude and happily inebriated. The Ritz Café is now part of the present house and the bedroom facing the road and the front hall still have the original V-joint paneling.

Allen Surtees courted then married Ishbel Marjoribanks, daughter of Coutts Marjoribanks, 2nd son of the Baron Tweedmouth, and brother of Lady Aberdeen. Allen Surtees added a dining room, kitchen, bathroom and an upstairs room to the former café.

Here he brought his bride. Their only child, John Surtees, was born in this home. One of the features of the house was steam heat and radiators were throughout the house including upstairs. Later, when the property was sold to the Coelens, the whole system froze up one winter when the house was empty for a few days.

Ishbel Surtees inherited two small fortunes. The first of which helped to build the barn, the finest in the district having double walls, draft free windows, hay chutes, a manure rack and bucket which ran on a rail to the back of the property. A round silo stood on the left hand side of the barn facing the road. For years the riding club used the upstairs for their dances as the floor was well sprung.

Allen Surtees imported dairy cattle from the Channel Islands, the offspring of whom are still here today. In 1910, the Apeseys had come out from Aberdeen to stay at Coldstream with Lady Aberdeen. In 1927 they moved to the Mission to help run the Dairy Farm known as “Greenways”. The original sign was on the barn for many years.

When John Surtees purchased the property back in the 1960s, many of the dairy records for milk production were still on the walls. Endearing names such as Buttercup and Daisy were given to these highbred Channel Island cows, along with their pedigree.

The role of the barn changed over the years. Two well known potters, Walter Dexter and Bob Kingsmill produced a great deal of pottery in the barn. Walter Dexter was one of the few potters invited

HISTORIC CONTEXT

to show at the Montreal Expo and Bob Kingsmill is now a renowned B.C. potter living in Coldstream and he owns a gallery featuring his work on Granville Island in Vancouver. Two well known local artists, Gwen Lamont and Don Li-Leger used the upstairs of the barn as a studio. Later, Barbara Keller, widow of General Rod Keller, Commander in Chief of the 2nd Canadian Division in WWII ran an antique shop out of the main part of the barn for several years. The barn also provided jobs for a number of men during this hard economic period. I used to get a number of people stopping by the house just to tell me that they had worked in the barn.

The small house at the back of the property was built by Bob Kingsmill. (Note: this house no longer exists). Mr. Surtees said that Bob could use the land at no cost but when Bob moved, it had to be sold to the Surtees for the cost of the building. Bob incorporated several interesting features such as colored and stained glass windows and a long semi-skylight window in the roof. Bob Kingsmill's wife, Yolanda, was a daughter of a Swiss Ambassador who delighted in catching fish in the creek during his many visits to the valley.

The log building is over 100 years old but it was not original to this site. (Note: this building has been removed by the City). When Springfield road was built it went through the Fairborn's (Freeborn?) property. They offered the building to me. We took it apart log by log using a color and numbering system and set it up in its new location. This building was used for years by the Kelowna Museum as the focus for their Pioneer Days program. Hundreds of children learned how to make baking powder biscuits on the wood



Photos showing interior spaces of Surtees House: dining room at early extension, showing expressed roof rafters (top); living room at north end of the original house, showing north bay window to the left (bottom). [Ursula Surtees Collection]

burning stove and how to cut the fuel to supply the heat along with many of the other skills needed to be self-sufficient in early settler's time. This log cabin is made of cottonwood, which was quite soft when newly cut down and hardens to an iron texture in a few years. I have had many young men and women from those school classes tell me how well they remembered these particular school field trips.

For years the Surtees' (who had creek rights) put a small pump in the creek and watered not only their lawn but the lawn and shrubs of the little St. Andrews church. We also donated the piece of land between the creek and north side of the church, as originally that whole piece was part of the Baillie property and that piece was snipped out and donated by Baillie for the building of the church and the remainder that surrounded it including the creek side piece. In consideration of the donation a bench was promised with John Surtees' name on it as a memorial. Sadly, that did not happen.

This site is a mixture of historic social and economic development. The trees in the back are magnificent and some seeds from these trees and the Douglas Fir were sent to Kew Garden in London, England, when it had been badly damaged in a storm, to help restock it.

Allen Surtees served on many agricultural and dairy committees. He had a very fine voice and in early radio days often sang over the new radio station established by the Browne family. Ishbel set a social tone with afternoon teas etc. She was well-travelled having taken the expected grand tour as part of her education. Her grandfather Baron Tweedmouth had shares in the Hudson's Bay Company

and she inherited these. This money went toward building the Three Gables Hotel in Penticton. There were also investments in the Kelowna Oil wells. They both believed in the Okanagan and invested much time and money in trying to help it prosper especially in the 1930s when things were very tough."

- Ursula Surtees

3.0 STATEMENTS OF SIGNIFICANCE

SURTEES HOUSE 4629 LAKESHORE ROAD, KELOWNA

Description of Historic Place

The Surtees House is a one and one-half storey, wood-frame structure located at 4639 Lakeshore Road in Kelowna's Mission Sector. Built circa 1910, the Edwardian-era house shares the property with the Surtees Barn, constructed circa 1927.

Heritage Value of Historic Place

Constructed around 1910, the Surtees House is valued for its notable ownership history, for its association with the development of the Okanagan Mission, and for its Edwardian-era architecture.

The Surtees House property is significant for its ownership history by prominent community figures. J.H. Baillie, who played a substantial role in the development of the Okanagan Mission following his arrival in 1903, originally owned this property. In 1906, he took over as postmaster for the Okanagan Mission and, two years later, Baillie was operating the Bellevue Hotel and a real estate office. Aside from his business endeavours, Baillie was a charitable figure and donated the land for the St. Andrew's Church, which adjoins this Lakeshore Road property. Baillie had purchased this property in 1910 and then sold it in 1911 to the South Kelowna Land Company; the house was constructed just prior to or just following this sale. During the early 1910s, the house was occupied by the Ritz Café, a business owned by two local women, which offered food, as well as more carnal selections, to local workers. Following the First World War, the Soldiers' Settlement Board acquired the property and held it until its 1924 purchase by well-known community members, and property namesakes, Allen and Ishbel Surtees. The Surtees expanded the house and constructed an impressive barn on the site as part of their Greenways Dairy operation, which operated until the property was sold to Edward Coelen in 1942. The property was once again owned by members of the Surtees family, John and Ursula, by the 1970s; they remained until 1993.

The Surtees House is associated with the social and economic development of the Okanagan Mission through the early twentieth century. In 1927, the Surtees provided work for Thomas Apsey (1870-1943), from Devon, England, and his wife Elizabeth (1884-1967) from Perth, Scotland. In addition, Allen Surtees served on many agricultural and dairy committees. The Surtees, who had rights to Bellevue Creek, installed a small pump and watered not only their own lawn but also the shrubs and lawn of the neighbouring St. Andrew's Church. The Surtees also donated a piece of land between the creek and the north side of the church. Both Ishbel and Allen were devoted to their community and invested time and money to help sustain the area through the 1930s, when economic malaise emerged.

The Surtees House is a valued example of vernacular, Edwardian-era architecture. The house is among the oldest extant structures from the early Okanagan Mission settlement and displays design tenets of the Edwardian era, including locally sourced wooden materials. In 1924, the Surtees made additions to the original house, including a dining room, kitchen, bathroom, and an upstairs room.

Character-Defining Elements

Key elements that define the heritage character of the Surtees House include:

- location on the Surtees property along Lakeshore Road in the City of Kelowna;
- continuous use since circa 1910;
- residential form, scale and massing as expressed by its one and one-half storey height and gabled roof;
- wood-frame construction;
- vernacular, Edwardian-era architecture expressed by its: wooden lapped siding, wooden bargeboards and cornerboards, open verandah, and hipped-roof bays and shed-roof extensions;
- variety of wooden windows, including double-hung assemblies;
- internal brick chimneys; and



- associated landscape features, including stone walls and a number of deciduous and coniferous trees on the property, which is shared with the adjacent Surtees Barn.

SURTEES BARN 4629 LAKESHORE ROAD, KELOWNA

Description of Historic Place

The Surtees Barn is a two-storey farm building with traditional gambrel roof located at 4639 Lakeshore Road in Kelowna's Mission Sector. Built circa 1927, the barn is characterized by its slightly flared eaves, front projecting peak, two rooftop cupolas, and its drop wooden siding. The barn shares the property with the Surtees House, constructed circa 1910.

Heritage Value of Historic Place

The Surtees Barn is valued for its association with original owners, Allen and Ishbel Surtees, for its association with various artists and organizations throughout its lifespan, and for its vernacular agrarian architecture, which was state-of-the-art at the time of its construction.

English-born Allen Villiers Surtees married Ishbel Agnes Marjoribanks in 1921 and together they purchased this property in the mid-1920s. Since 1920, the property had been in the possession of the Soldiers' Settlement Board. Ishbel was the daughter of Coutts Marjoribanks (1860-1924), the second son of Lord Sir Dudley Coutts Marjoribanks of Tweedmouth, and brother of Lady Aberdeen. Coutts Marjoribanks operated the Aberdeen's two farms in the Okanagan, including Coldstream, a 13,000-acre ranch near Vernon, and Guisachan, a 480-acre ranch in the Okanagan Valley, named after the family's estate in Scotland. Ishbel inherited two large sums of money from her grandfather, who owned shares in the Hudson's Bay Company and the Kelowna oil wells. One of these inheritances facilitated the construction of the Surtees Barn circa 1927 and the importation of the finest dairy cattle from the Channel Islands, establishing the Surtees'

Greenways Dairy operation. Ishbel Surtees died in 1939, just before the Second World War, and Allan Surtees sold the house and dairy farm before joining the war efforts. The couple is remembered for their active involvement in and generosity toward the local community. Allen served on many agricultural and dairy committees and the couple donated a piece of land between Bellevue Creek and the north side of the adjacent St. Andrew's Church. Additionally, the Surtees' invested time and money to help sustain the area through the Great Depression of the 1930s.

The Surtees Barn is noted for the various non-dairy purposes it served over the years. When it was owned by the Surtees family, the local riding club used the second floor of the barn for their dances and events. In subsequent years, the barn became a popular workspace for artists. Both Walter Dexter (born 1931) and Bob Kingsmill, two renowned British Columbia potters, utilized the barn as a workshop. Similarly, painters Don Li-Leger (born 1948) and Gwen Lamont (1909-1979), both used the barn as a workspace. Barbara Keller, widow of General Rod Keller, Commander in Chief of the 2nd Canadian Division in World War II, ran an antique shop out of the main portion of the barn.

The Surtees Barn is additionally significant as an example of vernacular interwar architecture. Constructed by Allen Surtees, the barn was reportedly the finest in the district. It was constructed with double walls, draft-free windows, hay chutes, and a manure rack and bucket, which ran on a rail to the back of the property; it was also the first in the Okanagan Mission to have electricity. The barn is significant as one of the few surviving early agricultural buildings in the area.

Character-Defining Elements

Key elements that define the heritage character of the Surtees Barn include:

- location on the Surtees property along Lakeshore Road in the City of Kelowna;
- continuous use since circa 1927;

STATEMENTS OF SIGNIFICANCE

- agrarian form, scale and massing as expressed by its two storey height and gambrel roof;
- wood-frame construction;
- vernacular architecture expressed by its: gambrel roof with its slightly flared eaves and front projecting peak; original drop wooden siding with cornerboards; open second storey, indicating its original function as a hayloft; two rooftop cupolas with venting and gabled caps; and an early extension with side-gabled roof to the west;
- variety of original wooden windows and openings in central symmetry at gable end elevations and openings;
- original wooden doors;
- interior gambrel rafters; and
- associated landscape features including stone walls and a number of deciduous and coniferous trees.



4.0 CONSERVATION GUIDELINES

4.1 STANDARDS AND GUIDELINES

The Surtees House & Barn are considered to form a significant historical site in Kelowna, and are listed on the Kelowna Heritage Register. The Parks Canada's *Standards & Guidelines for the Conservation of Historic Places in Canada* is the source used to assess the appropriate level of conservation and intervention. Under the *Standards & Guidelines*, the work proposed for the Surtees House & Barn includes aspects of preservation, rehabilitation and restoration.

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 value.*

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.*

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 additions, while protecting its heritage value.*

Interventions to the historic assets should be based upon the Standards outlined in the *Standards & Guidelines*, which are conservation principles of best practice. The following **General Standards** should be followed when carrying out any work to an historic property.

STANDARDS

Standards relating to all Conservation Projects

1. Conserve the heritage value of a historic place. Do not remove, replace, or substantially alter its intact or repairable character-defining elements. Do not move a part of a historic place if its current location is a character-defining element.
2. Conserve changes to a historic place, which over time, have become character-defining elements in their own right.
3. Conserve heritage value by adopting an approach calling for minimal intervention.
4. Recognize each historic place as a physical record of its time, place and use. Do not create a false sense of historical development by adding elements from other historic places or other properties or by combining features of the same property that never coexisted.
5. Find a use for a historic place that requires minimal or no change to its character defining elements.
6. Protect and, if necessary, stabilize a historic place until any subsequent intervention is undertaken. Protect and preserve archaeological resources in place. Where there is potential for disturbance of archaeological resources, take mitigation measures to limit damage and loss of information.
7. Evaluate the existing condition of character-defining element to determine the appropriate intervention needed. Use the gentlest means possible for any intervention. Respect heritage value when undertaking an intervention.
8. Maintain character-defining elements on an ongoing basis. Repair character-defining element by reinforcing the materials using recognized conservation methods. Replace in kind any extensively deteriorated or missing parts of character-defining elements, where there are surviving prototypes.

