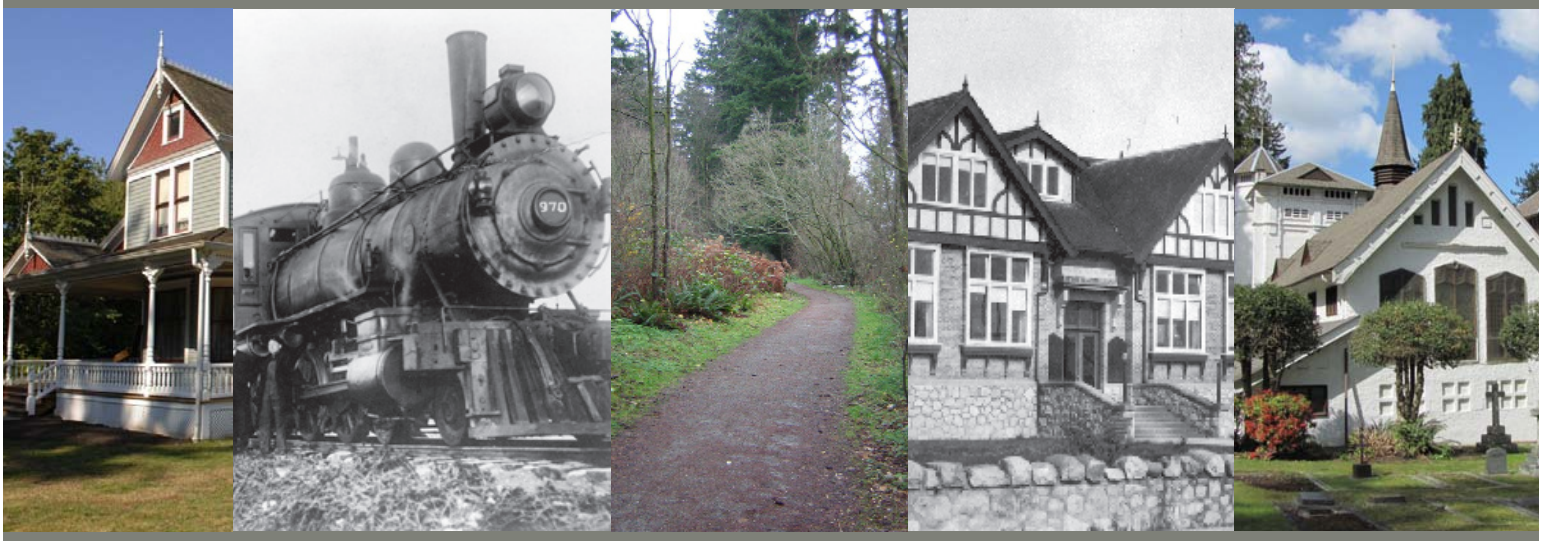
CITY OF SURREY

HERITAGE
STRATEGIC REVIEW



A RENEWED VISION FOR SURREY'S HERITAGE PROGRAM

OCTOBER 2010

DONALD LUXTON & ASSOCIATES inc.

176th Street Scene (c. 1970), Surrey Archives #180.1.86

CITY OF SURREY: HERITAGE STRATEGIC REVIEW

A RENEWED VISION FOR SURREY'S HERITAGE PROGRAM

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1. INTRODUCTION

United Church and IOOF Hall, Main Street (1908), Surrey Archives #180.1.11

Surrey has a significant heritage legacy, beginning with the early Semiahmoo and Kwantlen First Nations, established for more than 6,000 years; settlers from Europe, who first arrived in the mid-1800s; the settlement's incorporation as a municipality in 1879; and continuing through the transition to a City in 1993. Heritage, as a continuum, includes not only our past, but also our present and our future. Surrey's heritage includes built, natural, cultural and transportation resources that have been – and continue to be – important to the development of the City as a complete community. These heritage resources have been formally recognized, and their conservation has been the focus of Surrey's Heritage Program for more than forty years.

This Heritage Strategic Review provides a renewed vision for Surrey's Heritage Program, in order to enable it to be more effective in conserving, interpreting and celebrating Surrey's heritage.

1.1 THE HERITAGE STRATEGIC REVIEW PROCESS

This Strategic Review outlines the vision, goals and prioritized strategies for Surrey's Heritage Program. It provides: a background of past heritage awareness and planning initiatives; reviews key components of the existing program; defines the community's vision, goals and strategies for the program; and proposes an Implementation Plan to execute the strategies and actions that will help the City realize this renewed vision. Included in this process is a feasibility study of establishing a new heritage foundation for Surrey.

Surrey has a long history of heritage planning, dating back to its first heritage designation in 1970. This Strategic Review builds on the City's ongoing success in managing its heritage resources. Throughout the process, community support for heritage conservation has been amply demonstrated and opportunities have been identified for ongoing heritage partnerships that will advance Surrey's Heritage Program.

As part of this process, community heritage stakeholders were invited to sit on a Steering Committee that met four times to review and discuss the scope and recommendations of the Strategic Review. The project commenced with a background review and analysis of the existing situation, including an initial meeting on March 23, 2010 that focussed on heritage incentives and the potential for a new heritage foundation; continued with a visioning session on April 9, 2010; a workshop to review proposed strategies and actions on May 7, 2010; and a fourth and final workshop on June 11, 2010 in order to seek feedback on the vision, goals, strategies and implementation plan.

The Heritage Foundation Feasibility Study has been undertaken in concert with the Strategic Review. At the final Strategic Review workshop on June 11, the Steering Committee demonstrated strong support for the establishment of a new heritage foundation for Surrey; a proposed implementation plan for a new foundation is included in ***Section 4.3*** of this report.

1.2 COMMUNITY BENEFITS OF HERITAGE CONSERVATION

Heritage conservation has many potential cultural, social and economic benefits. Conserving and celebrating a community's heritage allows it to retain and convey a sense of its history, and provides aesthetic enrichment, as well as educational opportunities. Heritage resources help us understand where we have come from so that we can appreciate the continuity in our community, from past to present to future. Historic sites become physical landmarks and touchstones, and many other intangible cultural heritage features - such as traditions, events and personal histories – add to the City's vibrancy and character. This broad range of heritage resources represents a legacy that weaves a rich and unique community tapestry.

Cultural and heritage-based tourism, such as visits to historic sites, is now the fastest growing segment of the burgeoning tourism industry. Other benefits of strong heritage policies include maintaining distinctive neighbourhoods, conserving cultural heritage, providing community identity and promoting civic pride. Heritage conservation is also inherently sustainable, and supports initiatives such as landfill reduction and conservation of embodied energy. It reinvests in existing infrastructure and avoids certain environmental impacts through reduced greenhouse gas emissions. These are all important considerations in the long-term management of our built environment.

The benefits of a well-managed heritage conservation program include:

- retention of a community's unique physical heritage;
- celebrations of historical events and traditions;
- identification of ways that partnership opportunities can be fostered with senior levels of government;
- engagement of the broader community including the private and volunteer sectors;
- conservation of a broad range of historical sites that supports other public objectives such as tourism development and education;
- flexible heritage planning that assists private owners in retaining historic resources;
- investment in heritage sites through community partnerships;
- support for sustainability initiatives; and
- generation of employment opportunities and other economic benefits.

Heritage initiatives provide many tangible and intangible benefits, and have a strong positive impact on the development of a complete community and the emergence of a vibrant culture of creativity and innovation.

There is, however, a widely-held perception that protecting heritage property reduces property values or inhibits development. Studies have shown that this is not so; Professor Robert Shipley of the University of Waterloo investigated the property values over twenty years for more than 2,700 properties in 24 communities across Ontario. Shipley found that heritage designation could not be shown to have a negative impact on property values. In fact there appears to be a distinct and generally robust market in designated (protected) heritage properties. Their property values generally perform well in the market, with 74% of properties performing better than or equal to the average property value trend. The rate of sale among designated properties is as good or better than average market trends. Moreover, the values of heritage properties tend to be resistant to downturns in the general market.

The Vancouver Heritage Foundation has undertaken a research project comparing the assessed value of properties on the Heritage Register, designated properties, and non-heritage properties in four Vancouver neighbourhoods (Strathcona, Kitsilano, Mount Pleasant & Hastings Sunrise). The study indicated that between 1999 and 2005, Heritage Register and designated heritage houses increased in value at almost the same rate (42.1% & 42% respectively), while non-heritage houses increased at a slightly slower rate (39%).

The Victoria Heritage Foundation has also been tracking market values and assessments of 142 heritage houses designated prior to 1988. Between 1988 and 1999 the tax assessments for these houses increased 26% faster than the average for the City, resulting in an increased tax return to the City.

Heritage conservation, in general, actually provides stability in the marketplace and helps protect property values. This is especially true when conservation incentives are offered, creating a category of prestigious properties that are highly valued in the marketplace.

2. CURRENT SITUATION

For more than forty years, Surrey's heritage has been researched, documented and interpreted for the residents and visitors of the City. This solid foundation, built upon the work of the Surrey Historical Society dating from 1969, the original Surrey Heritage Advisory Committee dating from 1976, and continuing today through the dedicated work of a variety of heritage organizations, has provided Surrey with a rich understanding of its past as it seeks to define the future direction of its heritage program. The following sections outline past and current heritage initiatives and review the components currently in place that constitute the City of Surrey's Heritage Program.

2.1 SURREY HERITAGE INITIATIVES

The current *Official Community Plan* for the City of Surrey was adopted in 1996. There is an overarching statement regarding heritage: "Surrey will identify, retain, re-use and manage its natural, cultural and built heritage in a co-operative manner with those affected by heritage initiatives." More specifically, the City will "preserve, protect, integrate, maintain and revitalize buildings, structures, sites and landscape or natural and cultural features that are identified as having historical, architectural or cultural significance." The City's *Official Community Plan* is currently being reviewed and updated.

Heritage conservation policies and strategies are a part of Surrey's *Official Community Plan*, Local Area Plans and Neighbourhood Concept Plans, and have been since 1986. To date, there have also been multiple projects, studies and reviews that have guided municipal heritage management within the City of Surrey. More than two decades of community planning work inform and support the City of Surrey's current Heritage Program.

Heritage planning at the City of Surrey is housed within the Community Planning Division of the Planning & Development Department. The Community Planning Division is responsible for the "Management of Surrey's built, natural and cultural heritage resources." The first heritage site in Surrey, the 1865 Semiahmoo Trail, was designated in 1970. Throughout the past forty years, the Heritage Program has grown through the ongoing identification, evaluation and management of Surrey's heritage resources. Past planning initiatives that have shaped the direction of the Heritage Program include:

City of Surrey Heritage Strategy, 1994

Completed in 1994, the first Heritage Strategy provided direction for the City's Heritage Program. One of its goals was to reach a consensus on what historic features *must be*, *should be* and *might be* managed in the community. A review of the existing Heritage Program was conducted and a vision for future heritage management was formulated. Recommendations regarding the means to achieve the vision and what information was needed to implement revisions to the Heritage Program were made.

Three primary types of heritage in Surrey were identified, including Community, Transportation and Natural Heritage. In order to conserve these assets, there were four principal methods of implementation, including education and awareness programs, administrative and stewardship policies, planning initiatives and a heritage resource database. Workshops involving City Staff, the Heritage Advisory Committee and stakeholders in the community participated in developing the Heritage Strategy.

A review of the Heritage Strategy indicates that over time, much of what was recommended proved to be valid and was implemented. Some of these actions were: the inclusion of heritage conservation in the *Official Community Plan*; the establishment of a Heritage Management Plan; the provision of a City Staff position in charge of heritage; further development of education and awareness programs; and the expansion of heritage conservation incentives.

Soon after the 1994 Heritage Strategy was completed, changes in Provincial Legislation regarding heritage (specifically, the Heritage Conservation Statutes Amendment Act 1994) came into effect. These measures included new planning and support tools, an expanded legal protection toolkit and new procedures for local government. Municipalities across British Columbia, including the City of Surrey, have since taken advantage of the new heritage tools made available and today, these tools and procedures form the foundation for the City of Surrey's Heritage Program.

City of Surrey Heritage Register, 1997 to present

The Heritage Register was first established by Council resolution in 1997 and has continually evolved as sites are either added or removed. It contains a listing of sites recognized by the City as having heritage significance. The bulk of the sites were added in several phases through research, public nomination and evaluation. A review of the current status of the Heritage Register is provided in ***Section 2.1.2***.

City of Surrey Heritage Management Plan, 2000

The Heritage Strategy of 1994 recommended the development of a Heritage Management Plan as the next step in the delivery of heritage-related services within the City of Surrey. Such a plan was completed in 2000 and comprises two parts. Part I: Administrative Policies and Procedures for Surrey's Heritage Program, is designed to give direction and guidance on heritage conservation activities and initiatives and also to establish implementation tools and a heritage review process. Part II: Surrey's Potential Heritage Conservation Areas, sought to examine the feasibility of designating up to five Heritage Conservation Areas, including Crescent Beach, Crescent Road, Semiahmoo Trail, Surrey Centre-Five Corners and Cloverdale East (182 Street).

Surrey City Council approved the Heritage Management Plan in 2003, however the proposed conservation areas have yet to be established. The City pursued designation of Crescent Beach, Crescent Road and 182 Street, but there was insufficient community support to establish them as Heritage Conservation Areas. Council has also approved the Heritage Management Plan Implementation Strategy, which includes implementation actions, departments responsible for the actions and also the timeframe when actions should be completed.

The Heritage Program continues to be integrated with broader municipal policies. An example is the recent work undertaken on the *Sustainability Charter* (See ***Section 3.3.3***).

While heritage planning work is undertaken by the Community Planning Division, Heritage Services is responsible for the operation of the Surrey Museum, City of Surrey Archives and Stewart Farm. This division reports, to and is funded by the City's Parks, Recreation and Culture Department. Heritage Services develops school programs, public workshops, courses, demonstrations, tours and special events. The *Surrey's Stories* newsletter, which contains updates from a variety of heritage organizations throughout Surrey, is also collated and produced by Heritage Services. These education and awareness initiatives are an integral part of Surrey's Heritage Program.

2.1.1 COMMUNITY ADVISORY GROUPS

Two community advisory groups have the mandate of providing advice on civic heritage matters. The Surrey Heritage Advisory Commission has the primary focus of advising Council on matters relating to tangible heritage (land use and development issues relating to heritage applications), and is managed by Legislative Services. The Heritage Services Community Advisory Board is managed under the Parks, Recreation and Culture Department, and advises on matters related to the Surrey Museum, Archives and Stewart Farm.

Surrey Heritage Advisory Commission (SHAC)

The Commission was first established in 1976 as an advisory committee, and in 1997 it was given full Commission status. Council appoints the Commission for the purpose of advising on heritage matters, as outlined in its mandate or directed to it by Council, and also to provide support for heritage activities as directed or endorsed by Council. ***Appendix A*** provides additional information on the mandate and administration of the Commission.

Heritage Services Community Advisory Board

The Heritage Services Community Advisory Board was formed in 1988 and is composed of community members who advise Heritage Services on its collections and programs. The Board communicates via the minutes of its meetings and provides community input for the Surrey Museum, Archives and Stewart Farm. The Board includes: one representative each from the Surrey Historical Society, Surrey School District, Surrey Board of Trade and Cloverdale Chamber of Commerce; three community members at large; up to three Heritage Services volunteers; and two liaison appointments representing the Surrey Public Library and SHAC.

2.1.2 HERITAGE REGISTER

The City's Heritage Register is the list of sites approved by Council resolution as having recognized heritage value and character. Sites on the Register are not legally protected until they undergo negotiations with the City, leading to a Heritage Designation By-law, Heritage Revitalization Agreement (HRA) or Heritage Restrictive Covenant (HRC). Approximately 21% of the sites on the Register have been legally protected by these means. Protected sites on the Heritage Register are the focus of the City's heritage incentives program, which is discussed in ***Section 2.2***.

Strengths of the Heritage Register include:

- a variety of representative examples of built, natural, cultural and transportation resources;
- built resources that range from grand homes to modest vernacular structures;
- sites that range from small urban lots to large agricultural sites;
- resources that are unique, and others that are typical, representative or vernacular; and
- context that includes urban, rural, commercial, industrial and agricultural sites that illustrate the complete range of Surrey's history.

Challenges for the conservation of resources on the Heritage Register include:

- many sites are in isolated locations and there is little concentration of resources;
- many resources are modest in nature and cannot be meaningfully increased in size without destroying their heritage value; and
- many resources will lose their meaningful site context if redeveloped.

As part of this study, a high level review of the sites on the Heritage Register was conducted. No changes to the current listings are recommended, except for the removal of resources that have been demolished. These sites include Bourassa Farmhouse (Site #29), South Colebrook Railway Station (Site #189), Anniedale Methodist Church (Site #204), John Sedgewick House (Site #131) and Fred J. Ebben House (Site #129). The memory of these sites can be preserved through documentation and commemorated. Standards of Documentation should be developed and these should be consistent and applied in cases where, despite the best efforts of the City, a heritage resource cannot be preserved.

Each site on the Heritage Register has been identified as having recognized heritage value and character and therefore, each is worth considering for long-term conservation. The development process is unique in each situation and when heritage resources are involved, each must be carefully considered if the ultimate goal of meaningful and appropriate heritage conservation is to be achieved. It not possible to predict which developments will facilitate the conservation of heritage resources. Therefore it is not recommended that any additional sites be removed from the Register at this time, in advance of any future opportunities for conservation.

Not all resources have equal heritage value, and if conservation is being considered, the final outcome should meaningfully conserve heritage values and character-defining elements. During the high level review, a number of issues regarding site evaluation and conservation outcomes were analyzed. Recommendations that address these issues are included within the Planning Strategies in ***Section 3.3.1***.

