MUNICIPAL

HERITAGE DESIGNATION





Prepared for:

Town of Okotoks Okotoks Municipal Centre 5 Elizabeth Street Okotoks, AB

Prepared by:

J M Gartly Design Studio Inc. Calgary, AB

Adopted by Okotoks Town Council - 2018 November



ACKNOWLEDGEMENTS

We would like to thank all those people who took the time to contribute and support the preparation of the *Municipal Heritage Designation Program*. The collaboratively achieved vision and policy framework provide a foundation to protect and celebrate Okotoks' valued heritage resources for future generations. We look forward to continuing to work together to implement the short, medium and long-term actions within the *Municipal Heritage Designation Program*.

Town of Okotoks Council

Mayor Bill Robertson Councillors Florence Christophers, Ken Heemeryck, Matt Rockley, Ed Sands, Tanya Thorn, and Ray Watrin

Management Team

Elaine Vincent, Chief Administrative Officer Susan Laurin, Community Services Director Allan Boss, Culture and Heritage Manager Jamie Dugdale, Planning Services Manager

Town of Okotoks Staff

Kathy Coutts, Nagille Walsh-Besso, Jaime-Brett Sine, Craig Davies, Amanda Brinda, Kari Idland, Robert Mueller, Joan Botkin, Carla Trigiani, Katrina Lougheed

A sincere thank you to the Culture, Parks and Recreation Committee and community members who eagerly shared their stories and the value of Okotoks' heritage assets through surveys, in-person discussions, stakeholder meetings, workshops and open houses.

Consulting Team

Jeanie M. Gartly, MCIP, RPP, MArch, MEDes
Principal, J M Gartly Design Studio Inc.
Project Lead, Heritage Conservation and Urban Design
Consultant

In association with:

Marilyn Williams, CHAP, PEng, MA (Conservation Studies)
President, Marilyn Williams Heritage Management
Consulting

Melissa Chinski, BAA Owner, Graphic Designer, Flag Five Inc.

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Office of the Mayor 403-938-8904

November 29, 2018

To Whom It May Concern:

Re: Municipal Heritage Designation Program

On behalf of Okotoks Town Council, I am honoured to provide a letter in support of the Municipal Heritage Designation Program.

Giving residents and Administration the tools to preserve municipally significant historic places is key to preserving the Town of Okotoks' small town charm, something the entire community reiterates to Council as being important. Town Council has heard the community and we are pleased to approve the Municipal Heritage Designation Program (MHDP), designed to preserve and protect heritage resources important to the Town of Okotoks.

The MHDP aligns with our strategic plan to manage community growth, provide strong governance, and foster economic vitality. It supports social, cultural, and economic values of sustainability. It also supports our community vision with its emphasis on promoting a "sense of community" through "thoughtful planning and design".

It is clear our community is passionate about Okotoks' heritage and we are pleased to put in place the MHDP to protect, raise awareness of, and advocate for our community's heritage. We look forward to next steps of the plan, working together with our community and landowners to develop policy and designate valued heritage buildings, cultural landscapes, areas and artefacts.

Sincerely,

Wm. (Bill) B. Robertson

Mayor



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HERITAGE DESIGNATION

PROGRAM

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EXECUTIVE SUMMARY

The Town of Okotoks initiated a *Municipal Heritage Designation Program* to ensure its heritage resources, at this important time of growth, are preserved for future generations. The significant growth of the community since 2006, and anticipated growth from the removal of the 1998 finite growth model to a continued growth model, presented an ideal time and opportunity to establish a vision and policy framework to preserve and celebrate the community's heritage resources.

Through the public consultation process, it was identified that the community values the distinct historical character that has evolved the town's "sense of place" and vitality. The *Municipal Heritage Designation Program* recognizes, values and includes the community's input in creating the *Program*. The community is passionate about Okotoks' history, its heritage resources and raising awareness and advocating for them within the community. Consulting with the community has brought forward enthusiasm from interested landowners on a desire to protect heritage resources through designation.

The Municipal Heritage Designation Program has been prepared to provide solid policy direction that can be legislatively supported by Council; and ultimately, for the program to efficiently be implemented by administration as they work with landowners and the community to conserve the valued heritage buildings, cultural landscapes, areas and artefacts.

The *Municipal Heritage Designation Program* includes the following key elements:

- A vision to identify, protect, manage and celebrate Okotoks' heritage resources for future generations to enjoy the small town, vibrant atmosphere that makes Okotoks special;
- Identified goals and policies to conserve and implement historic resource standards, generate heritage awareness and education, and establish and facilitate heritage incentives and funding;
- Policies to ensure that the *Municipal Heritage* Designation Program is aligned and contributes to current and future planning work on the *Municipal Development Plan* and *Land Use Bylaw* review (e.g. Heritage Mixed Use District), among others;
- A framework to identify, protect and manage the heritage resources in Okotoks;

- A decision-making framework, identified roles and public participation strategy to support implementation of the *Program*.
- A continued emphasis on heritage awareness and education programs with the community;
- Enthusiasm within the community to contribute to the designation of heritage resources;
- · An immediate, medium and long-term action plan;
- An implementation strategy including a pilot project to designate heritage resources within the next year; and
- All the necessary process diagrams, templates, tools and resources needed to easily implement the *Program* for Council and administration.

The Municipal Heritage Designation Program supports the Council and community vision to further the social, economic and environmental benefits that come from the value of having such a Program in place as the town manages it growth. Ultimately, the Program will provide the necessary foundation to ensure that the heritage resources in the community are protected and celebrated.

"...the program will help to identify and protect buildings and locations of historic value in town for the future. It becomes important because there are numerous buildings in town that are really valuable for Okotoks' identity and for our history and they really tell the story of who we are and why we're here." ¹



1.1 PURPOSE

The Town of Okotoks recognizes that its heritage resources are of value to the character and sense of community that historically built and continues to build the town. Currently, Okotoks does not have a program in place to manage, identify and ensure that the heritage resources within the town are protected for future generations including guidance on development decisions that may impact valued heritage resources. Although, there are Federal initiatives and Provincial legislation in regards to heritage conservation, the level of recognition, designation and conservation of heritage resources for Okotoks is best achieved at a municipal level. Conserving heritage resources is a natural form of documenting the town's history in story and built-form thus reinforcing the town's heritage values in relationship to its social, cultural, economic and sustainable values.

The purpose of the *Municipal Heritage Designation Program* (also referred to as the "*MHDP*" or the "*Program*") is to identify a vision and framework to conserve and advocate for Okotoks' heritage resources. Combining strategic and management components, the *Program* will provide direction to implement the vision through policy, processes, tools and an immediate, medium and long-term implementation strategy to help achieve success in protecting and sustaining the heritage resources values within the community.

Heritage conservation supports the Town of Okotoks vision of what the community values aesthetically, historically, culturally, and economically. The *Municipal Heritage Designation Program* aligns with other Town

goals including stimulating strategic actions that meet the community's values. Ultimately, leveraging heritage conservation as a part of Okotoks growth will achieve preservation of the layers of history and buildings, and furthermore, it will promote local economies, local knowledge, arts and culture, tourism, sustainability and the retention and enhancement of its character and unique "sense of place".

The role of the *Municipal Heritage Designation Program* is to:

- 1. Provide support for the identification, protection and long-term management of Okotoks' heritage resources;
- 2. Establish the clarity of roles, processes and opportunities for heritage conservation;
- 3. Provide guidance for heritage planning decisions in alignment with new redevelopment opportunities;
- Reinforce Okotoks' character, "sense of community", quality of life and economic vitality including tourism; and
- 5. Provide input into Council and administration work plans and budgets (resources and financial opportunities).





1.2 BENEFITS & VALUE

The Okotoks community will benefit from the Municipal Heritage Designation Program for a number of reasons. The foundational reason is the value the community has for its sense of identity and character and equally the desire to ensure that Okotoks' unique "sense of place" is preserved. The history, people and memories have built Okotoks' quality of life and visually aesthetic urban environment. As the community grows it will be important that the Program be adopted and implemented to ensure the character of the community is maintained and integrated with future growth and development decisions. The goal is to ensure that the quality of life in Okotoks is sustained and enriched by the identification, protection and management of its heritage resources, resulting in economic, social, cultural and environmental benefits.

