# Corporate NO: C003 Report COUNCIL DATE: January 13, 2003

COUNCIL-IN-COMMITTEE						
TO:	Mayor & Council	DATE:	January 9, 2003			
FROM:	General Manager, Planning & Development	FILE:	6800-20 (HMP)			
SUBJECT:	Heritage Management Plan					

### RECOMMENDATION

The Planning and Development Department recommends that Council:

- 1. Receive this report as information;
- 2. Receive, as information, the Heritage Management Plan, Part 1 and Part 2, attached as Appendix I; and
- 3. Adopt the Heritage Management Plan Implementation Strategy documented in Appendix II as a framework for implementation of the Heritage Management Plan.

#### **PURPOSE**

The purpose of this report is to provide information to Council regarding the Heritage Management Plan ("HMP"), the process followed in the preparation of the HMP, the involvement of the Heritage Advisory Commission ("HAC") and others, in the process and to obtain the Council approval of the Implementation Strategy that will provide a framework for implementing the HMP in support of heritage conservation in the City.

#### BACKGROUND

The preparation of the HMP involved the following steps:

# 1. Study Initiation and Funding:

In April 1998, Council approved a recommendation from the HAC to apply to the B.C. Heritage Trust for funds to develop a HMP for the City. Unlike many other plans prepared by the City, a HMP does not have a specific basis in Provincial legislation. To assess whether funding would be provided, B.C. Heritage Trust required that the Terms of Reference for the plan show, in detail, how selected elements of a heritage strategy would be achieved using heritage conservation tools provided in legislation such as registers, Official Community Plan policies, designation bylaws and grants. In the early part of 1999, B.C. Heritage Trust approved \$15,000 in matching funding for the development of a HMP for the City.

In June of 1999, Corporate Report No. R1907 (attached as Appendix III) was forwarded to Council advising that the City had obtained a matching grant of \$15,000 from B.C. Heritage Trust to allow for the HMP preparation. The report also included the application to the Trust that contained the Terms of Reference for the development of the HMP and outlined the schedule for completion of the HMP.

#### 2. Consultant Selection and Plan Finalization:

A selection committee, consisting of the Chairman of HAC and City staff, selected Commonwealth Historic Resources Management Ltd. from among four firms responding to a proposal call issued by the City for the work of preparing the HMP. In August 1999, the City retained Commonwealth (the "Consultant"). The HMP preparation process was undertaken by the Consultant under the general direction of a Steering Committee made up of staff from Planning and Development, Parks, Recreation and Culture, Engineering, Legislative Services and a member of the HAC.

In mid 2000, the Consultant submitted a final draft of the HMP to the City. The HAC reviewed the HMP and forwarded it to Council with a recommendation that Council endorse the HMP that was submitted to the City by the Consultant and, further, that Council forward the HMP to staff to review HAC's suggestions to develop an Implementation Strategy involving all Departments having a role in heritage matters in the City and to investigate creating a position for a full-time heritage planner.

In December 2000, Council approved the recommendations of the HAC.

# 3. Development of the Implementation Strategy

During 2001 and early 2002, staff of the Planning and Development, Parks, Recreation and Culture and Engineering Departments jointly prepared a draft Implementation Strategy for the HMP.

In March 2002, the draft Implementation Strategy was reviewed by HAC and a recommendation was forwarded to Council that the HMP be deferred for two months in order to permit HAC to provide comments to the General Manager, Planning and Development on implementation matters. On March 25, 2002, Council approved the recommendation of the HAC.

In the latter part of 2002, HAC endorsed the revised Implementation Strategy and recommended that the General Manager of Planning and Development forward the HMP and Implementation Strategy to Council and that the Implementation Strategy be reviewed on an annual basis.

#### DISCUSSION

The Heritage Management Plan

The HMP, attached as Appendix I, is a two-volume document that sets out the general parameters for addressing heritage matters in the City.

The goals of the HMP are as follows:

- To provide direction and guidance on heritage conservation activities and to build upon heritage initiatives that are completed or are in progress;
- To define a set of administrative procedures for heritage planning, support and protection;
- To establish an integrated system of heritage management implementation tools;
- To establish a clear and efficient heritage review process; and
- To evaluate the City's built and natural heritage resources for consideration in relation to Heritage Conservation Area Designation.

