

Report to Council



Date: March 13, 2017
File: 0615-20
To: City Manager
From: Lauren Sanbrooks, Planner II, Policy & Planning
Subject: Heritage Review

Recommendation:

THAT Council receives, for information, the report from the Policy & Planning Department dated March 13, 2017, with respect to the Heritage Governance Review.

Purpose:

To provide Council with an update on the conclusion of the Heritage Governance Review process.

Background:

In March 2015, Council directed staff to move forward with a Heritage Governance Review to ensure that heritage management in Kelowna is being undertaken in an efficient, effective and coordinated manner between all parties involved. The Heritage Review was a three-phase process involving several stakeholders and City staff. The City would like to acknowledge and thank the many individuals and organizations who took part in this process for their contributions and dedication.

This report will highlight the Heritage Governance Review process to date, the conclusion of the process, the direction moving forward, as well as the ongoing heritage initiatives and successes from 2016.

Overview:

The direction for this review was based on the vision, goals and policies established in Kelowna's Heritage Strategy 2007-2016, 2030 Official Community Plan, and 2012-2017 Cultural Plan, as well as the Standards and Guidelines for the Conservation of Historic Places in Canada (2012). The vision of the Heritage Strategy is that:

Kelowna will be a viable and strong community that balances growth with support for the protection of our distinctive and authentic natural, cultural and built heritage

assets through: diverse partnerships; heritage incentives; and integrated and innovative approaches to heritage conservation, community development and public awareness.

One of the directions in the Heritage Strategy is to enhance partnerships, relying on a shared management approach involving cooperation and consultation between partners. This is particularly important to make efficient and effective use of limited financial and human resources.

Kelowna's heritage sector is involved in many valuable heritage management activities; however, the sector has not been able to leverage its limited resources to the extent necessary to achieve our collective heritage objectives. This stems from a lack of clarity around roles, mandates and the benefits of partnerships.

The Heritage Review was initiated to bring together heritage stakeholders to look at individual mandates, roles and responsibilities, governance, and funding and opportunities to streamline efforts through governance opportunities and collaboration.

An overview of the Heritage Review Process is described below.

Phase 1 - Heritage Review Advisory Committee (HRAC)

The HRAC consisted of nine key stakeholders, including representatives from heritage organizations, a First Nation, Tourism Kelowna, and three members of the public at large with relevant professional expertise. In May and June 2015, three HRAC meetings were led by City staff with the assistance of an independent facilitator. Through discussion of the governance challenges related to delivering heritage management activities and consideration of possible alternative governance models, the HRAC agreed on a long-term vision for a Heritage Council governance model. Under this structure, all of the independent heritage organizations still exist, but funding and strategic planning support would be through the establishment of a new not-for-profit Heritage Council at arm's length from the City. While consensus from the stakeholders on the Heritage Council model was reached at this stage, the Heritage Council had yet to be established.

Phase 2 - Understanding Roles and Responsibilities

In fall 2015, staff met with several heritage and community organizations¹ to discuss the proposed Heritage Council model and to better understand the roles and responsibilities of groups that are connected to heritage matters in Kelowna. The Community Heritage Committee was also reinstated under the new title Heritage Advisory Committee, whose primary role is to review and advise on major heritage-related development applications.

¹ Community Organizations included: Central Okanagan Heritage Society (COHS), West Bank First Nation, Tourism Kelowna, the former Community Heritage Committee, Kelowna Museums Society (KMS), Friends and Residents of the Abbott Street Heritage Conservation Area Society (FRAHCAS), Kelowna South-Central Association of Neighbourhoods (KSAN), and the Okanagan Chinese Canadian Association (OCCA). Staff also contacted, but were unable to arrange meetings with, the Okanagan Historical Society (OHS) and French Cultural Centre.

Phase 3 - Implementation (Steering Committee & Strategic Planning)

Phase 3 - Implementation commenced in January, 2016 and concluded in December, 2016.

In the first part of the Phase 3, a Heritage Council Steering Committee (Steering Committee) was formed and tasked with job of refining the Heritage Council's (Network²) mandate, understanding the roles and responsibilities, as well as creating a strategic plan, a funding plan and a transition plan. City staff engaged the services of an experienced not-for-profit management consultant (Vantage Point) who led the strategic planning process. The consultant met with the Steering Committee on four separate occasions: March 22, 2016, April 12, 2016, May 17, 2016, and June 7, 2016, and prepared a 2017-2019 Heritage Network Strategic and Transition Plan.

At the final December Steering Committee meeting, City staff and the Steering Committee determined that the creation of a Heritage Network right now would be too much change, too soon. At this time, there are outstanding concerns with regards to limited resources and capacity, and City staff and the heritage organizations are not confident that a new organization would be successful at this time. Over the course of this Heritage Governance Review, approximately 1300 staff hours have been dedicated to accomplish the original objective of this project. However, given the aforementioned challenges, the formation of a Heritage Network requires a unified reorganization and collaboration on behalf of the community heritage organizations. It is recommended that until these community organizations are favorably positioned, the City's role should remain focused on formulating heritage policy, ensuring development applications adhere to the heritage conservation guidelines, and utilizing resources (where available) for heritage asset management.

Conclusion of Heritage Review and Proposed New Direction:

At that same meeting, staff proposed a new direction for the Steering Committee, which would occur outside of the Heritage Review. Staff proposed that the heritage organizations take on a heritage project in order to achieve the original objectives of the Heritage Review, all while working together to find a solution for an already identified community heritage priority project. These objectives include: mandate and resource alignment, clarity on roles and responsibilities, increased emphasis on fundraising, continued/strengthened communication and coordination between heritage organizations.