The benefits of heritage conservation are well known and widely accepted as part of building a vibrant city and more specifically a unique sense of character for a city. The benefits to Okotoks will be both tangible and intangible and will emerge more specific as the *Municipal Heritage Designation Program* is implemented. The following benefits are reflective of the values, sustainability and successes that result when a municipality identifies, protects and manages its heritage resources.

Social

- Promotes a sense of place, identity, character and pride.
- Provides a sense of continuity from generation to generation.
- Adds layers of character, stories and architectural history.
- Maintains a human scale and richness in the public pedestrian realm.
- · Encourages healthy lifestyles.
- Provides affordable housing opportunities.
- · Generates community involvement and volunteerism.
- Promotes education and awareness by enhancing perspectives.
- Stimulates creativity and celebration through culture, arts, traditions, events and innovation.

"In short people love old buildings. They love their character, their history, and the sense of connection they provide – put simply, that power of place. "Place is more than a spot on the map," urban scholar Ed McMahon has said. "Place is what makes your hometown different from my hometown. . . . In the Old Economy, markets mattered. In the New Economy, place matters most. . . . In a world where capital is footloose, if you can't differentiate [your city] from any other place, you will have no competitive advantage. The same is true of a project, or a community or a building." ²

Economic

- Stimulates revitalization resulting in an increase in commercial activity including adjacent buildings and streets.
- · Generates investment and capital.
- · Increases municipal property taxes.
- · Increases property values.
- · Increases tourism and local spending.
- · Creates jobs and economic spin-offs.

"The power of old buildings is far more than just aesthetic. They are tremendous engines of economic growth, vitality and quality of life." ³

Environmental

- Reduces the construction and demolition debris into landfills.
- Reduces pollution and the consumption of energy and resources used in demolition and the production of new materials and assemblies.
- Reuses embedded energy from the original extracting, manufacturing and transporting of building materials and assemblies
- Shows a commitment to sustainability, e.g. reduces urban sprawl.

"To make a brick today to build a building on a site where there is already a building steals from two generations. It steals from the generation that built the brick originally by throwing away their asset before its work is done, and it steals from a future generation by using increasingly scarce natural resources today that should have been saved for tomorrow." ⁴

1.3 PUBLIC CONSULTATION

The Municipal Heritage Designation Program has been developed with a participatory and community-based public consultation process that met the key concepts and guiding principles within the Town of Okotoks Public Engagement Strategy and Toolkit. The Municipal Heritage Designation Program public consultation process has been designed to:

- Raise awareness within the community of the value of its heritage resources and a Municipal Heritage Designation Program to protect them;
- Learn from and involve the community through dialogue and information gathering on the community's heritage values and challenges;
- Test new ideas, processes and solutions together with Council, administration and the community;

- Build partnerships to implement the Municipal Heritage Designation Program; and
- Generate heritage awareness, involvement and volunteerism.

To best achieve the *Municipal Heritage Designation Program*, test, and implement it, the public consultation process was designed with three phases of engagement. Phase 1 public consultation was achieved in the preparation of the *Municipal Heritage Designation Program* whereas; Phase 2 and 3 will further engage the public to learn more, test and implement aspects of the *Program. See Figure 1: Public Consultation Timeline.*

PUBLIC CONSULTATION TIMELINE

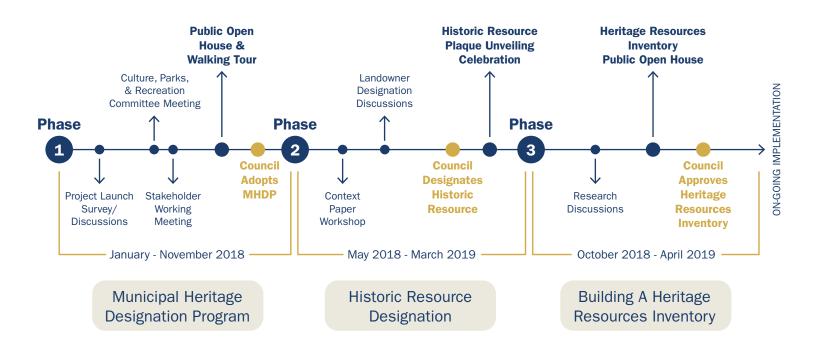


Figure 1: Public Consultation Timeline

Phase 1: Project Launch and Draft Municipal Heritage Designation Program

The project launch provided the opportunity to inform, dialogue and share with the community the purpose of the *Municipal Heritage Designation Program*; learn of the heritage buildings, places, and stories that the community values; identify the opportunities and concerns the community has with heritage conservation; and began a dialogue on the role that heritage plays in the town's character and "sense of place".

To launch the project an on-line survey was advertised in two articles with the Okotoks Western Wheel, through the Town of Okotoks social media venues and the Olde Towne Okotoks Association Facebook page. In-person discussions and the completion of hard-copies of the survey took place on Wednesday, January 31, 2018 with community residents and business owners at the Lineham House Gallery, Rumpled Quilt Skins and the Pason Centennial Arena opening. One hundred surveys were completed including additional insight from inperson business owner and resident discussions. The input has been summarized in a Public Consultation Summary, Phase 1: Project Launch with some feedback shared below.

What comes to mind when you think of Okotoks history?



Figure 2: Community Response Illustrative

"I feel it is so important to preserve and maintain and celebrate our history. Once it's gone, it's gone"

"Preservation of history is very important to me. I want to see the older buildings with historical relevance being protected. A sense of community coming together to celebrate various events in public spaces makes up a great deal of what is special in Okotoks"

"Our world is changing so fast. Keep in mind of how to share our heritage with the upcoming generations"

"All historic buildings are important – lose the history and lose your identity"

"Creating a sense of heritage around a defined district and space...rather than defining buildings would give a broader sense of the heritage"

"In this disconnected age of technology, I believe Okotoks focus needs to highlight its foundation to not become just another cookie cutter suburb of Calgary"

"Please do what is best for many, many future generations of Okotokians, so they never forget where they came from"

"Losing Okotoks History loses the towns identity making it simply "Everytown Canada" and not a unique Okotoks" The project launch input, along with technical expertise and staff direction, was used in the development of a *Draft Municipal Heritage Designation Program*.

Phase 1 of public consultation further included obtaining feedback on the *Draft Program*. This input involved ensuring that aspirations and concerns were considered and understood in the *Municipal Heritage Designation Program* and further garnering support to inspire its implementation and next steps.

The public consultation on the *Draft Municipal Heritage Designation Program* included a stakeholder meeting on March 27, 2018 and public open house and historic walking tour on April 21, 2018. The stakeholder meeting included a participatory decision-making discussion to further the *Program's* vision and designation opportunities. The public open house presented the *Draft Program* on illustrative boards and in a presentation. A survey at the public open house, and on-line, provided community feedback on the *Draft Program* and has been considered in the *Municipal Heritage Designation Program*.

Phase 2: Historic Resource Designation and Phase 3: Heritage Resource Inventory

As a part of the Implementation Strategy and next steps for the *Municipal Heritage Designation Program*, the following two phases of public consultation will take place:

Phase 2: Collaborate with a landowner and/or Town to designate a building and/or cultural landscape, present the Municipal Historic Resources to Council and host a public plaque unveiling celebration event.

Host a community workshop to prepare a:

- Historic Context Paper historical themes within the town; and
- Places of Interest List buildings and landscapes to evaluate in the town.
- Phase 3: Host a Heritage Resource Inventory Public Open House to:
 - Share and gather feedback on 15 evaluated buildings and/or landscapes.

Present the 15 Statements of Significance and Heritage Resource Inventory List to Council.



Figure 2: Community Response Illustrative





2.1 TOWN HISTORY & CONTEXT

The community's natural and built environment have rich stories to tell: the geological and biological legacy of its natural setting in the Sheep River Valley; the significant indigenous pre-contact places like the Big Rock and the Old Mcleod Trail; the frontier period when the trail became a cart route between mounted police forts, and Okotoks an important stopping place and river crossing; the residential, town infrastructure and industrial growth of the settlement period following the arrival of the Canadian Pacific Railway's (CPR) south branch of the C&E (Calgary-Edmonton Railway) with notable businesses like the Lineham Lumber Company; stories in architectural design and craftsmanship from the turn of the century to the post-war era; and many others. It is this history that built the valued historic buildings, parks and cultural landscapes that now have established the unique character of Okotoks.