The HMP focuses on three main areas:

- (a) To clearly define the roles and relationships of various City Departments and other agencies and organizations involved in heritage conservation;
- (b) To establish when and how various tools available for heritage management, such as Heritage Revitalization Agreements, Heritage Conservation Covenants, Heritage Alteration Permits and Orders for Temporary Protection, are to be used; and
- (c) To identify areas in the City with heritage value that may benefit from a Heritage Conservation Area Designation.

# Implementation Strategy

The Heritage Management Plan Implementation Strategy has been developed jointly by the affected City Departments that will be involved in the administration associated with the Strategy. The HAC has also had an opportunity to review each recommendation and to either endorse the recommendation or recommend alternative measures or approaches. The comments from HAC are contained in a separate column of the

Implementation Strategy table documented in Appendix II. The majority of actions documented in the Implementation Strategy can be completed within six to nine months; however, there are several measures that will take more time to implement or will be on-going. Appendix II includes a proposed timeline for implementing each of the actions documented in the HMP.

The Planning and Development Department will play a key role in the Implementation Strategy. However, there are also responsibilities allocated to other Departments and Divisions. These include Parks, Recreation and Culture Department, the Engineering Department (Facilities and Realty Sections) and the Finance Department, as well as the Legislative Services Division and the HAC. The HAC will also be consulted on an ongoing basis.

An annual review of the Implementation Strategy will be conducted by staff and be presented to the HAC as information and for review and comment. Measures that require Council approval, such as by-law amendments, budget considerations and the creation of Heritage Conservation Areas will be forwarded to Council for consideration by way of Corporate Reports.

# Staffing Assignment for Heritage

The HMP recommended the creation of a position of a full-time heritage planner in the Planning and Development Department once actual work levels warrant. The HAC expressed its support for this initiative and recommended that, in the interim, an official job title of "Senior Planner – Heritage" be implemented as a first step toward the creation of a full-time heritage planner.

Currently, the Planning and Development Department allocates approximately one-half of one planner's time to heritage matters. The Senior Planner responsible for heritage matters uses an official title of "Senior Planner-Heritage", as suggested by HAC, when corresponding on matters related to heritage. Increasing the staff resource allocation to full-time will impact other Planning and Development Department priorities. It is recommended that implementation of a full-time position not be considered unless a sustainable revenue source is identified in support of this position. Currently, fees and charges associated with heritage matters form a very minor revenue stream to the City.

#### Heritage Conservation Areas

As part of the work of preparing the Heritage Management Plan, the consultant was requested to evaluate each of five different areas within the City with respect to their potential to be designated a Heritage Conservation Area ("HCA").

A HCA is a neighbourhood or a district that is appreciated by the community for its special heritage value and character and which is identified in the OCP. If an area is identified as an HCA in the OCP, a property owner whose property is within the HCA cannot do any of the following without a heritage alteration permit:

- Subdivision of a property;
- Addition to an existing structure;
- Construction of a new building; or
- Alteration to a building, structure, land or feature.

The five areas of the City that were evaluated by the consultant were:

- Crescent Beach;
- Crescent Road;
- Semiahmoo Trail from 24 Avenue to the Nicomekl River;
- Surrey Centre Five Corners (area in the vicinity of 60 Avenue and 168 Street); and
- Cloverdale East (area along 182 Street from 56 Avenue to 58A Avenue).

During the preparation of the Crescent Beach Land Use Study, it was determined that residents in the Crescent Beach area are not in support of a HCA designation. As well, the Consultant determined that residents along Crescent Road did not support the implementation of an HCA. In accordance with the proposed Implementation Strategy, prior to proceeding with the implementation of any HCA, staff will conduct an intensive public consultation process in conjunction with HAC and present appropriate reports for Council's consideration.

### CONCLUSION

The HMP, attached as Appendix I, provides overall direction on heritage matters and the Implementation Strategy attached as Appendix II provides a framework for implementation of the recommendations in the HMP in current and future work plans of the various City Departments, subject to resource availability. The HAC has reviewed and endorsed this report and the attached Implementation Strategy. The Planning and Development Department recommends that Council receive, as information, the HMP (Parts 1 and 2) as the basis for addressing heritage matters in the City and approve the Implementation Strategy as a framework for implementing the various elements of the HMP.