The anticipated result of this project would include a high-level plan for a recognized community asset, in addition to achieving the aforementioned objectives. It is possible that this project could act as a stepping stone to the realization of the desired outcome of a Heritage Network.

Next Steps - Proposed Project Opportunity:

The Heritage Governance Review is now complete. While the Heritage Review did not see to the realization of an operational Heritage Network, it created a forum within which various organizations could begin to tackle the governance challenges that were identified in 2015.

² The Steering Committee recommended that the title "Heritage Council" be changed to "Heritage Network".

The proposed project opportunity would be led and supported by the heritage organizations, with facilitation support from the City. The project would be informed and guided by the baseline knowledge gathered during the Heritage Review, with an objective to improve heritage management in Kelowna. The project would bring value to the community as a whole by amplifying the potential of a high profile heritage asset, such as the Father Pandosy Mission site. Other potential opportunities that stem from the project include, but are not limited to:

- Representation of additional groups under the heritage ‘umbrella’
- Promotion of heritage tourism
- Increased coordination and collaboration among heritage groups and with the City
- Improved management of an important heritage asset
- Increased awareness in the community
- Diversified funding sources (e.g. fundraising, fees, donations, sponsorships)
- Aligned roles and responsibilities with organizational mandates (and vice versa)

Ongoing Heritage Initiatives:

The City values, respects and celebrates built, cultural and natural heritage³ and recognizes that it is a major contributor to our community's identity, character and sense of place.

Kelowna's heritage is reflected in the buildings, neighbourhoods and landscapes from the earlier eras. These are the homes, work spaces, and community gathering places created by the people who shaped and developed the city of Kelowna.

With that, the City promotes a number of ongoing heritage-related initiatives in order to identify, maintain and protect the community's heritage resources. These initiatives include:

- Heritage management policies and regulations for development
 - The 2030 Official Community Plan
 - The Heritage Procedures Bylaw No. 11185
 - The Heritage Strategy
- Protection of heritage conservation areas
 - The Abbott Street and Marshall Street Heritage Conservation Areas - Guidelines
- Recognition and identification of properties with heritage value
 - Kelowna Heritage Register
- Promotion of heritage conservation
 - City of Kelowna Heritage Grants Program
- Promotion of restoration, rehabilitation and maintenance of heritage buildings

³ Heritage is used to describe anything with heritage value: the aesthetic, historic, scientific, cultural, social or spiritual importance or significance for past, present and future generations. The heritage value of a historic place is embodied in its character-defining materials, forms, location, spatial configurations, uses and cultural associations or meanings (The Standards and Guidelines for the Conservation of Historic Places in Canada, 2010).

➤ Heritage Building Tax Incentive Program - Council Policy No. 318

- Protection and restoration of City-owned heritage assets
 - Heritage Asset Management Strategy

In addition to the above-mentioned initiatives, 2016 saw some additional successes in terms of heritage restoration and rehabilitation.

- Idea Fair & Request for Proposal (RFP) for the Cameron House - The City gathered input for the community to identify activities and uses that are compatible with the heritage building and the surrounding neighbourhood. A RFP process followed the public engagement.
- Partnership Opportunity with Worman Commercial for the Surtees Barn and Surtees Homestead - The goal of the partnership is to work towards restoration of the Surtees property by rehabilitating the existing buildings and protecting the character of the site in a fashion that showcases its heritage and park value.
- Heritage Procedures Bylaw Update - The bylaw was updated to reflect current heritage application procedures in respect of bylaws, agreements and permits.
- Heritage Advisory Committee - The Committee was established with a new Terms of Reference and a focus on reviewing major heritage-related development applications. To date, the Committee has reviewed and advised on 10 applications.

Conclusion:

Despite the fact the outcome changed from what was initially proposed in the Heritage Review process, there were still a number of lessons learned along the way. In addition to the increased communication that developed through the process, a higher level of trust was established between the heritage organizations and the City. Moreover, representation of additional groups under the heritage 'umbrella' were brought to the table and opportunities for diversified funding sources were discussed.

The City will continue to promote heritage-related initiatives as well as work with the heritage organizations in order to identify, promote, maintain and protect the community's heritage resources.

Internal Circulation:

Divisional Director, Community Planning & Strategic Investments
Divisional Director, Active Living & Culture
Cultural Services Manager, Cultural Services
Parks & Buildings Planning Manager, Parks and Buildings Planning
Planner II, Community Planning

Existing Policy:

Heritage Strategy 2007, Updated July 2015

Strategy 7: Enhance Partnerships. Enhance partnerships between the City and all aspects of community heritage, to achieve an inclusive, community-based approach to heritage.

2030 Official Community Plan

Policy 9.2.3 Financial Support. Continue to support the conservation, rehabilitation, interpretation, operation and maintenance of heritage assets through grants, incentives and other means.

2012-2017 Cultural Plan

Goal 4: Cultural Roots & Branches. Integrate heritage as part of cultural vitality.

Heritage Procedures Bylaw No. 11185

Considerations not applicable to this report:

Legal/Statutory Authority

Legal/Statutory Procedural Requirements

Financial/Budgetary Considerations

Personnel Implications

External Agency/Public Comments

Communications Comments

Alternate Recommendation

Submitted by:

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Approved for inclusion:



J. Moore, Long Range Policy Planning Manager, Policy &

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cc:

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