"A lot of people think Okotoks is just a bedroom community of Calgary. It's not. It started out as a stopping place on the Macleod Trail. We had the oil industry come through here. We were a farming community. We had a First Nations history." ⁵

A sense of heritage value is evident in the number of historic buildings that have been conserved and celebrated by the Town through their adaptive re-use for community and tourist enjoyment such as the Okotoks Museum and Archives (Welch House), Rotary Performing Arts Centre (United Church) and Okotoks Art Gallery (CPR Railway Station). Each of these buildings has a history, a story and community use that has established a "sense of place" and character for Okotoks, including the three Provincial Registered Historic Resources in the W.D. Lineham House, Mahon House and Stockton Block (Okotoks Town Hall). The investment in the town's thus far has been important in establishing, evolving and ultimately, creating a unique "sense of place" for the town that has, and will continue to, contribute significantly to the liveliness and success of the town as it grows.

Although valued and many heritage resources are still intact, the Town has identified that with anticipated growth there needs to be a strong vision, policies, bylaws, guidelines and tools to ensure that the historic character of the community is safely protected. The *Municipal Heritage Designation Program* builds upon









inventory research done for the Town in 2007 and the A Cultural Master Plan for Arts and Heritage. The Program also aligns with and/or will inform the Downtown Urban Design Master Plan, Municipal Development Plan, and Land Use Bylaw review (among others).

In conjunction to the three Provincial Registered Historic Resources, 15 heritage resources were evaluated in 2007 to begin a Heritage Resource Inventory for the Town. These included 14 buildings and one cultural landscape which are: Ardiel Residence, England Residence, General Store, Hessell Residence, Kadey Residence, Laudan Farmhouse, Mahon House, Morrison Residence, NWMP Residence, Okotoks Post Office, Okotoks United Church (now Rotary Performing Arts Centre), W.D. Lineham House, Presbyterian Manse, Stockton Block (former Okotoks Town Hall) and the Old Macleod Trail cultural landscape.

Since the time that these building evaluations (Statements of Significance) were completed, municipalities have furthered the depth of inventory research, identifying heritage values and character-defining elements when evaluating heritage resources therefore, it is anticipated that some of these may need some further evaluation work to ensure they been filled sufficiently as a part of the Okotoks Heritage Resource Inventory and possible future designation as a Municipal Historic Resource. At this time, they do form a solid foundation for the beginning of a Heritage Resource Inventory for the Town of Okotoks.

It should also be noted that the Registered Historic Resource (RHR) designation on the Mahon House, W.D. Lineham House and Stockton Block buildings has always been a less protective category than a Provincial Historic Resource (PHR) designation. The difference is that a Registered Historic Resource only requires notification to the Province rather than Ministerial approval needed for interventions to a Provincial Historic Resource. At the time of Provincial designation these buildings were seen to have more local heritage value than Provincial heritage value therefore, the reason they were designated as Registered Historic Resources rather than Provincial Historic Resources. The Province no longer designates buildings as Registered Historic Resources as many municipalities now have Municipal Designation programs in place. Given that Provincial Registered Historic Resources are fundamentally unprotected they are no longer eligible for Alberta Historical Resources Foundation (AHRF) funds. For this reason, and to ensure their protection, it is recommended that these buildings consider designation through the *Municipal Heritage* Designation Program.

Upon completion of Phase 2 and 3 of the *Municipal Heritage Designation Program*, a Places of Interest list, Heritage Resource Inventory and Historic Resource Registry will be established for the Town of Okotoks to continue with the on-going implementation of the *Program*.





2.2 HERITAGE LEGISLATION & INITIATIVES

The Canadian Register and Historic Places Initiative

Since 2001, Federal, Provincial and Territorial (F/P/T) governments have worked together through an initiative to jointly develop programs that recognize the significance historic places contribute to our communities. "The Canadian Register of Historic Places (CRHP) provides a single source of information for all historic places recognized for their heritage value at the local, provincial, territorial and national levels throughout Canada." ⁶ This initiative's benchmark guide is the *Standards and Guidelines for the Conservation of Historic Places in Canada*, which is a valuable tool for communities as they seek to protect and manage their heritage resources.

Province of Alberta

In Alberta there is a combination of legislation and initiatives to support the protection and management of heritage resources. The *Historical Resources Act* and *Municipal Government Act* function similarly by providing legislation to both legally protect historic places and to establish land use regulations and tax incentives in support of conserving heritage resources in a municipality.

Historical Resources Act (RSA 2000)

Municipalities in Alberta are empowered by the *Historical Resources Act (HRA)* to designate historic places. This is achieved through the passage of a local bylaw that legally protects designated resources from demolition or alterations that impact the heritage values of a building or site. The *Historical Resources Act* provides the ability to identify, protect and manage heritage resources in Alberta. It is a municipality's legislative means by which to legally protect historic buildings and sites.

Municipal Government Act

"The Municipal Government Act (MGA) is the legislative framework in which all municipalities and municipal entities across the Province of Alberta operate. The MGA provides the governance model for cities, towns, villages, municipal districts, specialized municipalities, and other forms of local government. It lays the foundation for how

municipalities operate, how municipal council's function, and how citizens can work with their municipalities." 7

The Municipal Government Act, Division 5, Land Use Sections 639 through 646 provide the municipality the regulatory powers and authority within the Land Use Bylaw to establish regulations, land uses and the ability to designate or create heritage districts such as the current Heritage Mixed Use District in Okotoks Land Use Bylaw. The MGA also provides authority for a municipality to establish tax incentives for historic resources.

In conjunction with the legislative means, the Alberta Culture and Tourism Ministry provides a wealth of support to municipalities through their years of work to establish the widely used framework and tools to identify, protect and manage heritage resources. The Heritage and Museums department, through the Alberta Historical Resources Foundation (AHRF), provides grants, recognition and heritage conservation expertise. Upon municipal designation of a heritage building or site, it is registered on the Alberta Register of Historic Places. This registration by the municipality is a courtesy to provide municipalities and land owners the opportunity to engage with the Province (usually a Heritage Conservation Advisor) in discussions about conservation issues and for potential AHRF eligibility. Documentation of municipal approval with the Province is required in support of an AHRF grant application and to assure AHRF that any conservation work it might fund has the municipality's support as meeting the Standards and Guidelines of Historic Places in Canada. The Province would also receive a copy of a Municipal Historic Resource designation if it were provincially designated (as PHR or RHR).

Town of Okotoks

The Historic Resources Act and Municipal Government Act provide the legislative means to designate a historic resource within the Town of Okotoks. With that, the municipal tool to regulate land use and development on private lands is the Land Use Bylaw. Currently, the Town's Land Use Bylaw includes a Heritage Mixed Use District to support the policies and framework within the Municipal Heritage Designation Program.

Land-Use Bylaw (1998, Consolidated 2018)

The current Land Use Bylaw No. 40-98 provides alignment with the policies in the Municipal Development Plan as well as a foundation to support the vision of the Municipal Heritage Designation Program to achieve preservation of the built heritage through land use, adaptive reuse and incentive opportunities. Section 13B, provides regulations for a defined Heritage Mixed Use District (HMU). The purpose and intent is stated as:

"The purpose and intent of this district is to provide for the continuation of residential development and allow for certain specialized commercial uses to develop in the form of unique shops, boutiques, professional offices and tourist attractions. The preservation of the historic and unique aesthetic character of the district will be encouraged." (13B.1.0)

A further section provides architectural design guidelines "for architects, planners, developers, business persons, and residents when planning and developing new buildings or renovating existing buildings in the district". (13B.7.0)

The Heritage Mixed Use District is valuable in supporting the implementation of the *Municipal Heritage Designation Program* as it provides regulation and guidelines to protect the heritage values in a defined area. Some challenges of the Heritage Mixed Use District were learned from residential and business owners of heritage buildings while preparing of the *Municipal Heritage Designation Program*. These identified challenges have been incorporated as a policy or action item to be addressed upon what is learned in a Pilot Project to designate a Municipal Historic Resource

and further over time as specific land use or development issues arise. The *Municipal Heritage Designation Program* has the additional action item to consider incorporating a Heritage District Overlay within the *Municipal Development Plan* or *Land Use Bylaw* such as expanding or revising the current Heritage Mixed Use District. The appropriate policy framework for a potential heritage overlay district can be identified as the *Program* is being implemented.

2.3 CURRENT MUNICIPAL POLICY FRAMEWORK

The Municipal Heritage Designation Program is a strategic and management framework to provide the necessary policy, guidelines and tools to preserve Okotoks heritage resources. It is a stand-alone document with the purpose to identify, protect and manage heritage assets within the town. It's purpose integrates and supports implementation of other current, recent and upcoming municipal policy work within the Municipal Development Plan, A Cultural Master Plan for Arts and Heritage, Downtown Urban Design Master Plan, among others reviewed at this time in preparation of the Program.