9. Make any intervention needed to preserve character-defining elements physically and visually compatible with the historic place and identifiable upon close inspection. Document any intervention for future reference.

Additional Standards relating to Rehabilitation

10. Repair rather than replace character-defining elements. Where character-defining elements are too severely deteriorated to repair, and where sufficient physical evidence exists, replace them with new elements that match the forms, materials and detailing of sound versions of the same elements. Where there is insufficient physical evidence, make the form, material and detailing of the new elements compatible with the character of the historic place.
11. Conserve the heritage value and character-defining elements when creating any new additions to a historic place and any related new construction. Make the new work physically and visually compatible with, subordinate to and distinguishable from the historic place.
12. Create any new additions or related new construction so that the essential form and integrity of a historic place will not be impaired if the new work is removed in the future.

Additional Standards relating to Restoration

13. Repair rather than replace character-defining elements from the restoration period. Where character-defining elements are too severely deteriorated to repair and where sufficient physical evidence exists, replace them with new elements that match the forms, materials and detailing of sound versions of the same elements.
14. Replace missing features from the restoration period with new features whose forms, materials and detailing are based on sufficient physical, documentary and/or oral evidence.

4.2 CONSERVATION REFERENCES

The proposed work entails the Restoration of the exterior of the Surtees House & Barn, along with the rehabilitation of their interior to accommodate for adaptive re-use of the historic assets. The following conservation resources should be referred to:

Standards & Guidelines for the Conservation of Historic Places in Canada, Parks Canada, 2010.
<http://www.historicplaces.ca/en/pages/standards-normes/document.aspx>

National Park Service, Technical Preservation Services. Preservation Briefs:

Preservation Brief 3: Improving Energy Efficiency in Historic Buildings.
<http://www.nps.gov/tps/how-to-preserve/briefs/3-improve-energy-efficiency.htm>

Preservation Brief 4: Roofing for Historic Buildings.
<http://www.nps.gov/tps/how-to-preserve/briefs/4-roofing.htm>

Preservation Brief 6: Dangers of Abrasive Cleaning to Historic Buildings.
<http://www.nps.gov/tps/how-to-preserve/briefs/6-dangers-abrasive-cleaning.htm>

Preservation Brief 9: The Repair of Historic Wooden Windows.
<http://www.nps.gov/tps/how-to-preserve/briefs/9-wooden-windows.htm>

Preservation Brief 10: Exterior Paint Problems on Historic Woodwork.
<http://www.nps.gov/tps/how-to-preserve/briefs/10-paint-problems.htm>

Preservation Brief 14: New Exterior Additions to Historic Buildings: Preservation Concerns.
<http://www.nps.gov/tps/how-to-preserve/briefs/14-exterior-additions.htm>



Preservation Brief 17: Architectural Character – Identifying the Visual Aspects of Historic Buildings as an Aid to Preserving their Character.
<http://www.nps.gov/tps/how-to-preserve/briefs/17-architectural-character.htm>

Preservation Brief 18: Rehabilitating Interiors in Historic Buildings – Identifying Character-Defining Elements.
<http://www.nps.gov/tps/how-to-preserve/briefs/18-rehabilitating-interiors.htm>

Preservation Brief 19: The Repair and Replacement of Historic Wood Shingle Roofs.
<http://www.nps.gov/tps/how-to-preserve/briefs/19-wooden-shingle-roofs.htm>

Preservation Brief 20: The Preservation of Historic Barns.
<http://www.nps.gov/tps/how-to-preserve/briefs/20-barns.htm>

Preservation Brief 24: Heating, Ventilating, and Cooling Historic Buildings: Problems and Recommended Approaches.
<http://www.nps.gov/tps/how-to-preserve/briefs/24-heat-vent-cool.htm>

Preservation Brief 32: Making Historic Properties Accessible.
<http://www.nps.gov/tps/how-to-preserve/briefs/32-accessibility.htm>

Preservation Brief 36: Protecting Cultural Landscapes: Planning, Treatment and Management of Historic Landscapes.
<http://www.nps.gov/tps/how-to-preserve/briefs/36-cultural-landscapes.htm>

Preservation Brief 37: Appropriate Methods of Reducing Lead-Paint Hazards in Historic Housing.
<http://www.nps.gov/tps/how-to-preserve/briefs/37-lead-paint-hazards.htm>

Preservation Brief 38: Removing Graffiti from Historic Masonry.
<http://www.nps.gov/tps/how-to-preserve/briefs/38-remove-graffiti.htm>

Preservation Brief 39: Holding the Line: Controlling Unwanted Moisture in Historic Buildings.
<http://www.nps.gov/tps/how-to-preserve/briefs/39-control-unwanted-moisture.htm>

Preservation Brief 41: The Seismic Retrofit of Historic Buildings: Keeping Preservation in the Forefront.
<http://www.nps.gov/tps/how-to-preserve/briefs/41-seismic-retrofit.htm>

Preservation Brief 45: Preserving Historic Wooden Porches.
<http://www.nps.gov/tps/how-to-preserve/briefs/45-wooden-porches.htm>

Preservation Brief 47: Maintaining the Exterior of Small and Medium Size Historic Buildings.
<http://www.nps.gov/tps/how-to-preserve/briefs/47-maintaining-exteriors.htm>

4.3 GENERAL CONSERVATION STRATEGY

The primary intent is to preserve the two existing historic buildings, while undertaking a rehabilitation that will upgrade their structures and services to increase functionality for commercial and retail uses. As part of the scope of work, character-defining elements will be preserved, while missing or deteriorated elements will be restored. The Heritage Revitalization Agreement includes a rehabilitation scheme that is being prepared by Worman Commercial. It also includes a Heritage Designation Bylaw, and the conservation of the Surtees House and Barn in a manner that meets the City's heritage objectives for the site.

The major proposed interventions of the overall project are to:

- Relocate of the historic assets within the property site
- Restore the exterior of the historic assets
- Provide necessary structural and seismic upgrades
- Rehabilitate the interior of the historic assets to accommodate adaptive re-use as commercial and retail spaces, while preserving their interior character-defining elements as possible.

Due to the proposed addition to the historic assets, all new visible construction will be considered a modern addition to the historic structure. The *Standards & Guidelines* list recommendations for new additions to historic places. The proposed design scheme should follow these principles:

- Designing a new addition in a manner that draws a clear distinction between what is historic and what is new.
- Design for the new work may be contemporary or may reference design motifs from the historic place. In either case, it should be compatible in terms of mass, materials, relationship of solids to voids, and colour, yet be distinguishable from the historic place.
- The new additions should be physically and visually compatible with, subordinate to and distinguishable from the preserved historic façade.

If an historic building must be moved, relocation on its existing lot is the least intrusive approach. The following Relocation Guidelines should be implemented for the relocation of the Surtees House & Barn within the existing property:

- A relocation plan should be prepared prior to relocation that ensures that the least destructive method of relocation will be used.

- Alterations to the historic structure proposed to further the relocation process should be evaluated in accordance with the Conservation Plan and reviewed by the Heritage Consultant. This can involve removal of later additions that are not enhancing the heritage value and historic appearance of the heritage buildings; for example, the concrete corner addition.
- Only an experienced and qualified contractor shall undertake the physical relocation of the historic structure.
- Preserve historic fabric of the exterior elevations including the wood-frame structure with original wood siding, wood sash windows and doors, and roof structure as much as possible.
- Preserve original interior brick chimneys of the Surtees House, and monitor vents of the Surtees Barn, in situ and relocate with the main structure if possible. Alternatively reconstruct chimney with salvaged bricks to match historic appearance, if unable to relocate with the historic building due to structural reasons.
- Appropriate foundation materials shall be used at the new site, which can include reinforced concrete foundations and floor slab. The final relative location to grade should match the original as closely as possible, taking into account applicable codes.
- Provide utility installations for electricity, communication and other service connections underground if possible. All installations located above ground should be incorporated harmoniously into the design concept for the relocated structure.



4.4 SUSTAINABILITY STRATEGY

Heritage conservation and sustainable development can go hand in hand with the mutual effort of all stakeholders. In a practical context, the conservation and re-use of historic and existing structures contributes to environmental sustainability by reducing solid waste disposal, saving embodied energy, and conserving historic materials that are often less consumptive of energy than many new replacement materials.

In 2016, the Federal Provincial Territorial Ministers of Culture & Heritage in Canada (FPTMCHC) published a document entitled, *Building Resilience: Practical Guidelines for the Retrofit and Rehabilitation of Buildings in Canada* that is “intended to establish a common pan-Canadian ‘how-to’ approach for practitioners, professionals, building owners, and operators alike.”

The following is an excerpt from the introduction of the document:

*[Building Resilience] is intended to serve as a “sustainable building toolkit” that will enhance understanding of the environmental benefits of heritage conservation and of the strong interrelationship between natural and built heritage conservation. Intended as a useful set of best practices, the guidelines in **Building Resilience** can be applied to existing and traditionally constructed buildings as well as formally recognized heritage places.*

These guidelines are primarily aimed at assisting designers, owners, and builders in providing existing buildings with increased levels of sustainability while protecting character-defining elements and, thus, their heritage value. The guidelines are also intended for a broader audience of architects, building developers, owners,

custodians and managers, contractors, crafts and trades people, energy advisers and sustainability specialists, engineers, heritage professionals, and officials responsible for built heritage and the existing built environment at all jurisdictional levels.

***Building Resilience** is not meant to provide case-specific advice. It is intended to provide guidance with some measure of flexibility, acknowledging the difficulty of evaluating the impact of every scenario and the realities of projects where buildings may contain inherently sustainable elements but limited or no heritage value. All interventions must be evaluated based on their unique context, on a case-by-case basis, by experts equipped with the necessary knowledge and experience to ensure a balanced consideration of heritage value and sustainable rehabilitation measures.*

***Building Resilience** can be read as a stand-alone document, but it may also further illustrate and build on the sustainability considerations in the Standards and Guidelines for the Conservation of Historic Places in Canada.*

4.5 ALTERNATE COMPLIANCE

As a listed building on the Municipal Heritage Register, the Surtees House & Barn may be eligible for heritage variances that will enable a higher degree of heritage conservation and retention of original material, including considerations available under the following municipal legislation.

4.5.2 BRITISH COLUMBIA BUILDING CODE

Building Code upgrading ensures life safety and long-term protection for historic resources. It is important to consider heritage buildings on a case-by-case basis, as the blanket application of Code requirements do not recognize the individual requirements and inherent strengths of each building. Over the past few years, a number of equivalencies have been developed and adopted in the British Columbia Building Code that enable more sensitive and appropriate heritage building upgrades. For example, the use of sprinklers in a heritage structure helps to satisfy fire separation and exiting requirements. Table A-1.1.1.1., found in Appendix A of the Code, outlines the “Alternative Compliance Methods for Heritage Buildings.”

Given that Code compliance is such a significant factor in the conservation of heritage buildings, the most important consideration is to provide viable economic methods of achieving building upgrades. In addition to the equivalencies offered under the current Code, the City can also accept the report of a Building Code Engineer as to acceptable levels of code performance.

4.5.3 ENERGY EFFICIENCY ACT

The provincial Energy Efficiency Act (Energy Efficiency Standards Regulation) was amended in 2009 to exempt buildings protected through heritage designation or listed on a community heritage register from compliance with the regulations. Energy Efficiency standards therefore do not apply to windows, glazing products, door slabs or products

installed in heritage buildings. This means that exemptions can be allowed to energy upgrading measures that would destroy heritage character-defining elements such as original windows and doors.

These provisions do not preclude that heritage buildings must be made more energy efficient, but they do allow a more sensitive approach of alternate compliance to individual situations and a higher degree of retained integrity. Increased energy performance can be provided through non-intrusive methods of alternate compliance, such as improved insulation and mechanical systems. Please refer to the *Standards & Guidelines for the Conservation of Historic Places in Canada* for further detail about “Energy Efficiency Considerations.”

4.6 SITE PROTECTION & STABILIZATION

It is the responsibility of the owner to ensure the heritage resource is protected from damage at all times. At any time that the Surtees House & Barn are left vacant, they should remain secured against intrusion and vandalism through the use of appropriate fencing and security measures. This is especially important if the buildings are missing windows or doors or is left elevated for any period of time.

Security measure may include mothballing the historic property and/or hiring a security guard for the duration of the work. Generally, once a heritage property is no longer undergoing rehabilitation work and is under occupancy of its owners, lockable doors and lower level windows and continued monitoring by the owners should be adequate protection. A comprehensive site protection plan should be developed in discussion between owner, contractor and/or architect. Plan may be reviewed by Heritage Consultant, if desired.



The Surtees House & Barn are currently vacant and the structures should remain closed up to protect them from the weather and to prohibit unauthorized access.

