

## Phase 2 – Consultation (conducted/co-led by the City of Kelowna)

### Community Consultation Summary

As part of its Heritage Conservation Areas (HCA) Review - Phase 2, the City of Kelowna invited input from community partners, City staff and the general public to help shape the HCA's future. This input, along with technical considerations and best practices in urban planning and heritage conservation, was gathered to inform the update to the Development Guidelines.



Screenshot of City of Kelowna engagement page on the HCA Guidelines Review, where information about the process and the public survey were available in Nov-Dec, 2023.

Source: <https://getinvolved.kelowna.ca/heritage-conservation-area-guideline-review>

### Key Themes

Shared themes raised consistently from the community partners, public survey and workshop consultations included:

#### 1. Community value

- The HCAs are valued community assets and tourist destinations worth protecting. Their unique community value goes beyond the historic buildings and includes the streetscapes, the mature tree canopy, the bike route and their unique sense of place that hasn't yet been well-defined and for this reason is being progressively lost.

#### 2. Growth/density

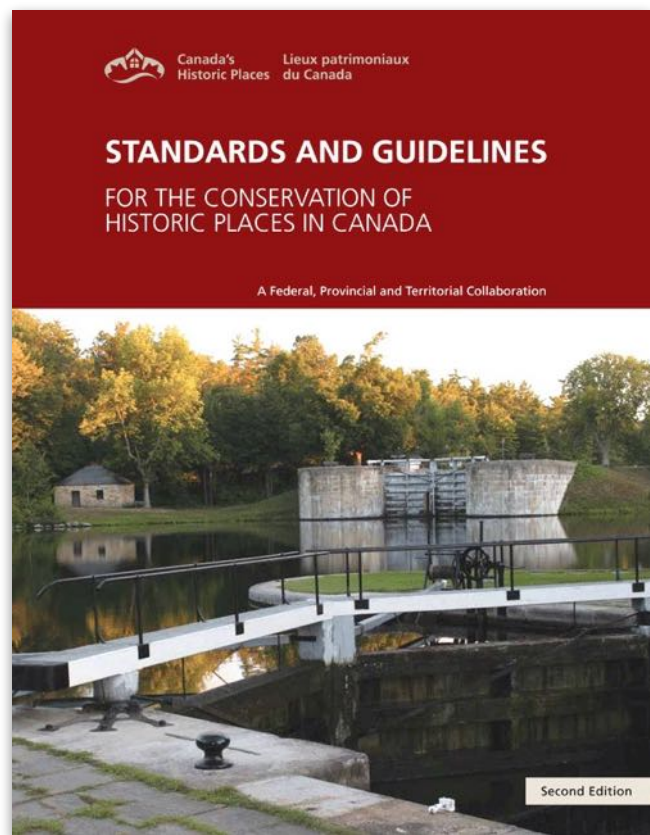
- HCAs can and do accommodate multi-unit and denser housing than their original single-family intent. There is successful precedent in historic districts all

over Canada for the conversion of existing historic buildings into multiple units as well as units added via infill buildings and additions.

- The introduction of density and/or new buildings in the HCA needs to be done thoughtfully and differently than it would in a non-heritage area.
- There is concern that the recently announced provincial Small Scale Multi-Unit Housing (SSMUH) and Transit-Oriented Development Areas (TOA) policies will disincentivize the retention of historic buildings and landscape elements in the HCAs.

### 3. Administration

- Standards & Guidelines for the Conservation of Historic Places is the best-practices, national framework for managing historic places and should be used in Kelowna's HCAs to help guide thoughtful, good design and additions, and to distinguish approaches between new builds and conservation projects.
- The HCAs need a neighbourhood-wide Statement of Significance (SOS)\* to help inform the HAP process and to help Kelowna meet the legislative requirements for HCAs. An SOS will help define the true and comprehensive history of the neighbourhood. The current Guidelines refer to the aesthetic historical character of the houses alone and that is a gap in our understanding of this area. The SOS would identify the landscapes and mature trees as Character Defining Elements worthy of conservation, as this is an aspect of the neighbourhood valued by the vast majority of respondents.