Municipal Development Plan (1998, Consolidated 2016)

The Municipal Development Plan (MDP) is the primary long-range (20 year) planning document that establishes a holistic vision for the Town and guides overall growth and development for the Town. The MDP established a vision for a "Sustainable Deemed as 'The Legacy Plan', it Okotoks". acknowledges the long history that developed the town and further supports that history with heritage policies for residential, commercial and downtown development. A residential land use area illustrated as "Heritage Okotoks" identified density targets and established the Heritage Mixed-use District in the Land Use Bylaw to accommodate residences and businesses under single ownership such as can be seen along Elma Street. The district intended to provide incentives for developers and to facilitate innovative forms of housing. Consistent with the residential policies, the commercial policies support retaining and building on the heritage character of Elma Street (east of Highway 2A), McRae Street east and North Railway Street. The MDP policies and implementation of them over the years have reinforced the town's value of preserving its built heritage.

"Elma Street (east of Highway 2A) will build on and retain its heritage character by achieving a balance between residential development and specialized businesses (e.g. boutiques, antiques, professional offices, B and B's, tourist-oriented businesses) that can use heritage character as a selling feature and focus. Much of Elma Street is composed of older residential units, which portray the community's early history in terms of examples of local architectural styles, and original homes of the Town's first inhabitants. The preservation of

this historic and unique aesthetic character will be mandatory."

"McRae St. east and North Railway Street. Existing heritage character development will be respected in limited commercial expansion into this district (North Railway Street - CBD land use with Elma Street architectural guidelines, and McRae Street - Heritage Mixed Use land use). New developments shall reflect heritage legacy in the form of scale, architectural interest (e.g. pitched roofs, porches, window and roof treatments, finishing materials, colour palette). The type of future business envisioned in this district is mixed given heritage appeal for specialty businesses and demand for convenience services created by a future high-density resident population in this district." (MDP, page 63-64).

Policies to maintain vibrancy of the downtown for future generations include a key one which is stated as, "The Town shall identify heritage resources and endeavour to have them designated as provincial heritage sites to ensure their preservation into the future" (MDP, page 81).

In response to Council's shift in policy direction from a finite growth model to a continued growth model, a section titled "2015 and Beyond" was added to enhance the "Sustainable Okotoks" vision to be:

"The Town of Okotoks is resilient, where people, businesses, ideas and sense of community thrive. Grounded by the Sheep River valley and supported by thoughtful planning and design, a strong local economy and a vibrant civic culture, Okotoks offers exceptional quality of life at every stage of life. Respect for each other and the natural environment makes Okotoks home" (MDP, page 93-94).

Among the guiding principles of a livable Okotoks, inclusive neighbourhoods, active lifestyles, environmental stewardship and local economy, it is the vibrant civic culture & heritage principle that provides additional heritage policy support and guidance for the *Municipal Heritage Designation Program*. The same vision and guiding principles were incorporated into the *Sustainability Plan* (2016 – 2019), which identified the action item for "municipal designation for historic buildings" (*Sustainability Plan*, page 15).

The Town of Okotoks is embarking this year (2018) on the preparation of a new *Municipal Development Plan*. The *Municipal Heritage Designation Program* should be integrated and incorporated as supporting input to what is learned and adopted as a part of a potential revised vision for the Town and in support of the implementation of the *Municipal Heritage Designation Program* in contributing to the Town's social, economic and environmental goals.

A Cultural Master Plan for Arts and Heritage (2018)

The Cultural Master Plan for Arts and Heritage ("Plan") "provides direction for building vibrant arts and heritage opportunities, connections and assets that benefit the community of Okotoks". Continuing to support the vision and principles established in the Municipal Development Plan in 2014, the Cultural Master Plan sets "goals, outcomes and objectives for future decision-making around culture in Okotoks". The Plan "details a framework for linking the desired long-term future of arts and heritage in Okotoks" with a focus on providing a "dynamic model of action" to achieve the goals.

The public consultation for the *Municipal Heritage Designation Program* aligns with what was learned through the *Cultural Master Plan's* public consultation in that Okotoks' history, and natural and cultural heritage are valued as a part of the culture of the town. One of the five goals of the *Plan* is "to connect people with the history of Okotoks" with the outcome to raise awareness of the natural and cultural heritage within the town through educational activity; cultivating Okotoks' unique historic identity and sense of place as the town grows; and protecting key natural and cultural heritage resources. These objectives all align with the purpose and actions within the *Municipal Heritage Designation Program*.

The Municipal Heritage Designation Program specifically supports implementation of the action items identified in the Cultural Master Plan. These action items include building foundations through the "development and approval of a new municipal heritage designation policy and bylaw", building momentum by "designating heritage resources using new policy and bylaw", and developing mechanisms to "provide grants to culture and heritage organization and champions". Each of these action items in the Cultural Master Plan aligns with the goals of the Municipal Heritage Designation Program to designate

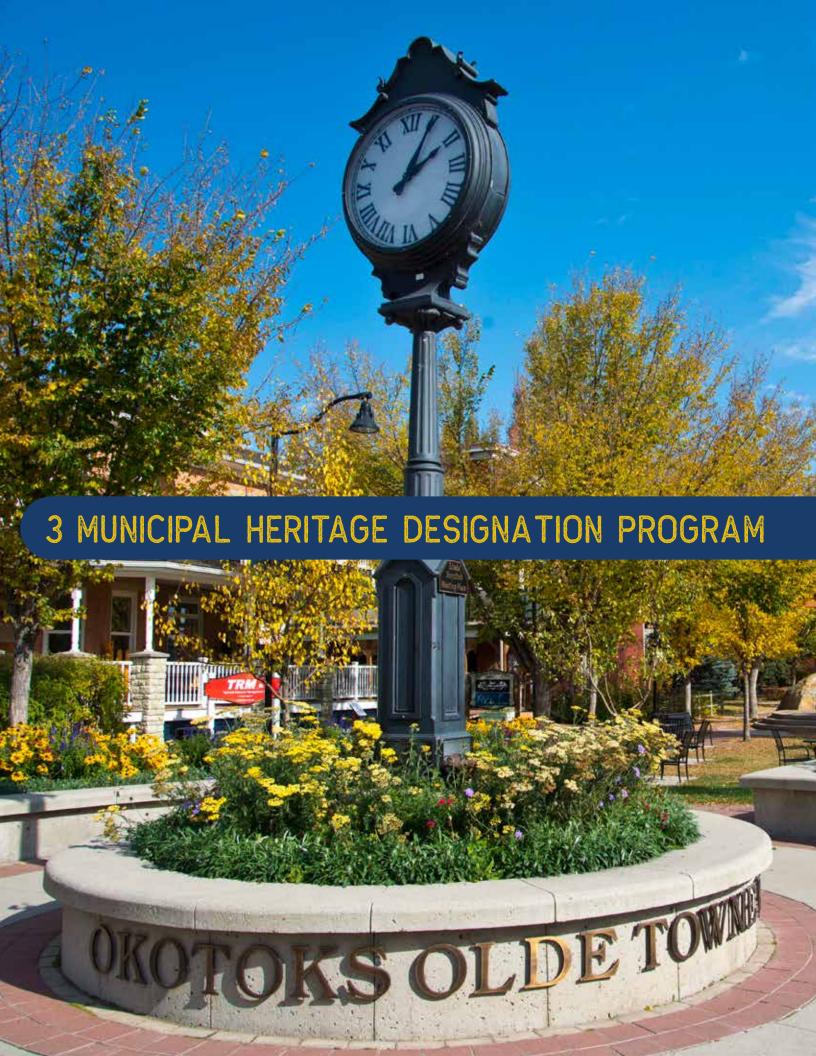
heritage resources, generate heritage awareness and education, and establish and facilitate heritage incentives and grant funding.

Downtown Urban Design Master Plan (2018)

The Downtown Urban Design Master Plan (UDMP) is a guiding document for the design of the built-form, streetscapes and public spaces with the intention of informing a future Area Redevelopment Plan and Land Use Bylaw review. The Downtown Urban Design Master Plan established a vision for "an image of contemporary sustainability along with its warm main streets that celebrate its vibrant heritage" (Draft UDMP, page 7). The Plan acknowledges, "Existing heritage buildings should be protected and celebrated as a part of the defining characteristics of the town" (Draft UDMP, page 7).