Existing Evaluation System

The existing heritage site evaluation system used by the City of Surrey was adapted from the Parks Canada numerical evaluation system, which dates to 1979. Numerical evaluation systems do not recognize individual criteria as self-sufficient (such as in the case of the United States National Register of Historic Places). The current evaluation system is additive only, meaning a site must score highly in a number of categories. Scores cannot decrease in situations where heritage value has been compromised, such as when a resource has been significantly altered and has therefore lost its heritage integrity. Surrey's evaluation system has no ranking categories on the existing Heritage Register, which is consistent with the Canadian Register of Historic Places.

Over time, best practice in the evaluation of historic sites has evolved from the use of numerical systems to values-based assessment. International best practice includes the following evaluation tools:

1. Historic Context Statements;
2. Thematic Frameworks; and
3. Statements of Significance.

These tools are qualitative rather than quantitative.

The review of the existing Heritage Register sites indicated a number of areas where the evaluation system has provided confusing results; a qualitative, values-based assessment system would help eliminate much of this confusion. Situations in which the current evaluation system provided inflated results (on Surrey's Heritage Evaluation Worksheets) include:

- Assessments with no review of heritage integrity, e.g. Site #40 – Heppell Family House, which has lost much of its integrity through alterations including new siding and windows.
- High assessment scores that result from unrated categories, e.g. Site #38 – Ross House, which was not rated for its ownership/construction history, nor its additions/alterations. This provides an unusually high number that exaggerates the heritage value of the site.

Many of Surrey's Heritage Evaluation Worksheets, which are the foundation of the information and scores for sites on the Register, were completed in the late 1990s or early 2000s. Since then, many heritage resources have undergone alterations and therefore, reassessments based on a new, more appropriate values-based system (discussed in ***Section 3.3.1***) should be undertaken.

Conservation Outcomes

There is a need to assess what the final outcome of any heritage project will be and what will happen to the integrity and context of the resource, once it has been conserved. When this assessment has been completed and the results are positive, meaningful conservation can occur. However, the review of existing Register resources produced examples of conservation outcomes that have not been meaningful, including:

- Replication, rather than conservation, of the resource, e.g. W. Gillis House, Site #109 and Charles Bell House, Site #95
- Inappropriate, non-authentic conservation work that does not protect historic integrity and does not meet the intent of heritage Standards and Guidelines, e.g. Baron von Mackensen Residence, Site #147.

Conversely, there are examples where integrity could be recovered in a meaningful way through restoration, e.g., the Strawberry Hill Farmers Institute, Site #113, which is relatively intact under its unoriginal siding and also has a substantially intact interior.

Heppell Family House

Ross House

W. Gillis House

Baron von Mackensen Residence

Strawberry Hill Farmers Institute

Heritage Resource Analysis

An analysis of Surrey's Heritage Register reveals the current ownership and land use pattern of the sites:

Register Site Ownership:
Private: 72%
City: 20%
School District: 4%
Other[1]: 4%

Register Site Land Use:
Residential: 47%
Institutional: 19%
Agricultural: 12%
Natural: 8%
Commercial: 6%
Transportation: 4%
Other[2]: 4%

Whalley's first bank, Bank of Nova Scotia (1944), Surrey Archives #180.7.18

Heritage properties that are privately owned are potentially more difficult to protect, given the legislative requirements for compensation, but when heritage incentives are offered, owners are often willing to work with the City towards a conservation solution. The 20% of City-owned sites on the Register are easier to protect since incentives do not need to be offered, however each property is different and each has a different set of hurdles to clear before protection can be secured. The City should increase the protection of some City-owned sites, including the Anderson Cabin (Site #153), Thomas Joseph Brown House (Site #91) and Darts Hill Garden Park (Site #251).

The variety of land uses associated with sites on the Register highlights the diversity of Surrey's heritage resources and is also a reminder that a variety of methods will need to be employed when working to protect these sites. A private homeowner will respond to different incentives than will a commercial or institutional building owner, who will also respond differently than an agricultural landowner.

Twelve of the sites on the Register are currently undergoing Heritage Revitalization Agreement negotiations including:

- Cecil Heppell House (Site #50)
- Ferguson House (Site #143)
- George E. Lawrence House (Site #196)
- John Horner House (Site #68)
- Louis Dahl House (Site #132)
- Meadow Ridge Farm – Barn (Site #97)
- Meadow Ridge Farm – Dairy Building (Site #98)
- Meadow Ridge Farm – Henry John Bose House (Site #99)
- Ocean Park Community Hall (Site #67)
- Sullivan Community Hall (Site #108)
- Tynehead Elementary School West Wing (Site #200)
- Welsh House (Site #182)

In addition, South Westminster School (Site #208) and Tynehead Community Hall (Site #25) are both undergoing applications for Heritage Alteration Permits. The number of heritage resources currently undergoing negotiations leading to protection is encouraging, and the City should continue to offer incentives to owners so that additional resources are eventually protected.

[1] Includes BC Hydro, BN Rail, Federal Government, Provincial Government, Regional Government and Railway ROW
[2] Includes Monument, Cemetery and "Site" descriptions

Surrey's heritage resources are spread throughout the City and a division of the sites by neighbourhood, as expressed in the following table, demonstrates the high volume of resources in certain neighbourhoods and the low volume of resources in others. While every heritage resource is important, those located in neighbourhoods with few heritage sites should receive special consideration. Conversely, heritage resources located in neighbourhoods with many listed sites, including Cloverdale and the previously proposed Heritage Conservation Areas (See ***Section 2.1***) of Crescent Beach and 182 Street, should also be pursued for designation and protection, as the heritage value of these areas has already been recognized.

Inventoried, Registered and Protected Sites by Neighbourhood:

Neighbourhood	*Inventory*	*Register*[3]	*Protected*	*Total*
Anniedale	2	0	1	3
Bridgeview	0	1	0	1
Cedar Hills	0	0	0	0
Clayton	0	18	0	18
Cloverdale	4	26	5	35
Crescent Beach	21	25	11	57
Douglas	3	6	0	9
Elgin	1	4	5	10
Fleetwood	1	2	0	3
Grandview Heights	3	8	0	11
Green Timbers	0	6	0	6
Hazelmere	1	13	2	16
Kennedy	1	3	1	5
Kensington Prairie	0	2	3	5
Mud Bay	0	3	0	3
Newton	4	3	0	7
Ocean Park	3	5	0	8
Panorama Ridge	2	4	2	8
Port Kells	9	10	4	23
Port Mann	4	3	1	8
Royal Heights	0	1	1	2
South Westminster	1	9	3	13
Strawberry Hills	0	1	0	1
Sullivan	0	2	1	3
Sunnyside	0	0	0	0
Surrey Centre	1	16	6	23
Tynehead	1	4	1	6
Whalley	0	2	1	3
TOTALS	62	177	48	287

Ship loading grain (c. 1964), Surrey Archives #204.11

2.1.3 HERITAGE INVENTORY

The City's Heritage Inventory includes a listing of sites in Surrey that have potential heritage value or character. A Heritage Inventory is not enabled under the Local Government Act, and has no legal status. The Inventory sites are therefore in limbo, not fully recognized as having heritage value but still officially flagged on the City's website. There are no specific policies relating to Heritage Inventory sites.

There are currently 62 Heritage Inventory sites. A review of the Heritage Inventory determined that those sites that have already been formally evaluated, score highly enough and maintain sufficient heritage integrity should be included on the Heritage Register. Those sites that have not yet been formally evaluated should be evaluated and then added to the Register if they score highly enough and maintain their heritage integrity. After evaluation, Heritage Inventory sites that do not score highly enough or that have lost their heritage integrity should be removed.

Four of the sites on the Inventory may be under threat for redevelopment. These include the Danish Community Centre in Cloverdale and three sites that are affected by the Anniedale-Tynehead Neighbourhood Concept Plan, including the Harbidge House, Whiting House and Witzer Residence. These plans should be reviewed and these sites should be prioritized for protection if the resources maintain their heritage integrity and the City, through formal evaluation, considers these properties to have significant heritage value.

Given the confusion that it generates, the Heritage Inventory should be eliminated, and these 62 sites should either be included on the Heritage Register, or removed altogether.

[3]King George Highway & Royal Oak Trees listing (on Register) does not apply to a single neighbourhood and has been excluded in the table.

2.2 HERITAGE CONSERVATION INCENTIVES

City Financial and Non-Financial Incentives

The City of Surrey's Building Preservation Program provides grants to owners of protected heritage properties. Grants are provided to help carry out exterior stabilization, maintenance or restoration of privately-owned and protected heritage buildings. The City will contribute 50% of the cost of the work, up to $5,000 each year, for up to 3 years. In 2009, the City provided grants totalling $7,865 and in 2008, $15,286. The program has sufficient funding in place to provide grants to all owners of protected heritage properties, should they decide to perform work and apply for the grants. The City also provides property tax exemptions for owners of protected heritage properties. Council must adopt a by-law to allow the tax relief each year and in 2009 the City dedicated $11,351 to this program.

Non-financial incentives include the consideration of building code equivalencies, which establish compliance with the theory behind the contemporary code, but are sympathetic to the structural intricacies of heritage buildings. Zoning relaxations can be allowed in order to retain a non-conforming heritage building on a specific site. Also, technical assistance from City staff may be offered to owners of heritage properties. Finally, recent amendments to the Homeowner Protection Act and Energy Efficiency Act have removed some of the barriers to compliance for designated heritage buildings.

Community Enhancement Partnership Program

The City of Surrey offers two types of beautification grants through the Community Enhancement Partnership Program. These grants are designed to promote community activism and neighbourhood beautification and could be used to promote local heritage assets either through the physical improvement of a public heritage resource (Small Project Grant) or through a neighbourhood heritage festival (Partnership Grant).

2.3 HERITAGE EDUCATION AND AWARENESS

Beginning in the 1980s, Surrey established itself as a leader in British Columbia for heritage awareness and interpretation initiatives. In 1985, the Surrey Heritage Advisory Committee published *Surrey's Heritage: A Selection of Surrey's Historically Significant Buildings*. The book contains photographs and information on sixteen of the most important heritage sites in Surrey. Videos, an innovative format at the time, were also successfully produced throughout the 1980s and 1990s.

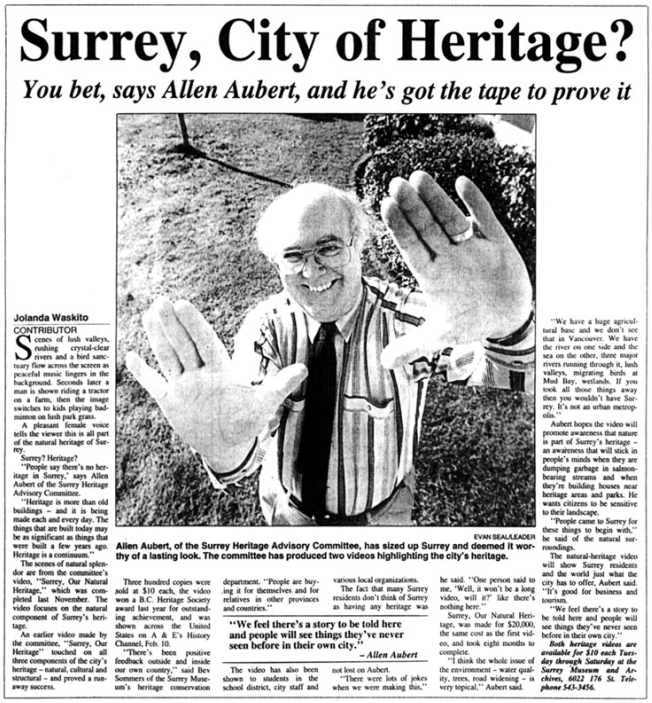
The City continues to have multiple programs designed to highlight historic places in the community. Street markers identify heritage streets. Storyboards provide information and education on significant areas, trees, landscapes or structures. The City maintains 38 heritage storyboards and the City's website provides the opportunity to virtually access many of the storyboards. Tree and heritage site plaques are used to identify and provide information to the community. There are also three virtual walking tours on the City's website, including tours of Historic Cemeteries, Crescent Beach and Cloverdale. The tours provide information on the area and specific heritage sites. Other areas, such as Port Kells, have site-specific interpretation.

2.4 STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS

As part of the consultative process for the Strategic Review, the Steering Committee was asked to assess the current strengths, weaknesses, opportunities and threats to Surrey's Heritage Program. This discussion, and the analysis contained within this report, determined the recommendations for the Strategic Review. In general, there was consensus that the current Heritage Program, despite some recent negative issues, is extremely effective. The Heritage Program has a long history, deep roots in the community, and has made strong and steady progress in the identification, evaluation and management of Surrey's heritage resources. The current situation may be summarized as follows:

Strengths of Surrey's Heritage Program

- Council and public support of heritage, with strong City Staff support.
- The Heritage Program recognizes broad and representative categories of heritage, including built, cultural and natural resources.
- The Heritage Register is well-established and flags sites recognized as having heritage value.
- The City's heritage webpages provide a substantial information base.
- There are a large number of local groups, such as the Surrey Historical Society and the Fraser Valley Heritage Rail Society, involved in community-based heritage initiatives.



Surrey, City of Heritage?

You bet, says Allen Aubert, and he's got the tape to prove it

Jolanda Waskito
CONTRIBUTOR

Scenes of lush valleys, rushing crystal-clear rivers and a bird sanctuary flow across the screen as peaceful music lingers in the background. Seconds later a man is shown riding a tractor on a farm, then the image switches to kids playing badminton on lush park grass.

A pleasant female voice tells the viewer this is all part of the natural heritage of Surrey.

Surrey? Heritage?

"People say there's no heritage in Surrey,' says Allen Aubert of the Surrey Heritage Advisory Committee.

"Heritage is more than old buildings – and it is being made each and every day. The things that are built today may be as significant as things that were built a few years ago. Heritage is a continuum."

The scenes of natural splendor are from the committee's video, "Surrey, Our Natural Heritage," which was completed last November. The video focuses on the natural component of Surrey's heritage.

An earlier video made by the committee, "Surrey, Our Heritage" touched on all three components of the city's heritage – natural, cultural and structural – and proved a runaway success.

Three hundred copies were sold at $10 each, the video won a B.C. Heritage Society award last year for outstanding achievement, and was shown across the United States on A & E's History Channel, Feb. 10.

"There's been positive feedback outside and inside our own country," said Bev Sommers of the Surrey Museum's heritage conservation department. "People are buying it for themselves and for relatives in other provinces and countries."

"We feel there's a story to be told here and people will see things they've never seen before in their own city."
– Allen Aubert

The video has also been shown to students in the school district, city staff and various local organizations.

The fact that many Surrey residents don't think of Surrey as having any heritage was not lost on Aubert.

"There were lots of jokes when we were making this," he said. "One person said to me, 'Well, it won't be a long video, will it?' like there's nothing here."

Surrey, Our Natural Heritage, was made for $20,000, the same cost as the first video, and took eight months to complete.

"I think the whole issue of the environment – water quality, trees, road widening – is very topical," Aubert said.

"We have a huge agricultural base and we don't see that in Vancouver. We have the river on one side and the sea on the other, three major rivers running through it, lush valleys, migrating birds at Mud Bay, wetlands. If you took all those things away then you wouldn't have Surrey. It's not an urban metropolis."

Aubert hopes the video will promote awareness that nature is part of Surrey's heritage – an awareness that will stick in people's minds when they are dumping garbage in salmon-bearing streams and when they're building houses near heritage areas and parks. He wants citizens to be sensitive to their landscape.

"People came to Surrey for these things to begin with," he said of the natural surroundings.

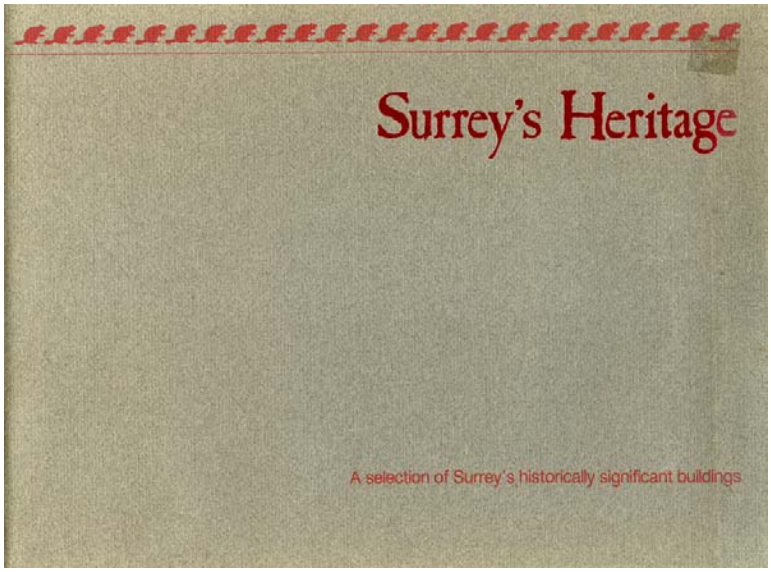
The natural-heritage video will show Surrey residents and the world just what the city has to offer, Aubert said. "It's good for business and tourism.

"We feel there's a story to be told here and people will see things they've never seen before in their own city."

Both heritage videos are available for $10 each Tuesday through Saturday at the Surrey Museum and Archives, 6022 176 St. Telephone 543-3456.

EVAN SEALE/LEADER

Allen Aubert, of the Surrey Heritage Advisory Committee, has sized up Surrey and deemed it worthy of a lasting look. The committee has produced two videos highlighting the city's heritage.



Weaknesses of Surrey's Heritage Program

- The Heritage Program tends to be reactive rather than proactive.
- Changeovers in Council, Staff and SHAC have disrupted the collective institutional memory. New Commissioners/Councillors have to familiarize themselves with the local situation and community groups.
- There is a lack of clarity within the City as to the overall heritage mandate and how different departments can work together.
- Many Staff members involved in development negotiations have not been trained in heritage conservation.
- Lack of diverse technical expertise on SHAC makes it difficult to provide meaningful advice on development applications.
- There are difficulties in attracting new Commissioners to SHAC.
- There is a general lack of communication between heritage groups operating within Surrey.
- There has been an inconsistent application of Standards and Guidelines in heritage projects.