The following checklist will ensure that work items for the protection during the temporary mothballing of each historic assets are not inadvertently omitted and the listed heritage resources secured:

Moisture

- Is the roof watertight?
- Is exterior cladding in good condition to keep water out?
- Is the site of the temporary location properly graded for water run-off?

Ventilation

- Have steps been taken to ensure proper ventilation of the building?
- Have interior doors been left open for ventilation purposes?
- Has the secured building been checked within the last 3 months for interior dampness or excessive humidity?

Pests

- Have nests/pests been removed from the building's interior and eaves?
- Are adequate screens in place to guard against pests?
- Has the building been inspected and treated for termites, carpenter ants, rodents, etc.?

Security

- Are smoke and fire detectors in working order?
- Are wall openings boarded up and exterior doors securely fastened?
- Are plans in place to monitor the building on a regular basis?
- Are the keys to the building in a secure but accessible location?
- Are the grounds being kept from becoming overgrown?

- Have the following been removed from the interior: trash, hazardous materials such as inflammable liquids, poisons, and paints and canned goods that could freeze and burst?
- Is the site securely fenced and regularly patrolled?
- Is the building signed identifying it as a protected heritage building with a phone number for citizens to call with questions or concerns or report vandals?

The aforementioned items will assist in protecting the listed heritage resources that are currently unoccupied during the planning process until actual site work commences.





SURTEES HOUSE CONSERVATION PLAN

5.0 CONSERVATION RECOMMENDATIONS

A condition review of the Surtees House was carried out during a site visit in February 2017. Observations were made only in areas accessible during the review. In addition to the visual review of the building, paint samples were taken from exterior building materials and examined. The recommendations for the preservation and rehabilitation of the historic residence are based on the site review, material samples, and archival documents that provide valuable information about the original appearance of the Surtees House.

The following chapter describes the materials, physical condition and recommended conservation strategy for the Surtees House based on Parks Canada *Standards & Guidelines for the Conservation of Historic Places in Canada*.

5.1 SITE

The Surtees House is located at 4629 Lakeshore Road, at the southwest portion of the Surtees Property, with its historic front facade facing a strip mall across the street. Directly adjacent to the north of the property is St. Andrew's Church with a small cemetery to the rear. The southern edge of the property is characterized by a small hill that is vegetated by mature trees and shrubs. Located diagonally behind the house to the northeast is the Surtees Barn that was built in 1927.

The Surtees property is valued for its central location at the heart of the original Okanagan Mission settlement. It has many natural heritage features such as the Bellevue Creek and its riparian flora and fauna, and mature deciduous and coniferous trees acting as noise and visual barrier from adjacent neighbouring properties.

The location of the Surtees house, its relationship to the Surtees Barn, and the surrounding natural heritage features of the property are important character-defining element of the historic assets.

Conservation Strategy: Relocation

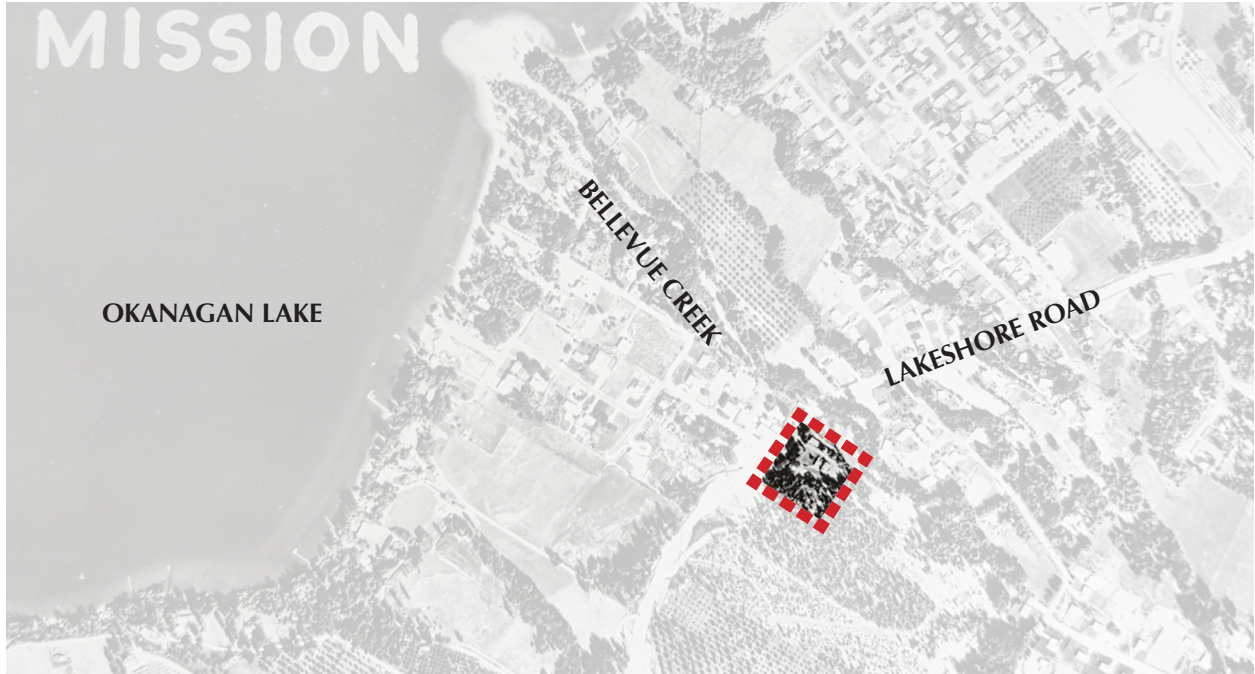
- Preserve the historic front facade as it relates to Lakeshore Road.
- Protect and retain natural heritage features of the Surtees property. Replace in kind disturbed vegetation with new plantings to match original as required.
- Relocate the historic house within the property lines.

5.1.1 RELOCATION

Site protection measures should be done in order to preserve the structure prior to relocation. Before moving the house to its permanent location, the following **Relocation Guidelines** should be implemented:

- A relocation plan should be prepared to ensure that the least destructive method of relocation will be used. The original exterior brick chimney should be moved with the main house, if possible.
- The existing structural bracing should be reviewed by a qualified engineer or a professional building relocation company.
- An experienced and qualified contractor should undertake the physical relocation of the historic structure.
- Appropriate foundation materials can be used at the new site, which can include reinforced concrete basement walls and slab.
- Provide utility installations for electricity, communication and other service connections underground. Installations located above ground should be incorporated harmoniously into the design concept for the relocated structure.
- Implement measures for site protection, in particular when the house sits vacant, and until construction work commences.





Aerial maps showing location of the Surtees House at 4629 Lakeshore Road, and the extent of Surtees Property.

5.2 OVERALL FORM, SCALE & MASSING

The Surtees House is valued as one of the oldest structures to survive in this vicinity. The original residential form, scale, and massing of the historic house circa 1910 remains legible despite a number of rehabilitation throughout the years. It includes: early addition to the front and rear of the north elevation by Allan Surtees circa 1924, and later unsympathetic extension to the kitchen at the side (south) and rear (east) elevations (date unknown).

The Surtees House is characterized by its: one and one-half storey height, with partial basement accesible from the exterior rear of the house; cross gable roof, with front and rear extension, and hipped-roof dormer; hipped-roof bay window to the north, and; front porch, with shed roof and closed balustrade. Its original configuration, along with the early additions to the historic house, are important character-defining elements that should be preserved.

Later additions to the kitchen area include a small extension to the rear (east elevation), as well as to the side (south elevation), which is characterized by a low-slope roof and a tall, exterior brick chimney. These later additions do not contribute to the historic character of the house, and may be demolished to restore the original overall form, scale, and massing of the Surtees House.

Future rehabilitation of the historic house should ensure the conservation of its heritage value by adopting minimal intervention that retains the integrity of its overall form, scale, and massing.

Conservation Strategy: Preservation

- Preserve the overall form, scale and massing of the building.
- Preserve the primary elevations (front façade and north elevation) as it relates to Lakeshore Road.
- All new addition should be reviewed by Heritage Consultant to ensure that the essential form and integrity of the historic asset is preserved.

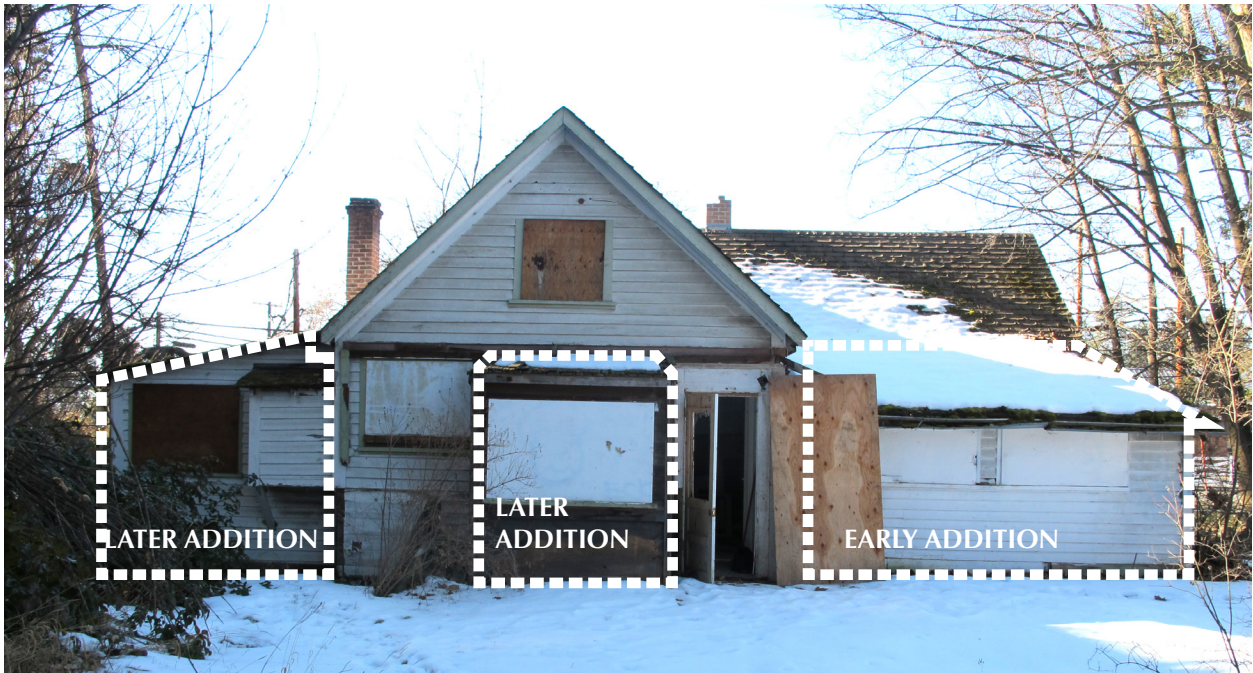
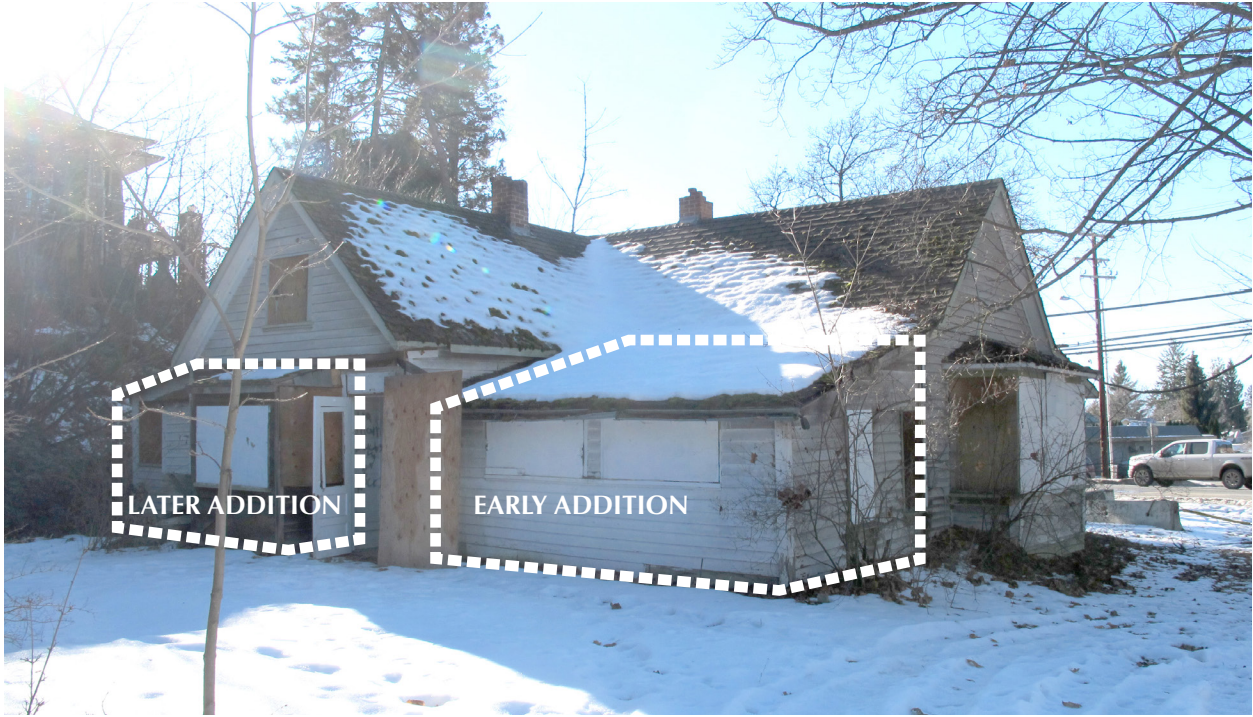


Historic front facade (west elevation) of Surtees House at 4629 Lakeshore Road.