*\* A Statement of Significance (SOS) is one of the first steps in understanding historic places. The SOS was created by the federal Historic Places Initiative (HPI) in 2001 as a succinct and consistent format to express the heritage values of places that matter to Canadian*

communities. An SOS, in its simple, non-technical language, is “a declaration of value that briefly explains what a historic place is and why it is important”. It is both a starting point and a guide for communities, property owners, architects, developers, planners and anyone who may be planning the future of a historic place. Completed SOSs are submitted by the local government to the province of BC, and from there to the Canadian Register of Historic Places ([historicplaces.ca](http://historicplaces.ca)).

- The process for managing properties in the HCAs needs to be clearly outlined and timelined on the City’s website so that expectations for applicants are clear and future HAPs can be processed in a more streamlined manner. The requirement for a Heritage Review by a CAHP professional should be positioned as a preliminary step, to be conducted before or concurrently with design development.
- Give the historic buildings in the HCAs heritage status (add them to the Heritage Register) so that conversion of old houses to multiple-units can access the alternate solutions allowed in the BC Building Code for heritage buildings.
- HCA Guidelines and zoning should be updated together and align with each other to create a clearer and more enforceable planning framework
- New Guidelines should be consistent, enforceable and leave some flexibility to the discretion of planners



City of Kelowna Information Bulletin: An Introduction to the Kelowna Heritage Register - March 2012. Source: City of Kelowna



#### 4. Retention/preservation

- Retention of historic buildings and other resources such as mature trees in the HCAs need to be incentivized, especially in light of the new provincial housing policies. Ideas for incentives are more units in the HCAs than allowed outright under the new SSMUH policy, allow smaller units, small lot subdivision, parking relaxations, the expansion of Kelowna's Heritage Grants, tax incentives, lowered or free permit fees, DCCs, and applying Housing Accelerator Funds to HCAs
- Properties incentivized should in return be protected via heritage designation bylaw or HRA.
- Demolitions should be discouraged with deconstruction permits and fees. Buildings that are coming down should be deconstructed, not demolished, and their materials salvaged for conservation projects.
- Set different tenure allowances and restrictions for retention versus new build developments in a revised HCA zoning to incentivize retention and disincentivize demolitions in the HCAs



Aerial view of the 1800 block of Abbott Street, the bridge and the lake. Source: Jane Hoffman Realty

## **Engagement Approach**

Targeted audiences were sent background context via e-mail or mailouts which included links to the 1997 Abbott Street and Marshall Street Heritage Conservation Areas (HCA) Development Guidelines, which are still currently used, as well as to the City's Heritage Planning webpage where additional information about the HCAs in general, and this Phase 1 Data Review report was, and remains available for their review.

Engagement efforts were focused on those individuals and groups most affected by the HCA update, namely area residents and organizations with a high degree of interest or involvement in heritage preservation, as well as City staff, partners and professionals who have a working relationship with the HCA policies and their Development Guidelines.

## **Public Engagement**

Engagement with the general public was offered in two formats: the opportunity to respond to a survey (Nov 8 - Dec 3, 2023) and the opportunity to participate in an HCA neighbourhood 'walkshop' which took place on Saturday, Nov 25, 2023. The survey was available on City's public engagement webpage - Get Involved, Kelowna, where a page dedicated to the HCAs Review offered extensive background context and numerous linked documents for participants to review. Contact information for planning staff was also provided on this page.

## **Survey**

The public survey was advertised via direct mail outs to all addresses in the HCAs as well as to owners of HCA properties that live elsewhere. The online survey was open on "Get Involved" for 5 weeks between Nov 8 and Dec 3, 2023 and received 117 individual responses during that time.

## **Limitations**

Due to the opt-in nature of public participation, results may not be representative of all HCA residents. Input is typically reflective of those who hold the strongest, often polarized, views on any given topic. While all feedback is valuable, some input may not have been relevant or applicable within the scope of this project.