Opportunities for Surrey's Heritage Program

- Heritage tourism can develop as an economic driver; Crescent Beach is the top destination in Surrey.
- Heritage can be seen as an investment, not just as expenditure.
- Heritage conservation can be linked strongly to the *Sustainability Charter*.
- Project for Public Spaces "Power of 10" could be considered.
- Digital technology could be used to promote local heritage.

Threats to Surrey's Heritage Program

- Federal and provincial heritage grants are evaporating as programs are downloaded to the municipal level.
- There is intense development pressure in Surrey.
- Civic character and identity may be lost if heritage opportunities are not realized.

These identified strengths, weaknesses, opportunities and threats provide the basis for the renewed vision, goals and strategies for Surrey's Heritage Program. The recommendations build upon the strong foundation of heritage work in Surrey, address the gaps and weaknesses of the existing program initiatives, and provide direction for the future of heritage conservation in Surrey.

3. RENEWED VISION, GOALS AND STRATEGIES

3.1 A NEW VISION FOR SURREY'S HERITAGE PROGRAM

The following Vision was developed in conjunction with the Steering Committee. This summarizes the consensus on the renewed direction for Surrey's Heritage Program:

> *Surrey is a growing, diverse and progressive community that takes pride in its rich history and heritage legacy. The conservation of Surrey's heritage resources is inherently sustainable and an important economic generator that will provide long-term benefits to the residents and visitors of Surrey.*
>
> *Enabled by renewed management, incentives, education and awareness programs, we will preserve Surrey's built, cultural and natural heritage. Through community partnerships, we will achieve a better understanding of our past, its meaning to the present, and our vision for the future.*

3.2 GOALS OF SURREY'S HERITAGE PROGRAM

The following overarching goals were developed as the basis for the renewed Heritage Program:

1. Make Heritage Planning more effective in the identification, management, conservation and protection of Surrey's heritage resources.

2. Inspire residents to appreciate, learn about and support heritage programs and resources in Surrey.

3. Bring together different heritage groups throughout Surrey and partner with broader municipal objectives that foster sustainability and economic development.

3.3 STRATEGIES FOR SURREY'S HERITAGE PROGRAM

The following recommended strategies fall into three broad categories: Planning, Outreach and Collaboration, and each work toward the realization of the renewed vision and goals of Surrey's Heritage Program. Many strategies have associated actions, and many of these actions can work in concert with each other.

The Implementation Plan that follows in ***Section 5*** summarizes these strategies and provides guidance on the anticipated timeline, group lead, support organizations and also the implication of each strategy.

3.3.1 PLANNING STRATEGIES

The City of Surrey recognizes the value of heritage conservation and has over time dedicated substantial resources to heritage conservation initiatives. The Community Planning Division of the Planning and Development Department is responsible for heritage planning, but a variety of City Staff may encounter situations that involve heritage issues. It will increase the effectiveness of the Heritage Program if the heritage information base is clearly organized, if resources are properly evaluated and if Staff members are properly trained and educated. This builds upon existing successful heritage planning initiatives.

PLANNING STRATEGY 1: Enable More Effective Heritage Planning

Heritage planning at the City of Surrey is built upon a strong foundation. For more than forty years, the City has been completing heritage projects and today, the City has undertaken heritage initiatives to identify, evaluate, manage and protect Surrey's heritage resources. The following actions describe how the City can make its Heritage Program even more effective.

ACTION: Eliminate the Heritage Inventory
As described in ***Section 2.1.3***, the Heritage Inventory sites should either be included on the Heritage Register, or else dropped from the list. The Heritage Inventory should cease to exist.

ACTION: Develop Standards of Documentation for Heritage Register Sites
Standards of documentation, including research, descriptive text and annotated photographs, should be developed for sites on the Heritage Register. These standards should be applied consistently in situations when a resource cannot meaningfully be preserved and will be demolished or significantly altered.

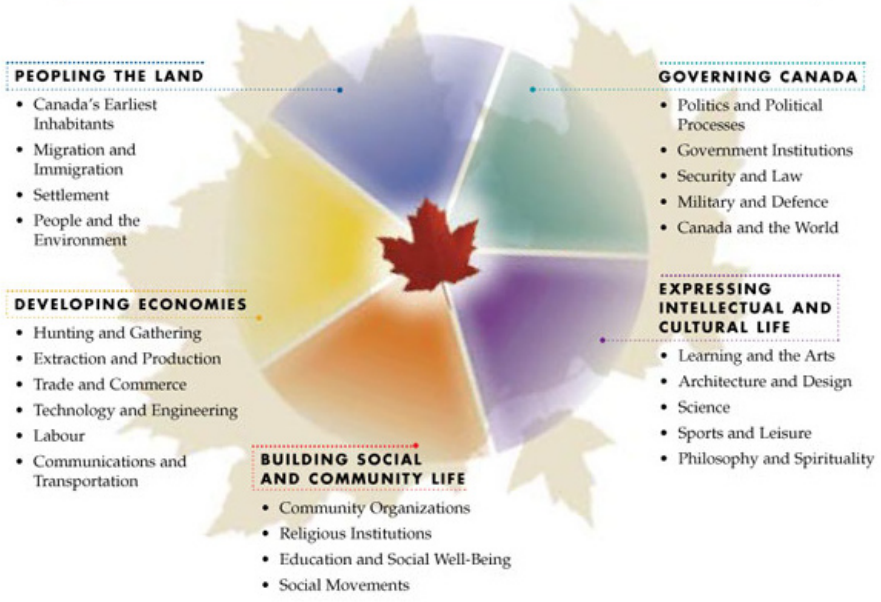
ACTION: Develop a New Evaluation Framework for Heritage Resources and Re-evaluate Existing Heritage Resources Using the New Evaluation Framework
The City should undertake the development of a new framework in which the heritage value of each property can be more fully reviewed. This assessment framework should be values-based and serve as a guideline for determining which heritage resources should be managed. Properties on the Heritage Register should then be re-evaluated using the new framework, which should include a thematic framework and a historic context statement.

A thematic framework organizes and defines historical themes that identify significant sites, persons and events. Historical themes provide a context within which heritage significance can be understood, assessed and compared. Themes help to explain why a site exists, how it has changed over time and how it relates to other sites linked by the theme. Historical themes can be comprehensively identified once a thematic history is prepared. This can also provide a framework for a more effective evaluation of which sites represent important themes, and the values that they represent.

As part of a thematic framework, a historic context statement is developed that provides a framework for understanding and evaluating historical resources. The significance of an individual site can be judged and explained by providing information about patterns and trends that define community history. Each site should be considered in the context of the underlying historical influences that have shaped and continue to shape settlement and development. Historic context may be organized by theme, geographic area, or chronology, and is associated with a defined area and an identified period of significance. In this way, common, ever-present and representative historic sites, as well as interesting, rare or exceptional examples, can be identified and placed in context.

Parks Canada has undertaken the development of a thematic framework, within the *National Historic Sites of Canada System Plan*, which provides a comprehensive way of looking at Canadian history and identifies sites of national significance. This overarching thematic framework can inform and support the development of a civic historic context and the development of a local thematic framework.

Parks Canada National Historic Sites of Canada Thematic Framework



A number of communities throughout British Columbia have adopted this approach and are actively developing this type of heritage evaluation framework. Municipal planning best practices now support the development of thematic frameworks as the basis of heritage planning, thus enabling better integration of heritage within community planning. In Canada, the City of Victoria has led the way with the development of the first comprehensive civic thematic framework in 2008-2010, developed by drilling down from the *National Historic Sites of Canada System Plan* to forge a deeper understanding of historic forces at the local level. This is being used as a tool to determine the value of neighbourhoods and individual sites; update and evaluate the Victoria Heritage Register; and inform the development of neighbourhood plans. This process has articulated the heritage values associated with heritage assets that link to the evolution of the city, and describes the types of resources that make up the city's heritage, including implications for municipal heritage management. In Vancouver, the development of historic context statements is underway in certain neighbourhoods and for certain categories of resources such as postwar heritage.

The City of Surrey has already started this process. A historic context statement was undertaken for Surrey schools in 2007-2008 – See ***Appendix B***. The City should undertake the development of a comprehensive city-wide thematic framework and a historic context statement that will support the evaluation of Surrey's heritage resources. This new evaluation framework will allow for a better understanding of the broad range of potential heritage resources located throughout the entire city, ground the identification and evaluation of heritage resources in a solid, defensible academic footing and assist in the integration of heritage resources within the planning for each neighbourhood, based on local identity and character.

ACTION: Provide Heritage Training and Education to City Staff and SHAC
Many City Staff members work with development plans that include heritage issues, but many may be unaware of the broader context of heritage conservation policies. Providing heritage workshops and courses on such topics as the *Standards and Guidelines for the Conservation of Historic Places in Canada* would prove effective in raising the overall level of heritage knowledge within the City. Heritage Planning Staff and members of SHAC should also regularly attend heritage workshops and conferences in order to continually increase their knowledge base. These actions will ensure that heritage issues are addressed with the specialized technical knowledge they require.

PLANNING STRATEGY 2: Provide Heritage Conservation Incentives
The City's heritage conservation incentives programs, which include the Building Preservation Program, property tax exemptions, building code equivalencies, zoning and subdivision relaxations and technical assistance from Staff, should be reviewed to determine if they are effectively encouraging heritage property owners to work with the City to conserve heritage resources. The rigorous application of the *Standards and Guidelines for the Conservation of Historic Places in Canada* should be a prerequisite for every conservation plan so that each resource maintains its heritage integrity.

ACTION: Review Surrey's Heritage Incentives Programs
It is important to remember that incentives should ensure the long-term financial viability of each heritage conservation project and that the application of incentives is subject to the following conditions:

- All properties on the Heritage Register, or eligible for the Register, should be considered for financial incentives, but legal protection, in the form of a heritage designation or a covenant, should be a pre-requisite before any municipal heritage incentive is granted.
- The amount of incentives offered should be directly related to the level of conservation, and should reflect a good conservation outcome. The heritage character-defining elements of the site are to be maintained.
- The proposed work on the site would be compatible with, and sympathetic to, the character and context of the heritage site, according to the *Standards and Guidelines for the Conservation of Historic Places in Canada*.
- For larger incentives, proof of financial necessity may be required through a *pro forma* economic analysis.

ACTION: Establish a Surrey Heritage Foundation
As per the results of the Heritage Foundation Feasibility Study, establish a new heritage foundation for Surrey within the next two years. The new foundation should eventually be responsible for the Building Preservation Program. See ***Section 4*** for details.

3.3.2 OUTREACH STRATEGIES

A successful heritage program reaches out to the community in order to gain support. In turn, heritage knowledge and awareness will be raised, which will then encourage community members to contribute to ongoing heritage efforts. This is a cyclical, ongoing process, as the community grows and new residents want to be involved, and learn more about the unique identity of where they live.

OUTREACH STRATEGY 1: Establish Better Communications

A communications strategy is an essential part of a heritage program. Communication regarding heritage matters is necessary not only between the City and residents of Surrey, but also between heritage groups and the media.

ACTION: Update Heritage Information on the City's Website

The provision of heritage information on the City's website is currently the best method of public communication. Heritage webpages should be monitored and updated as needed in order to provide the public with the most accurate and relevant heritage information. As the City of Surrey develops its new website, the organization and layout of heritage information should be reviewed and revised, as necessary. For example, it should be very simple for heritage property owners to find out what resources and incentives are available to them. The wording on individual webpages should also be clear and direct for the intended audience, including heritage property owners. The series of online brochures entitled "Heritage Matters in Surrey" is an effective way to increase awareness and access to information regarding heritage planning. This format should be considered as further heritage information is compiled for revised website content.

ACTION: Maintain a Positive Public Relations Image

It is important to work proactively with the media in order to champion initiatives, increase heritage awareness and explain the complete story on heritage issues in Surrey. It is important to show the positive side of heritage conservation, and the numerous benefits it affords to the larger community, rather than get stuck on the occasional reverses that inevitably occur.

OUTREACH STRATEGY 2: Promote Heritage Education and Increase Heritage Awareness

Heritage awareness begins with education. An understanding of what heritage encompasses is essential to the appreciation of the different heritage assets in Surrey. Heritage does not simply involve "old" buildings; it involves resources that illustrate the city's development, including: natural sites, such as farms and forests; cultural assets, such as churches and meeting halls; transportation corridors, such as roads and railways; as well as significant buildings including municipal halls, houses and schools.

ACTION: Provide Heritage Education to Residents and Professionals

Establishing a foundational knowledge of heritage is important for the development and sustainability of heritage programs. This can be executed in a variety of ways, including courses, workshops, and community events, such as heritage tours. Advertising educational opportunities is necessary to keep residents informed of the full range of heritage information that is available.

Heritage Services currently offers a variety of public programs throughout the fall and winter at the Archives. The Archives also offers a range of presentations that can be booked by community groups. These outreach tools are an effective way to increase heritage education in Surrey, and future programs should be built upon their success.

Heritage education should also be promoted and offered to development and design industry professionals so that they are more prepared to work with heritage issues. Linking these courses with those offered to City Staff would increase efficiency and provide networking opportunities.

ACTION: Offer Heritage Education Programs for Schools

Offering heritage education programs in schools not only introduces the importance of heritage to young residents of Surrey, it also raises the overall level of heritage awareness in the community, as teachers and administrators learn about the programs. Much like the programs described above, school programs can take different forms, including workshops, presentations and tours, depending on how they can best be integrated into the curriculum.

Heritage Services already offers school programs at the Museum, Archives and Stewart Farm, and also provides "edukits" that can be loaned to schools for two-week periods. Building and expanding upon the success of these programs will help establish heritage firmly in the minds of all those involved in local education.

There may also be significant opportunities to involve the increasing number of post-secondary institutions that are locating in Surrey. These growing institutions will likely be receptive to opportunities to integrate with the community and may be able to direct resources towards an understanding of their local context.

ACTION: Foster Heritage at the Neighbourhood Level
Heritage education should also be delivered at the neighbourhood level because that is where residents can become most engaged and knowledgeable. When neighbourhood heritage is researched and made available to its residents, they are more likely to take pride in it and foster heritage as an integral part of their neighbourhood's development. Once residents understand their neighbourhood heritage, they can come together across the city and tell their stories, thereby increasing overall heritage awareness in Surrey. Students can be involved through research, discussion and analysis of local history.

3.3.3 COLLABORATION STRATEGIES

Working with other heritage groups and associated organizations in strong collaborative partnerships will increase the reach and audience for Surrey's Heritage Program. This will increase the number of people and resources working toward the common goal of heritage conservation. Linking heritage with sustainability and economic development will establish heritage in these compatible initiatives and further the overall goals of each individual program.

COLLABORATION STRATEGY 1: Forge Partnerships with Heritage Groups throughout Surrey

The Heritage Services Community Advisory Board is the most appropriate organization to coordinate different heritage groups throughout Surrey. Many heritage and heritage-affiliated organizations are already represented on the Board. Adding additional representatives or adjusting the Board's mandate to include a coordination role should be considered in order to determine how best to partner the multiple heritage groups in Surrey.

Once the heritage organizations in Surrey are linked through a coordination function, each organization will become more familiar with the work of the other organizations, thereby increasing the awareness and understanding of the different heritage initiatives and events occurring throughout Surrey. This, in turn, will help streamline the vision and goals of the different groups into a cohesive framework that will support the future of Surrey's Heritage Program. Opportunities for joint programming and marketing should also be explored, and communications between the different groups should become more fluid and dynamic.

COLLABORATION STRATEGY 2: Link Heritage with Sustainability

Heritage conservation is an inherently sustainable activity, and supports social, environmental and economic sustainability. The linkage between heritage and sustainability is both strong and beneficial and should be developed and promoted for the advancement of Surrey's Heritage Program. Heritage conservation is a desirable, more sustainable form of development for the following reasons:

- Building rehabilitation is an exceptional economic stimulant.
- Property renewal attracts new businesses and residents, and takes advantage of existing infrastructure.
- Building rehabilitation uses less than half the energy of new construction.[4]
- The property values of a majority of designated heritage properties are better than or equal to the average property value trend.[5]

The benefits of heritage conservation in terms of social, environmental and economic sustainability include the following:

Social Sustainability

- Conserves communities and identities
- Provides affordable housing
- Fosters urban revitalization

[4]The Heritage Canada Foundation: <http://www.heritagecanada.org/eng/services/advocacy.html>
[5]Dr. Robert Shipley Study, University of Waterloo: <http://advocacyaction.org/english/pays/canadian_case_studies.htm>

Environmental Sustainability
- Reduction of waste and materials sent to landfill
- Conserved embodied energy
- Reused and recycled buildings and material
- Reduced sprawl and impact on infrastructure

Economic Sustainability
- Reduced development costs
- Increased property value
- Less wasteful, based on life cycle costing models
- Supports local economies

***ACTION: Integrate Heritage Conservation with the* Sustainability Charter**

The City of Surrey has formulated a *Sustainability Charter* that will help guide the development and operations of the City in a more sustainable fashion. Heritage conservation is inherently sustainable and therefore a natural fit in such a document. The inclusion of heritage conservation goals in the *Charter* (found in Part 3) supports the mandate of the document, and also raises awareness of heritage, both in terms of sustainability and City development. The current *Charter*, however, does not go far enough in explaining the overarching importance of heritage conservation in achieving sustainability goals. As the *Charter* evolves, opportunities for the further elaboration of heritage conservation strategies should be explored. The City's Sustainability Office should collaborate with the Cascadia Green Building Council and SHAC to determine how to more fully integrate heritage conservation into the *Charter*. Eventually, using the *Charter* as the foundation, heritage and sustainability should be linked together in Surrey's *Official Community Plan*.