A guiding design principle for character and identity in the UDMP states "The Downtown represents Okotoks with an identity of sustainability and innovation while anchoring in the heritage values of its neighbourhoods" (Draft UDMP, page 7). This principle aligns with what was learned through the Municipal Heritage Designation Program preparation in regards to the role heritage buildings, mature trees and parks play in creating a unique "sense of place" and character in Okotoks. The UDMP identifies a form of historic district along Elma Street West with supporting sensitive infill guidelines and urban design features (e.g. a new sidewalk on north side of the street and heritage-style pedestrian lighting) to provide guidance on how best to integrate new development with heritage resources within this area of the downtown.

It is anticipated that the *Downtown Urban Design Master Plan* and the *Municipal Heritage Designation Program* will contribute to future planning work on the *Land Use Bylaw* and *Municipal Development Plan* to ensure that density, uses, sensitive design guidelines and historic areas are aligned. Overall, the *UDMP* supports the protection and celebration of heritage buildings and landscapes and the goal will be to ensure that the implementation of these plans remains aligned through *Land Use Bylaw* amendments such as with the Heritage Mixed-Use District and the proposed Elma Street West historic area among the other potential historic areas downtown.



3.1 VISION

Okotoks values the sense of community that comes from its history and heritage resources. Preserving the town's built, natural and cultural heritage will continue to bring people together to celebrate the small town, vibrant atmosphere that makes Okotoks special. To preserve the town's layering of history and unique character for future generations, the heritage resources will be identified, protected, managed and always celebrated.

3.2 GUIDING PRINCIPLES

In order to achieve the vision to protect and celebrate the town's heritage resources, the *Municipal Heritage Designation Program* has been designed as a foundation to conserve heritage resources, generate heritage awareness, and establish and facilitate conservation funding opportunities.

To best ensure protection of the town's heritage values and resources, the following heritage conservation guiding principles have been established:

- 1. Identify, protect and manage the heritage resources within the town;
- 2. Collaboratively work together to implement heritage policies, standards and actions:
- 3. Capitalize on adaptive re-use and the integration of heritage buildings with new development;
- 4. Promote heritage conservation values through awareness and education; and
- 5. Creatively seek financial, resource and partnerships to further heritage conservation.



3.3 POLICIES

The Municipal Development Plan, Sustainability Plan, A Cultural Master Plan for Arts and Heritage, and Downtown Urban Design Master Plan, among others, provide general heritage policies to support heritage values for the community. As the town continues to grow and provide social, cultural, economic and environmental policy directions for growth and sustainability, the need has been identified for specific heritage policies to ensure that the town's heritage is protected and integrated with new planning policies.

The following goals and policies will help provide guidance to protect heritage resources and support the integration of new development.

3.3.1 Goal: To Conserve and Implement Standards to Protect Heritage Resources

- Identify, protect and manage heritage resources within the town.
- Encourage the protection of heritage resources by sustained maintenance, productive use of a building and designation.
- Seek to achieve built and cultural landscape Municipal Historic Resources.
- Adopt the Standards and Guidelines for the Conservation of Historic Places in Canada as the basis to review interventions to Municipal Historic Resources and heritage resources on the Inventory.
- Establish a defined heritage overlay district in the *Municipal Development Plan* and *Land Use Bylaw* (including updating recently approved plans to include reference to the *MHDP* such as the *Downtown Urban Design Master Plan*, e.g. Olde Towne, Elma Street and McRae Street) to include, but is not limited to the following policies:
 - Prioritize the identification, evaluation and designation of heritage resources;
 - Encourage new developments to keep with the history of the area, reflecting traditional building design and site planning elements (e.g. materials, colours, scale, frontages and urban features);
 - Establish a consistent and unified image for the urban features of the streetscape;

- Ensure signage, lighting, wayfinding, banners, sidewalk features (benches, pavement) reinforce the historic qualities; and
- Amend, and possibly expand, the current Heritage Mixed-Use District, to address issues that may affect conserving and designating properties within the Heritage Overlay District.
- Encourage and support the maintenance and rehabilitation of potential future heritage resources that may not yet be evaluated.
- Achieve the adaptive re-use of vacant or underutilized heritage buildings through:
 - Land Use Bylaw amendments to parking requirements and land use regulations that may negate the ability to have a mix of uses in a building or a particular appropriate use;
 - Amendment to the Land Use Bylaw, Heritage Mixed-Use District, as needed; and
 - Create a streamlined approval process for property owners seeking adaptive re-use of a heritage building.
- When redeveloping heritage resources, work with property owners to problem-solve building code and safety upgrades necessary to achieve the adaptive reuse and rehabilitation of heritage buildings.
- Establish a demolition permit process within the Planning Services department to provide a review timeframe for any heritage resources on the Heritage Resource Inventory.
- Avoid de-designating historic buildings for the precedence it sets in opposition to the purpose of the *Municipal Heritage Designation Program*; the de-valuing of a designation; investment of time, resources and grants (if applicable) to achieve the designation; and, the potential impact to the integrity of the Historic Resource in the future.

3.3.2 Goal: Generate and Encourage Heritage Awareness and Education

- Increase public awareness about heritage resources and encourage public participation in the preservation and designation of these resources.
- Work with tourism and economic development to align synergies to promote heritage and its sustainability.
- Develop templates and education programs to support the heritage evaluation, designation and development processes for building owners.
- Establish and implement an education program that provides clarity of the designation bylaw process, intervention of designated buildings, and the preservation, rehabilitation and/or restoration of heritage resources per the Standards and Guidelines for the Conservation of Historic Places in Canada.
- Property owners should dialogue with Planning Services early in their process when considering façade and storefront alterations, additions and other design ideas for a heritage resource.
- Promote arts and culture within any heritage overlay districts.
- Continue to promote historic walking tours for locals and tourism.

3.3.3 Goal: Establish and Facilitate Heritage Conservation Incentive and Funding

- Establish a Town incentive program as a part of the Town's budget planning cycles (density transfer, tax abatement, etc.).
- Seek out information, education and financial opportunities with other heritage resource groups to support the identification, protection and management of heritage resources.
- Seek programing and financial synergies with tourism, economic development and sustainability to reinforce the benefits of heritage conservation.
- Promote heritage incentive opportunities including the value of designation to access incentives and grant funding with Alberta Historical Resources Foundation, among others.



3.4 FRAMEWORK

The Municipal Heritage Designation Program framework provides the processes and the tools needed to identify, designate, and further manage Okotoks' heritage resources. The Province of Alberta has established a base framework for managing heritage resources, which includes the Standards and Guidelines for the Conservation of Historic Places in Canada to conserve heritage resources and for heritage incentives and funding such as grants. The Municipal Heritage Designation Program is consistent with provincial legislation while further adopts policy that is contextual to the Town of Okotoks civic goals, bylaws, policies, processes, and funding mechanisms used to achieve and sustain the Town's vision.

The framework provides the process and tools needed to identify and designate heritage resources and the decision-making roles and responsibilities to achieve success by working together to protect and manage Okotoks' heritage resources. The framework defines a sequence of actions that will provide an ease of understanding, planning guidance and implementation for use by Town Council, administration, landowners and the community. See *Appendix C: Inventory, Designation and Intervention Processes* for the detailed process steps to achieve these aspects.



3.4.1 Identifying and Designating Historic Resources

The framework for identifying and designating heritage resources within the Town of Okotoks includes the following sequence of actions to be initially implemented and then become on-going implementation of the Program. See Figure 7: Identify, Designate and Intervene Framework Diagram.

Identification

- Establish a Context Paper/Thematic Framework.
- · Establish a Place of Interest list.
- Establish the Heritage Resource Inventory.

Designation

• Establish the Municipal Historic Resource process and bylaws.

Intervention

- Establish an intervention and maintenance process and conservation plans for Municipal Historic Resources.
- · Establish a demolition process.
- Provide public awareness and education programs for landowners on the value of identification, designation and intervention processes.
- Educate administration and landowners on the Standards and Guidelines for the Conservation of Historic Places in Canada.
- Establish and promote local incentives and grant funding opportunities.
- · Generate heritage awareness and support.

The sequence of each of these actions will at some level be achieved immediately by way of the established processes and tools prepared as a part of the *Municipal Heritage Designation Program*. At the same time, these actions will be the on-going heritage management tool to identify, protect and manage heritage resources, including an important goal to generate heritage awareness, education and projects.