Perspectival views of the Surtees House along Lakeshore Road showing partial west and south elevations (top), and partial west and north elevations (bottom). Note that the .

CONSERVATION RECOMMENDATIONS



Perspectival view of the Surtees House showing partial east (rear) and north elevations (top); Rear elevation of surtees House to the east (bottom)





Lower portion of bay window at north elevation, showing wood lapped siding, window sill, and board trims. Note that foundation wall is clad in later vertical siding.



Portion of rear elevation showing opening to unoccupied partial basement, with exposed cast-in-place concrete foundation walls.

5.3 FOUNDATION

The foundation of the Surtees House was inaccessible during the initial review, and would require the removal of exterior cladding in localized area to expose the foundation beneath. However, a partial basement was noted from an opening at the rear of the building, suggesting that the timber-frame structure is sitting on a cast-in-place concrete footing and foundation wall.

The existing foundation should be rehabilitated to include seismic reinforcements, as required. Careful attention should be executed to ensure the exterior walls above grade, particularly the primary elevations (front façade and north elevation), are not damaged during demolition of foundation, and relocation of the house. The heritage resource should be protected from damage or destruction at all times. Reference sections **4.3: General Conservation Strategy** and **4.6: Site Protection** for further information.

Conservation Strategy: Rehabilitation

- If new foundations are proposed, concrete is a suitable material. New material should match original in appearance, as viewed from the exterior, as possible.
- Foundations should be reviewed by a Structural Engineer. Once condition is assessed, conservation recommendations can be finalized.
- To ensure the prolonged preservation of the new foundations, all landscaping should be separated from the foundations at grade by a course of gravel or decorative stones, which help prevent splash back and assist drainage. New vegetation may assist in concealing the newly exposed foundations, if desired.

5.4 EXTERIOR WOOD-FRAME WALLS

The Surtees House features a traditional wood-frame construction, that is likely balloon-framed, given the abundance of old growth lumber in the past. In general, the exterior wood-frame walls appear to be in good condition, with no evident signs of heavy deterioration based on visual observation from the interior and exterior of the historic house. Further investigation is required to determine its construction and structural integrity.

The original exterior wall cladding of the historic house are still intact, and is characterized by horizontal wood siding with bevelled profile. The original wood siding of the historic house is visually and physically distinguishable from replacement wood siding, illustrating the craftsmanship involved with construction of earlier vernacular detailing of the exterior wood-frame walls. Original wood trims are also extant at all elevations, which include, but not limited to: corner boards, skirt boards, window and door surround trims, window sills and door thresholds.

The exterior wood cladding and trims appears to be in good condition with signs of minor deterioration in localized areas, which are attributed to natural weathering and inadequate protection and stabilization since the house was left unoccupied. All aforementioned elements contribute to the historic character of the Surtees House, and should be preserved, and repaired as required.

Conservation Strategy: Preservation

- Due to the integrity of the original wood-frame structure, the exterior walls should be preserved through retention and in-situ repair work.
- Preserve the original wood-frame structure of the historic building.
- Preserve original siding on all elevations, if possible, and clean surface for repainting.
- Replace damaged siding to match existing in material, size, profile and thickness.
- Any existing trim should be preserved, and new material that is visually physically compatible with the original should be reinstated when original fabric is missing. Combed and/or textured lumber is not acceptable. Hardi-plank or other cementitious boards are not acceptable.
- Design structural or seismic upgrades so as to minimize the impact to the character-defining elements.
- Utilize Alternate Compliance Methods outlined in the BC Building Code for fire and spatial separations, including installation of sprinklers where possible.
- Cleaning procedures should be undertaken with non-destructive methods. Areas with biological growth should be cleaned using a soft, natural bristle brush, without water, to remove dirt and other material. If a more intense cleaning is required, this can be accomplished with warm water, mild detergent (such as D/2 Biological Solution®) and a soft bristle brush. High-pressure power washing, abrasive cleaning or sandblasting should not be allowed under any circumstances.





Photo showing existing condition of original exterior wall, with horizontal lapped wood siding and trims at north elevation (top left), and at the interior return walls of the enclosed early addition to the west (top right).



Photos showing original exterior walls with original materials interfaced with later rehabilitation with inappropriate detailing; at historic front facade between door and window opening (bottom left), and at south elevation and return wall of later addition (bottom right).

5.5 ROOF

The original T-shaped configuration of the cross-gabled roof structure of the Surtees House retains its legibility, that is likely clad with wooden shingles. A small portion of the cross-gabled roof structure is exposed from the interior of the house, and appears to be in good condition. Further investigation is required to determine its structural integrity. The historic house also features early front and rear extension to the north, a hipped-roof dormer facing west, a hipped-roof bay window to the north, and a modest front porch with shed roof.

The roof of the historic house is characterized by narrow overhang with closed soffit, and are clad with later asphalt shingles that do not contribute to the historic character of the house. Archival photos show hexagonal asphalt shingles, which indicates that the existing cladding have been in place for at least 25 years. It appears to be in fair condition, showing signs of deterioration in localized areas, as evident by heavy biological growth, granular loss, and staining.

Original wood structure should be retained as much as possible. New cedar shingles is preferred replacement material, but asphalt shingles may also be used as roofing replacement to match original in appearance, and should be reviewed by Heritage Consultant prior to installation.



Existing condition of original, primary cross-gabled roof, with shed roof extension of early addition to the northeast portion of the house, as well as two original interior brick masonry chimney stacks along the roof ridges.

Conservation Recommendation: Rehabilitation

- Preserve the roof structure in its current configuration, as expressed by its primary cross-gabled roof structure.
- If required, roofing membrane and cladding system may be rehabilitated. Cedar shingles are the preferred material, but uroid shingles or Aged Cedar Enviroshingles™ are also acceptable.
- Retain the original bargeboards and fascia boards, as well as the soffit any exposed roof elements.
- Design and install adequate rainwater disposal system and ensure proper drainage from the site is maintained. Wood gutters with galvanized steel downspouts are recommended. Aluminum in appropriate colours is also acceptable. Paint or provide specification of drainage system elements according to colour schedule devised by Heritage Consultant.



Southwest corner view of the house showing later addition, with exterior brick chimney in the foreground, and two original interior chimney stacks in the background.

5.5.1 CHIMNEYS

The Surtees House features two original interior brick chimney along the roof ridges that provides venting for the kitchen and the fireplace. Above the roofline, the chimneys appear to be in poor condition, with missing brick masonry units, including the original corbelled crown detail. The bricks require cleaning and repointing, but generally appears to be in fair condition. Based on observations in the kitchen area, the chimney flue terminates abruptly within the interior wall, and is only supported by the interior wood-frame of the house. This configuration may have structural implications to the integrity of the chimney, and further investigation is required if the intent is to restore the element from the interior.

A later, exterior brick chimney is extant at the south kitchen extension of the historic house. It does not have a heritage value, and may be demolished to restore the historic character of the Surtees House. The original chimneys should be preserved in their original configuration and exterior appearance. Venting may be installed within the existing chimney opening, and should not protrude through any of the exterior brickwork. The original brickwork should be carefully cleaned and repointed, as required.

Conservation Recommendation: Preservation

- Preserve the original chimneys in its original configuration, if possible.
- Original chimneys may require structural stabilization.
- Investigate condition of brickwork. If required, brickwork may be repointed and cleaned using a natural bristle brush and mild rinse detergent.
- If the existing chimneys need to be removed prior to relocation, the existing chimney should be carefully documented prior to dismantling of the existing chimneys. All sound, brick masonry units should be salvaged. Chimneys should be reinstated above roofline to match original configuration using salvaged masonry as possible, or

if necessary, with new, full-dimensioned brick masonry units to match the original. Reconstruction should be discussed with the Heritage Consultant.

5.6 FENESTRATION

Windows, doors and storefronts are among the most conspicuous feature of any building. In addition to their function — providing light, views, fresh air and access to the building — their arrangement and design is fundamental to the building's appearance and heritage value. Each element of fenestration is, in itself, a complex assembly whose function and operation must be considered as part of its conservation. — Standards and Guidelines for the Conservation of Historic Places in Canada.

5.6.1 WINDOWS

The Surtees House originally featured a number of wood window assemblies, which include double-hung, casement, and fixed wood window sashes, some with six window panes in true divided lights.

Initial observations were done from the interior of the house because all of the window openings of the Surtees House have been securely boarded up from the exterior. A number of surviving original window sashes with missing or broken glazing are exposed from the interior of the house; some openings with missing assemblies were also noted during the review. Most of the windows are finished with paint.

In general, the window sashes appear to be in good and repairable condition. Some areas of the house were inaccessible, and further investigation would

be required to determine full condition of extant, original window assemblies. The windows of the historic house are important character-defining elements that should be preserved, and repaired as necessary.

Conservation Strategy: Preservation

- Inspect for condition and complete detailed inventory to determine extent of recommended repair or replacement.
- Retain existing window sashes; repair as required; install replacement matching sashes where missing or beyond repair.
- Preserve and repair as required, using in kind repair techniques where feasible.
- Overhaul, tighten/reinforce joints. Repair frame, trim and counterbalances.
- Each window should be made weather tight by re-puttying and weather-stripping as necessary.
- Retain historic glass, where possible. Where broken glass exists in historic wood-sash windows, the broken glass should be replaced. When removing broken glass, the exterior putty should be carefully chipped off with a chisel and the glazier's points should be removed. The wood where the new glass will be rested on should be scraped and cleaned well, and given a coat of linseed oil to prevent the wood from absorbing the oil from the new putty. The new glass should be cut 1/16-1/8th smaller than the opening to allow for expansion and irregularities in the opening, to ensure the glazing does not crack due to natural forces. Window repairs should be undertaken by a contractor skilled in heritage restoration.
- Replacement glass to be single glazing, and visually and physically compatible with existing.
- Prime and repaint as required in appropriate colour, based on colour schedule devised by Heritage Consultant.



CONSERVATION RECOMMENDATIONS



Photos showing existing typical conditions of surviving original wood windows and doors: gable ends at the east/west elevations (1, 2); bay window at north elevation (3); historic front facade at west elevation, showing partial wood door (4); rear exterior door at east elevation (5); main entrance door at west elevation (6).

5.6.2 DOORS

The Surtees House features two original exterior door assemblies, which include the main entrance door at the front porch, and a secondary entrance door to the kitchen area at the rear of the house. Both doors are characterized by inset wood panelling and glazing unit that are finished with paint in unsympathetic colour. The surviving original exterior wooden door assemblies contribute to the historic character of the house and should be preserved, and repaired as required.

Conservation Strategy: Preservation



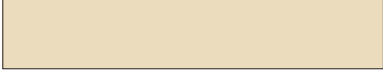
- Retain the door openings in their original locations, and preserve and repair all original door.
- New doors should be visually compatible with the historic character of the building.

5.7 EXTERIOR COLOUR SCHEDULE

Part of the restoration process is to finish the building in historically appropriate paint colours. The following preliminary colour scheme has been derived by the Heritage Consultant. On-site paint sampling and microscopic paint analysis did not provide sufficient evidence to determine the original colour scheme. A preliminary placeholder colour scheme has been suggested, using Benjamin Moore’s Historical True Colours Palette. Further on-site analysis is required for final colour confirmation once access is available.

Prior to final paint application, samples of these colours should be placed on the building to be viewed in natural light. Final colour selection can then be verified. Matching to any other paint company products should be verified by the Heritage Consultant.

PRELIMINARY COLOUR TABLE: SURTEES HOUSE, 4629 LAKESHORE ROAD, KELOWNA

Element	Colour	Code	Sample	Finish
Wood Window Frames & Sashes	Hastings Red	VC-30		High Gloss
Doors	Stained & Varnished	-	-	-
Wood Siding	Pendrell Verdigris	VC-22		Flat
Window & Door Trim, Corner & Skirt Boards, Fascia, Soffit, Other Trims	Oxford Ivory	VC-15		Semi-Gloss
Roof	Cedar Shingles	-	-	-

Paint colours come from Benjamin Moore’s *Historical Vancouver True Colours*



5.8 INTERIOR

“Interior features can include elements such as interior walls, floors and ceilings, mouldings, staircases, fireplace mantels, faucets, sinks, built-in cabinets, light fixtures, hardware, radiators, mail chutes, telephone booths and elevators. Because their heritage value resides not only in their physical characteristics, but also in their location in the historic building, it is important to protect them from removal. This is particularly true of doors, banisters, church pews, fireplace mantels, sinks and light fixtures, which are often replaced instead of being upgraded. Reuse in their original location not only protects their heritage value, but is also a more sustainable approach to conserving these artefacts.” Standards & Guidelines for the Conservation of Historic Places in Canada

Building Code upgrading is one of the most important aspects of heritage building rehabilitation, as it ensures life safety and long-term protection for the resource. However, the interior features of an historic property are often heavily damaged in the process. Both Vancouver Building By-law and the British Columbia Building Code offer equivalencies and exemptions to heritage buildings, which enable a higher degree of heritage conservation and retention of original material. The following guidelines pertaining to Health, Safety and Security Considerations from the *Standards & Guidelines* should be followed when faced with the conservation of interior character-defining elements:

- Upgrade interior features to meet health, safety and security requirements, in a manner that preserves the existing feature and minimizes impact on its heritage value.
- Work with code specialists to determine the most appropriate solution to health, safety and security requirements with the least impact on the character-defining elements and overall heritage value of the historic building.