COLLABORATION STRATEGY 3: Link Heritage with Economic Development

Economic development is critical to the overall development of any city. Within economic development, tourism, and specifically cultural tourism, which includes visiting historic sites, plays a crucial role. Cultural tourism is the fastest growing segment of the tourism industry. Canadians spent more than $5 billion on cultural tourism in 2007[6] and so many tourists now come to Canada to visit historic places that their conservation and interpretation is now a major factor in sustaining the tourism industry. Although it is more difficult to measure the impact at the local level, heritage is without question a driving factor in the booming cultural tourism industry. Surrey's heritage initiatives should, therefore, be linked to this growing sector so that both heritage conservation efforts and economic development are mutually promoted and fostered.

ACTION: Promote Heritage Tourism

Currently, the Tourism Surrey website features the Stewart Farm, Surrey Museum, Semiahmoo Trail and the Fraser Valley Heritage Railway Society. Historic neighbourhood profiles are also included for Cloverdale and Elgin. The 2010 Official Surrey Visitor's Guide has three pages dedicated to heritage and includes information regarding the same heritage features that are included on the website, plus the Surrey Archives.

Tourism Surrey, Heritage Services and the City's Economic Development Office should collaborate to consider the inclusion of additional heritage attractions and to determine the most effective methods of promoting heritage tourism. The Surrey Board of Trade, Business Improvement Associations (both Downtown and Cloverdale), local heritage groups and, eventually, the new heritage foundation, should also be consulted.

COLLABORATION STRATEGY 4: Advance Heritage Research

Once fundamental heritage knowledge is established, opportunities for the advancement of heritage research present themselves. It may be beneficial to explore partnerships with educational institutions in Surrey, such as Simon Fraser University and Kwantlen Polytechnic University. These partnerships may be able to determine the feasibility of founding a "Living Laboratory" for urban development in Surrey, in which heritage would be an integral part.

The Surrey Public Library, which has one of the most extensive collections of Canadian genealogical materials in Western Canada, and Heritage Services, including the Surrey Museum and City of Surrey Archives, should work together order to provide the public with the best possible access to heritage information and research.

[6] Canadian Heritage: <http://www2.pch.gc.ca/pc-ch/org/sectr/inter/econ_impct2007/104-eng.cfm>

4. A NEW SURREY HERITAGE FOUNDATION

The formation of a new heritage foundation is one method that could be used to implement certain strategies and actions for Surrey's Heritage Program. A new heritage foundation may also have the ability to raise funds from the community in a way the City cannot: many community members interested in heritage conservation will not donate directly to the City, thinking their donation will disappear into General Revenue. Community members interested in heritage are, however, much more likely to donate to an established heritage foundation that focuses on heritage conservation grants and activities. This ability to raise funds, combined with the ability to raise heritage awareness in the community, could make a new heritage foundation a viable and attractive option for the City of Surrey. As part of the Strategic Review, the community and financial feasibility of such a foundation has been assessed. This feasibility study involved: a review of existing heritage foundations throughout British Columbia; discussions with the Steering Committee; and a final presentation of recommendations that received stakeholder consensus as an appropriate framework for the development of a new foundation.

4.1 POTENTIAL MODELS FOR A HERITAGE FOUNDATION

Based on the experience of other jurisdictions, there are four primary options for the establishment of a heritage foundation:

Option One: Flowthrough Model

Most municipal heritage foundations operate on this basis. An annual municipal grant is provided to the foundation, with the funds, in turn, distributed as financial incentives. Administrative costs tend to remain low, but the activities also remain limited.

Advantages:
- Almost all funding goes directly to the mandate of providing financial incentives
- Immediate results
- Low administrative cost

Disadvantages:
- Not self-sustaining
- Less likely to attract donations and bequests, as the foundation does not focus on this issue

Option Two: Fundraising Model

The Vancouver Heritage Foundation operates on this model. It has been extremely successful at fulfilling its mandate, but has been only partially successful in achieving the goal of self-sufficiency. It is now recognized that there needs to be a long-term partnership with the City of Vancouver, and that a financial contribution will likely always be required to help fund the administration of the Foundation. Fundraising has been difficult, as the competition for charity dollars is very stiff, and people are reluctant to commit large sums of money that, in turn, are disbursed to private homeowners. However, their endowment continues to grow, and the Foundation remains confident of long-term success, especially in the planned giving area.

Advantages:
- Eventually wholly or partially self-sustaining
- More likely to attract donations and bequests as this is the Board's primary mandate

Disadvantages:
- Almost all funding goes to administration at the beginning
- Results not evident in the short-term
- Competition against other charities for scarce resources

Option Three: Dedicated Heritage Fund

There is also an option of establishing a dedicated heritage fund within an existing charitable organization, in lieu of establishing a separate and distinct heritage foundation. This is not the same as the establishment of an endowment within another organization (such as the Vancouver Heritage Foundation's relationship with the Vancouver Foundation), rather it tasks an existing organization with a heritage incentives mandate.

Advantages:

- Uses existing staff/administrative resources
- Can be set up quickly and efficiently

Disadvantages:

- Lack of individual heritage identity for marketing and fundraising purposes
- Staff may lack technical expertise or focus on heritage
- Fundraising specifically for heritage may not be a priority

Option Four: Hybrid Model

The flowthrough and fundraising models can be combined; some heritage foundations actually represent a blending of these functions. This would require a Board with expertise in both heritage issues and fundraising. An annual grant would be provided by the municipality, a substantial portion of which would be used for administration (part-time staff salary). The staff member and the Board would be tasked with disbursing modest grants at first, but would work towards attracting matching funds, corporate donations and bequests.

Advantages:

- Allows modest granting to begin with, but also recognizes the importance of attracting community resources
- Some immediate results
- Eventually works towards long-term self-sufficiency
- Can work to attract donations and bequests

Disadvantages:

- May take a long time to achieve self-sufficiency
- Conflict between fundraising/endowment and giving grants, as both are priorities

See ***Appendix C*** for detailed information on heritage foundations in British Columbia.

4.2 ESTABLISHING THE FOUNDATION

As each of the potential heritage foundation models have advantages and disadvantages, their potential fit with the current situation was carefully considered. Based on the assessment of the current situation, a review of community resources and the determination of potential outcomes, it is recommended that the concept of a Surrey Heritage Foundation should be implemented, based on some initial steps that need to be undertaken over a two-year period. This concept was endorsed by the project Steering Committee. Several considerations point to cautious timing. The recent economic downturn has hurt existing foundations, and it will be some time before charitable donations return to previous levels. Historically low interest rates have also drastically affected the income from charitable endowments. It also makes sense to allow the potential for the new foundation to evolve and unfold over time, in order to allow maximum integration with existing initiatives. Promotion and publicity can then be in place when the foundation is launched, and new Board members can be appointed and be working together as a unit prior to the time of the launch of the foundation. A two-year window for establishment of a new foundation fits municipal funding cycles and given the current financial situation, is felt to be realistic.

The recommended model for a new heritage foundation in Surrey is the Hybrid Model. The City, through Council and through SHAC, could provide funding to the Surrey Heritage Foundation, but it would be the responsibility of the Foundation to initiate fundraising in order to support its administration and activities. As an endowment is developed, it can be reserved as a dedicated heritage fund with an existing organization; the Surrey Foundation is the logical partner in this initiative.

Over the next two years, Council, Heritage Planning Staff and SHAC should discuss the composition, funding requirements, operations and the eventual transfer of responsibilities to the new Foundation. Once the details of its organization and funding requirements are agreed upon, Council can establish a by-law that will enable the Foundation. Council would need to approve an initial grant commitment, arguably in the range of $50,000 per annum, which will be necessary to fund the administration of the Foundation, including a part-time administrator salary, plus expenditures. This commitment could grow over time as the Foundation becomes further established and can take on more fee-for-service activities for the City. Additionally, an initial outlay from SHAC, such as $50,000 from its unrestricted reserve for future expenditures, would help kick-start the Foundation's endowment fund and send a powerful message of support and commitment.

Following its establishment, the new Foundation will need to launch a website and a marketing campaign in order to inform the community of its presence. Fundraising will also need to begin, although this will likely be slow until the Foundation is more widely known across Surrey. Providing grants to homeowners, currently the responsibility of Legislative Services, via the Building Preservation Program, should become the responsibility of the Foundation. Options to expand the Building Preservation Program's reach and raise its appeal should then be explored and fundraising efforts should eventually be directed to building the endowment of the Program, so that grants to homeowners can ultimately increase. Collaboration with Heritage Services regarding awareness and education programs should occur after the Foundation assumes responsibility of the Building Preservation Program and can begin to expand its activities into heritage education.

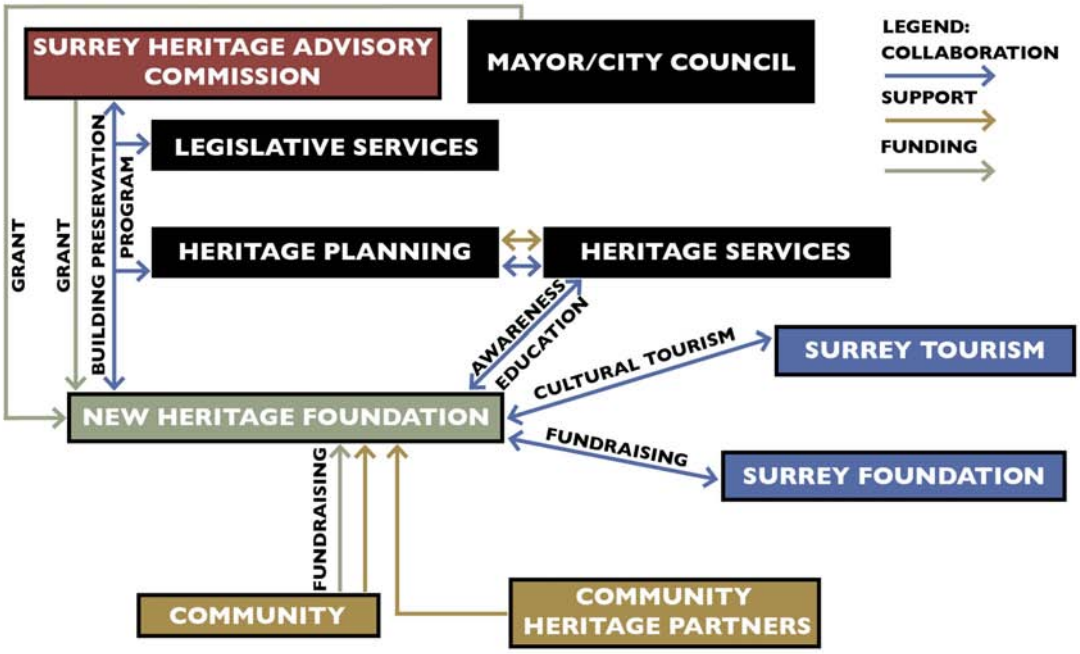
After a few years of capacity building, the Foundation should be able to offer technical assistance to heritage homeowners and be fully responsible for the administration, promotion and expansion of the Building Preservation Program; the responsibility for the distribution of Program funds should be transferred from SHAC to the new Foundation. It may also be effective to transfer City funds currently allocated to the Building Preservation Program directly to the Foundation, to provide control of these funds and also promote economic stability.

As the Foundation grows, it should consider partnerships with other heritage foundations in the Lower Mainland, in order to coordinate programs and identify opportunities for networking. Also, the new Foundation should collaborate with Tourism Surrey in order to better promote heritage attractions and tours throughout Surrey. It can also play a role in linking heritage and sustainability initiatives, as seen in the efforts of the Vancouver Heritage Foundation.The following Implementation Plan should be used as a guide for the establishment of a new Heritage Foundation in Surrey.

4.3 HERITAGE FOUNDATION IMPLEMENTATION PLAN

YEAR	0-2	2-5	5-10
FUNDING		• $50,000/year from City + $50,000 from SHAC for endowment	• $50,000/year from City + Fundraising
STAFFING	• City Staff and SHAC contribute time	• 1 part-time position	• 1 full-time position
ACTIVITIES	• Discuss composition, funding and operations • Discuss transfer of responsibilities between City, SHAC and new Foundation	• Establish Foundation • Establish endowment • Launch website • Begin marketing • Begin fundraising • Assume responsibility of Building Preservation Program	• Advocacy • Fundraising • Technical assistance for heritage homeowners • Administration and promotion of Building Preservation Program • Manage volunteers • Awareness and education: programs, courses and tours • Apply for provincial and federal grants
COLLABORATION	• City Council, Staff and SHAC to determine exact funding and proposed activities and responsibilities	• Work with Heritage Services to determine best delivery of awareness and education programs	• Work with other heritage foundations in the Lower Mainland to coordinate programs and courses, and with Tourism Surrey to promote heritage attractions

A NEW SURREY HERITAGE FOUNDATION



Mandate

The mandate should be similar to those of other municipal heritage foundations (e.g., Vancouver Heritage Foundation "Creating new life for old buildings") and should complement the vision and goals of Surrey's Heritage Program, specifically the conservation of not just built, but also natural and cultural heritage. The mandate should also include the ability to own property; to raise money to fulfill the mandate; and to undertake education and awareness initiatives.

The Foundation should be set up as a charitable organization, enabled to provide grants to individuals. Private foundations (such as family trusts) and public foundations (such as the Surrey Foundation) are not permitted to give grants to individuals. However, a charitable organization (like the Vancouver Heritage Foundation) can undertake any activities and spend money on good charitable works that further its mission, in this case, giving grants to the private owners of heritage properties, which, according to the proposed guidelines for grant eligibility, establishes legal protection for these sites. These activities would be based on the public benefit achieved by the legal protection of these heritage sites.

Budget

The Foundation needs to get started on a modest basis, and develop a pubic profile, before it can effectively fundraise. As mentioned above, a grant from City Council of $50,000 per annum, plus a $50,000 contribution from SHAC for the endowment fund, should be secured upon establishment of the Foundation. The amount of the annual grant can be reviewed based on fundraising progress in subsequent years, however Council should make an ongoing commitment to provide a minimum grant per year so that the Foundation has a consistent source of funding that it can rely upon as it grows.

The Surrey Foundation could manage the endowment after the Foundation's establishment, and options for earning interest on the endowment should be considered. The following budget and fundraising targets are based on the experience of other foundations, and indicate how modest growth can lead to sustainable operations.

YEAR	1	2	3	4	5	6	7	8	9	10
CITY GRANT	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000
FUNDRAISING		5,000	10,000	20,000	35,000	50,000	65,000	80,000	100,000	125,000
TOTAL BUDGET	50,000	55,000	60,000	70,000	85,000	100,000	115,000	130,000	150,000	175,000

Board of Directors

The Board of Directors would be responsible for increasing public and private sector involvement and investment, distributing funds according to the developed allocation process, developing policies for the programs undertaken by the organization, and prudently managing the Foundation's assets. The Foundation should be an active fundraising organization, and the Board would be expected to engage in fundraising activities and to promote the Foundation to the public, sponsors, donors and planned giving professionals. Directors should be selected for their individual interest, abilities and expertise, and their willingness to participate fully in the responsibilities of the organization. Potential Directors could come from SHAC, community heritage groups and other affiliated organizations, such as Tourism Surrey and the Surrey Foundation. Specific responsibilities of the Board of Directors should include:

Governance

The Board, in conjunction with their Council-provided mandate, would establish the mission, purpose, long-range objectives and operating procedures of the Foundation, and amend them as necessary to ensure that they remain relevant to the Foundation's evolving role. The Board would be responsible for formulating and approving policies consistent with the Foundation's purpose, public trust and financial capabilities, and for regularly monitoring progress in implementing these policies.

Education

The Board would have a responsibility to communicate the mission and purpose of the Foundation to the public and elected representatives, and to advocate both greater public involvement in the Foundation's activities and increased moral and financial support for the Foundation.

Fundraising

Board members would be responsible for ensuring that the Foundation can meet its financial obligations. Board members, both individually and collectively, would also be responsible for raising funds for the Foundation from both public and private sources, and then using these sources to assist in raising additional funds.

Granting Programs

Privately-owned and legally protected properties listed on the Heritage Register are currently eligible for funding through the Building Preservation Program, and for the first few years, these properties may continue to be the only eligible properties. As the Foundation's endowment and ability to provide grants increases, additional City-owned properties on the Heritage Register should be considered for the grants. However, it is strongly recommended that eligibility for grants continue to require legal protection, in the form of a heritage designation by-law, heritage revitalization agreement or covenant.

As the grant program develops, it will be desirable to pursue corporate sponsorship that could provide matching funding or in-kind assistance (e.g., Vancouver Heritage Foundation's True Colours Program partnership with Benjamin Moore Paints).

Fund Development Program

As the Foundation grows, it should also concentrate on building the endowment fund in order to help fund its ongoing operations. This fund could be grown through active solicitation of financial gifts, and strategies for garnering bequests and other planned gifts. Most fund development plans are multifaceted, encompassing a combination of annual fundraising through events, major gifts and planned giving.

Over time the Foundation has the potential to grow a healthy endowment that can provide financial incentives for heritage building owners and heritage education initiatives in Surrey. This would be a strong and positive addition to the City of Surrey's heritage conservation efforts.

Future Directions

Once a new Foundation has been established, the existing responsibilities of heritage organizations in Surrey will shift, and there will be enhanced opportunities for collaboration between different organizations. The Foundation would assume responsibility for the Building Preservation Program administration, and also act as another voice for community heritage conservation. SHAC will then be able to more actively focus on its mandate, to advise on heritage matters as directed by City Council and also to support Heritage Planning as required. As noted in the Strategic Review Implementation Plan, the Foundation could also take an active role in efforts to link heritage with sustainability.

Heritage Services will also be able to collaborate with the new Foundation regarding awareness and education programs. The Foundation could also collaborate with Heritage Planning regarding the provision of technical assistance to heritage homeowners. ***Appendix D*** outlines the proposed renewed flow of responsibilities within the Surrey Heritage Program.