## What Was Asked & What Was Heard

The survey questions and responses were as below:

1. What makes the Abbott Street and Marshall Street Heritage Conservation Areas unique and/or special in your opinion? Skipped: 14 | Answered: 103 (88%)

A tourist/visitor attraction/destination 19.41%  
Authentic historic neighbourhood/tangible history 31.06%  
Walkable proximity to park/s 9.70%  
Walkable proximity to cultural district 7.76%  
Walkable proximity to lake/beach access 22.33%  
Walkable proximity to downtown 11.65%  
Walkable proximity to the hospital 6.79%  
Large, old trees/tree canopy 60.19%  
Unique charm distinguishing it from other neighbourhoods 33.00%  
"village" within the city 1.94%  
Peaceful and quiet/sanctuary 14.56%  
Pedestrian and bike paths (recreation corridor) 40.77%  
Old/heritage houses 44.66%  
Diversity and uniqueness of house styles 29.12%  
Modest house sizes 7.76%  
Large lots and/or setbacks 10.67%  
Well-kept gardens and prominent landscaping, green neighbourhood 27.18%  
Preservation-oriented residents 8.73%  
Interpretive signage (for homes and trees) 16.50%  
Discreet garages and power lines 1.94%  
Welcoming/friendly vibe 9.70%  
Low-rise character 5.82%  
Family-friendly 3.88%  
Non-generic, subdivision, strata character like the rest of Kelowna 9.70%  
Lack of multi-family units 6.79%  
Limited car traffic 10.67%  
Street lamp style 3.88%  
Lack of commercial uses/buildings 1.94%  
Lack of renters 1.94%  
Walking tour/brochure 1.94%  
Sense of community 2.91%

2. Before completing this survey, have you used or reviewed the HCA Development Guidelines? Skipped: 5 | Answered: 112 (95.7%)

Yes 70.54%

No 29.46%

3. Were the guidelines easy to understand? Skipped: 38 | Answered: 79 (67.5%)

Yes 35.44%

Mostly 43.04%

Somewhat 17.72%

No 3.80%

4. What did you use them for? Skipped: 42 | Answered: 75 (64.1%)

For a Heritage Alteration Permit (HAP) or as part of the development process 52.00%

Some other purpose 49.33%

5. Please describe the other purpose: Skipped: 82 | Answered: 35 (29.9%)

For interest, information, education, realtor wanting information, to respond to this survey, past member of HAC, KSAN review

6. Is there anything that might make them easier to use / understand?

Skipped: 79 | Answered: 38 (32.5%)

Too general/too open to interpretation 15.78%

Use Standards & Guidelines for the Conservation of Historic Places in Canada 10.52%

These should be enforceable requirements not guidelines 28.94%

Include case studies and example pictures of dos and don'ts 7.89%

Address on site and off-site tree conservation 2.63%

Tighter definitions of height, massing and appropriate siting 5.26%

Clear and not long-winded 13.15%

Homeowner-friendly language 5.26%

Interpretation by planners should be consistent and not always varied 7.89%

Summary of key components 2.63%

How the zoning and other bylaws are linked to the guidelines 2.63%

Clear vision and purpose 2.63%

Distinguish between heritage buildings and non 10.52%

A section outlining the review process including heritage professionals and staff 2.63%

7. There are many things to consider when guiding additions and new development within the HCA. Prioritize the following considerations by most important to least important. Skipped: 29 | Answered: 88 (75.2%)

	1	2	3	4
Site Layout	8.05%	12.64%	37.93%	41.38%
Building Height and Size	39.08%	25.29%	25.29%	10.34%
Architectural Style and Materials	38.64%	37.50%	11.36%	12.50%
Streetscape and Landscaping	14.94%	24.14%	25.29%	35.63%

8. Heritage conservation can include preservation of assets other than individual buildings. Of the options below, which do you feel is most important to consider for conservation within the HCA development guidelines?