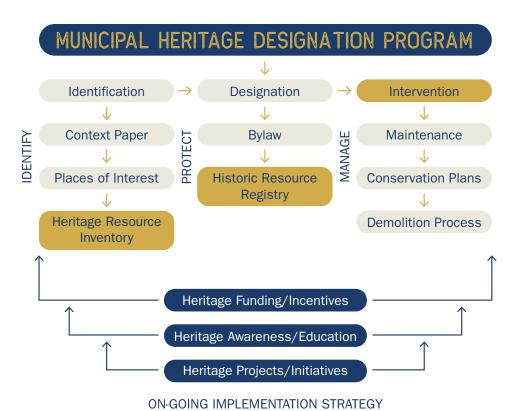


Figure 3: Identify, Designate and Intervene Framework Diagram

3.4.2 Decision-Making & Roles

A clear and defined decision-making process is necessary to ensure that the vision and goals of the *Municipal Heritage Designation Program* are achieved in an efficient and sustaining manner. Working within the Town of Okotoks organizational structure, identified roles for Council, administration, and collaborative relationships within the community will all contribute to the decision-making process. *Figure 4: Decision-Making Process Diagram.*



Figure 4: Decision-making Process Diagram

Council

- Authorizes Culture and Heritage and Planning Services to establish, enact and maintain a Municipal Heritage Designation Program action plan.
- · Adopts the Municipal Heritage Designation Program.
- Approves the designation of properties in accordance with the *Alberta Historic Resources Act (RSA 2000)*.
- Supports the actions within the *Municipal Heritage* Designation Program with an established annual ongoing budget.

Municipal Planning Commission

 Recommends and/or approves development or demolition applications to Council.

Administration Roles

Community Services (Culture and Heritage - Museum and Archives)

• Administers the *Municipal Heritage Designation Program* and action items.

- Submits the on-line Registration of Municipal Historic Resources for the Alberta Register of Historic Places.
- Prepares and administers cost-sharing grant applications.
- Manages projects requiring heritage consultant resources.
- Oversees and seeks input from the public on matters that relate to the Heritage Resource Inventory, heritage resource designations and further taking the input through to Strategic Leadership Team.

Development Services (Planning Services, Permit Inspection Assessment – Safety Codes)

- Prepares Municipal Historic Resource Bylaws with the Manager of Legislative Services.
- Ensures that building plans, pertinent to Municipal Historic Resources, satisfy conditions set out in the Municipal Heritage Designation Program including Municipal Historic Resource bylaws, maintenance agreements and working with landowners on intervention to a Municipal Historic Resource per the Standards and Guidelines for the Conservation of Historic Places in Canada.
- Circulates for comment all development or demolition applications for properties listed on the Heritage Resource Inventory and Historic Resource Registry to Culture and Heritage and Planning Services Departments.
- Reviews, approves, or recommends to the Municipal Planning Commission development or demolition applications following review of the Heritage Resource Inventory and Historic Resources Registry.
- Maintains the Heritage Resource Inventory and Historic Resources Registry on the Town's permit application system.
- Provides advice to Culture and Heritage and the public on matters that relate to heritage resource land use planning and conservation.

Depending on the nature of the heritage designation or conservation item, other Town departments should be engaged accordingly. These departments will include, but are not limited to, the legal department, economic development, parks, and transportation.

Public Participation and Collaborative Partnerships

Managing the towns' heritage resources is a community-wide responsibility that will rely on the support and contributions of public participation, collaborative relationships and partnerships to enhance heritage awareness and the implementation of the Municipal Heritage Designation Program. In return, this will build a resource base that extends beyond the formal day-to-day decision-making responsibilities to ensure heritage resources are protected. Although not a formal and defined decision making role in the process, it is important that a cross section of community interests be engaged to provide support and resources to help with heritage initiatives such as specific enhancement projects, events and on-going heritage awareness and advocacy. Such collaborations should include the Okotoks and District Historical Society, business organizations, service clubs, arts and culture groups, and interested volunteers, and among the broader community. To achieve public participation and the building of collaborative partnerships, the Municipal Heritage Designation Program will incorporate the Town of Okotoks Public Participation Strategy and Toolkit to engage the community in the implementation of the Program.



3.5 ACTION PLAN

The purpose of the *Municipal Heritage Designation Program* is to protect heritage resources through formal designation. For this reason it is important that specific actions be outlined to achieve Municipal Historic Resource designations and build momentum for the *Program* with landowners and the community to ensure on-going and successful results. The following identifies actions and a timeframe for them to be achieved.

Immediate (First Year)

- · Prepare a Context Paper/Thematic Framework.
- Prepare a Places of Interest list.
- Establish a Council funding mechanism (Budget Item) for the Heritage Resource Inventory, designation and plaque program.
- Assess the need for additional human resources to implement and manage the processes.
- Implement a Pilot Project to achieve the initial Municipal Historic Resources to include, but is not limited to the process, plaque design, and a plaque unveiling celebration.
- Prepare 15 building evaluations for the Heritage Resource Inventory.
- Prepare a Heritage Resource Inventory and flag these on the Town's permitting process.

Medium (Year 2-5)

- Prepare a heritage overlay district to be included in the *Municipal Development Plan* and/or *Land Use Bylaw*.
- Amend the Land Use Bylaw Heritage Mixed-Use District.
- Prepare and implement a local incentive program (density transfer, tax abatement or other).
- Prepare and implement a heritage awareness education program for landowners.
- Seek heritage projects and initiatives in addition to implementing the designation process.

Long-Term (Year 5-10)

- · Update the Places of Interest list.
- Build the Heritage Resource Inventory (an annual building evaluations program).
- · Build the Historic Resource Registry.
- · Explore municipal incentive program opportunities.

3.6 IMPLEMENTATION STRATEGY

Upon having the *Municipal Heritage Designation Program* adopted, the priority will be to simultaneously achieve the immediate action items in the first year. Therefore, the following short-term implementation strategy has been prepared.

- 1. A Pilot Project to designate a heritage building and/ or cultural landscape, including a plaque unveiling celebration by Q2 2019.
- 2. Prepare a Context Paper and 15 building evaluations by 01 2019.
- 3. Establish annual Council funding for the *MHDP* action items by Q4 2019.
- Align and amend, if need be, any immediate policy and regulation alignment identified in the Pilot Project of the Municipal Heritage Designation Program, e.g. Municipal Development Plan and Land Use Bylaw by Q4 2019.
- 5. Establish an initial communications and public education program for the *Municipal Heritage Designation Program* by Q2 2019.

A significant part of the implementation strategy will be the Pilot Project, as it will lay a foundation to stimulate the many benefits of protecting Okotoks heritage resources and further serve as a catalyst for other heritage initiatives. The Pilot Project will test and evaluate the designation process, tools, time, and cost including providing an opportunity to align, discuss and amend, if need be, any challenges that have been identified through the process (e.g. *Land Use Bylaw*, legal or economic). A significant component of the Pilot Project will be to celebrate it with the community to generate interest in local history, the built heritage and the *Municipal Heritage Designation Program*.

3.6.1 Pilot Project

Through the public consultation process, the Town, private landowners and the community expressed interest in designating a building(s) and cultural landscape this year. Upon adoption of the *Municipal Heritage Designation Program*, the following three heritage resources will be explored for discussion, negotiation and a Municipal Historic Resource bylaw prepared.

- 1. Town-owned heritage building
- 2. Town-owned cultural landscape
- 3. Privately-owned heritage building

The Pilot Project will include, but is not limited to, the following considerations:

- Evaluate the heritage resources (prepare a Statement of Significance and Integrity);
- Discuss (including intervention considerations once designated) and negotiate with the landowner(s) the scope of the Municipal Historic Resource bylaw and any associated agreements;
- Test the templates and tools within the *Municipal Heritage Designation Program*;
- Identify any associated issues such as Land Use Bylaw challenges and potential amendments;
- Educate and connect landowners on incentive opportunities and other resources in regards to the conservation of the Municipal Historic Resource;
- Discuss with the Town what a plaque program might incorporate and cost;
- Present the Municipal Historic Resource designations to Town Council for consideration and approval; and
- Plan a plaque unveiling celebration for the community to celebrate the first municipally designated buildings as a result of implementation of the *Municipal Heritage Designation Program*.