5. IMPLEMENTATION PLAN

The timeline for the Implementation Plan is based on Immediate (0-1 years), Medium Term (1-3 years) and Long Term (3-5 years) implementation. Some strategies also should be considered on an Ongoing basis.

The following is a list of groups and organizations that could lead or support the proposed strategies:

- City of Surrey: City Council ("City")
- City of Surrey: Heritage Planning ("H-PLAN")
- City of Surrey: Heritage Services ("H-SERV")
- City of Surrey: Legislative Services ("Legislative")
- City of Surrey: Economic Development Office ("EDO")
- City of Surrey: Sustainability Office ("SO")
- Surrey Heritage Advisory Commission ("SHAC")
- Heritage Services Community Advisory Board ("HSCAB")
- Cascadia Green Building Council ("GBC")
- Surrey Board of Trade ("Trade")
- Surrey School District ("School")
- Tourism Surrey ("Tourism")
- New Surrey Heritage Foundation ("Foundation")
- Community Heritage Partners ("Partners"):
    - Community Associations
    - Surrey Historical Society
    - Fraser Valley Heritage Rail Society
    - Agricultural Advisory Committee
    - Green Timbers Heritage Society
    - Friends of the Semiahmoo Trail
    - The Land Conservancy of British Columbia
    - Local Universities (e.g., Simon Fraser and Kwantlen)
    - Business Improvement Associations (Downtown and Cloverdale)
    - Friends of the Museum & Archives Society
    - Surrey Public Library

Surrey municipal trucks (1920), BC Archives #C-02416

Parading horses at the Surrey Fall Fair (1938), BC Archives #C-00456

5.1 IMPLEMENTATION PLAN

1. PLANNING STRATEGIES	Time Line	Lead	Support	Implication
1.1 ENABLE MORE EFFECTIVE HERITAGE PLANNING				Improved response to heritage conservation
1.1.1 Action: Eliminate the Heritage Inventory	Immediate	H-PLAN	SHAC	Greater clarity
1.1.2 Action: Develop Standards of Documentation	Immediate	H-PLAN	SHAC	Increased consistency
1.1.3 Action: Develop a New Evaluation Framework for Heritage Resources	Medium Term	H-PLAN	SHAC	Improved capacity to evaluate resources
1.1.4 Action: Provide Heritage Training and Education to City Staff and SHAC	Immediate, Ongoing	H-PLAN	SHAC; City	Improved response to heritage issues
1.2 PROVIDE HERITAGE CONSERVATION INCENTIVES				Improved heritage conservation incentives
1.2.1 Action: Review Surrey's Heritage Incentives Programs	Immediate, Ongoing	SHAC; Legislative	H-PLAN	Transfer responsibility to new Foundation in 2-5 years
1.2.2 Action: Establish a Surrey Heritage Foundation	Medium Term	H-PLAN	SHAC; Council; Partners;	Creates another community partner in heritage conservation
2. OUTREACH STRATEGIES	**Time Line**	**Lead**	**Support**	**Implication**
2.1 ESTABLISH BETTER COMMUNICATIONS				Better access to heritage information for residents
2.1.1 Action: Update Heritage Information on the City's Website	Immediate	H-PLAN; H-SERV	SHAC	Wider distribution at minimal cost
2.1.2 Action: Maintain a Positive Public Relations Image	Ongoing	SHAC	H-PLAN; Partners	Avoid perceived conflicts and negativity
2.2 PROMOTE HERITAGE EDUCATION AND INCREASE HERITAGE AWARENESS				More opportunities for students, residents and professionals to learn about heritage
2.2.1 Action: Provide Heritage Education to Residents and Professionals	Medium Term	H-SERV	SHAC; Partners; School; Foundation	Advanced local knowledge of heritage
2.2.2 Action: Offer Heritage Education Programs for Schools	Ongoing	H-SERV	SHAC; Partners; School; Foundation	Ongoing integration of local heritage information with school curricula
2.2.3 Action: Foster Heritage at the Neighbourhood Level	Medium Term	H-SERV	H-PLAN; SHAC; Partners; School; Foundation	Direct connections of local heritage to the neighbourhood level
3. COLLABORATION STRATEGIES	**Time Line**	**Lead**	**Support**	**Implication**
3.1 FORGE PARTNERSHIPS WITH HERITAGE GROUPS THROUGHOUT SURREY	Medium Term	HSCAB	H-SERV; Partners	Coordination of Community Heritage Partners
3.2 LINK HERITAGE WITH SUSTAINABILITY				Link heritage with broader municipal policies
3.2.1 Action: Integrate Heritage Conservation with the *Sustainability Charter*	Ongoing	SHAC; SO	Foundation; GBC	Heritage linked with sustainability in *Official Community Plan*
3.3 LINK HERITAGE WITH ECONOMIC DEVELOPMENT				Link heritage with broader municipal policies
3.3.1 Action: Promote Heritage Tourism	Ongoing	H-SERV; EDO; Tourism	Partners; Trade; Foundation	Increased tourism; heightened awareness and protection of heritage resources
3.4 ADVANCE HERITAGE RESEARCH	Long Term	H-SERV	Local Universities; Library; Partners	New partnerships between educational institutions and heritage groups

5.2 IMPLEMENTATION TOOLS AND METHODS

A variety of implementation tools and methods have been proposed in this document, including, but not limited to the following:

Evaluation Framework (Action 1.1.2)
The thematic framework/historic context statement provides a framework in which to evaluate Surrey's heritage resources. The framework is designed to help the City identify important heritage sites and understand why each site is important to Surrey's development.

Education and Awareness Programs (Strategy 2.2)
Programs designed to inform the community about heritage resources include courses, workshops and tours and these can be offered to residents, professionals and schools.

Partnerships between Heritage Groups (Strategy 3.1)
Forging partnerships between different heritage groups and organizations throughout Surrey should help organize and coordinate the efforts of the different groups, thereby increasing the efficiency and effectiveness of their associated heritage activities.

Heritage Research (Strategy 3.4)
Advancing heritage research in collaboration with local universities would increase heritage awareness across Surrey and the region.

5.3 PRIORITIZED WORK PLAN

IMMEDIATE PRIORITIES (0-1 YEARS)

- **Action 1.1.1**: Eliminate the Heritage Inventory
- **Action 1.1.2**: Develop Standards of Documentation
- **Action 1.1.4**: Provide Heritage Training and Education to City Staff and SHAC (also Ongoing)
- **Action 1.2.1**: Review Surrey's Heritage Incentives Programs (also Ongoing)
- **Action 2.1.1**: Update Heritage Information on the City's Website

MEDIUM TERM PRIORITIES (1-3 YEARS)

- **Action 1.1.3**: Develop a New Evaluation Framework for Heritage Resources
- **Action 1.2.2**: Establish a Surrey Heritage Foundation
- **Action 2.2.1**: Provide Heritage Education to Residents and Professionals
- **Action 2.2.3**: Foster Heritage at the Neighbourhood Level
- **Strategy 3.1**: Forge Partnerships with Heritage Groups Throughout Surrey

LONG TERM PRIORITIES (3-5 YEARS)

- **Strategy 3.4**: Advance Heritage Research

ONGOING PRIORITIES

- **Action 2.1.2**: Maintain a Positive Public Relations Image
- **Action 2.2.2**: Offer Heritage Education Programs for Schools
- **Action 3.2.1**: Integrate Heritage Conservation with the *Sustainability Charter*
- **Action 3.3.1**: Promote Heritage Tourism

See ***Appendix E*** for the Organizational Chart for Surrey's Heritage Program, according to the proposed recommendations contained in this report.

ACKNOWLEDGEMENTS

The City of Surrey Heritage Strategic Review was undertaken in 2009-2010 by Donald Luxton & Associates Inc. for the City of Surrey. The project team consisted of Donald Luxton, Principal, R.J. McCulloch and Megan Faulkner.

We would like to thank the following for their participation and invaluable advice throughout the course of the project.

City of Surrey Staff:

- Erin Schultz (Project Liaison), Planning Technician
- Don Luymes, Manager, Community Planning
- Jacqueline O'Donnell, Manager, Heritage Services

Steering Committee:

- Barbara Steele, Surrey City Councillor
- Lesley Tannen, Surrey Heritage Advisory Commission
- Rick Hart, Surrey Heritage Advisory Commission
- Bert Hol, Surrey Heritage Advisory Commission
- Bill Farrand, Surrey Heritage Advisory Commission
- Allen Aubert, Fraser Valley Heritage Rail Society
- John Sprung, Fraser Valley Heritage Rail Society
- Elva Reid, Surrey Historical Society
- Diane Johnson, Surrey Historical Society
- Kim Angel, Surrey Foundation
- Mike Bose, Agricultural Advisory Committee
- Pat Harrison, Agricultural Advisory Committee
- Ron Larsen, Friends of the Semiahmoo Trail
- Peter Maarsman, Green Timbers Heritage Society

Crescent Beach Hotel and Staff (c. 1912), Surrey Archives #180.2.05

Cloverdale Board of Trade (c. 1920), Surrey Archives #180.1.81

Wedding photo of Mr. and Mrs. Bose, Surrey Centre (1899), BC Archives #C-00403

APPENDIX A

CITY OF SURREY

BY-LAW NO. 13282

As amended by By-laws: 13563, 11/02/98; 14621, 02/04/02; 14924, 02/17/03; 15100, 07/24/03; 17108, 01/25/10

A By-law to establish a Surrey Heritage Advisory Commission

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THIS IS A CONSOLIDATED BY-LAW PREPARED BY THE CITY OF SURREY FOR CONVENIENCE ONLY. THE CITY DOES NOT WARRANT THAT THE INFORMATION CONTAINED IN THIS CONSOLIDATION IS CURRENT. IT IS THE RESPONSIBILITY OF THE PERSON USING THIS CONSOLIDATION TO ENSURE THAT IT ACCURATELY REFLECTS CURRENT BY-LAW PROVISIONS.

WHEREAS pursuant to Section 953 of the Local Government Act, R.S.B.C. 1996, c.323, the Council of the City of Surrey (hereinafter called the "Council") may, by by-law, establish a community heritage commission (hereinafter called the "Commission");

AND WHEREAS the City of Surrey's heritage is an integral part of its identity; to be discovered, preserved and enjoyed;

AND WHEREAS the residents of City of Surrey have identified through the Future Surrey process the importance of "preserving and promoting our heritage sites and history";

AND WHEREAS the effective management of the City of Surrey's heritage resources requires the attention of all parties to ensure their preservation for future generations;

AND WHEREAS in the by-law establishing the Commission, there shall be set out:

I The Name of the Commission
II The Terms of Reference of the Commission
III The Composition of the Commission
IV The Manner of Appointment
V The Procedures Governing the Operation of the Commission
VI General Provisions

NOW, THEREFORE, the City Council of the City of Surrey (the "City"), in open meeting assembled, ENACTS AS FOLLOWS:

PART I THE NAME OF THE COMMISSION

The Commission is an advisory commission of Council and shall be known as the "Surrey Heritage Advisory Commission".

PART II THE TERMS OF REFERENCE OF THE COMMISSION

1. Purpose

The purpose of the Commission is:

(a) to advise Council on heritage matters as outlined in its mandate;

(b) to advise Council on heritage matters referred to it by Council; and

(c) to provide support for heritage activities as directed or endorsed by Council.

2. Mandate

(a) The advisory mandate of the Commission shall be:

(i) to advise Council on matters dealing with the creation and maintenance of a Heritage Register (as defined in the Local Government Act), which identifies heritage features and heritage properties and details their heritage value or heritage character;

(ii) to advise Council on the designation by by-law of a feature or property, in whole or in part, interior or exterior, as a City heritage site and the terms and conditions of such designation;

(iii) to advise Council on expenditures related to financial assistance or compensation to feature owners or property owners for maintenance or preservation of a designated heritage feature or property as authorized by By-law No. 15099;

(iv) to advise Council on the recognition of significant heritage features or heritage properties through the installation of markers, plaques and cairns;

(v) to advise Council on the recognition of individual or corporate achievements in the area of heritage preservation and awareness through the presentation of awards and commendations;

(vi) to review information and recommendations prepared by City staff concerning all proposed heritage preservation tools and strategies for properties and features included in the Heritage Register, and to advise Council accordingly;

(vii) to review information and recommendations prepared by City staff on matters related to Heritage Conservation Covenants, Heritage Conservation Areas and Heritage Revitalization Agreements (all as defined in the Local Government Act), and to advise Council accordingly;

(viii) to advise Council on all matters relating to heritage conservation as referred to the Commission by Council; and

(ix) to advise Council and to provide comments on the heritage aspect of development applications involving sites with heritage designations and sites on or proposed to be on the Heritage Register.

(b) The support mandate of the Commission shall be:

(i) to support awareness of and appreciation for the City's heritage by developing and promoting information related to the City's heritage in a variety of formats and media;

(ii) to support heritage activities and heritage programs undertaken by the City or community organizations in the areas of environmental preservation and interpretation, built preservation and interpretation and cultural preservation and interpretation; and

(iii) to support activities undertaken by the City related to awareness and preservation of significant heritage features or heritage property in the City, by raising funds as authorized by Council.

PART III THE COMPOSITION OF THE COMMISSION

3. The Commission shall consist of a total of five members, of which up to two members may be members of Council. The Commission may also have an alternate member appointed to the Commission to sit as a voting member, when a member of the Commission is absent.

4. In making appointments, Council may consider the interests, skills and expertise necessary to carry out the Commission's mandate.

5. In making appointments, Council may consider a balance of technical expertise and knowledge of the community.

6. All of the citizen appointees of Commission shall be resident electors (as defined by the Local Government Act) of the City.

PART IV THE MANNER OF APPOINTMENT

7. Prior to the appointment of the members of the Commission, the City Clerk shall, on behalf of Council, advertise for citizens interested in serving on the Commission.

8. The Commission may host an orientation meeting to meet potential applicants for vacancies on the Commission.

9. Council shall review the applications and shall appoint the members of the Commission by resolution of Council.

10. The Mayor may appoint up to two members of Council to attend Commission meetings, to vote on motions of the Commission and to provide liaison between the Commission and the Council.

PART V THE PROCEDURES GOVERNING THE OPERATION OF THE COMMISSION

11. Term of Appointment

(a) The term of appointment of a member/alternate of the Commission shall be for two years dating from January 1st to December 31st two years later.

(b) Notwithstanding the above, in order to provide continuity, in 1997, half of the members shall be appointed for a one-year term dating from January 1, 1997 to December 31, 1997. Thereafter, all appointments shall be for a two-year term.

(c) A member/alternate of the Commission shall not serve more than three consecutive terms, provided however, that after at least one year out of office that member may be re-appointed.

(d) All appointed members/alternate shall remain members until their successors have been appointed.

(e) In the event of the resignation or death of an appointed member, Council shall appoint a new member to fill such vacancy for the unexpired balance of the term of the incumbent.

12. Chair

(a) One member of City Council shall be appointed annually by the Mayor to serve as the Chair of the Commission.

(b) The Commission shall select a vice-Chair from among its members on an annual basis.

13. Meetings

(a) The Commission shall meet regularly.

(b) The Chair and City staff shall prepare the agendas for the Commission meetings.

(c) The Legislative Services Department shall record the minutes of the meetings of the Commission and submit the minutes to Council for its information.

(d) The Commission shall submit its recommendations to Council for Council's consideration and approval, accompanied by the Commission's records and any other information that the Commission may consider relevant.

(e) The Chair, or any three members, may call a special meeting by giving three days' written notice to all members, stating the purpose of the meeting.

(f) In case of an emergency, the Chair may call an emergency meeting, and notice in writing may be waived by unanimous approval of all members of the Commission.

(g) A quorum for the meeting shall be a majority of the members of the Commission. A recommendation of a quorum shall be considered that of the full Commission.

(h) Council shall be advised of any member who misses three consecutive meetings or three meetings within a six month period. Council shall consider the impact of the absences and shall fill the vacancy by reappointing the member or appointing a new member to fill the balance of the unexpired term.

(i) Meetings of the Commission shall be conducted in accordance with the procedures set out in Part 17 of the Council Procedure By-law, 1999, No. 13600, as amended.

14. Budget

(a) The Commission shall submit to the Finance, Technology & Human Resources Department for Council's consideration and approval a proposed budget of its anticipated expenditures and revenues for the next fiscal year by September 30th of each year.

(b) The Commission budget may include an amount for heritage preservation and maintenance grants for designated heritage features or heritage properties as authorized by City of Surrey Heritage Sites Financial Assistance By-law, 2003, No. 15099.

(c) Any grants recommended for approval by the Commission must receive a 2/3 majority vote of Council, in accordance with s. 183.1 of the "Local Government Act".

Expenditures

(d) Attendance at conferences and related travel must be approved by Council, and expenses approved for payment must not exceed City policy.

(e) Expenditures of the Commission may include expenditures for items such as recognition projects, memberships, subscriptions, supplies, and projects/events necessary to fulfill its mandate. Minor expenditures, up to $500 shall be approved by the Commission and referred to the City Clerk to authorize payment.

(f) The Commission, with Council's approval, may solicit and receive funds for special projects relevant to its mandate. In such cases, a separate budget shall be established by the Commission and approved by Council to manage such funds.

15. Staff Support and Attendance

(a) Technical, administrative and advisory information, services and support shall be provided to the Commission by City staff from the following departments and divisions: Legislative Services, Parks, Recreation and Culture, Planning and Development, Legal Services, Finance, Engineering, and Public Affairs.

(b) The Legislative Services Department shall designate an Administrative Assistant to provide clerical support and coordination services to the Commission as outlined in Section 16 (c).

(c) The Parks, Recreation and Culture Department shall designate a professional liaison who shall attend meetings of the Commission and shall provide liaison and support services to the Commission as outlined in Section 16 (d), as required.

(d) The Planning and Development Department shall designate a professional liaison who shall attend meetings of the Commission and shall provide liaison and support services to the Commission as outlined in Section 16 (e), as required.