Murray Dinwoodie

General Manager

Planning and Development

# AK/kms/saw

Appendix I - Heritage Management Plan (Parts 1 and 2) - Packaged and Distributed Separately

Appendix II - Heritage Management Plan Implementation Strategy

Appendix III - Corporate Report No. R1907

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Appendix I

Appendix I consists of the following reports that are packaged and distributed separately:

- Heritage Management Plan (Part 1)
- Heritage Management Plan (Part 2)

Appendix II

		HERITAGE MANAGE	MENT PLAN IMPLEMEN	TATION STRATEGY	1	
Category	HMP Recommendation	Staff Review	HAC Review	Actions Resulting from Recommendation and Reviews	Lead Department	Target
Staffing	Responsibility for heritage and responsibility for serving as liaison to HAC should continue to be vested in the same planner in the Planning & Development Department.	The main role is assigned to a Senior Planner in the Policy & Long Range Section.	HAC confirms its satisfaction with the qualifications of staff currently responsible for heritage matters, and respectfully recommends that wherever staff is referenced within the HMP, that those staff continue to have adequate working knowledge of maintenance and management of heritage structures.	Ongoing.	Planning & Development	Ongoing
	address any confusion of roles	Confusion over roles and responsibilities have been significant problems.	Endorsed.	Will be undertaken if it is determined at some point in the future that there is confusing roles or overlapping responsibilities.	Planning & Development; Parks, Recreation & Culture	On-going, no set schedule
	Managers from various departments that deal with heritage should liase from time to time and do joint planning.	Quarterly meetings will be arranged involving Parks, Recreation & Culture, Planning & Development and Engineering staff.	Endorsed.	Additional meetings will take place whenever necessary and comments/outcomes to be forwarded to HAC via verbal reports when appropriate.	Planning & Development; Parks, Recreation & Culture; Engineering	Parks, Recreation & Culture staff initiated in 4 <sup>th</sup> quarter of 2001 and ongoing.
	Additional staff time for heritage to address heritage for privately owned properties. Amend role of Planner	Planning does not have the budget for a full time heritage planner. The planner responsible for	HAC supports the creation of the position of a full-time heritage planner in P&D, and in the interim	Renaming can be implemented. A full time heritage planner cannot be implemented unless additional resources are	Planning & Development	The timing for the full- time staff position is dependent on Council approval of an amende

	responsible for heritage.	heritage is half-time now, and increasing to full time will impact other priorities.	recommends the official job title of Associate Planner – Heritage be implemented as the first step toward the creation of a full-time heritage planner.	available. More detailed comments are provided in the body of this report.		departmental budget.
	If a site visit to a property is required for information, this should be done by Planning & Development, and if a structural assessment is needed, this may be done by the Building Division.		HAC requests that the wording be amended to say "this should be done by the Building Division".	This will be implemented with coordination between Area Planning & Administration & Policy and Building Divisions and input from Engineering (Facilities).	Planning & Development	This will be implemented immediately.
	The Facilities Section should have access to inspectors, either staff or a contractor, who are trained or experienced in the assessment and repair of heritage buildings.	When required, Facilities retains the expertise of specialized consultants on all City- owned buildings. Facilities does not consult on privately- owned buildings.	Terms of Reference for each case to be referred to HAC for review and comment	Existing operating budgets do not allow for additional staff inspectors. All capital projects include consultants with the required specialist expertise.	Engineering (Facilities)	Ongoing
Heritage Advisory Commission	HAC By-law and Mission Statement be amended to restrict the HAC's mandate to advising Council and staff on heritage matters and supporting heritage activities authorized by Council, and not to engage in public advocacy.	The Mission Statement has been amended.	With reference to the consultant's comments regarding the advocacy of the Commission, HAC is pleased to advise Council that its Mission Statement has been amended to align with the objectives of the consultant.	None.	Legislative Services	Recommendation has been completed.
	Rationalize the sub-committees.	The number of sub- committees has been reduced to 6. Not all are active at the same time.	Endorsed.	The current number of sub- committees serves the commission well at the present time.	НАС	Not applicable.
	Maintain regular lines of contact with the heritage community.		Endorsed.	HAC initiative.	HAC	On-going, no set schedule
	The 8-working-day deadline for HAC agenda items should be shortened to expedite the process.	Already shortened to 5 days.	Endorsed.		Legislative Services	Recommendation has been completed.
Information/Liaison	HAC to encourage Surrey's heritage community to form a separate advocacy society.		Endorsed.	HAC initiative.	НАС	On-going
	Communicate information on its heritage program by means of leaflets following the existing format.		Endorsed.	Monitor and produce as needed.	Planning & Development	On-going
	Additional opportunities should be sought for informing and involving the community in heritage planning activities.		Endorsed.		Planning & Development, Information Technology	On-going
	An effort should be made to help property owners understand how agreements can be reached to enable development while retaining heritage buildings/features, and what incentives are available, through information sheets and occasional public workshops.	An information sheet can be prepared outlining the types of agreements and incentives. A workshop is not necessary at this time, as this applies on a site-by-site basis. An information meeting may be organized as the need arises.	HAC requests that Council have staff included in the workshops as well as property owners.	Information sheet to be produced.	Planning & Development	6 months (mid 2003)