- Explore all options for modifications to existing interior features to meet functional requirements prior to considering removal or replacement.
- Remove or encapsulate hazardous materials, such as friable asbestos insulation, using the least-invasive abatement methods possible, and only after thorough testing has been conducted.
- Install sensitively designed fire-suppression systems that retain character-defining elements and respect heritage value.

5.8.1 WALLS AND CEILINGS

The interior walls and ceilings of the Surtees House feature different finishes that include gypsum board and V-joint panelling. The front hall retains the V-joint panelling on the walls and ceilings, interfaced with corner board trim. The large bedroom with bay window to the north features a low ceiling with expressed horizontal beams, providing a coffered effect with flat inset gypsum board.

On the opposite sides of the bedroom to the east and the west are the early extensions to the original house, with walls that are characterized by horizontal wood siding of the original exterior walls. The dining area to the east features exposed roof rafters with an angle web wood member; the ceiling is covered in square ceramic tiles, which are not historically accurate.

The adaptive re-use of the Surtees House would require the rehabilitation of the interior of the house, and all efforts should be made to ensure that new work retains the integrity of the historic house, and is physically and visually compatible with, subordinate to and distinguishable from the historic place.

Conservation Strategy: Rehabilitation

CONSERVATION RECOMMENDATIONS



Interior space of the enclosed vestibule (west early addition) showing original exterior horizontal wood lapped siding to the right.



Interior space of the dining room (east early addition) showing exposed shed roof rafters with angle web wood members.



Interior brick masonry chimney flue terminating at midsection of the interior wall, partially showing wood structural support.



Surviving original v-joint panelling on walls and ceiling of front hall, showing original main entrance door to the left.





5.8.2 STAIRCASE

The Surtees House features an original, narrow winder staircase that is accessible from the large bedroom to the north, leading up to the attic spaces behind the fireplace. The low-height attic apaces may have been used for storage or boarding rooms for servants. The staircase is intact and appears to be in good condition, and may be rehabilitated, as necessary.

Conservation Strategy: Rehabilitation

5.8.3 FIREPLACE

The Surtees House features a modest brick masonry fireplace with raised concrete hearth and wood mantel. The paint finish is not historically accurate, and should be removed. The fireplace is intact and appears to be in good condition, and may be rehabilitated, as necessary.

Conservation Strategy: Rehabilitation



Photos showing surviving interior character-defining elements of Surtees House, including narrow winder staircase; brick masonry fireplace with raised concrete hearth and wood mantel; low ceiling with expressed horizontal beams and coffered-effect.

6.0 MAINTENANCE PLAN

A Maintenance Plan should be adopted by the property owner, who is responsible for the long-term protection of the heritage features of the Surtees House. The Maintenance Plan should include provisions for:

- Copies of the Maintenance Plan and this Conservation Report to be incorporated into the terms of reference for the management and maintenance contract for the building;
- Cyclical maintenance procedures to be adopted as outlined below;
- Record drawings and photos of the building to be kept by the management / maintenance contractor; and
- Records of all maintenance procedures to be kept by the owner.

A thorough maintenance plan will ensure the integrity of the Surtees House is preserved. If existing materials are regularly maintained and deterioration is significantly reduced or prevented, the integrity of materials and workmanship of the building will be protected. Proper maintenance is the most cost effective method of extending the life of a building, and preserving its character-defining elements. The survival of historic buildings in good condition is primarily due to regular upkeep and the preservation of historic materials.

6.1 MAINTENANCE GUIDELINES

A maintenance schedule should be formulated that adheres to the *Standards & Guidelines for the Conservation of Historic Places in Canada*. As defined by the *Standards & Guidelines*, maintenance is defined as:

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.

The assumption that newly renovated buildings become immune to deterioration and require less maintenance is a falsehood. Rather, newly renovated buildings require heightened vigilance to spot errors in construction where previous problems had not occurred, and where deterioration may gain a foothold.

Routine maintenance keeps water out of the building, which is the single most damaging element to a heritage building. Maintenance also prevents damage by sun, wind, snow, frost and all weather; prevents damage by insects and vermin; and aids in protecting all parts of the building against deterioration. The effort and expense expended on an aggressive maintenance will not only lead to a higher degree of preservation, but also over time potentially save large amount of money otherwise required for later repairs.

6.2 PERMITTING

Repair activities, such as simple in-kind repair of materials, or repainting in the same colour, should be exempt from requiring city permits. Other more intensive activities will require the issuance of a Heritage Alteration Permit.

6.3 ROUTINE, CYCLICAL AND NON-DESTRUCTIVE CLEANING

Following the *Standards & Guidelines for the Conservation of Historic Places in Canada*, be mindful of the principle that recommends “using the gentlest means possible”. Any cleaning procedures should be undertaken on a routine basis and should be undertaken with non-destructive methods. Cleaning should be limited to the exterior material such as concrete surfaces and wood elements such as siding and trims. All of these elements are usually easily cleaned, simply with a soft, natural bristle brush, without water, to remove dirt and other material. If a more intensive cleaning is required,



this can be accomplished with warm water, mild detergent and a soft bristle brush. High-pressure washing, sandblasting or other abrasive cleaning should not be undertaken under any circumstances.

6.4 REPAIRS AND REPLACEMENT OF DETERIORATED MATERIALS

Interventions such as repairs and replacements must conform to the *Standards & Guidelines for the Conservation of Historic Places in Canada*. The building's character-defining elements – characteristics of the building that contribute to its heritage value (and identified in the Statement of Significance) such as materials, form, configuration, etc. - must be conserved, referencing the following principles to guide interventions:

- An approach of minimal intervention must be adopted - where intervention is carried out it will be by the least intrusive and most gentle means possible.
- Repair rather than replace character-defining elements.
- Repair character-defining elements using recognized conservation methods.
- Replace 'in kind' extensively deteriorated or missing parts of character-defining elements.
- Make interventions physically and visually compatible with the historic place.

6.5 INSPECTIONS

Inspections are a key element in the maintenance plan, and should be carried out by a qualified person or firm, preferably with experience in the assessment of heritage buildings. These inspections should be conducted on a regular and timely schedule. The inspection should address all aspects of the building including exterior, interior and site conditions. It makes good sense to inspect a building in wet weather, as well as in dry, in order to see how water runs off – or through – a building. From this inspection, an inspection report should

be compiled that will include notes, sketches and observations. It is helpful for the inspector to have copies of the building's elevation drawings on which to mark areas of concern such as cracks, staining and rot. These observations can then be included in the report. The report need not be overly complicated or formal, but must be thorough, clear and concise. Issues of concern, taken from the report should then be entered in a log book so that corrective action can be documented and tracked. Major issues of concern should be extracted from the report by the property manager.

An appropriate schedule for regular, periodic inspections would be twice a year, preferably during spring and fall. The spring inspection should be more rigorous since in spring moisture-related deterioration is most visible, and because needed work, such as painting, can be completed during the good weather in summer. The fall inspection should focus on seasonal issues such as weather-sealants, mechanical (heating) systems and drainage issues. Comprehensive inspections should occur at five-year periods, comparing records from previous inspections and the original work, particularly in monitoring structural movement and durability of utilities. Inspections should also occur after major storms.

6.6 INFORMATION FILE

The Surtees House should have its own information file where an inspection report can be filed. This file should also contain the log book that itemizes problems and corrective action. Additionally, this file should contain building plans, building permits, heritage reports, photographs and other relevant documentation so that a complete understanding of the building and its evolution is readily available, which will aid in determining appropriate interventions when needed.

The file should also contain a list outlining the finishes and materials used, and information

detailing where they are available (store, supplier). The building owner should keep on hand a stock of spare materials for minor repairs.

6.6.1 LOG BOOK

The maintenance log book is an important maintenance tool that should be kept to record all maintenance activities, recurring problems and building observations and will assist in the overall maintenance planning of the historic residence. Routine maintenance work should be noted in the maintenance log to keep track of past and plan future activities. All items noted on the maintenance log should indicate the date, problem, type of repair, location and all other observations and information pertaining to each specific maintenance activity.

Each log should include the full list of recommended maintenance and inspection areas noted in this Maintenance Plan, to ensure a record of all activities is maintained. A full record of these activities will help in planning future repairs and provide valuable building information for all parties involved in the overall maintenance and operation of the building, and will provide essential information for long term programming and determining of future budgets. It will also serve as a reminder to amend the maintenance and inspection activities should new issues be discovered or previous recommendations prove inaccurate.

The log book will also indicate unexpectedly repeated repairs, which may help in solving more serious problems that may arise in the historic building. The log book is a living document that will require constant adding to, and should be kept in the information file along with other documentation noted in section **6.6 Information File**.

6.7 EXTERIOR MAINTENANCE

Water, in all its forms and sources (rain, snow, frost, rising ground water, leaking pipes, back-splash, etc.) is the single most damaging element to historic buildings.

The most common place for water to enter a building is through the roof. Keeping roofs repaired or renewed is the most cost-effective maintenance option. Evidence of a small interior leak should be viewed as a warning for a much larger and worrisome water damage problem elsewhere and should be fixed immediately.

6.7.1 INSPECTION CHECKLIST

The following checklist considers a wide range of potential problems specific to the Surtees House, such as water/moisture penetration, material deterioration and structural deterioration. This does not include interior inspections.

EXTERIOR INSPECTION

Site Inspection:

- Is the lot well drained? Is there pooling of water?
- Does water drain away from foundation?

Foundation

- Moisture: Is rising damp present?
- Is there back splashing from ground to structure?
- Is any moisture problem general or local?
- Is damp proof course present?
- Are there shrinkage cracks in the foundation?
- Are there movement cracks in the foundation?
- Is crack monitoring required?
- Is uneven foundation settlement evident?
- Are foundation crawl space vents clear and working?
- Do foundation openings (doors and windows) show: rust; rot; insect attack; soil build-up;
- Deflection of lintels?



Wood Elements

- Are there moisture problems present? (Rising damp, rain penetration, condensation moisture from plants, water run-off from roof, sills, or ledges?)
- Is wood in direct contact with the ground?
- Is there insect attack present? Where and probable source?
- Is there fungal attack present? Where and probable source?
- Are there any other forms of biological attack? (Moss, birds, etc.) Where and probable source?
- Is any wood surface damaged from UV radiation? (bleached surface, loose surface fibres)
- Is any wood warped, cupped or twisted?
- Is any wood split? Are there loose knots?
- Are nails pulling loose or rusted?
- Is there any staining of wood elements? Source?

Condition of Exterior Painted Materials

- Paint shows: blistering, sagging or wrinkling, alligatoring, peeling. Cause?
- Paint has the following stains: rust, bleeding knots, mildew, etc. Cause?
- Paint cleanliness, especially at air vents?

Porch:

- Are steps safe? Balustrade secure?
- Do any support columns show rot at their bases?
- Attachment – are porches, steps, etc. securely connected to the building?

Windows

- Is there glass cracked or missing?
- If the glazing is puttied has it gone brittle and cracked? Fallen out? Painted to shed water?
- If the glass is secured by beading, are the beads in good condition?
- Is there condensation or water damage to the paint?
- Are the sashes easy to operate? If hinged, do they swing freely?
- Is the frame free from distortion?

- Do sills show weathering or deterioration?
- Are drip mouldings/flashing above the windows properly shedding water?
- Is the caulking between the frame and the cladding in good condition?

Doors

- Do the doors create a good seal when closed?
- Are the hinges sprung? In need of lubrication?
- Do locks and latches work freely?
- If glazed, is the glass in good condition? Does the putty need repair?
- Are door frames wicking up water? Where? Why?
- Are door frames caulked at the cladding? Is the caulking in good condition?
- What is the condition of the sill?

Gutters and Downspouts

- Are downspouts leaking? Clogged? Are there holes or corrosion? (Water against structure)
- Are downspouts complete without any missing sections? Are they properly connected?
- Is the water being effectively carried away from the downspout by a drainage system?
- Do downspouts drain completely away?

Roof

- Are there water blockage points?
- Is the leading edge of the roof wet?
- Is there evidence of biological attack? (Fungus, moss, birds, insects)
- Are wood shingles wind damaged or severely weathered? Are they cupped or split or lifting?
- Are the nails sound? Are there loose or missing shingles?
- Are flashings well seated?
- If there is a lightning protection system are the cables properly connected and grounded?
- Does the soffit show any signs of water damage? Insect or bird infestation?
- Is there rubbish buildup on the roof?