(e) The Engineering Department shall designate a professional liaison who shall attend meetings of the Commission as required and shall provide liaison and support services to the Commission as outlined in Section 16 (f), as required.

(f) At the request of the Commission, the Administrative Assistant shall advise the appropriate General Manager, or designate, of the attendance, information, support or reports required from the department.

(g) At the request of the Administrative Assistant, the General Manager, or designate, shall determine and provide the required attendance, information, support or reports.

16. Roles

(a) The Council representative shall:

(i) provide liaison between the Commission and Council;

(ii) speak to Commission recommendations at Council meetings to augment information for Council decisions; and

(iii) have the power to vote on motions of the Commission.

(b) The Chair shall:

(i) liaise with the Administrative Assistant (as hereinafter defined) for the preparation of agendas for meetings;

(ii) liaise with the Administrative Assistant for the coordination and facilitation of support services required of City staff;

(iii) send correspondence on behalf of the Commission;

(iv) send invitations or announcements on behalf of the Commission;

(v) liaise with representatives of other heritage commissions and societies;

(vi) chair Commission meetings to ensure the efficient conduct of Commission business; and

(vii) review the minutes of Commission and authorize the forwarding of the unapproved minutes to Council.

(c) The City Clerk shall designate an administrative assistant (the "Administrative Assistant") to:

(i) record the minutes of the regular meetings of the Commission;

(ii) prepare minutes of regular Commission meetings and forward the minutes to Council;

(iii) liaise with the Chair to prepare and distribute agendas for meetings;

(iv) prepare the correspondence of the Commission and keep records related to the activities of the Commission;

(v) coordinate clerical support for regular Commission meetings and for Commission activities, such clerical support to include hospitality, registrations, and bookings;

(vi) advertise vacancies on the Commission;

(vii) liaise and coordinate with appropriate City staff and external agencies to access technical, administrative and advisory information, services and support related to the mandate of the Commission and necessary for the development of Commission advice and recommendations to Council;

(viii) liaise with the designated Planning and Development Department liaison in the distribution of information related to the status of heritage sites, and Council's decisions on Commission recommendations on heritage sites;

(ix) facilitate applications and distribute information related to the eligibility for grants and compensations related to heritage maintenance or heritage preservation, acknowledgments of applications, and Council's decisions on Commission recommendations;

(x) liaise with the Commission to develop its annual budget;

(xi) disburse funds authorized by the Commission and Council and report to the Commission on revenues and expenditures approved by Council in its budget; and

(xii) assist the Commission in preparing an annual report to Council on Commission goals, objectives, projects, priorities and achievements.

(d) The General Manager, Parks, Recreation and Culture Department shall designate an appropriate liaison to:

(i) assist in providing an annual orientation for Commission members concerning the role and relationship of the Parks, Recreation and Culture Department to heritage matters;

(ii) facilitate Commission efforts to increase public awareness of and appreciation for the City's built, natural and cultural heritage;

(iii) advise and inform the Commission and liaise with the Engineering Department (Facilities Management Division) on maintenance standards and preservation works related to designated heritage public properties or park sites operated or managed by the Parks, Recreation and Culture Department;

(iv) preserve, arrange and provide public access to records and documents related to Surrey's heritage inventory and Heritage Register; and

(v) assist in preparing an annual report on the achievements concerning the promotion and public awareness projects undertaken by the Commission.

(e) The General Manager, Planning and Development Department, shall designate an appropriate liaison to:

(i) provide continuity through an annual orientation for Commission members concerning the role and relationship of the Planning and Development Department to the Commission;

(ii) maintain the Heritage Register and provide information and recommendations on properties and features proposed to be included in the Register;

(iii) liaise with the Administrative Assistant in the distribution of information related to the status of heritage sites, and Council's decisions on Commission recommendations on heritage sites;

(iv) assist the Commission in preparing an annual report to Council on Commission goals, objectives, projects, priorities and achievements;

(v) advise the Commission on the status of development applications involving sites with heritage designation and sites on or proposed to be on the Heritage Register and liaise with staff to ensure that the recommendations as adopted by Council with respect to the protection of the heritage sites, buildings, or trees are implemented; and

(vi) assist in preparing a heritage management plan.

(f) The General Manager, Engineering Department, shall designate an appropriate liaison to:

(i) assist in providing an annual orientation for Commission members concerning the role and relationship of the Engineering Department to the Commission;

(ii) facilitate Commission efforts to protect the City's built, natural and cultural heritage when public works are being conceived, designed, constructed, operated, or maintained; and

(iii) assist the Commission in preparing an annual report to Council on Commission achievements concerning heritage preservation relative to public works activities.

PART VI General Provisions

17. "Surrey Heritage Advisory Committee Establishment By-law, 1989, No. 9949", as amended, is hereby repealed.

18. This By-law shall be cited for all purposes as the "Surrey Heritage Advisory Commission Establishment By-law, 1997, No. 13282.

PASSED THREE READINGS on the 24th day of November, 1997.

RECONSIDERED AND FINALLY ADOPTED, signed by the Mayor and Clerk, and sealed with the Corporate Seal on the 1st day of December, 1997.

_____ D.W. MCCALLUM _____ MAYOR

_____ D.B. KENNY _____ CLERK

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APPENDIX B

HISTORIC CONTEXT STATEMENT: SURREY SCHOOLS

The following is an example of an historic context statement. It was prepared by Donald Luxton & Associates Inc. in 2007-2008 for the City of Surrey, as part of a package of Statements of Significance for six schools in Surrey.

THE DEVELOPMENT OF A PUBLIC SCHOOL SYSTEM IN BRITISH COLUMBIA

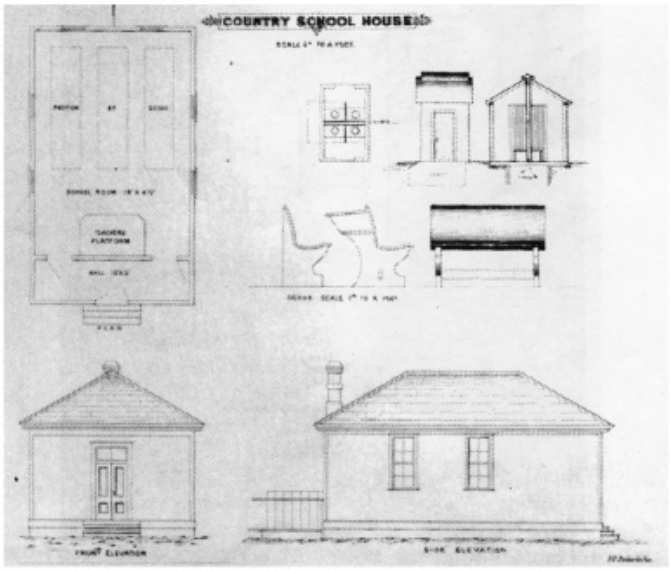
British Columbia's school system is connected with the establishment of the two Crown British colonies in British Columbia, Vancouver Island and British Columbia. The origins of the British Columbia school system are rooted in two decades of political and sectarian struggle with the establishment of the first school classes in Victoria in 1849 and the later Provincial Schools Act of 1872. The two British colonies of Vancouver Island and British Columbia followed separate courses of educational development; however, both colonies struggled with the Anglican dominance of public schools, which, in turn, created a need for free non-sectarian public schools. The rate of settlement in the Colony of British Columbia also played a critical role in the establishment and construction of schools. While the Fraser Valley Gold Rush of 1858 brought a number of prospectors to the mainland, few settlers took up permanent residence, putting little pressure on the government to provide free education. The first mainland school, which operated out of a rented building, opened in Sapperton in 1859 and served the children of the Royal Engineers, who were laying out the new colonial capital at New Westminster. A few years later in 1863, the first schoolhouse was built in New Westminster. By 1866, the number of schools in the Colony of British Columbia had increased; in total, there were four government-sponsored schools, three denominational private schools in New Westminster, and two denominational Indian mission schools located at Hope and Mission City.

The political union of the two colonies in November of 1866 did little to bolster public education, despite the increasing number of settlers in both regions. No new schools were built until the new colony wide school ordinance was issued in 1869. This legislation stimulated the growth of public schools, with a total of 21 schools constructed by 1871. Most of these schools, however, were located in cramped, poorly equipped buildings. In response to these poor conditions, the public rejected the clause in the 1869 ordinance that attempted to introduce local taxation for the construction and maintenance of government-sponsored schools. This lack of funding and support of the public, in turn, spurred the growth of denominational and private schools in the years prior to 1871.

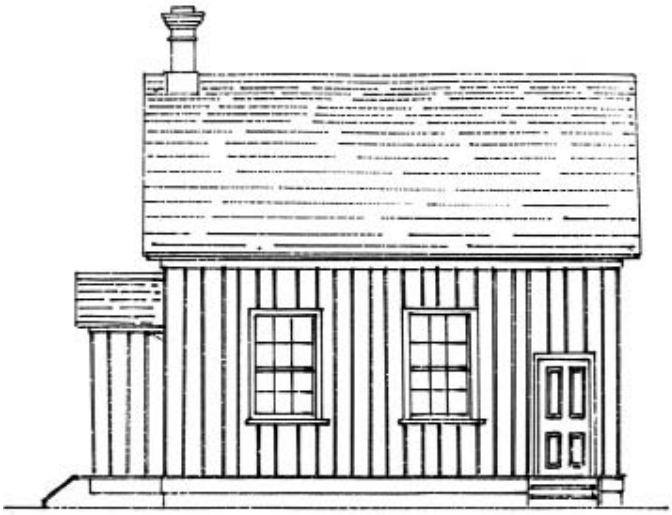
THE PROVINCIAL SCHOOLS ACT OF 1872 AND SCHOOL ARCHITECTURE IN BRITISH COLUMBIA

It was not until the latter half of the nineteenth century that public education in British Columbia began to take shape. Under the British North America Act of 1867, education became a provincial responsibility. The Provincial Schools Act of 1872 aimed to develop educational mandates as well as provide standardized schoolhouse construction. The Schools Act additionally sought to establish central control over education, while providing free, non-sectarian education to the public. The central government was also to provide school buildings, furnishings and equipment from general revenues of the province. By 1875, there were 45 public schools in operation and 25 of these were constructed as a result of the 1872 Schools Act. Nearly all of these schools were simple one-room schoolhouses with wood-frame construction built in a variety of sizes, styles, and degrees of architectural sophistication. By 1881, the Department of Land and Works took over responsibility for new rural school construction. The increased demand for new school accommodation led to the first standardized one-room schoolhouse issued by the Department of Land and Works. Features of the standardized plan included a wood-frame, gable-roof building that measured 22 by 40 feet with 13 foot ceilings. The cost of the one-room schoolhouse was kept to a minimum, made possible by simple construction materials such as simple rustic siding. In 1885, the rural schoolhouse plan was revised and re-introduced as the "Country School House" plan. This new plan was characterized by its rectangular, low-hipped roof that measured 20 by 34 feet with a partitioned-off cloakroom and a classroom that measured 19 feet by 27.5 feet. Until 1890 this plan continued to form the basis for all of the government's rural schools. In sum, the Public Schools Act of 1872 enabled the government to have central control over British Columbia schools and simultaneously achieve a consistent standard of pioneering school construction.

Rural one-room schoolhouse, BC Archives GR 0080 Box 3, file 60



Country School House Plan, Department of Land & Works, BCA 54-4-89



Rural one-room schoolhouse, BC Archives GR0083 Box 3 File 60

Despite the government's effort to control all aspects of British Columbia's schools, which included finances, construction, maintenance and operation, economic pressures due to rapid population growth resulted in the gradual decentralization of this power. With the completion of Canadian Pacific Railway to the West Coast in 1886, student enrollment soared, as did construction costs. The result was that costs were shifted from the provincial treasury to local levels of government. The larger provincial centers such as Victoria, Nanaimo, New Westminster and Vancouver were forced to assume a growing number of the costs between 1888 and 1891. While the government continued to maintain responsibility for rural schools, it offered various levels and types of financial assistance to other categories of city, rural, municipal and "assisted" schools. The Department of Land and Works, which became Public Works after 1908, maintained a pervasive influence on the designs of all but the largest urban schools. Until 1930 the department continued to design schools up to four rooms, as well as providing approval for the designs of larger schools.

THE HISTORY OF EDUCATION IN SURREY

Surrey was incorporated as a municipality 1879. Clover Valley was the first school to be built in Surrey in 1882, with the assistance of the Department of Land & Works. Pioneer Henry Thrift (1824-1907), who settled in the Clover Valley in 1881, played a pivotal role in the school's origins. Thrift, his wife, Florence M. Johnstone Thrift, and their children moved to the Clover Valley only to discover that there was no school in the area. The community had more than eight children, which was the minimum number required to have a school. In response, Thrift organized a petition that was sent to Victoria requesting that a school be built. The government responded by offering to pay the teacher's salary but the school board would be responsible for building the school. The Superintendent of Education replied to Thrift, offering to pay the salary of the teacher, providing that the pioneers of the community provided the building and the equipment. This small building, which was set back from the southwest corner of 176 Street and 60 Avenue, was the first classroom. Members of the community built the furnishings, such as the desks, and the school was opened in 1882.

The influx of settlers into Surrey in the 1890s necessitated the formation of additional school districts. Surrey attracted settlers because of its rich fertile soil, which offered ideal farming conditions. Additionally, the high quality of Surrey's forests drew many people and a number of logging and milling firms into the district, and forestry played a crucial role in the Surrey's settlement and development. Built during this time were schools: Mud Bay (1883), Hall's Prairie (1885), Kensington Prairie (1889), and Clayton (1890). In 1891, Port Kells, Tynehead, Anniedale, Surrey Centre School, Serpentine and Brownsville Schools opened. Each school constituted its own school district, and therefore was governed individually.

Surrey drastically reorganized its school administration with the inauguration of the Surrey School District established on March 14, 1906. A School Board was elected to serve the entire municipality, which eliminated the local Boards of Trustees for each school. The first elected members of the Surrey School board included E.M. Wiltshire, J.E. Murphy, W. McBride, George Atchison, and John Keery. At the time of its formation, the Surrey School District consisted of 11 schools, 11 teachers and 300 students. This central school board was just one part of an overall school initiative for Surrey. A school tax was added to the Municipal tax roll and the Municipal government provided an education grant.

During the 1910s and 1920s, a number of new schools were constructed in Surrey, reflecting the ongoing community growth and development. Population growth was steady, with a slight decrease during World War One. Following the war, population growth was on the rise again. The arrival of the Great Northern Railway (GNR), the B.C. Electric Railway (BCER), the construction of the Pacific Highway (176 Street) and Highway No. 10 initiated major growth in Surrey and further permitted the transport of goods. A new four-room elementary school, Cloverdale Public School, was completed in 1912. By 1919, Cloverdale School became the first dedicated high school in Surrey. A referendum passed in 1921 that allowed the construction of a new free-standing high school - the first high school between New Westminster and Chilliwack - which opened in January, 1922 and comprises the oldest part of the current structure. The relocation of the high school to another site in 1957 allowed the elementary school to expand into the 1922 building. Adjacent to the Cloverdale school yard is a City-owned park, purchased in 1923 and indicative of the City of Surrey's policy to acquire parkland adjacent to school sites so that the uses of schoolyards and city parks could complement each other.

The Cloverdale Elementary School is not only a significant example of traditional school architecture, but it is also a noted example of a design by English-trained architect, James Boulton Whitburn (1882-1931). The 1922 structure is two storeys in height, distinguished by a semicircular parapetted gable and broad hipped roof. Whitburn had established his practice in New Westminster in 1912, and designed a number of that city's local schools. Whitburn also designed the Surrey High School in 1922, marking Surrey's departure from standardized school plans to more sophisticated examples of architectural design.

At present School District 36, the Surrey School District, has the largest school enrollment in British Columbia. It is also Surrey's largest employer with more than 7,900 employees and 4,900 teachers. In 2006, the District celebrated its 100th anniversary.

APPENDIX C

HERITAGE FOUNDATIONS IN BRITISH COLUMBIA

1. KELOWNA HERITAGE GRANTS PROGRAM

Contact: Lorri Dauncey
Manager, Central Okanagan Heritage Society/Kelowna Heritage Grants Program
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Kelowna, BC V1Y 8V3
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Email: ldauncey.cohs@telus.net

The Kelowna Heritage Foundation was dissolved in 2008, when support it once received from city planning staff was removed. The City of Kelowna's Heritage Grants Program is now managed by the Central Okanagan Heritage Society, and it provides grants to heritage building owners for a portion of the expenses incurred in restoration work related to the exterior of their buildings.

Mandate: The Kelowna Heritage Grants Program encourages the preservation of heritage buildings in Kelowna and furthers public awareness of the significance of irreplaceable heritage resources.

Funding: The City of Kelowna annual allotment has helped many heritage building owners restore and maintain their heritage buildings. The City annually allocates $30,000 in funds to the Kelowna Heritage Grant Program, in care of the Central Okanagan Heritage Society. From 1991, when the Kelowna Heritage Foundation was first created, to 2009, a year after it was dismantled, the City allocated $20,000 to the grant program; 2010 marks the first year that the funds have been increased. The City money is to be used for grants to owners who have houses on the Kelowna Heritage Register.

Administration: Prior to the increase in City funds allocated to the Kelowna Heritage Grants Program, administration costs used to be subtracted from the City money, as did heritage awareness programs and the heritage plaque program. Currently, administration costs come out of what the City pays the Central Okanagan Heritage Society to run the program. Prior to the dismantlement of the Kelowna Heritage Foundation, members used to meet regularly, ten times per year, to review grant applications for heritage building restorations and for initiatives that raise awareness of Kelowna's heritage. Currently, members meet four times per year to review grant applications and to pay out successful grants to homeowners.