	Re-design the information sheet on the Heritage Register so that it is consistent with the other Planning information sheets.	This has been completed.	Endorsed.	N/A	Planning & Development	Recommendation has been completed.
	Place the Heritage Register on a single official database accessible to all departments.	A more efficient process will be in place once all the sources are brought into one database to be managed by Planning.	HAC requests that data on heritage properties be centralized so that it is an integrated and automatic source of information for the City's computer network, cross-referenced between Departments.	Implementation is underway, with Information Technology working with Planning to establish a single database folder system under Amanda.	Planning & Development	3 months (early 2003)
	one database.	The heritage data is to be placed on Amanda and will note the site by lot, building and road (in cases where a property is adjacent to a heritage road such as Crescent Road).				
	to ensure that all procedures are followed, and that HAC is consulted when required.	Creation of a heritage database mechanism will ensure that all sites either on the Heritage Register or protected will be referred to HAC for comment.	Endorsed.	Tracking will take place through the development review process.	Planning & Development	4 months (mid 2003)
Planning Process	Ensure that the referral process for a building permit is consistent with that for a demolition permit.	The referral of a building permit is now consistent with that for a demolition permit.	HAC requests that Council adopt a policy that all inter-departmental processes regarding heritage issues be conducted in consultation with HAC.	The final stage in implementing this recommendation is the completion of the Amanda database to ensure that all sites are flagged and referred to HAC.	Planning & Development (Building)	3 months (early 2003)
	Permit and development applications referred to HAC should receive expedited consideration, if possible concurrently with the Building Division review process.	The process has been shortened from 8 to 5 days already. HAC is provided with sufficient information.	Endorsed.	Special HAC meetings have been held when necessary and this practice will be maintained.	Planning & Development, HAC, Legislative Services	On-going, no set schedule
	Staff should provide HAC with sufficient information so that it is in a position to consider an application promptly and thoroughly and ask HAC to visit the site prior to the meeting.		Endorsed.	HAC will get its Agenda by Friday and can visit the site on the weekend, meet the following Wednesday and make a decision at that meeting.	Planning & Development	On-going, no set schedule
	Ensure that heritage considerations are always incorporated into a LAP or NCP. Where appropriate, this should include provisions for the protection of individual properties.	The Official Community Plan outlines the content of NCP's and notes that the land use plan shall show lands designated for special purposes including heritage preservation.	Endorsed.	Ensure that for each LAP or NCP being prepared, evaluation of all heritage sites, as needed, is completed in consultation with HAC as part of the initial research and initiatives for heritage recognition and protection are considered in the land use plan.	Planning & Development, HAC	On-going, no set schedule
	Consider the incorporation of Heritage Conservation Areas into the LAP or NCP process where appropriate, or at least use the LAP or NCP to recommend where the HCA study should be done.		Endorsed.			
Process for protected sites	Planner dealing with heritage should give an opinion on		Endorsed.	The application will be referred to HAC, with staff providing	Planning & Development	On-going, no set schedule