INTERIOR INSPECTION

Basement

- Are there signs of moisture damage to the walls?
- Are there signs of past flooding, or leaks from the floor above? Is the floor damp?
- Are walls even or buckling or cracked? Is the floor cracked or heaved?
- Are there signs of insect or rodent infestation?

Concealed spaces

- Is light visible through walls, to the outsider or to another space?
- Are the ventilators for windowless spaces clear and functional?
- Do pipes or exhausts that pass through concealed spaces leak?
- Are wooden elements soft, damp, cracked? Is metal material rusted, paint peeling or off altogether?
- Infestations - are there signs of birds, bats, insects, rodents, past or present?

6.7.2 MAINTENANCE PROGRAMME

INSPECTION CYCLE:

Daily

- Observations noted during cleaning (cracks; damp, dripping pipes; malfunctioning hardware; etc.) to be noted in log book or building file.

Semi-annually

- Semi-annual inspection and report with special focus on seasonal issues.
- Thorough cleaning of drainage system to cope with winter rains and summer storms
- Check condition of weather sealants (Fall).
- Clean the exterior using a soft bristle broom/brush.

Annually (Spring)

- Inspect concrete for cracks, deterioration.
- Inspect metal elements, especially in areas that may trap water.
- Inspect windows for paint and glazing compound failure, corrosion and wood decay and proper operation.
- Complete annual inspection and report.
- Clean out of all perimeter drains and rainwater systems.
- Touch up worn paint on the building's exterior.
- Check for plant, insect or animal infestation.
- Routine cleaning, as required.

Five-Year Cycle

- A full inspection report should be undertaken every five years comparing records from previous inspections and the original work, particularly monitoring structural movement and durability of utilities.
- Repaint windows every five to fifteen years.

Ten-Year Cycle

- Check condition of roof every ten years after last replacement.

Twenty-Year Cycle

- Confirm condition of roof and estimate effective lifespan. Replace when required.

Major Maintenance Work (as required)

- Thorough repainting, downspout and drain replacement; replacement of deteriorated building materials; etc.





SURTEES BARN

7.0 CONSERVATION RECOMMENDATIONS

A condition review of the Surtees Barn was carried out during a site visit in February 2017. Observations were made only in areas accessible during the review. In addition to the visual review of the building, paint samples were taken from exterior building materials and examined. The recommendations for the preservation and rehabilitation of the historic barn are based on the site review, material samples, and archival documents that provide valuable information about the original appearance of the Surtees Barn.

The following chapter describes the materials, physical condition and recommended conservation strategy for the Surtees Barn based on Parks Canada *Standards & Guidelines for the Conservation of Historic Places in Canada*.

7.1 SITE

The Surtees Barn is located within the Surtees property at 4629 Lakeshore Road, diagonally situated to the northeast of the Surtees House. It is characterized by a narrow set back from the north property line, with the front gable end of the barn directly facing St. Andrew's Church. To the south is a small hill that features a number of mature trees and shrubs.

The Surtees property is valued for its central location at the heart of the original Okanagan Mission settlement. It has many natural heritage features such as the Bellevue Creek and its riparian flora and fauna, and mature deciduous and coniferous trees acting as noise and visual barrier from adjacent neighbouring properties.

The Surtees Barn is intimately associated with the Surtees house, and along with its relationship to the surrounding natural heritage features of the property, its location is an important character-defining element of the historic assets.

Conservation Strategy: Relocation

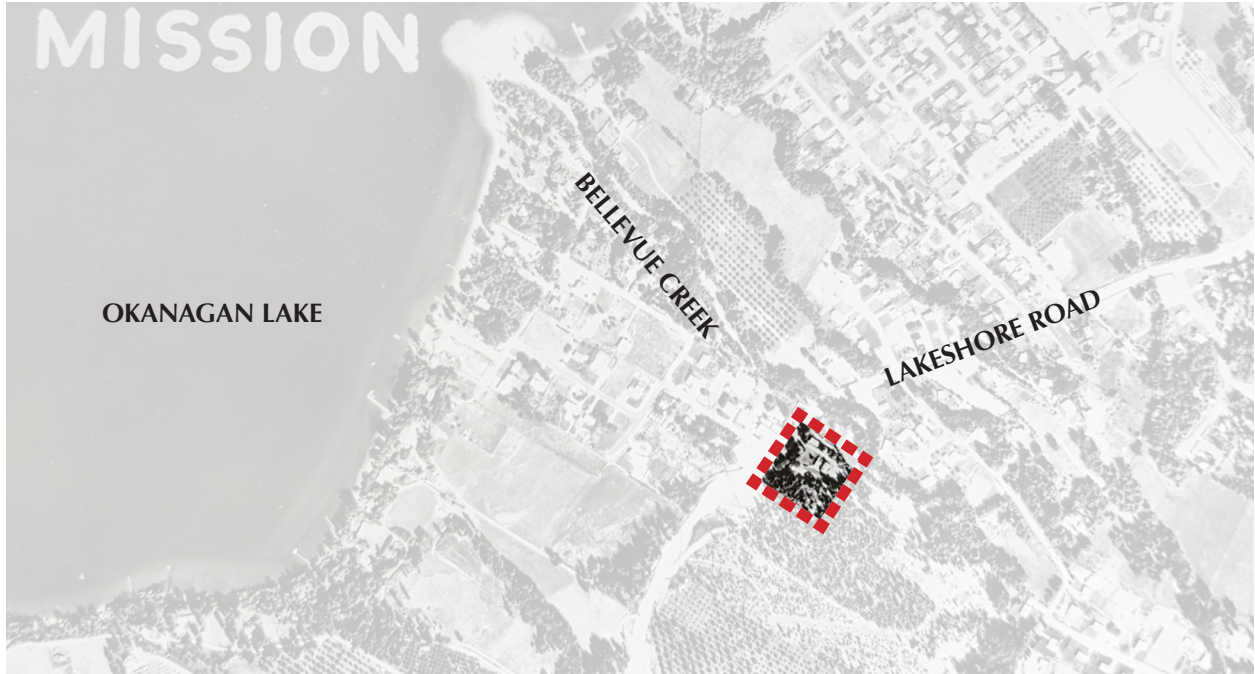
- Preserve the original location of the building. All rehabilitation work should occur within the property lines.
- Retain the relationship of the Surtees Barn with the Surtees House and the surrounding natural heritage features.
- Protect and retain natural heritage features of the Surtees property. Replace in kind disturbed vegetation with new plantings to match original as required.
- Relocate the historic building within the property lines.

7.1.1 RELOCATION

Site protection measures should be done in order to preserve the structure prior to relocation. Before moving the barn to its permanent location, the following **Relocation Guidelines** should be implemented:

- A relocation plan should be prepared to ensure that the least destructive method of relocation will be used. The original monitor vents should be moved with the barn, if possible.
- The existing structural bracing should be reviewed by a qualified engineer or a professional building relocation company.
- An experienced and qualified contractor should undertake the physical relocation of the historic structure.
- Appropriate foundation materials can be used at the new site, which can include reinforced concrete basement walls and slab.
- Provide utility installations for electricity, communication and other service connections underground. Installations located above ground should be incorporated harmoniously into the design concept for the relocated structure.
- Implement measures for site protection, in particular when the barn sits vacant, and until construction work commences.





Aerial maps showing location of the Surtees Barn at 4629 Lakeshore Road, and the extent of Surtees Property.

CONSERVATION RECOMMENDATIONS



Archival photo showing south elevation of Surtees Barn with cross of church in the background (top; date unknown); photo showing existing condition of Surtees Barn, as viewed from southwest, with St. Andrew's Church in the background.





Photos showing north elevation of Surtees Barn, as viewed from northeast (top) and northwest (bottom). Note hill with mature landscape in the background.

CONSERVATION RECOMMENDATIONS



Archival photo showing east elevation of the Surtees Barn (top), with small log house in the background (demolished). Photo showing existing condition of east elevation of the Surtees Barn (bottom); note in the background showing a portion of the Surtees House to the left, and the St. Andrew's Church to the right.



7.2 OVERALL FORM, SCALE & MASSING

The Surtees Barn retains its original form, scale, and massing, characterized by its two-storey height; gambrel roof with slightly flared eaves, a peaked roof projection above the hayloft opening to the north, and two venting stacks along the roof ridge; fenestration in central symmetry at gable end elevations; and an early extension with side-gable roof to the west. Based on archival photos, a series of later interventions was done to the early extension. None are surviving, but traces of their roof outline remain visible on the west side exterior walls of the barn.

The overall form, scale, and massing of the Surtees Barn, including the early extension to the west, are important character-defining elements that should be preserved, and repaired as necessary. All efforts should be made to ensure conservation of its heritage value by adopting minimal intervention that retains the integrity of its overall form, scale, and massing.

Conservation Strategy: Preservation

- Preserve the overall form, scale and massing of the Surtees Barn.
- All new addition should be reviewed by Heritage Consultant to ensure that the essential form and integrity of the historic asset is preserved.

7.3 FOUNDATIONS

The Surtees Barn features exposed, poured-in-place concrete foundation walls supporting its original wood-frame structure, and raised concrete floor slab. A new concrete foundation will be constructed prior to relocation of the historic building. Careful attention should be executed to ensure the exterior walls above grade are not damaged during demolition of existing foundation and relocation of the barn. The heritage resource should be protected from damage or destruction at all times. Reference sections **4.3: General Conservation Strategy** and **4.6: Site Protection** for further information.



Basement of the west extension to the Surtees Barn.

CONSERVATION RECOMMENDATIONS



Photos showing typical deteriorated condition of exterior wall cladding above concrete foundation walls. Note profile of original drop siding (top right).



Photos showing typical deteriorated condition of exterior wall cladding, as well as roof soffit and corner board trims.





Northeast corner condition of the existing, original exterior walls of the Surtees Barn, showing unsympathetic paint finish.



Interior side of the wall-to-roof interface, showing typical existing condition of the original wood materials.

Conservation Strategy: Rehabilitation

- If new foundations are proposed, concrete is a suitable material. New material should match original in appearance, as viewed from the exterior, as possible.
- Foundations should be reviewed by a Structural Engineer. Once condition is assessed, conservation recommendations can be finalized.
- To ensure the prolonged preservation of the new foundations, all landscaping should be separated from the foundations at grade by a course of gravel or decorative stones, which help prevent splash back and assist drainage. New vegetation may assist in concealing the newly exposed foundations, if desired.

7.4 EXTERIOR WOOD-FRAME WALLS

The Surtees Barn features a traditional wood-frame construction with exposed roof structure in gambrel and side-gable configuration, and partially-exposed wood studs of the exterior walls at the second floor level, as viewed from the interior of the building. In general, the exterior wood-frame walls appear to be in fair condition, with no evident signs of heavy deterioration based on visual observation from the interior and exterior of the barn. Further investigation is required to determine its construction and structural integrity.

The exterior walls of the building feature surviving original materials, which include horizontal wood drop siding, and wood trims such as corner boards, skirt boards, window and door surround trims, and window sills. The exterior wood cladding and trims appears to be in fair condition, with most of the original materials showing signs of deterioration, as evident by: wood shrinkage, cracking, or missing pieces altogether; peeling of paint; discolouration; staining; and some biological growth in localized areas. These conditions may have resulted from inadequate protection of the historic asset since the building was left unoccupied.

CONSERVATION RECOMMENDATIONS

The exterior wood-frame walls are important character-defining elements of the Surtees Barn, and should be preserved and repaired, as required. The proposed rehabilitation scheme will include structural, seismic, and envelope upgrades, and all original wood materials, particularly the horizontal drop siding and trims in good condition will be salvaged, reinstated, and finished to match original.

Conservation Strategy: Preservation

- Due to the integrity of the original wood-frame structure, the exterior walls should be preserved through retention and in-situ repair work, as possible.
- Preserve the original wood-frame structure of the historic building, and carefully document exterior walls prior to relocation and dismantling.
- Any existing original materials in good condition should be salvaged, and reinstated to match original. Replace damaged siding to match existing in material, size, profile and thickness.
- New materials that is visually physically compatible with the original should be reinstated when original fabric is missing. Combed and/or textured lumber is not acceptable. Hardi-plank or other cementitious boards are not acceptable.
- Design structural, seismic, and envelope upgrades so as to minimize the impact to the character-defining elements.
- Utilize Alternate Compliance Methods outlined in the BC Building Code for fire and spatial separations, including installation of sprinklers where possible.
- Cleaning procedures should be undertaken with non-destructive methods. Areas with biological growth should be cleaned using a soft, natural bristle brush, without water, to remove dirt and other material. If a more intense cleaning is required, this can be accomplished with warm water, mild detergent (such as D/2 Biological Solution®) and a soft bristle brush. High-pressure power washing, abrasive cleaning or sandblasting should not be allowed under any circumstances.



Photo showing interior side of the exterior wood-frame walls, looking north, and underside of the gambrel roof structure of the Surtees Barn.

7.5 ROOF

The gambrel roof of the Surtees Barn is the most prominent feature of the historic asset, both from the exterior and the interior of the building. Functionally, the gambrel configuration allowed for an enlarged storage capacity of the hayloft. The roof of the Surtees Barn is characterized by flared eaves to the east and west, and a narrow roof overhang at gambrel ends to the north and south, with a peaked projection on the north side.