Public Programs: Owners of heritage homes and heritage advocates are encouraged to use the Kelowna Heritage Grants Program web site as a resource towards restoring heritage properties in Kelowna and in raising awareness of our past. Since the increase in City funds however, public awareness programs have been put on hold.

Challenges and Concerns: The Kelowna Heritage Grants Program can no longer afford to have more frequent meetings; therefore, homeowners are often left waiting for months to receive information regarding their grant application or to receive grant money. When the Kelowna Heritage Foundation was still functioning the Foundation had access to a City planner; this valued help was discontinued in 2008. Now, the Manager of the Central Okanagan Heritage Society and the Kelowna Heritage Grants Program works only four hours per week on Tuesdays; she responds to public concerns and enquiries as often and as quickly as possible.

Successes: Since the dismantlement of the Kelowna Heritage Foundation, the Kelowna Heritage Grants Program is able to get word of the available monies to more homeowners than it was able to previously. Since someone is overseeing the program who is solely focused on Kelowna heritage, as opposed to a City planner who would have other focuses and responsibilities, the available grants have become the sole focus of the Program.

2. NEW WESTMINSTER HERITAGE FOUNDATION/ NEW WESTMINSTER HERITAGE PRESERVATION SOCIETY

Contact: Ethel Field
127 Queens Avenue
New Westminster, BC V3L 1J4
Phone: 604-521-5733
Email: ethelfield@lightspeed.ca

Mandate: To provide funding for designated heritage properties for exterior work, including the replacement of roofs, painting, and foundation repairs.

Funding: Yearly, the New Westminster Heritage Foundation is promised grant money from the City from a special endowment fund and from the New Westminster Heritage Preservation Society's heritage homes tour. Usually, the provision of funding totals close to $10,000 from each contributor; however, the City has lowered its grant amounts over the past two years. The provision of funding for the grant façade program is for restoration work on municipally-designated residential heritage buildings.

Administration: The New Westminster Heritage Foundation is run entirely on volunteer time and money. Public enquiries are forwarded from City Hall to Ethel Field.

Public Programs: Since the provision of funds is available only to owners of designated residential heritage properties in New Westminster, no public programs are offered. However, the New Westminster Heritage Preservation Society, which provides matching funds to the New Westminster Heritage Foundation, does offer public programs such as the annual heritage homes tour.

Challenges and Concerns: The biggest concern facing the New Westminster Heritage Foundation is the reduction of grant money from the City of New Westminster. Secondary to that concern is when City-negotiated Heritage Revitalization Agreements (HRAs) interfere with the opinions of the New Westminster Heritage Foundation.

3. OAK BAY HERITAGE FOUNDATION

Website: http://www.heritageoakbay.ca

Contact: Jean Sparks
Phone: 250-592-2077
Email: jasparks2@shaw.ca

The Oak Bay Heritage Foundation provides grants to owners of designated heritage properties to assist with preservation, maintenance or restoration; and promotes education and awareness of heritage. The Foundation serves primarily to promote preservation of our built, cultural and natural heritage or significant heritage buildings, and make funding available for a portion of conservation work expenses. The Foundation is a not-for-profit entity, established and registered under the Societies' Act. The Foundation provides advice on heritage preservation and limited grants to homeowners for maintenance of heritage designated properties. The Committee can recommend heritage designation; once Council approves designation, the homeowner can apply for monetary assistance to the Foundation.

The Oak Bay Heritage Foundation is a volunteer organization with no set hours. In addition to assisting owners of designated heritage buildings with restoration and preservation costs, the Foundation promotes heritage awareness and engages in fund raising activities to augment grants from the municipality.

Mandate: The Oak Bay Heritage Foundation was established in 1992. One of the purposes of the Foundation is to provide cost-sharing grants to owners of buildings listed on the official Oak Bay Community Heritage Register and to owners of designated heritage buildings. Buildings protected under a Heritage Revitalization Agreement may also be eligible for the Heritage Restoration Grants program.

Administration: Although the Oak Bay Heritage Foundation is incorporated under the Societies Act and operates at arms-length from Council, Council makes appointments to the Foundation. The Foundation is mandated to provide grants to designated and registered homes within the District of Oak Bay.

Funding: In 2009, Council provided $5,000 for the purpose of providing grants owners of designated or registered heritage buildings. Two grants totaling $3,000 were awarded in 2009 – one for the painting of a pre-1900 designated heritage building, and the other for re-roofing a pre-1900 designated heritage building. The Foundation funded, and is actively marketing, the second printing of Oak Bay's centennial book – Oak Bay, B.C.: in photographs – and will receive profits once sales have surpassed the breakeven point.

Public Programs: The Oak Bay Heritage Foundation has supported several programs in the past including the Kildonan Volunteer Gardeners for restoration of the historic DeMezy rhododendron garden at Kildonan, the restoration of Oak Bay United Church, and the Foundation is currently supporting the construction of eight monuments recognizing the settlements and sacred sites of the First Nations (Lewungen family) in Oak Bay. All meetings of the Oak Bay Heritage Foundation are open to the public and the Executive of the Heritage Foundation answers any public enquiries.

Challenges and Concerns: Challenges facing the Oak Bay Heritage Foundation include the lack of volunteers to take on heritage-related projects, the reluctance of homeowners to designated or register their homes, and the lack of Council support in expanding the Heritage Register.

4. SAANICH HERITAGE FOUNDATION

The goals and objectives of the Foundation are to promote and encourage the preservation of significant examples of Saanich's heritage buildings and sites. The Foundation provides grants to owners of designated heritage buildings for the purpose of assisting in the costs of the preservation, maintenance or restoration of such structures.

Website: http://www.saanich.ca/living/mayor/boards/shf.html

Contact: Shirley Leggett
Senior Committee Clerk
Corporation of the District of Saanich
Saanich Municipal Hall
770 Vernon Avenue
Phone: 250-475-1775 ext. 3513
Email: Shirley.Leggett@saanich.ca

Mandate:The Saanich Heritage Foundation is a registered non-profit society that promotes the preservation, maintenance and restoration of buildings, structures and land located in the Municipality of Saanich, which have been designated as Municipal Heritage Sites. The Saanich Heritage Foundation will, consistent with the purpose described above, undertake the following:

- Provide grants to owners of heritage buildings, structures or land for the purpose of assisting in the preservation, maintenance or restoration of the property.
- Review changes to the Saanich Community Heritage Register and Saanich Heritage Management Plan.
- Review and make recommendations to Council on heritage designation requests and requests for changes in heritage buildings.
- Promote and encourage public interest in heritage conservation in the Municipality of Saanich.
- Raise funds to enable the Society to carry out the above purposes by soliciting and receiving money and property, both real and personal, by gift, contribution, bequest, devise or otherwise and including but not limited to the obtaining of funds from The Corporation of the District of Saanich, the Government of Canada and the Government of British Columbia.

Funding: The Saanich Heritage Foundation (SHF) receives funding from Council in the form of a grant once a year during budget deliberations. The deadline for grant applications to the SHF is currently the second Friday in January. The Foundation has, typically over the past several years, given applicants 35% of the lowest of 3 quotes submitted for restoration work - for this year, the total is around $30,000, which is the amount the SHF will ask for from Council. The SHF submits a by the end of January and it is considered during Council's budget meetings which start in February and wrap up at the beginning of April. Council then sends the SHF a letter confirming the grant; the applicants are then informed that their grant applications have been approved.

The SHF also manages two Saanich-owned heritage houses, which are rented out - the rent monies from those places are used for ongoing maintenance/upgrades for those two houses.

Administration: In the past, the Saanich Heritage Foundation has had secretarial services provided by one of the Senior Clerks in the Legislative Division as part of her overall duties. For the past several years that person has been Shirley Leggett who was also the Recording Secretary for Council. Council is billed at the end of each year for time spent on minutes, agendas, meetings, correspondence, etc. for the Foundation; Council pays the invoice out of an Operating Account. Typically, billing was around $3,500 for the year (any meetings are billed at time and a half).

At the end of June Shirley Leggett retired but agreed to remain as the secretary for the SHF. For the last six months of 2009 administrative time averaged to about 35 hours a month, meaning that the Foundation will be facing a substantial increase in secretarial costs. The Saanich Heritage Foundation also has a planner involved who spends time dealing with heritage issues – that time is not included in the administration costs.

Public Programs: Part of the Foundation's mandate is to promote and encourage public interest in heritage conservation in the Municipality. Each year in October the SHF does a mailout of the Restoration Guidelines and Grant applications to the owners of heritage designated dwellings. The Saanich Heritage Foundation is also considering sending these out to all owners of properties on the Heritage Register (but not yet designated).

Last year in June the Foundation collaborated with the Victoria Heritage Foundation and held a Restoration Workshop at the Municipal Hall and people paid to attend the all day event; they had the opportunity to learn about and speak to experts on heritage restoration. The Foundation also updated/revised the Heritage Inventory and now sell it through a number of venues.

Public Enquiries: Enquiries, with respect to the Heritage Foundation, are forwarded to Shirley Leggett and they are monitored on a regular basis. If there are issues that need immediate attention they can be referred to the heritage planner if another person in the Legislative Division is unable to respond. The heritage planner deals with a lot of enquiries and contacts the members of the Foundation when issues of significance arise.

Challenges and Concerns: Over the past few years the mandate of the SHF has changed and the scope has broadened, which in turn means more staff time, lengthier agendas, more members of the public attending the meetings, and increased administrative costs. It has also been difficult to find volunteers to sit on the Committee.

Usually, each year when the SHF submits their grant request to Council, Council takes into account the operating costs of the Foundation itself, this year that will mean increased secretarial costs as well.

5. VANCOUVER HERITAGE FOUNDATION

Website: www.vancouverheritagefoundation.org

Contact: Diane Switzer
Executive Director
402 - 510 West Hastings Street
Vancouver, BC V6B 1L8
Phone: 604-264-9642 ext 302
Email: diane@vancouverheritagefoundation.org

The Vancouver Heritage Foundation is a registered charity that is dedicated to supporting the conservation of the city's heritage buildings through education, public awareness and granting activities. Foundation activities are open to everyone with a special emphasis on members of the public with an interest in the city's history, building owners, related professionals and related organizations. Activities include workshops, lectures, tours, publications, and granting programs to paint, restore and maintain designated heritage properties. The Vancouver Heritage Foundation is a non-profit, charitable organization created by the City of Vancouver in 1992 to promote the preservation, maintenance and restoration of Vancouver buildings, structures and lands with historical or architectural significance. The Mayor and City Councillors were its first Directors and remain Honorary Directors today. Since 1998, the Foundation has been governed by a private citizen Board, comprised of 15 voting Directors and 3 non-voting members who are appointed by the Mayor & Council.

Mandate: The Vancouver Heritage Foundation is a registered charity supporting the conservation of heritage buildings and structures in recognition of their contribution to the city's economy, sustainability and culture. The Foundation does this by:

- Developing practical tools, information and incentives to help in the successful conservation of heritage buildings and structures.
- Creating opportunities to access and learn about Vancouver's heritage buildings.
- Fundraising in the public and private sectors to build an endowment that will protect our built heritage into the future.
- Promoting relationships that support heritage conservation.

Funding: Funding is provided by an annual operating grant from the City of Vancouver that has increased from $108,000 in 2008 to $110,000 in 2009 to $112,000 in 2010. The success of the VHF is garnered in part by running at arms-length from the City of Vancouver. The rest of the funds are acquired through grants and fundraising - primarily the House Tours which usually brings in about $50,000 per year, the Old School courses (see below), and the newly established Hot Dogs for Heritage which last year came in at around $35,000. The grant covers salaries, office rent and office supplies and is supplemented by fundraising.

In 2008, the Vancouver Heritage Foundation reached the $1 million mark of a $3 million campaign to support VHF programs into the future, inaugurated a program of activities raising awareness about the adaptation of the ubiquitous Vancouver Special for 21st century living, launched a new Conservation Plan granting program to produce multi-year plans for the repair and rehabilitation of historic buildings, awarded 8 grants for a total of $30,000, and opened 16 unique heritage buildings to more than 3000 people.

Perhaps the Foundation's proudest achievement is the launch of Old School: Courses for Building Conservation in 2008, which is British Columbia's first continuing education program designed specifically to educate the public about conserving heritage structures.

In 2008, the Foundation launched a new grant program for Conservation Plans to help building owners make timely and sympathetic decisions about the maintenance and rehabilitation of their buildings.

In 2008, The VHF Major Gifts Fundraising Team began meeting with individuals and businesses to raise funds in support of three new fundraising initiatives, which will provide for the long-term viability of the VHF and its programs. The fundraising efforts are yielding significant results. The campaign goal is to raise $3 million over 5 years:

- $1 million endowment fund to support Education & Public Awareness activities that will include lectures, tours, workshops and publications
- $1 million endowment fund to expand the scope and size of the Granting Programs to meet increased demand for VHF grants and to realize a greater impact in the community
- $1 million Save the Buildings Fund, a revolving fund to rescue threatened buildings.

Generous supporters have made commitments that bring the campaign total to almost $1.5 million. This includes a gift from the provincial government received early in 2009.

In 2010, the Vancouver Heritage Foundation launched an annual campaign, which brought in over $20,000; this was a mail/email campaign where people could donate directly to the foundation. In addition, there are a number of major gift campaigns for large donors; this money goes to the Endowment Fund and the Save the Building Fund. In 2003, fifteen donors became **Founding Pillars** of the Vancouver Heritage Foundation by donating $10,000 each to seed the Foundation's Endowment Fund at the Vancouver Foundation. Over the next 3-5 years the Vancouver Heritage Foundation hopes to raise a $2 Million Endowment Fund. Along with funds granted to the Foundation by the City of Vancouver, over $250,000 was put into the new Endowment Fund. The position of Development Director is the one position at the VHF that is entirely funded by donations.

The VHF actively fundraises through donations of cash, securities, property, and planned gifts to grow an endowment fund to protect heritage buildings in perpetuity. The Vancouver Heritage Foundation is the only operating Heritage Foundation in British Columbia that uses the fundraising model.

Administration: Currently, the Vancouver Heritage Foundation has a full-time Executive Director, a full-time Program Director, a part-time Development Director, and a full-time Administrative Assistant. The employees are paid from the operating grant primarily, supplemented by fundraising. There are also 15 directors who serve two-year terms and can be re-elected by the City of Vancouver for a period up to 10 years. Most of the larger programs such as the House Tours and Hot Dogs for Heritage are run entirely by volunteers. There are 15 voting Directors and 3 Non-voting Directors of the Vancouver Heritage Foundation. All Directors are appointed by the Mayor & Council of the City of Vancouver. Mayor & Council are Honorary Directors of the Foundation retaining limited voting rights with respect to appointment of Directors, changes to the constitution and the expulsion of Directors. The Mayor and Council acted as the Board of Directors until 1998, when a citizen, community-based Board of Directors was appointed.

The Board of Directors of the Vancouver Heritage Foundation is responsible for increasing private and public sector involvement and investment in the conservation of heritage resources, distributing funds according to developed allocation processes, developing policies for the programs undertaken by the organization, and prudently managing the assets of the Foundation. As this is an active fundraising organization, the Board will be expected to engage in fundraising activities and to promote the Foundation to the public, sponsors, donors and planned giving professionals.

Education and Public Awareness Programs:
- Old School
- Walking Tours of downtown Vancouver
- Mid Century Modern Tour of Modern buildings downtown
- Heritage House Tour - 8-10 houses that are open for a tour once per year
- Vancouver Special Tour

Granting Programs:
- True Colours: Paint for house and up to $2,000 in labour per house.
- Restore It: 50% of project up to $5,000.
- Conservation Plans: 50% of project up to $2,500.

There are also a number of projects that the Foundation takes on if it fits well with the mission, if funding is provided, and if the Foundation can partner with another organization. For example, last year, the VHF partnered with CBC and a local coffee shop to establish a Foundation wall that will project heritage images onto a wall outside of the CBC Building.

Public Enquiries: Public enquiries are answered by the office administrative assistant and passed on to the Program Director, for house enquiries, to the Executive Director, "for big picture" items, and the Development Director for all fund-related questions.

Challenges and Concerns: Sustainability of programs is always a concern for the Vancouver Heritage Foundation - how can the Foundation design the programs to run and not lose money? Funding is always an issue - particularly with the downturn in the economy and funding freezes at the provincial level.

The foundation did start very small – it was run out of the Executive Director's house for a number of years. It has grown exponentially since then and is now an integral part of the community. It has also helped to set the bar for conservation in the City and has increased awareness of preserving our built fabric.

6. VICTORIA HERITAGE FOUNDATION

Website: www.victoriaheritagefoundation.ca

Contact: Brigitte Clark
Executive Director
Victoria Heritage Foundation (VHF)
Victoria City Hall
#1 Centennial Square
Victoria, BC V8W 1P6
Phone: 250-383-4546
Email: vhf@victoriaheritagefoundation.ca

The Victoria Heritage Foundation was created in 1983 by the City of Victoria to manage its funding program for Designated Heritage houses.

Mandate: VHF's mandate is to provide grants to assist with rehabilitating homes that were originally built as single-family or duplex, as well as to undertake projects of an educational nature to promote conservation of built heritage. The sister organization, Victoria Civic Heritage Trust, deals with commercial, industrial and institutional buildings, which are mostly downtown.

Funding: Funding is provided through a grant from the City of Victoria. In 2007, the VHF received $168,746 from the City and in 2008 they received $185,655. As of 2008 the VHF had unrestricted net assets of $70,396. The Victoria Heritage Foundation requests funds annually in October and receives them the following July. The VHF has also been able to obtain grants (Heritage Legacy Fund, BC 150) to assist with some of the education projects.

Administration: The VHF has been staffed by one Executive Director (3/4 time contract) for the last 22 years, and an Office Assistant 1 day a week, working out of home offices. The VHF relies heavily on volunteers (e.g. houses are inspected at least twice during the year by volunteer House Grant Inspectors).