	whether to recommend appropriate buffering on the subject property or protected property.			appropriate comments and recommendations.		
	Heritage Impact Assessment be prepared if a development might be anticipated to negatively affect a protected property.	Staff can require an impact assessment if it is considered that a development may have an adverse affect on a neighbouring protected heritage property.	Endorsed.	Staff will consider buffering and whether an impact assessment is required and make appropriate recommendations to HAC and Council.	Planning & Development, HAC	Ongoing
	Address the potential negative impact on adjacent (protected) heritage properties caused by work on City-owned properties.	Parks Division staff to liase with Planning and/or Engineering, to ensure that those undertaking parkland works are aware of heritage issues and respond accordingly.	Endorsed.		Parks, Recreation & Culture; Engineering	Ongoing
	Staff should be authorized to issue a Heritage Alteration Permit in places where proposed changes to a protected building are considered reasonable (in consultation with HAC).	A heritage alteration permit is similar to a development variance permit. Each permit requires Council approval unless the authority is delegated to staff.	Endorsed.	Procedural changes and by-law amendments be undertaken to allow issuance and collect fees for Heritage Alteration Permits.	Planning & Development	6 months (mid 2003)
	Use heritage revitalization agreements and heritage conservation covenants for property specific situations where appropriate.	Endorsed.	Endorsed.		Planning & Development	On-going, no set schedule
By-laws	Staff should be authorized by by-law to withhold approvals and provide temporary heritage protection for buildings to allow time to discuss options for long term protection with the applicant.	The ability to withhold approvals and demolition permits can be delegated to staff with Council's approval.	Endorsed.	Prepare a Corporate Report and draft a by-law for Council consideration.	Planning & Development, HAC	9 months (late 2003)
	Replace the Municipal Heritage Sites Financial Compensation By-law to compensate for the repealing of sections of it by By-law No. 10947	This is an administrative procedure to correct and update references in this by-law that provides financial assistance to owners of protected heritage buildings.	Endorsed.	A new by-law, or by-law amendment, will be drafted for the City Solicitor's review.	Planning & Development in consultation with Legal Services and HAC	9 months (late 2003)
	Consider amending this By- law to enable Council to provide compensation for all protected properties, including those protected by heritage revitalization agreements and heritage conservation covenants.	This is similar to the recommendation dealing with expanding the grant program to all privately owned protected property.	Endorsed.			
	Amend the old-style heritage designation by-laws to the new format.	The owners of properties covered by the old-style by-laws should be notified of any re-writes.	Endorsed.	This can be undertaken as issues arise and as time permits.	Planning & Development; Parks, Recreation &	Began in 2001 and continues as the need arises
	(Note: This also needs to be consistent with the new Federal Historic Places Initiative and the Provincial Standards & Guidelines.)	Planning & Development to consult with Parks, Recreation & Culture and Engineering (Facilities/ Realty) re. City-owned heritage buildings, including school sites, as appropriate.			Culture	
	Complete the draft Heritage	The by-law is to apply to	Endorsed.	A joint review of the draft by-law	Planning &	6 months (mid 2003)