In general, the roof cladding appears to be in poor condition. The temporary roof protection is heavily damaged, which may result to further water penetration and unwanted access to pests.

Conservation Recommendation: Rehabilitation

- Preserve the roof structure in its current configuration, as expressed by its primary cross-gabled roof structure.
- If required, roofing membrane and cladding system may be rehabilitated. Cedar shingles are the preferred material, but Duroid shingles or Aged Cedar Enviroshingles™ are also acceptable.
- Retain the original bargeboards and fascia boards, as well as the soffit any exposed roof elements.
- Design and install adequate rainwater disposal system and ensure proper drainage from the site is maintained. Wood gutters with galvanized steel downspouts are recommended. Aluminum in appropriate colours is also acceptable. Paint or provide specification of drainage system elements according to colour schedule devised by Heritage Consultant.

7.5.1 MONITOR VENTS

The Surtees Barn features two original monitor vents along the roof ridges, characterized by wooden louvres, walls clad in horizontal drop siding, and front-gabled cap. The monitor vents were inaccessible during the review, but observations

from the ground indicate that they appear to be in fair condition, showing signs of minor deterioration caused by natural weathering. Further investigation is required to determine their existing condition and structural integrity.

Conservation Recommendation: Preservation

- Preserve the original monitor vents in its original configuration, if possible.
- Original chimneys may require structural stabilization.
- Investigate condition of louvers and siding. If required, they should be repaired and cleaned using gentlest means as possible.
- If the existing monitor vents need to be removed prior to relocation, the existing monitor vents should be carefully documented prior to dismantling. All sound, original materials should be salvaged. Monitor vents should be reinstated above roofline to match original configuration using salvaged original materials as possible, or if necessary, with new materials to match the original. Reconstruction should be discussed with the Heritage Consultant.



Photo showing typical deteriorated condition of two, existing monitor vents along the roof ridge.

CONSERVATION RECOMMENDATIONS



Photos showing exposed gambrel roof structure of the Surtees Barn.





Photos showing side-gabled roof structure of the Surtees Barn extension, from exterior (top) and interior (bottom) side.

7.6 FENESTRATION

Windows, doors and storefronts are among the most conspicuous feature of any building. In addition to their function — providing light, views, fresh air and access to the building — their arrangement and design is fundamental to the building’s appearance and heritage value. Each element of fenestration is, in itself, a complex assembly whose function and operation must be considered as part of its conservation. — Standards and Guidelines for the Conservation of Historic Places in Canada.

7.6.1 WINDOWS

The Surtees Barn features surviving original wood window assemblies, including a number of fixed wood window sashes in various sizes, with six window panes in true divided lights. All of the window openings have been securely boarded up from the exterior, and all observations of surviving wood window sashes were done from interior spaces of the Surtees Barn that were accessible during the initial review. Further investigation would be required to assess the condition of all extant, original window assemblies.

All of surviving sashes were finished in paint, and some have missing or broken glazing, while others have been entirely detached from the window opening. In general, the window sashes appear to be in good and repairable condition. The windows of the Surtees Barn are important character-defining elements that should be preserved, and repaired as necessary.

One later window opening was introduced at the loft level of the south elevation, which breaks central symmetry of the gable ends. This could be rehabilitated in a sympathetic manner by enlarging the opening to achieve central symmetry.



Photos showing original, existing door assembly at west return of south elevation (top), and later door surround trim at east elevation (bottom).

Conservation Strategy: Preservation

- Inspect for condition and complete detailed inventory to determine extent of recommended repair or replacement.
- Retain existing window sashes; repair as required; install replacement matching sashes where missing or beyond repair.
- Preserve and repair as required, using in kind repair techniques where feasible.
- Overhaul, tighten/reinforce joints. Repair frame, trim and counterbalances.
- Each window should be made weather tight by re-puttying and weather-stripping as necessary.
- Retain historic glass, where possible. Where broken glass exists in historic wood-sash windows, the broken glass should be replaced. When removing broken glass, the exterior putty should be carefully chipped off with a chisel and the glazier's points should be removed. The wood where the new glass will be rested on should be scraped and cleaned well, and given a coat of linseed oil to prevent the wood from absorbing the oil from the new putty. The new glass should be cut 1/16-1/8th smaller than the opening to allow for expansion and irregularities in the opening, to ensure the glazing does not crack due to natural forces. Window repairs should be undertaken by a contractor skilled in heritage restoration.
- Replacement glass to be single glazing, and visually and physically compatible with existing.
- Prime and repaint as required in appropriate colour, based on colour schedule devised by Heritage Consultant.

7.6.2 DOORS

The Surtees Barn features original door openings on all elevations, although it appears that only one later door is extant, which is located at the west wall return of the Surtees Barn. The door is characterized by an inset panelling, with six glass panes in true divided lights. The surviving later door should be preserved, and repaired as necessary. All missing doors should be replaced with new, appropriate wooden doors that are sympathetic to the historic character of the Barn.

Conservation Strategy: Preservation & Rehabilitation




- Retain the door openings in their original locations, and preserve and repair all original door.
- New doors should be visually compatible with the historic character of the building.

7.7 EXTERIOR COLOUR SCHEDULE

Part of the restoration process is to finish the building in historically appropriate paint colours. The following preliminary colour scheme has been derived by the Heritage Consultant, based on on-site paint sampling and microscopic paint analysis. The colours have been matched to Benjamin Moore's Historical True Colours Palette. Further on-site analysis is required for final colour confirmation once access is available.

Prior to final paint application, samples of these colours should be placed on the building to be viewed in natural light. Final colour selection can then be verified. Matching to any other paint company products should be verified by the Heritage Consultant.

PRELIMINARY COLOUR TABLE: NAME OF BUILDING, ADDRESS

Element	Colour*	Code	Sample	Finish
Wood Siding	Pendrell Red	VC-29		Flat
Window Sash	Oxford Ivory	VC-1		High-Gloss
Door	TBD	-		-
Window & Door Trim, Corner & Skirt Boards, Fascia, Soffit, Other Trims	Oxford Ivory	VC-1		Semi-Gloss
Roof	Cedar Shingles	-	-	-

*Paint colours come from Benjamin Moore's *Historical Vancouver True Colours*



8.0 MAINTENANCE PLAN

A Maintenance Plan should be adopted by the property owner, who is responsible for the long-term protection of the heritage features of the Surtees Barn. The Maintenance Plan should include provisions for:

- Copies of the Maintenance Plan and this Conservation Report to be incorporated into the terms of reference for the management and maintenance contract for the building;
- Cyclical maintenance procedures to be adopted as outlined below;
- Record drawings and photos of the building to be kept by the management / maintenance contractor; and
- Records of all maintenance procedures to be kept by the owner.

A thorough maintenance plan will ensure the integrity of the Surtees Barn is preserved. If existing materials are regularly maintained and deterioration is significantly reduced or prevented, the integrity of materials and workmanship of the building will be protected. Proper maintenance is the most cost effective method of extending the life of a building, and preserving its character-defining elements. The survival of historic buildings in good condition is primarily due to regular upkeep and the preservation of historic materials.

8.1 MAINTENANCE GUIDELINES

A maintenance schedule should be formulated that adheres to the *Standards & Guidelines for the Conservation of Historic Places in Canada*. As defined by the *Standards & Guidelines*, maintenance is defined as:

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.

The assumption that newly renovated buildings become immune to deterioration and require less maintenance is a falsehood. Rather, newly renovated buildings require heightened vigilance to spot errors in construction where previous problems had not occurred, and where deterioration may gain a foothold.

Routine maintenance keeps water out of the building, which is the single most damaging element to a heritage building. Maintenance also prevents damage by sun, wind, snow, frost and all weather; prevents damage by insects and vermin; and aids in protecting all parts of the building against deterioration. The effort and expense expended on an aggressive maintenance will not only lead to a higher degree of preservation, but also over time potentially save large amount of money otherwise required for later repairs.

8.2 PERMITTING

Repair activities, such as simple in-kind repair of materials, or repainting in the same colour, should be exempt from requiring city permits. Other more intensive activities will require the issuance of a Heritage Alteration Permit.

8.3 ROUTINE, CYCLICAL AND NON-DESTRUCTIVE CLEANING

Following the *Standards & Guidelines for the Conservation of Historic Places in Canada*, be mindful of the principle that recommends “using the gentlest means possible”. Any cleaning procedures should be undertaken on a routine basis and should be undertaken with non-destructive methods. Cleaning should be limited to the exterior material such as concrete and stucco wall surfaces and wood elements such as storefront frames. All of these elements are usually easily cleaned, simply with a soft, natural bristle brush, without water, to remove dirt and other material. If a more intensive

cleaning is required, this can be accomplished with warm water, mild detergent and a soft bristle brush. High-pressure washing, sandblasting or other abrasive cleaning should not be undertaken under any circumstances.

8.4 REPAIRS AND REPLACEMENT OF DETERIORATED MATERIALS

Interventions such as repairs and replacements must conform to the *Standards & Guidelines for the Conservation of Historic Places in Canada*. The building's character-defining elements – characteristics of the building that contribute to its heritage value (and identified in the Statement of Significance) such as materials, form, configuration, etc. - must be conserved, referencing the following principles to guide interventions:

- An approach of minimal intervention must be adopted - where intervention is carried out it will be by the least intrusive and most gentle means possible.
- Repair rather than replace character-defining elements.
- Repair character-defining elements using recognized conservation methods.
- Replace 'in kind' extensively deteriorated or missing parts of character-defining elements.
- Make interventions physically and visually compatible with the historic place.

8.5 INSPECTIONS

Inspections are a key element in the maintenance plan, and should be carried out by a qualified person or firm, preferably with experience in the assessment of heritage buildings. These inspections should be conducted on a regular and timely schedule. The inspection should address all aspects of the building including exterior, interior and site conditions. It makes good sense to inspect a building in wet weather, as well as in dry, in order to see how water runs off – or through – a building.

From this inspection, an inspection report should be compiled that will include notes, sketches and observations. It is helpful for the inspector to have copies of the building's elevation drawings on which to mark areas of concern such as cracks, staining and rot. These observations can then be included in the report. The report need not be overly complicated or formal, but must be thorough, clear and concise. Issues of concern, taken from the report should then be entered in a log book so that corrective action can be documented and tracked. Major issues of concern should be extracted from the report by the property manager.

An appropriate schedule for regular, periodic inspections would be twice a year, preferably during spring and fall. The spring inspection should be more rigorous since in spring moisture-related deterioration is most visible, and because needed work, such as painting, can be completed during the good weather in summer. The fall inspection should focus on seasonal issues such as weather-sealants, mechanical (heating) systems and drainage issues. Comprehensive inspections should occur at five-year periods, comparing records from previous inspections and the original work, particularly in monitoring structural movement and durability of utilities. Inspections should also occur after major storms.

8.6 INFORMATION FILE

The building should have its own information file where an inspection report can be filed. This file should also contain the log book that itemizes problems and corrective action. Additionally, this file should contain building plans, building permits, heritage reports, photographs and other relevant documentation so that a complete understanding of the building and its evolution is readily available, which will aid in determining appropriate interventions when needed.

The file should also contain a list outlining the finishes and materials used, and information detailing where they are available (store, supplier). The building owner should keep on hand a stock of spare materials for minor repairs.

8.6.1 LOG BOOK

The maintenance log book is an important maintenance tool that should be kept to record all maintenance activities, recurring problems and building observations and will assist in the overall maintenance planning of the building. Routine maintenance work should be noted in the maintenance log to keep track of past and plan future activities. All items noted on the maintenance log should indicate the date, problem, type of repair, location and all other observations and information pertaining to each specific maintenance activity.

Each log should include the full list of recommended maintenance and inspection areas noted in this Maintenance Plan, to ensure a record of all activities is maintained. A full record of these activities will help in planning future repairs and provide valuable building information for all parties involved in the overall maintenance and operation of the building, and will provide essential information for long term programming and determining of future budgets. It will also serve as a reminder to amend the maintenance and inspection activities should new issues be discovered or previous recommendations prove inaccurate.

The log book will also indicate unexpectedly repeated repairs, which may help in solving more serious problems that may arise in the historic building. The log book is a living document that will require constant adding to, and should be kept in the information file along with other documentation noted in section **6.6 Information File**.

8.7 EXTERIOR MAINTENANCE

Water, in all its forms and sources (rain, snow, frost, rising ground water, leaking pipes, back-splash, etc.) is the single most damaging element to historic buildings.

The most common place for water to enter a building is through the roof. Keeping roofs repaired or renewed is the most cost-effective maintenance option. Evidence of a small interior leak should be viewed as a warning for a much larger and worrisome water damage problem elsewhere and should be fixed immediately.

8.7.1 INSPECTION CHECKLIST

The following checklist considers a wide range of potential problems specific to the Surtees Barn, such as water/moisture penetration, material deterioration and structural deterioration. This does not include interior inspections.

EXTERIOR INSPECTION

Site Inspection:

- Is the lot well drained? Is there pooling of water?
- Does water drain away from foundation?