Public Programs: The VHF funds between 50 and 60 rehabilitation projects per year, at approximately 25% of project costs (to a maximum project cost of $16,500). The grants can be used to aid property owners with restoration and maintenance of the house exteriors & foundations as well as interiors, outbuildings and landscape features if designated. Education projects are undertaken by the Education Committee and have included lectures, Your Old House Rehabilitation Workshops, Walking Tour Brochures, our website. The eleven-year "This Old House" 4-volume publishing project has just been completed.

Public Enquiries: VHF has a high profile in the community and fields many calls that need to be re-directed to the City's Heritage Planners, Victoria Civic Heritage Trust, Hallmark Society, etc. The public, and others, often want the Victoria Heritage Foundation to advocate for certain heritage buildings, which is something that it does not do. Homeowners often request a recommended trades list. This is something the VHF will do cautiously (i.e. no list is given out, names will be passed on based on positive feedback from other homeowners).

Challenges and Concerns: Funding may not be able to keep up with increased costs of rehabilitation, the number of new designations and applications, and administrative costs. The Victoria Heritage Foundation may have outgrown the use of home offices, as the storage of files and materials is an issue. However, this would increase administration costs. The VHF relies heavily on volunteers, and faces the challenge of how to retain current volunteers and how to recruit new volunteers. In addition, recruiting, retaining and revitalizing Board members has become a challenge. Lastly, the VHF faces the challenge of balancing the priorities of House Grants and Education.

Successes: To date, 53 of Victoria's Designated Heritage houses have received Hallmark Society awards for outstanding rehabilitation work. A number have also received awards from Heritage BC and Heritage Canada for their efforts. Most of those award-winning houses have received VHF/City of Victoria funding. VHF has also undertaken major projects in the field of education and public awareness. VHF produces the This Old House heritage publication series, Neighbourhood Heritage Walking Tour brochures and Your Old House booklets in partnership with Heritage BC and the Vancouver Heritage Foundation. VHF sponsors special education events such as lectures and Your Old House workshops.

7. VICTORIA CIVIC HERITAGE TRUST

Website: http://www.heritagevictoria.org

Contact: Catherine Umland
Executive Director
Victoria City Hall
#1 Centennial Square
Victoria, BC V8W 1P6
Phone: 250-727-8482

The Victoria Civic Heritage Trust is a non-profit charitable organization established in 1989 by the City of Victoria to support the enhancement, interpretation and preservation of Victoria's heritage. The Victoria Civic Heritage Trust (VCHT) aids in the rehabilitation of downtown heritage buildings through cost-share restoration grant programs and promotes the conservation of Victoria's heritage through various interpretation programs.

The Victoria Civic Heritage Trust is modelled on the many examples of successful Civic Heritage Trusts in Britain, Canada, and the United States. These trusts are independent charitable organizations at arms length from government. Their objectives are to preserve and enhance the heritage of their communities and to sensitively rehabilitate their downtown areas.

Mandate: The Victoria Civic Heritage Trust works in cooperation with the City and community heritage groups to develop, administer and financially support programs that preserve, promote, interpret and enhance the cultural and natural heritage resources of the City of Victoria and its environs. The VCHT aims to:

- Aid in the rehabilitation of heritage buildings through restoration grant programs.
- Develop a program to interpret the history of Victoria to its residents and visitors.
- Promote the interpretation and conservation of Victoria's landscapes and historic cemeteries.
- Stimulate in the general public an appreciation and knowledge of heritage activities in the Greater Victoria area.

Funding: The VCHT's Building Incentive Program, Design Assistance Grants, and Heritage Tax Incentive Program are financially assisted by the City of Victoria. In turn, The VCHT assists the City of Victoria with technical review. In 2006, the VCHT requested $300,000 from the City of Victoria in Capital Funding for the Building Incentive program because of the strong demand, driven by market for downtown residential and sharply rising construction costs. The rationale for increased BIP Funds was that it fit with the City's strategic downtown priorities, i.e. revitalization areas and downtown housing; Tax Incentive Program and Building Incentive Program help offset various costs; and civic investment yields a good return in current market condition.

To carry out new projects, the Victoria Civic Heritage Trust obtains funds from various granting agencies, and through private donations and fundraising activities. The VCHT accepts direct financial contributions and donations of real property.

Administration: The Victoria Civic Heritage Trust is composed of a volunteer elected Board of Directors and is a sister organization of the Victoria Heritage Foundation.

8. NORTH SHORE COMMUNITY FOUNDATION

Website: http://www.nscommunityfoundation.com

Contact: Norman Smith
Email: info@nscommunityfoundation.com

The North Shore Community Foundation (NSCF) is a registered charitable organization formed in 1988, which provides funding to bridge the gap between community needs and resources. It is a focus for community philanthropy, and managers a number of endowed funds.

Mandate: To professionally manage trust funds and endowment funds and to distribute the net income from each fund by grants within the North Shore community.

Funding: The North Shore Community Foundation are managers of money who solicit funds and granters. The Foundation calculates the total income at the end of the year and prorates that amount to each fund. The Foundation encourages the programs but leaves the growth of funds to people who are actively concerned about heritage issues – therefore, heritage people do the fundraising. As of 2003 the NSCF had $531,000 under management. One of its funds is the District of North Vancouver Centennial Heritage Fund, which currently has an endowment of $18,560; the interest on this fund is available to be spent on community heritage projects. The NSCF does not necessarily have the expertise to act as a granting body for specific heritage building restoration grants, however it could be an invaluable partner in managing the funds and endowment of a community heritage foundation.

The amount of money given to the NSCF was not much more in 2010 than it was in 2003, mostly due to the fact that the District itself has a heritage committee, which also receives Municipal funds. The most successful endeavor undertaken by the NSCF over the past three years has been the annual golf tournament (in the last two years alone it has raised over $100,000 per year).

Administration: The NSCF does not have a staff but is run entirely by volunteers. Currently the Foundation is feeling the need for staff and for the subsidy of overhead costs and issues. Overhead costs are fairly minimal at the moment, but include graphic work and printing. The Board of Directors is selected from the community.

Public Programs: The Centennial Heritage Fund is the heritage grant administered by the NSCF. The Centennial Heritage Fund gives money to the heritage plaque program, and in the past has helped the Deep Cove Heritage Society collect stories from the community; it has also provided funding for a nature park near the Second Narrows Bridge. In 2009, the NSCF received no applications for grants and the money was reinvested back into the fund.

Public Enquiries: The NSCF does not receive many public enquiries, those that are received are mainly dealt with via email and the Executive will return phone calls.

Challenges and Concerns: One of the biggest challenges is that the NSCF Centennial Fund cannot grant to homeowners because they do not qualify as a registered charity. In order for grants to be provided to homeowners the money would first have to run from the Foundation to the Municipality who could then administer a grant to the homeowner.

9. TOWNSHIP OF LANGLEY HERITAGE BUILDING INCENTIVE PROGRAM

Website: http://www.tol.ca/index.php?option=com_content&view=article&id=1167&Itemid=972

The Heritage Building Incentive Program assists with costs associated with the stabilization and exterior restoration, repair, and maintenance of eligible heritage buildings in the Township. Grants are available to property owners of a heritage building included in the Township of Langley's 'Listing of Heritage Resources' and for work that maximizes the retention of original materials and design.

Mandate: The objectives of the Township of Langley Heritage Building Incentive Program are to:
- promote the conservation and stewardship of residential, commercial, industrial, institutional and agricultural heritage buildings in the Township
- encourage investment in the Township's built heritage
- ensure the long-term viability of the Township's historic resources.

Achievement of these objectives will help to support the Township's overall economic development by:
- improving neighbourhood livability
- attracting tourists
- increasing construction jobs and expenditures
- stabilizing neighbourhoods and property values
- enhancing the community's self-image.

The Township of Langley, through legislation established under the Heritage Conservation Act and the Local Government Act, is offering a Heritage Building Incentive Program to assist with the costs of restoration, repair and maintenance of eligible heritage buildings within the Township. Grants are available to property owners of a heritage building included in the Township of Langley "Listing of Heritage Resources". Owners of residential, commercial, institutional, industrial and agricultural properties are eligible to apply to the Township of Langley Heritage Building Incentive Program for a grant if:
- the building is listed in the Township of Langley "Listing of Heritage Resources"
- taxes are fully paid
- the building is in conformance with all applicable bylaws
- the building is covered by current comprehensive insurance.

If a property owner believes a building located on that property merits consideration for an Incentive Grant and is not currently listed in the "Listing of Heritage Resources", the owner may request Township Council to have the building evaluated. Council may then direct the Community Heritage Commission to assess the property for possible inclusion in the "Listing of Heritage" Resources. If Council determines, by resolution, to include the building in the Listing, it will be eligible for consideration for a grant. The Program is under no obligation to approve a grant for any building on the Township of Langley "Listing of Heritage Resources"; each application for a grant shall be assessed on its own merits.

Priority will be given to heritage buildings that:
- are readily visible to the general public from a public right-of-way fronting or flanking the building
- are privately owned
- have not received any other incentives from the Township of Langley

Grants will not be given for work under undertaken prior to grant approval.

Buildings and Projects Eligible for Grants
Except for special circumstances, original materials are to be retained, and the use of modern equivalents of historic materials maximized. Sympathetic adaptation of modern materials will be considered on a case-by-case basis. The order of priority for Heritage Building Grant funding is as follows:
1. Exterior or structural restoration
2. Exterior or structural repairs
3. Exterior or structural maintenance

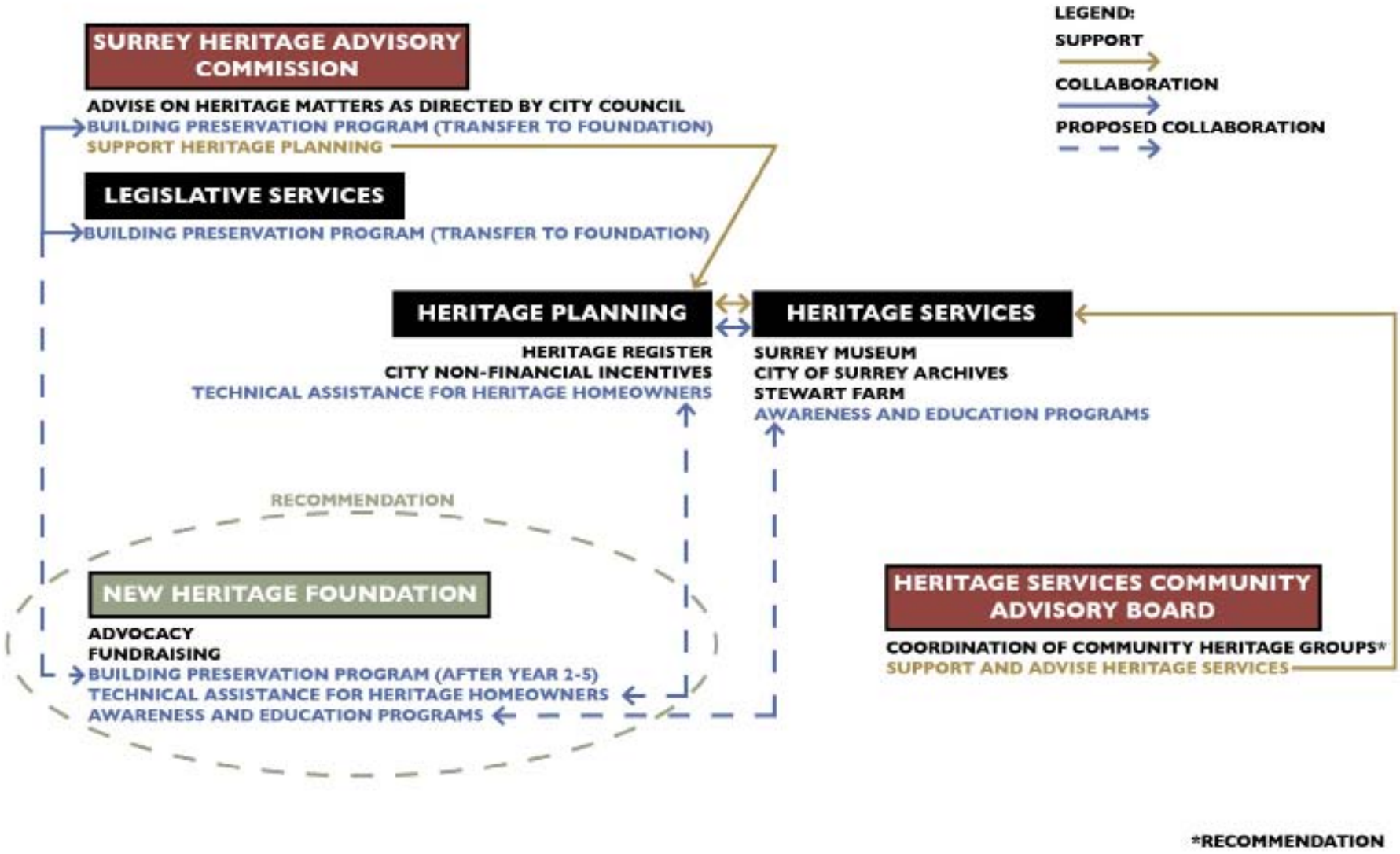
Grants
The maximum grant available to any building per year is dependent on the level of legal protection acquired by the property owner and the funds available, but will not exceed 50% of the approved project costs. Placement of the building on the Township of Langley Heritage Register is the minimum commitment required by any grant recipient. Any heritage building operating or owned by a business will require legal protection to qualify for grant funding. Heritage Building Grants will generally be allocated as follows:

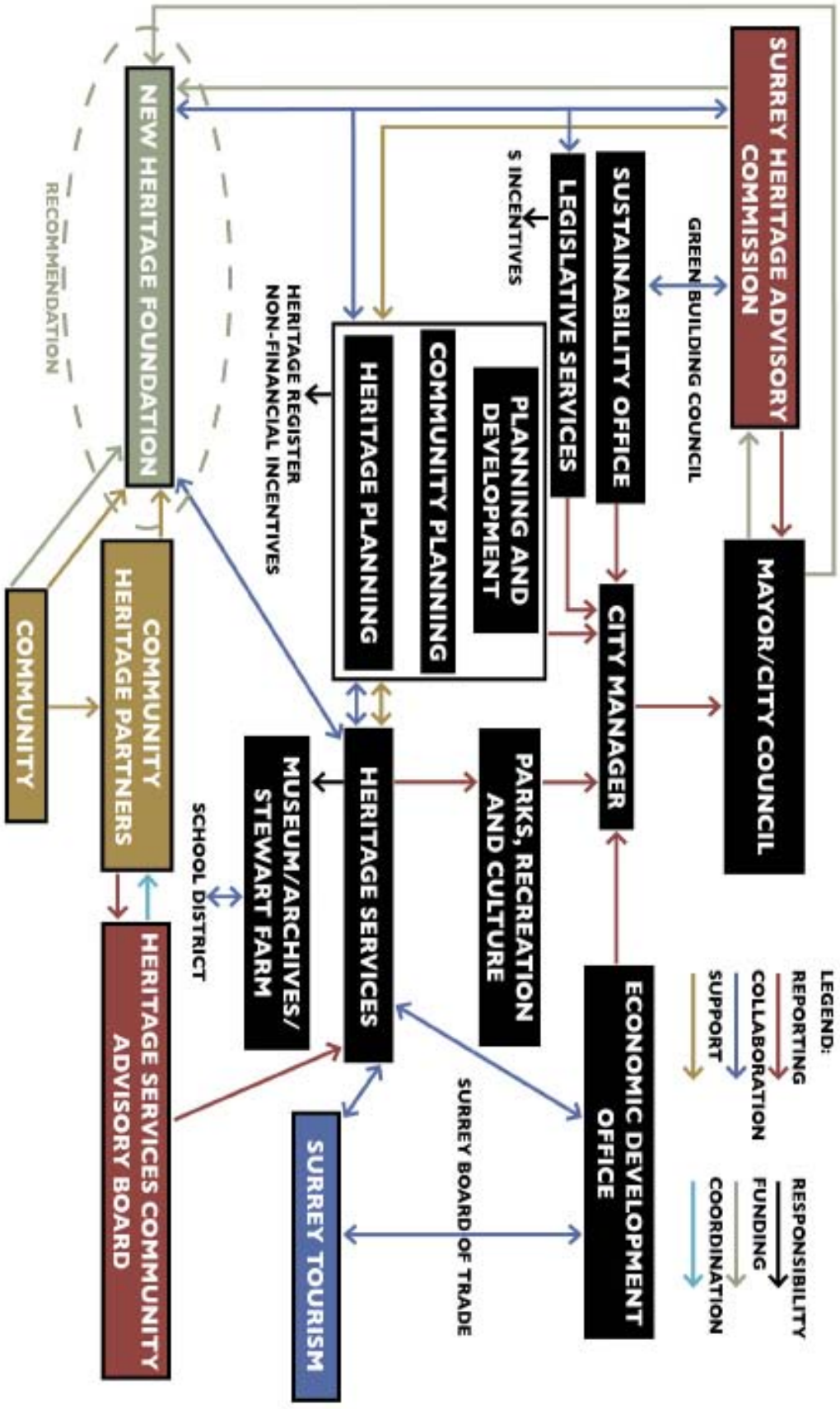
Level of Building Protection	***Grant Maximum***
Heritage Register	Up to 10% of project costs
Covenant	Up to 25% of project costs
Designation or HRA	Up to 50% of project costs

An initial discussion must first be held with the Manager of Heritage and Community Services to determine eligibility and funding availability. Technical and design advice is available if needed. Following this discussion, applicants should submit the details necessary to explain and identify existing conditions and the proposed work.

Grant Application Process
Grants will be reviewed and funding decisions will be made by a committee comprised of senior staff and the Land Use and Planning Committee of the Township of Langley Community Heritage Commission.

SURREY HERITAGE PROGRAM



APPENDIX E

ORGANIZATIONAL CHART FOR SURREY'S HERITAGE PROGRAM