	Maintenance Standards By- law.  (Note: This also needs to be consistent with the new Federal Historic Initiatives and the Provincial Standards & Guidelines.)	any protected heritage building to ensure that it is well maintained by the owners. Planning & Development to consult with Parks, Recreation & Culture re. City-owned heritage buildings as appropriate.		will be undertaken with Planning, Parks, Engineering, Finance and HAC.	Development; Parks, Recreation & Culture; Engineering (Facilities); HAC	
City-Owned Properties	Include heritage buildings in the municipal building condition assessment / inventory program, which reviews the condition of each building every 5 to 10 years and forms the basis for capital programs for repairs and replacement.	Parks, Recreation & Culture heritage buildings are already included in the annual capital improvement process as needed.  Engineering (Facilities) includes those heritage buildings in the maintenance plan that have an operating budget. Those buildings that do not have an identified budget are not included. Priorities for a capital improvement are ranked with all other City-owned buildings and work is completed according to available funding.	Due consideration shall be given to the preservation of heritage assets and priority should be given to City owned heritage assets that need immediate action.	Operating budgets need to be identified for all existing City-owned heritage buildings as well as for all new buildings added to the City's inventory.	Parks, Recreation & Culture (Heritage Services); Engineering (Facilities); Finance	Parks, Recreation & Culture heritage facilities currently included.  Late 2003
	The Facilities Section should accept responsibility for maintenance of unused and abandoned City-owned heritage buildings.	An identified operating funding source needs to be secured before Engineering (Facilities) can take over the responsibility of maintaining these buildings	HAC recommends that for consistency and continuity, and to assure that all staff or contractors who are responsible for undertaking repair or assessment be experienced with heritage buildings and that Facilities Management be responsible for all Cityowned heritage buildings.	An adequate budget source needs to be identified for the maintenance of unused or abandoned City-owned heritage buildings.	Engineering (Facilities), Finance	Late 2003 and ongoing
	responsibility for maintenance of rented City- owned buildings with a heritage designation.	Engineering (Realty Section is responsible for the regular maintenance of City rental properties. However, unless additional funding is provide the maintenance works must be limited to the funds available in the heritage rent maintenance fund.	d,	Engineering (Realty Section) will continue to be responsible for the maintenance of Cityowned heritage rental buildings within the budget that has been developed for this purpose. Prior to acquiring new rental properties, the group initiating the purchase must identify the short and long term use of the facility. This group shall also provide an appropriate funding source to upgrade/maintain the buildings to an acceptable standard prior to becoming part of the Realty Section's rental portfolio.	Engineering (Realty), Finance	Ongoing
Financial Measures (FM)	Provide funding for the preventative maintenance of all City-owned heritage buildings in the same manner as for non-heritage buildings.	Parks, Recreation & Cultu heritage buildings are alread included the F	maintenance of all City- owned heritage buildings on the same basis as non- heritage buildings.	S	Parks, Recreation & Culture & Engineering in consultation with Finance	Parks, Recreation & Culture heritage buildings are included in the FM preventative maintenance program currently.  Ongoing

		preventative maintenance program. Engineering (Facilities) develops a preventative maintenance plan specific to a building when an adequate source of funding is provided.				
	Establish a reserve fund for the inspection and preventative maintenance of City-owned heritage buildings not covered by the Parks, Recreation & Culture Department's preventative maintenance fund.	A fund has been created for four of the heritage buildings (Smith, Snow, Mound Farm and Pilath houses) but this is limited to the amount of the rental income.	HAC recommends that all City-owned heritage buildings, both protected and registered, be considered for annual capital repair funds as required.	Future acquisitions of heritage properties or buildings should be undertaken in parallel with the identification of funding sources for their ongoing operation, maintenance and upgrading.	Engineering	Ongoing
	The existing grant program should be continued, and eligibility extended to all privately-owned protected property. Grants should be offered as an incentive to encourage owners of registered properties to seek designation. The assistance should be related to the total value of a benefit / incentive package.	This measure is tied to the Financial Compensation By-law, which is also recommended to be amended (see By-laws above). More work is necessary to determine the extent of financial assistance and the funding sources for such assistance.	Endorsed.	Consult with HAC and report back to Council on amending or expanding the scope of the Financial Compensation By-law	Planning & Development, Finance	9 months (late 2003) for a report to Council on the matter.
	In consultation with the Finance Department, a formal policy should be drawn up for tax exemptions, including guidelines for the appropriate reduction, after considering the provisions of the Federal Heritage Register.		Endorsed.	A report will be provided to Council.	Finance, Planning & Development	9 months (late 2003)
Heritage Conservation Areas (HCA)	Initiate a public process to establish Heritage Conservation Areas in East Cloverdale (182 Street), Surrey Centre/Five Corners, Crescent Beach and Crescent Road.	More work will be necessary to determine the degree of support in Surrey Centre, since no input was obtained through the first open house. Crescent Beach residents did not support HCA when consulted regarding the preparation of the Crescent Beach Land Use Plan. Residents did not support an HCA for properties along Crescent Road.	HAC recommends that prior to proceeding with the implementation plan of any of the proposed heritage conservation areas, that an intensive public consultation process take place for each area to allow the public to understand the implications and options of what is being proposed. HAC recommends the following order: Cloverdale East Surrey Centre  Crescent Beach and  Crescent Road	Undertake Cloverdale East public consultation first.  An initial consultation with owners in Surrey Centre is still necessary to determine the level of support.	Planning & Development	18 months (mid 2004) for Cloverdale East; 2 years (early 2005) for Surrey Centre (if support is evident)

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