Foundation

- Moisture: Is rising damp present?
- Is there back splashing from ground to structure?
- Is any moisture problem general or local?
- Is damp proof course present?
- Are there shrinkage cracks in the foundation?
- Are there movement cracks in the foundation?
- Is crack monitoring required?
- Is uneven foundation settlement evident?
- Are foundation crawl space vents clear and working?
- Do foundation openings (doors and windows) show: rust; rot; insect attack; paint failure; soil build-up;
- Deflection of lintels?

Wood Elements

- Are there moisture problems present? (Rising damp, rain penetration, condensation moisture from plants, water run-off from roof, sills, or ledges?)
- Is wood in direct contact with the ground?
- Is there insect attack present? Where and probable source?
- Is there fungal attack present? Where and probable source?
- Are there any other forms of biological attack? (Moss, birds, etc.) Where and probable source?
- Is any wood surface damaged from UV radiation? (bleached surface, loose surface fibres)
- Is any wood warped, cupped or twisted?
- Is any wood split? Are there loose knots?
- Are nails pulling loose or rusted?
- Is there any staining of wood elements? Source?

Condition of Exterior Painted Materials

- Paint shows: blistering, sagging or wrinkling, alligatoring, peeling. Cause?
- Paint has the following stains: rust, bleeding knots, mildew, etc. Cause?
- Paint cleanliness, especially at air vents?

Windows

- Is there glass cracked or missing?
- If the glazing is puttied has it gone brittle and cracked? Fallen out? Painted to shed water?
- If the glass is secured by beading, are the beads in good condition?
- Is there condensation or water damage to the paint?
- Are the sashes easy to operate? If hinged, do they swing freely?
- Is the frame free from distortion?
- Do sills show weathering or deterioration?
- Are drip mouldings/flushing above the windows properly shedding water?
- Is the caulking between the frame and the cladding in good condition?

Doors

- Do the doors create a good seal when closed?
- Are the hinges sprung? In need of lubrication?
- Do locks and latches work freely?
- If glazed, is the glass in good condition? Does the putty need repair?
- Are door frames wicking up water? Where? Why?
- Are door frames caulked at the cladding? Is the caulking in good condition?
- What is the condition of the sill?

Roof

- Are there water blockage points?
- Is there evidence of biological attack? (Fungus, moss, birds, insects)
- Are wood shingles wind damaged or severely weathered? Are they cupped or split or lifting?
- Are the nails sound? Are there loose or missing shingles?
- If there is a lightening protection system are the cables properly connected and grounded?
- Does the soffit show any signs of water damage? Insect or bird infestation?
- Is there rubbish buildup on the roof?
- Are flashings well positioned and sealed?

INTERIOR INSPECTION

Basement

- Are there signs of moisture damage to the walls? Is masonry cracked, discoloured, spalling?
- Is wood cracked, peeling rotting? Does it appear wet when surroundings are dry?
- Are there signs of past flooding, or leaks from the floor above? Is the floor damp?
- Are walls even or buckling or cracked? Is the floor cracked or heaved?
- Are there signs of insect or rodent infestation?



Concealed spaces

- Is light visible through walls, to the outsider or to another space?
- Are the ventilators for windowless spaces clear and functional?
- Do pipes or exhausts that pass through concealed spaces leak?
- Are wooden elements soft, damp, cracked? Is metal material rusted, paint peeling or off altogether?
- Infestations - are there signs of birds, bats, insects, rodents, past or present?

8.7.2 MAINTENANCE PROGRAMME

INSPECTION CYCLE:

Daily

- Observations noted during cleaning (cracks; damp, dripping pipes; malfunctioning hardware; etc.) to be noted in log book or building file.

Semi-annually

- Semi-annual inspection and report with special focus on seasonal issues.
- Thorough cleaning of drainage system to cope with winter rains and summer storms
- Check condition of weather sealants (Fall).
- Clean the exterior using a soft bristle broom/brush.

Annually (Spring)

- Inspect concrete for cracks, deterioration.
- Inspect metal elements, especially in areas that may trap water.
- Inspect windows for paint and glazing compound failure, corrosion and wood decay and proper operation.
- Complete annual inspection and report.
- Clean out of all perimeter drains and rainwater systems.

- Touch up worn paint on the building's exterior.
- Check for plant, insect or animal infestation.
- Routine cleaning, as required.

Five-Year Cycle

- A full inspection report should be undertaken every five years comparing records from previous inspections and the original work, particularly monitoring structural movement and durability of utilities.
- Repaint windows every five to fifteen years.

Ten-Year Cycle

- Check condition of roof every ten years after last replacement.

Twenty-Year Cycle

- Confirm condition of roof and estimate effective lifespan. Replace when required.

Major Maintenance Work (as required)

- Thorough repainting, downspout and drain replacement; replacement of deteriorated building materials; etc.

APPENDIX A: RESEARCH SUMMARY

LEGAL DESCRIPTION: Lot A, Plan KAP 71341
CIVIC ADDRESS: 4629 Lakeshore Road
CONSTRUCTION DATE: House circa 1910, Barn circa 1927

SOURCES

- City of Kelowna website: <http://www.kelowna.ca/CM/page1219.aspx> (accessed January 2007)
- BC Archives, Vital Events
- British Columbia Archival Union List (BCAUL), St. Andrew's Church: <http://aabc.bc.ca/WWW.angbc.archbc/display.ANGKOOT-330> (accessed January 2007)
- Marjoribanks, R. J. ed. "Coutts and Archie: The Honourable Cowboys," in *The Marjoribanks Journal*. 5 (1998):1-6. <http://members.fortunecity.com/jgreen/Mbanks/n5.html> (accessed January 2007)
- Okanagan Historical Society, Kelowna Branch. *Our History Our Heritage: One Hundred Stories Celebrating One Hundred Years*. Kelowna: Kelowna Branch Okanagan Historical Society, 2004.
- Surtees, Ursula. *History of Okanagan Mission House & Barn* (1919/1920). (attached as Appendix B).
- Upton, Primrose. *The History of the Okanagan Mission*. Okanagan Mission: Okanagan Mission Centennial Committee: 1958.
- Zuehlke, Mark. *Scoundrels, Dreamers & Second Sons: British Remittance Men in the Canadian West*. Vancouver: Whitecap, 1994.

LAND TITLE SEARCH

- Original Legal Description: Fractional N ½ of Section 25, Twp. 28, ODYD
- Subdivided: Lot 9, Plan 477
- Subdivided: Lot 22, Plan 1575
- Lot 3, Plan 6731
- Subdivided: Lot A, Plan KAP 71341

OWNERSHIP

1905: Crown to Gifford Rutter Thompson (Fractional N ½ of Section 25)
1910: A.B. Carle (Fractional N ½ of Section 25)
1910: James H. Baillie (Lot 9)
1911: (Registered 1912): The South Kelowna Land Co. Ltd. (Lot 9)
1920: Soldier's Settlement Board
1942: Edward Coelen
1961: Glenn James Coe and Verna May Coe
1978: John Coutts Surtees and Ursula Margaret Surtees
1986: Ursula Margaret Surtees
1993: Douglas Mulholland
1993: 434003 B.C. Ltd.
2002: City of Kelowna



Heritage Advisory Committee

Minutes

Date: Thursday, March 16, 2017
Location: Knox Mountain Meeting Room (#4A)
City Hall, 1435 Water Street

Committee Members Present: Abigail Riley (Chair), Stoke Tonne, Brian Anderson and Lorri Dauncey

Committee Members Absent: Amanda Snyder, Ryan Esbjerg (Alternate) and Bob Haynes (Alternate)

Staff Present: Community Planning Supervisor, Ryan Roycroft; Planner, Trisa Brandt; Planner, Lydia Korolchuk*; and FOI-Legislative Coordinator, Sandi Horning

(* denotes partial attendance)

1. Call to Order

The Chair called the meeting to order at 12:03 p.m.

Opening remarks by the Chair regarding conduct of the meeting were read. The Chair noted that the applicant for HAP17-0001 is not present and confirmed that staff are expecting the applicant to attend. The Chair advised that the Committee would deal with Agenda items 3 and 4 first in order to give the applicant more time.

3. Minutes

Moved by Lorri Dauncey/Seconded by Brian Anderson

THAT the Minutes of the February 16, 2017 Heritage Advisory Committee meeting be adopted as circulated.

Carried

4. Update - Council Decisions

Staff:

- Advised that the Heritage Revitalization Agreement with respect to 1449 Ethel Street is on the March 20, 2017 Council Agenda for Initial consideration.
- Advised that the Heritage Alteration Permit for 370 Burne Avenue is on the March 21, 2017 Council Agenda for consideration.
- Advised that the Thomson Farm Bylaw was adopted on March 6, 2017.
- Advised that 1985 Knox Crescent was approved for the carriage house and HAP for the second story on the primary dwelling. However, during the Building Permit process, it was discovered that the primary dwelling foundation cannot support a second storey. As a result, the applicant has redesigned to a single storey and applied for a new HAP. This will be presented to the Committee at the April meeting.
- Advised that a Stop Work Order has been placed on 1989 Abbott Street as the building on the property has been largely demolished. The City is currently considering enforcement options against the property owner. Staff will keep the Committee advised as this matter moves forward.

2. Applications for Consideration

2.1 2210 Abbott Street, HAP17-0001 - Richard, Judith & Craig Mohr

Staff:

- Displayed a PowerPoint presentation summarizing the Heritage Alteration Permit application with respect to the form and character of semi-detached housing and detached accessory buildings, including variances for site coverage, height and setbacks.
- The subject property is "Early Suburban" style with a dominant block style of "Late Arts and Crafts".
- Advised that there are other flat roof and modern homes in the area.
- Advised that a Development Permit was previously approved on the lot for a duplex which included a variance for the height of the accessory building and setback variances.
- The project details include:
 - o Modern design;
 - o "Frank Lloyd Wright Falling Water" inspiration;
 - o Horizontal planes;
 - o Stone columns;
 - o Mix of stone, stucco and glass;
 - o Detached accessory building:
 - Two single car garages;
 - Two bonus rooms;
 - o Opaque stucco walls around property line.
- Advised that upon staff's review of the requested variances, it was noted that an additional variance was overlooked and is required, being a variance to the Lake Okanagan Sight Line.
- Confirmed that the variances being requested include:
 - o Semi-detached dwellings:
 - Height – 3 stories proposed, 2.5 required
 - Setback – 2.3m proposed, 4.5m required
 - o Accessory buildings:
 - Height – 5.95m proposed, 4.5m maximum
 - Setback – 1.2m proposed, 9.0m required
 - o Site Coverage – 62% proposed, 60% required

- Lake Okanagan Sight Line (adjacent property).
- Staff are seeking a recommendation to Council regarding HAP17-0001 with respect to:
 - Form and Character;
 - Heritage Conservation Area Guidelines;
 - Variances requested for:
 - Height;
 - Setbacks;
 - Site Coverage;
 - Lake Okanagan Sight Lines.
- Responded to questions from the Committee Members.
- Clarified the number of parking spaces proposed:
 - 4 for each unit (minimum required is 2 for each unit).
- Clarified the height variance as relating to the number of stories rather than maximum height of 9.5m.
- Displayed a number of renderings for the subject property.

HAC Discussion:

- Each Committee Member provided individual comments regarding the application.
- Expressed a concern regarding the accessory buildings and the severe impact to the streetscape.

Moved by Stoke Tonne/Seconded by Brian Anderson

THAT the Heritage Advisory Committee recommends that Council support Heritage Alteration Permit Application No. HAP17-0001 for the property located at 2210 Abbott Street for the form and character of semi-detached housing in the Heritage Conservation Area subject to considering breaking up the symmetry of the primary residence and the articulation of the building halves form both the lake and street.

Defeated

Abigail Riley and Lorri Dauncey – Opposed.

Moved by Brian Anderson/Seconded by Lorri Dauncey

THAT the Heritage Advisory Committee recommends that Council not support Heritage Permit Application No. HAP17-0001 for the property located at 2210 Abbott Street to:

- vary the maximum number of stories of a semi-detached dwelling from 2.5 stories permitted to 3 stories proposed;
- vary the minimum front yard setback for a detached accessory building from 9.0m permitted to 1.2m proposed;
- vary the minimum side yard setback for a flanking street from 4.5m permitted to 2.31m proposed;
- vary the maximum site coverage including buildings, driveways and parking from 60% permitted to 62.4% proposed;
- vary the maximum height of an accessory building from 4.5m permitted to 5.95m proposed; and
- vary the Lake Okanagan Sight Line (adjacent property).

Carried

Anecdotal Comments:

The Heritage Advisory Committee recommends revisions to the application in order to reduce the massing of the structures for consistency with the adjacent properties and to reduce the number of parking spaces proposed. The Heritage Advisory Committee is concerned that the accessory building is too large and pushes the project above what is acceptable in the Heritage Conservation area. The variances indicate a clear desire to do more than the zone allows and noted that without the detached accessory building, fewer variances would be required, which would include the site coverage and Okanagan Lake Site Line and minimum parking requirement would still be met.

5. Next Meeting

The next Committee meeting has been scheduled for April 20, 2017.

6. Termination of Meeting

The Chair declared the meeting terminated at 12:43 p.m.

Abigail Riley, Chair

/slh