Skipped: 3 | Answered: 114 (97.4%)

- Trees 56.14%
- Groups of buildings 19.30%
- Natural landscapes 9.65%
- Archeological sites 3.51%
- Not sure 1.75%
- Other 9.65%

9. Please describe other:

Human Scale, Landscaping, Blend of mature trees with a variety of shrubbery, Beach park access

10. Is there anything else that should be considered as the City updates the HCA Development Guidelines? Skipped: 29 | Answered: 88 (75.2%)

- Restrict density and resist multi-family developments 12.5%
- Improve street lighting 2.27%
- Improve pedestrian paths 3.40%
- Re-establish the Heritage Advisory Committee to review applications and not require Heritage Professional review at the homeowners' expense 2.27%
- No commercial uses 2.27%
- Commercial uses OK when they contribute to heritage value of HCAs 1.13%
- Consult with residents 1.13%
- Protect tree canopy (both on private and City property) 12.5%



Listen to all views 1.13%  
 Write enforceable guidelines 9.09%  
 Retain authenticity and diversity of architecture 3.40%  
 No monster homes 3.40%  
 Flexibility 2.27%  
 Maintain green space in the neighbourhood 4.54%  
 Limit rentals and renters 1.13%  
 Simple and streamlined permitting in HCAs 2.27%  
 Guidelines for new builds 1.13%  
 Thoughtful, good design for new builds 5.68%  
 Specific zoning for HCAs 1.13%  
 Preservation of parking bylaws and permit parking 2.27%  
 Protect beach access 1.13%  
 Comprehensive city staff training on heritage planning 1.13%  
 Traffic calming 3.40%  
 Prioritize heritage conservation 12.5%  
 Align with new provincial policies 1.13%  
 Boardwalk from Strathcona Beach Park up to the access to City Park 1.13%  
 Consider Safety, noise, pollution 1.13%  
 New builds should be in a traditional style 5.68%  
 Benches and points of interest 1.13%  
 Address colour of finishing 1.13%  
 Remove Pandosy from HCAs 1.13%  
 Safer means for pedestrians and bikers to cross highway in the heritage area 1.13%  
 Walkway along the shoreline 1.13%  
 Removal of the dark park at Lake street 1.13%  
 Address affordability and inclusivity 1.13%

11. Are you currently a member associated with any of the following heritage organizations or resident associations? Skipped: 46 | Answered: 71 (60.7%)

Kelowna Museums Society (KMS) 1.41% - 1 person  
 Okanagan Historical Society (OHS) 1.41% - 1 person  
 Central Okanagan Heritage Society (COHS) 16.90% - 12 people  
 (Friends and Residents of the Abbott Street Heritage Conservation Area Society (FRAHCAS) 64.79% - 46 people  
 Kelowna South-Central Association of Neighbourhoods (KSAN) 53.52% - 38 people  
 Other 8.45% - 6 people

12. What is your relationship to the Heritage Conservation Area?  
 Skipped: 2 | Answered: 115 (98.3%)

Live in the area 81.74%  
Work in the area 16.52%  
Recreate in the area 43.48%  
Travel through the area (walk, bike, drive) 46.96%  
Visit the area socially 18.26%  
Other 7.83%

13. What are the first three digits of your postal code?

V1P - 0%  
V1V - 1.71%  
V1W - 5.13%  
V1X - 0%  
V1Y - 92.31%  
Other - 0.85%

**“Walkshop”**

A walkshop was held on Nov 25, 2023, co-led by four members of the City’s Planning staff and the author of this report. It involved a 1.5 hour 1-km guided consultation walk in the Abbott Street HCA starting at Abbott and Riverside and ending at Abbott and Glenwood. A total of 28 participants attended the walkshop, plus the 4 City staff members.

Topics of discussion that were addressed during the walk were:

- Defining the significance of Heritage Conservation Areas (HCAs)
- An overview of the current HCA Development Guidelines and their purpose and function
- A clarification of Local Government Act tools including Heritage Conservation Area vs. Heritage Register vs. Heritage Designation
- The distinctive characteristics of the Abbott Street HCA

The group stopped at 7 different points to hear about these topics from the consultant and Planning staff, and to ask questions and engage in discussion. Specific blocks, properties and even trees were pointed at and discussed in the context of the walkshop.