FOOTNOTES

- ¹ Allan Boss, "Town looks to identify heritage buildings", cited in Don Patterson, *Okotoks Western Wheel*, July 26, 2017.
- ² Stephanie Meeks with Kevin C. Murphy, *The Past and Future City* (Washington: Island Press, 2016), 18.
- ³ Stephanie Meeks with Kevin C. Murphy, *The Past and Future City* (Washington: Island Press, 2016), 44.
- ⁴ Stephanie Meeks with Kevin C. Murphy, *The Past and Future City* (Washington: Island Press, 2016), 43.
- ⁵ Karen Peters, "Walking tours delve into town's unique history", cited in Tammy Rollie, *Okotoks Western Wheel*, July 1, 2015.
- ⁶ The Canadian Register [Online]. Available: http://www.historicplaces.ca/en/pages/about-apropos.aspx
- ⁷ Alberta Municipal Affairs, Municipal Government Act Review [Online]. Available: http://www. municipalaffairs.alberta.ca/mga_review



APPENDICES

APPENDIX A: GLOSSARY

APPENDIX B: INCENTIVES & FUNDING

APPENDIX C: INVENTORY, DESIGNATION AND INTERVENTION PROCESSES

APPENDIX D: TEMPLATE FORMS & TOOLS

APPENDIX E: RESOURCES

APPENDIX A: GLOSSARY

GLOSSARY

Alberta Historical Resources Act – R.S.A. 2000: The *Historical Resources Act* provides the ability to identify, protect and manage historic resources in Alberta. It is a municipality's legislative means by which to legally protect historic buildings and sites. It includes and follows the *Standards and Guidelines for the Conservation of Historic Places in Canada*, and can be found at the Queen's Printer, Alberta Government.

Alberta Register of Historic Places: A listing of Provincial and Municipal Historic Resources in Alberta that have been designated under the *Historical Resources Act*.

Canadian Register of Historic Places: A listing of recognized historic places that have local, provincial, territorial and national significance.

Character-defining elements: The materials, forms, location, spatial configuration, uses and cultural associations, or meanings that contribute to the heritage value of an historic place, which must be retained in order to preserve its heritage value. ¹

Conservation: All actions or processes that are aimed at safeguarding the character defining elements of a heritage and cultural resource for the future. Its purpose may involve study, preservation, rehabilitation, restoration or a combination of these actions or processes. ¹

Context Paper: A paper that describes the historical themes or trends relating to resources significance that creates a picture of the resources place in history. ²

Cultural Landscape: Is any geographical area that has been modified or influenced by human activity, including natural landscapes used and/or altered by native peoples; designed landscapes which derive value from their aesthetic qualities; vernacular landscapes associated with the region's demographic, social and economic development; heritage landscapes, (including heritage routes and trails), which are valued primarily for their historical associations; and such specific landscape types as cemeteries, canals and fortification earthworks.³

Demolition: In respect of a heritage resource, includes the following: the destruction, removal, dismantling of a resource or the significant and irreversible alteration of a resource.

Designation: The protection of an historic resource by bylaw under the *Alberta Historical Resources Act*. ²

Heritage Resource(s): Refers to a structure, site, object, cultural or natural feature, in or above the ground, or related cluster of structures, sites, objects, cultural or natural features that are deemed to be significant by virtue of their design, construction, association with an heritage event, trend, person, place or social movement, or by virtue of the importance of the research or knowledge content which the resources may possess. ³

Heritage Resource Inventory: Is a list of properties and sites with qualities or characteristics that are recognized or significant and contribute to the Town's heritage. (Placement on the Inventory entails a thorough evaluation of the building or site along with any other photographs or documentation, and archival research. ³

Heritage Structure: Refers to any building, work, or structure or the remains of same, on or above the surface of the earth, forty (40) years of age or older, that is deemed to be of historical or architectural interest by virtue of its design, construction, architect/designer or builder, its association with a person, place, event, or social movement also deemed to be of historical or heritage architectural interest. The environmental and contextual significance of a heritage property is also noted. ³

Heritage Value: The aesthetic, historic, scientific, cultural, social or spiritual importance or significance for past, present or future generations. The heritage value of an historic place is embodied in its character-defining materials, forms, location, spatial configurations, uses and cultural associations or meanings. ¹

HeRMIS: Acronym for Alberta Culture and Tourism's Heritage Resources Management Information System. This information system provides a central location for all of Alberta's heritage and cultural collections including Alberta's Register of Historic Places where future Okotoks Municipal Historic Resources will be placed. It also includes a list of Alberta's Heritage Survey Program. Surveyed building information may include architectural characteristics, history, designation status, location and photographs. Okotoks had 262 buildings surveyed back in the 1980's.

Historical Integrity: Conveys the sense of remaining true to the original and is the ability of a property to clearly and visibly convey its significance with reference to location, design, setting, materials, workmanship, sense of place and:

- Association with events that have made significant contribution to the broad patterns of our history; or
- Embodiment of a type, period, or method of construction, or representation of the work of a master, or possession of high artistic values, or representation of a significant and distinguishable entity whose individual components may lack individual distinction; or
- Representation of information important in Canada's prehistory or history.

Historic Place: A structure, building, group of buildings, district, landscape, archaeological site or other place in Canada that has been formally recognized for its heritage value. ¹

Historic Resource Registry: Is a list of properties and sites that have been designated under section 20 (1) in the *Historic Resources Act* as a Historic Resource. All Municipal, Provincial and Federal designated historic resources within Okotoks will be listed on the local Historic Resource Registry.

Intervention: Any action, other than demolition or destruction, that results in a physical change to an element of a historic place. $^{\rm 1}$

Maintenance: Routine, cyclical, non-destructive actions necessary to slow the deterioration of an historic place. It entails periodic inspection; routine, cyclical, non-destructive cleaning; minor repair and refinishing operations; replacement of damaged or deteriorated materials that are impractical to save. ¹

Minimal intervention: The approach that allows functional goals to be met with the least physical intervention. ¹

Municipal Historic Resource: A historic resource that has been designated municipally under section 26 (1) in the *Historic Resources Act* as a Municipal Historic Resource.

Per section 26 (6), Notwithstanding any other Act, no person shall

- (a) destroy, disturb, alter, restore or repair an historic resource that has been designated under this section, or
- (b) remove any historic object from an historic resource that has been designated under this section.

without the written approval of the council or a person appointed by the council for the purpose.

Places of Interest List (POIL): A prioritized list of identified sites that have potential heritage value and have not yet been evaluated.

Provincial Historic Resource: A historic resource that has been designated under section 20 (1) in the Historic Resources Act as a Provincial Historic Resource.

Per section 20(9), Notwithstanding any other Act, no person shall:

- (a) destroy, disturb, alter, restore or repair any historic resource or land that has been designated under this section, or
- (b) remove an historic object from an historic resource that has been designated under this section

without the written approval of the Minister.

Preservation: The action or process of protecting, maintaining, and/or stabilizing the existing materials, form, and integrity of a historic place or of an individual component, while protecting its heritage value. ¹

Registered Historic Resource: A historic resource that has been designated under section 19 (1) in the *Historic Resources Act* as a Registered Historic Resource.

Per section 19(5), Notwithstanding any other Act, no person shall

(a) destroy, disturb, alter, restore or repair any historic resource or land that has been designated under this section, or

(b) remove an historic object from an historic resource that has been designated under this section

until the expiration of 90 days from the date that notice of the person's proposed action is served on the Minister, unless the Minister sooner consents to the proposed action.

This designation only requires notification rather than actual approval from the Minister therefore, is deemed to not be protective and is no longer used as a designation by the Province.

Rehabilitation: The action or process of making possible a continuing or compatible contemporary use of a historic place or an individual component, while protecting its heritage value. ¹

Restoration: The action or process of accurately revealing, recovering or representing the state of a historic place or of an individual component, as it appeared at a particular period in its history, while protecting its heritage value. ¹

Standards and Guidelines for the Conservation of Historic Places in Canada: A Federal, Provincial and Territorial document collaboration. The document has "been adopted by Federal, Provincial, territorial and municipal authorities as a benchmark for assessing proposed conservation intervention on the character-defining elements of a historic place". It is intended to provide guidance to municipalities when reviewing and assessing conservation projects. ¹

Statement of Integrity: A statement that describes the integrity of a heritage resource, its wholeness and completeness, both of material or "fabric" as well as historical character. A Statement of Integrity is prepared after the Statement of Significance has been established.

