



Heritage Review Terms of Reference

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INTRODUCTION

A Heritage Conservation Area is a distinct area with special heritage value and character identified for heritage conservation purposes in an Official Community Plan (OCP). Individual properties within a heritage conservation area (HCA) may exhibit heritage value, but it is the overall heritage character and value that distinguishes a heritage conservation area. In establishing an HCA, the local government is not only recognizing the significance of the collective structures, but also the total environment, landscape, streetscape, spatial elements, vistas and views, and the relationships of buildings to each other and their surroundings.

Kelowna's Abbott Street and Marshall Street Heritage Conservation Areas are recognized for their special character and qualities and their importance is to be retained for future generations. Conservation is a balance between preserving the special character, quality, and significance of the historic place and facilitating change in a way that sustains it into the future. With skill and care, it is possible to accommodate modern uses and forms within a historical setting.

The quality of the relationship between the surrounding neighbourhood context and the proposed development is essential. Changes to existing buildings, and the design of new buildings should demonstrate an understanding of the special character and qualities of the historic context. As additions to a historic place, additions to existing buildings, and any new and infill buildings should be "compatible with, subordinate to, and distinguishable from"¹ the immediate historic homes and streetscapes. Design elements such as scale, form, siting, materials, colour, and detailing are important to address in new proposals to demonstrate sensitive and appropriate integration².

¹ Standard 11 - from the Standards & Guidelines for the Conservation of Historic Places in Canada.

² A Heritage Alteration Permit must be obtained prior to or in conjunction with issuance of a building permit for demolition or removal of a building, construction of a new building, or structural changes to the exterior of an existing building located in a Heritage Conservation Area (see [Map 23.1](#)).

OBJECTIVE OF HERITAGE REVIEW

The objective of the Heritage Review process is to ensure that proposed designs are informed by a professional understanding of the historic context and immediate surroundings and make a positive contribution to Kelowna's Heritage Conservation Areas as per the above introduction³.

The Heritage Review report must be completed by a **Registered Heritage Consultant** (a member of the BC Association of Heritage Professionals). The Consultant must have experience in assessing and articulating heritage values and have experience working with alterations to existing buildings and new builds in conservation areas. The Consultant is required to prepare a report to be submitted to the Planning Department for consideration in the review of the Heritage Alteration Permit. The primary objectives of the report are to:

- Review City of Kelowna policy regarding the Heritage Conservation Areas as well as any relevant provincial and national best management practices for heritage resources (**Note: The 1998 HCA Guidelines conflict with current best practices for conservation**)
- Evaluate and understand the heritage value and past significance of the site and existing building
- Recommend strategies and design options that may reflect the character defining elements of the subject property's past and existing building
- Provide comments and potential design options on the overall site layout, in reference to the subject property's heritage

SUBMISSION REQUIREMENTS

One PDF report that includes the following components:

- a. Description of the historic value of the property
- b. Evaluation of the heritage value and significance
- c. Identification of the character defining elements of the property
- d. Using Standards and Guidelines, recommendations, and strategies to inform the design of the alteration or new build, including landscaping and on-site parking layout

Upon submission of the report, the Planning Department will review the Consultant's recommendations and provide formal design direction to the applicant regarding any potential revisions. The Planning Department acknowledges that design is an iterative process and that project architects/designers may have input and collaborate with the Heritage Consultant. The heritage report and a summary of the process will be included in the Council report to help support the Staff recommendation.

³ It is important to note that while most of the Heritage Reviews are for properties located within the Heritage Conservation Areas, it is possible that a Heritage Review could be required for a property identified as having heritage value (through Heritage Designation or a Heritage Revitalization Agreement) located outside of the Heritage Conservation Areas.