A follow-up feedback e-mail was sent to all participants, 9 of which submitted replies.

## What Was Asked & What Was Heard

Were staff able to answer participants' questions?

Yes 5

Mostly 4

Was the information presented in a way that was easy to understand?

Yes 6

Mostly 2

Somewhat 1

Do you feel attending this event was worthwhile?

Yes 8

Mostly 1

Did you like the in-neighbourhood format of the event?

Yes 9

Was there enough opportunity to ask questions and participate in discussion?

Yes 7

Mostly 2

Did you learn something new?

Yes 9

How might we improve this type of event in the future?

- Perhaps meet in a hall afterwards for a more comfortable discussion, it was cold
- Allow more participants
- Be more clear on the purpose of the walkshop
- The interactive format was great
- Hold in better weather

## Community Partner Engagement

The community partners consultation was conducted through focused interviews, both with individuals and in small groups, to gather opinions and suggestions regarding the Heritage Conservation Areas and their Development Guidelines.

The community partners interviewees were:

- BC Association of Heritage Professional (BCAHP) members who have worked professionally in Kelowna on reviewing Heritage Alteration Permits (HAPs) for Kelowna's HCAs or who are heritage planners that manage HCAs in other municipalities
- Representatives of the Central Okanagan Heritage Society (COHS) board and staff
- Staff at the Kelowna Museums Society (KMS)
- A Kelowna-based UDI (Urban Development Institute) member
- A representative of the Kelowna Tree Protectors

Interviews and other opportunities to provide feedback were also extended to the Canadian Home Builders Association – Okanagan Chapter (CHBA), the Association of Interior Realtors and to the Okanagan Historical Society (OHS), but these groups didn't reply or submit any feedback.

## What We Asked & What We Heard

*What is your working experience with the HCA development guidelines?*

- Heritage Reviews of HAPs (Heritage Alteration Permits) in Kelowna's HCAs by CAHP members are a difficult task because of the conflict between the Development Guidelines and Standards & Guidelines for the Conservation of Historic Places in Canada.
- Heritage Reviews need to be conducted before a design or even site plan is proposed for a property in Kelowna's HCAs. Provide a standardized example or template for the Heritage Review
- The process for managing properties in the HCAs needs to be outlined and timelined on the City's website so that expectations for applicants are clear.

- The HAC (Heritage Advisory Committee) was not the best vehicle for reviewing HAPs (Heritage Alteration Permits). Most involved found the HAC involvement in the HCAs frustrating and ineffective.

What is your opinion of the guidelines?

- The approach of managing HCAs using form & character principles, where replica historic house types and styles are permitted and encouraged is outdated. Best practices now align with Standards & Guidelines which require that each property is understood for its unique heritage value and its development is informed by this.
- The Development Guidelines were aimed at new builds and don't guide conservation in a meaningful way. There should be separate Guidelines for new builds versus retention/conservation projects.

What do you think of the Guidelines purpose\* - in today's context?

*\*The purpose of these guidelines is to maintain the existing single or two family residential and historical character of the Marshall Street and the Abbott Street Heritage Conservation Areas. They encourage new development or additions to existing development which are compatible with the form and character of the existing context, and advocate retention and renovation of existing development.*

- It's essential to reframe the Guidelines purpose and it comes off as exclusionary of renters and newcomers.
- City should take a lead stance on equity lens

The new provincial housing policy will allow a minimum of 4 units on every lot in the HCAs with possibly six-storey buildings allowed in the TOA areas of the HCA. How do we address this in updating the guidelines to incentivize the important features of these historic neighbourhoods including buildings, trees etc? And what other ideas do you have for updated guidelines?

- The HCAs need neighbourhood-wide SOSs to help inform and simplify the HAP process and to help Kelowna meet the legislative requirements for HCAs.
- Guidelines and zoning should be updated together to address issues of setback for example.

- Conservation of historic houses and mature trees need to be incentivized. The Heritage Grants program could be expanded to include grants for the conservation and maintenance of heritage landscaping. Demolitions should be disincentivized in the HCAs.
- Buildings that are being replaced should be deconstructed, not demolished, and their materials salvaged for conservation projects.
- HCAs can accommodate multi-unit and dense housing. In other historic areas this is often achieved through conversion of existing historic buildings into multiple units. Explore how this can be done without significantly impacting the character of an individual historic property and its integration in the neighbourhood.
- Heritage development proposals are always unique, as they are based on the unique context and heritage value of a heritage site. The solutions for achieving density and multiple units are going to need to involve creativity and customization.
- Concerns that the perceived cost of renovation and conversion will be higher than demolition and building new, so the conservations will need to be incentivized.
- We shouldn't adapt our heritage principles to what we think will be best supported politically, but we should stay committed to implementing whatever is best for heritage.
- The strong green aspects of heritage conservation need to be highlighted in this update.
- Density in the HCAs in the form of coach houses, additions, secondary buildings and conversion of homes to multiple units is a good idea, but needs to be guided.
- New materials should be allowed in the HCAs as long as there is visual similarities with traditional materials.



## City Staff Engagement

As development planners at the City process Heritage Alteration permits (HAPs) and manage the HCAs, and building inspectors are involved in supervising the developments, we consulted with staff members at Development Planning and the Building Department to gather their working insight, knowledge and recommendations for the review.

### What We Asked & What We Heard

#### What is your working experience with the HCA development guidelines?

- The current Guidelines are outdated and hard to apply. They are also full of loopholes and subjective interpretation which has degraded the heritage value of the neighbourhood over time.

#### What is your opinion of the guidelines?

- The current guidelines refer to the aesthetic historical character alone and that is a gap in our understanding of this area.

#### What do you think of the Guidelines purpose\* - in today's context?

*\*The purpose of these guidelines is to maintain the existing single or two family residential and historical character of the Marshall Street and the Abbott Street Heritage Conservation Areas. They encourage new development or additions to existing development which are compatible with the form and character of the existing context, and advocate retention and renovation of existing development.*

- The retention of the single family character as an objective seems inapplicable and restrictive in today's context. This intent is no longer relevant to Kelowna today and our OCP. Our DEI policies needs to be considered moving forward.
- The new provincial housing policy will allow a minimum of 4 units on every lot in the HCAs with possibly six-storey buildings allowed in the TOA areas of the HCA. How do we address this in updating the guidelines to incentivize the important features of these historic neighbourhoods including buildings, trees etc? And what other ideas do you have for updated guidelines?
- The HCAs need an SOS and to be managed under conservation Standards & Guidelines. They are the Canadian standard for managing a heritage area. An SOS

will help define the true and comprehensive history of the neighbourhood, including some of its dark aspects.

- Part of the neighbourhood's history is that it has evolved overtime. New forward-thinking Guidelines could be a new chapter in Kelowna's history.
- We should incentivize the retention of old houses and trees and can obtain lots of new heritage designations in return for the incentives. Demolition should be a last resort and penalized with deconstruction permits and fees.
- The Guidelines should address the most valued elements of the neighbourhood, the streetscapes, the tree canopy, the bike route, the diversity of house styles, the lack of driveways, the site lines into the depth of the properties etc.
- The new Guidelines shouldn't be so prescriptive, less is more, so the planner can still use their discretion.
- Heritage capacity training is needed for Development Planners when the new Guidelines are out.
- The HCAs can absolutely take density in the form of house conversions, additions at the back and infill buildings.
- Development Planners rely heavily on the Heritage Reviews which need a standard template so that they are effective and consistent.
- Give the neighbourhood heritage status so that the conversions can access the alternate solutions for heritage buildings.
- A percentage of the units could have commercial uses could be an incentives - offices, businesses, bike and paddle board rentals, restaurants etc.
- Some of the Housing Accelerator Fund needs to go towards the HCAs to augment the Heritage Grants and compensate for the cost of the conversion. Consider a free development permit if you are retaining the house.
- The Building Department could support a new set of Guidelines and incentives by reviewing and endorsing bulletins, tips or case studies.