Statement of Significance (SoS): A statement that identifies the description, heritage value, and character-defining elements of an historic place. A Statement of Significance is required in order for an historic place to be listed on the *Canadian Register of Historic Places, Alberta Historic Places Registry* and a *Municipal Historic Resources Registry*. ¹

FOOTNOTES

- ¹ Canada's Historic Places, Standards and Guidelines for the Conservation of Historic Places in Canada (Ottawa: Her Majesty the Queen in Right of Canada, 2010), 253-255.
- ² Alberta Culture and Tourism, "Evaluating Historic Places" [Online]. Available: https://www.alberta.ca/ municipal-heritage.aspx
- ³ City of Medicine Hat, "Heritage Resource Policy" [Online]. Available: https://www.medicinehat.ca/ home/showdocument?id=1469.

All other Glossary terms and definitions have been written to define the term for ease of use and understanding by the Town of Okotoks and the community as the *Municipal Heritage Designation Program* is implemented.

APPENDIX	B:	INCENTIVES	&	FUNDING

INCENTIVES & FUNDING

Incentive programs may be monetary or non-monetary and are provided to encourage and support private investment in the conservation of historic places. Incentives help to offset additional costs associated with specialized materials and skills required to conserve historic resources. It is important that the investment of public sector monetary and non-monetary incentives in privately-owned heritage properties be included as implementation of the Municipal Heritage Designation Program. Heritage conservation is a collaborative undertaking and such incentives reflect the public interest in and commitment to the protection and stewardship of Okotoks' historic resources

Incentives for Okotoks (through the Province) currently include:

- Cost-shared conservation grants to Municipal Historic Resources through the Alberta Historical Resources Foundation; and
- Conservation advice to heritage property owners from Alberta Culture and Tourism's Historic Resources Management Branch.

Currently the Town of Okotoks does not have monetary incentives in place for the identification, designation and intervention to heritage resources. Some non-monetary regulatory incentives are evident in regulations in the Land Use Bylaw, Heritage Mixed Use District. To further support the Municipal Heritage Designation Program, the action plan includes exploring opportunities for municipal monetary and non-monetary incentive opportunities such as, but not limited to:

- Property tax abatement (e.g. deferrals and exemptions) to mitigate increases in property taxes that might result from conservation;
- · Density transfers and bonuses;
- Regulatory relaxations and variances to meet land use regulations;
- Administrative incentives such as expediting heritage inventory and designated resource development applications and waiving development and building permit fees for designated properties; and
- Commemoration and recognition through plaque programs and the visibility that comes from such recognition.

APPENDIX C: INVENTORY, DESIGNATION AND INTERVENTION PROCESSES

MUNICIPAL HISTORIC RESOURCE: INVENTORY PROCESS

MUNICIPAL RESPONSIBILITIES

● →	Annually determine from the Places of Interest List which potential heritage resources should be evaluated based on the Context Paper/Thematic Framework.		↓
$\phi \rightarrow$	Number of building evaluations (Statements of Significance) determined by annual budget	·	Culture and Heritage: Manages project based on annual budget and on behalf of Admin/Town Council
lack	Consultants selected and provided buildings list to evaluate		Culture and Heritage: Prepares RFP, works with Purchasing, coordinates selection committee and administration
\rightarrow	Culture and Heritage Department project manages the Heritage Resources Inventory Project on behalf of Administration	\longrightarrow	Culture and Heritage: Project Manager for Heritage Consultant as well as coordinates with Province, as needed
ightharpoons	Consultant works with Culture and Heritage (including the community) and landowners to gather research		Culture and Heritage and Planning Services: Provides heritage planning expertise and guidance, coordinates meetings between consultants and community
$\bullet \rightarrow$	Public Open Houses on heritage resources being evaluated	\longrightarrow	Culture and Heritage: Coordinates content with Consultant, coordinates venue and open house advertising with Communications
\rightarrow	Culture and Heritage finalizes Statements of Significance with Consultant		1
\rightarrow	Project completed for year or determined timeframe	\longrightarrow	Final Review of Heritage Resource Inventory, prepare to present to Council
→	Heritage Resources Inventory Project presented to Council by Culture and Heritage & Consultant		

MUNICIPAL HISTORIC RESOURCE: DESIGNATION PROCESS

MUNICIPAL RESPONSIBILITIES



MUNICIPAL HISTORIC RESOURCE: INTERVENTION PROCESS

MUNICIPAL RESPONSIBILITIES



ADDENIDIY	D.	TEMPLATE	EODMS	2.	TOOLS
APPENDIA	U:	IEMPLAIE	FURMS	OX.	TUULS



Copyright



INVENTORY EVALUATION SUMMARY

HISTORIC PLACE DESCRIPTION

RESOURCE NAME			
ALTERNATE NAMES			
ADDRESS			
LEGAL DESCR	IPTION		
GEOGRAPHIC	LOCATION		
CONSTRUCTIO	N YEAR		
ARCHITECT/DE	SIGNER		
BUILDER/CONT	TRACTOR		
ORIGINAL OWN	NER		
NEIGHBOURHO	OOD		
ORIGINAL USE			
CURRENT USE			
CONTEXT PHOTO	Insert Photo here		
Description			
Date			
Copyright			
CURRENT PHOTO	Insert Photo here		
Description			
Date			
Copyright	Copyright		
HISTORIC Insert Photo here		o here	
Description			
Date			
		·	

May 01, 2018 Page 1 of 7 INVENTORY EVALUATION SUMMARY





HISTORIC PLACE SIGNIFICANCE SUMMARY

SIGNIFICANCE	This site is significant because		
SUMMARY	Summary statement to reflect chosen significance (value) below here (xxx Value) and Summary statement to reflect chosen significance (value) below here		
	(xxx Value)		
SIGNIFICANCE CRITERIA (VALUES)	Activity/Theme/Cultural Practice/Event		
ORTERIA (VALUES)	☐ Institution/Person		
	☐ Design/Style/Construction		
	☐ Information Potential		
	☐ Landmark/Symbolic Value		
ERA OF DEVELOPMENT	Development Era (Note: The range of years and development era theme will be added to the template upon completion for a historic context paper)		
DATES	As well as the year of completion other significant dates are:		
INTEGRITY	Does the resource retain sufficient integrity to convey significance? Yes No		
DESIGNATION	Federal Yes No Provincial Yes No Registered Yes No Municipal Yes No		

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STATEMENT OF SIGNIFICANCE

DESCRIPTION (Max. 2,000 characters)	
HERITAGE VALUES (Max. 4,000 characters)	
CHARACTER- DEFINING ELEMENTS (Max. 4,000 characters)	Character-defining elements include, but are not limited to:
EVALUATION AUTHOR, CONTACT	
COMMUNITY SERVICES APPROVAL DATE	
TOWN OF OKOTOKS APPROVAL DATE	

ADDITIONAL PHOTOS	Insert Photo here	
Description	FRONT ELEVATION (Note: If a cultural landscape or artifact then photo titles will vary)	
Date		
Copyright		
ADDITIONAL PHOTOS	Insert Photo here	
Description	REAR ELEVATION	
Date		
Copyright		
ADDITIONAL PHOTOS	Insert Photo here	
Description	SIDE ELEVATION	

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Date	
Copyright	
ADDITIONAL PHOTOS	Insert Photo here
Description	SIDE ELEVATION
Date	
Copyright	
ADDITIONAL PHOTOS	Insert Photo here
Description	CHARACTER-DEFINING ELEMENT
Date	
Copyright	
ADDITIONAL PHOTOS	Insert Photo here
Description	CHARACTER-DEFINING ELEMENT
Date	
Copyright	
ADDITIONAL PHOTOS	Insert Photo here
Description	CHARACTER-DEFINING ELEMENT
Date	
Copyright	
ADDITIONAL PHOTOS	Insert Photo here
Description	CHARACTER-DEFINING ELEMENT
Date	
Copyright	
ADDITIONAL	Insert Photo here

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PHOTOS	
Description CHARACTER-DEFINING ELEMENT	
Date	
Copyright	

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STATEMENT OF INTEGRITY

NA	STORIC PLACE ME AND DRESS		
	ONIFICANCE MMARY	Use Significance Summary from Historic Place Significance section here	
	RIOD OF GNIFICANCE		
	RONOLOGY OF TERATIONS		
	PECTS OF EGRITY	Does the resource maintain sufficient overall integrity to convey its significance? Yes \(\subseteq \text{No} \subseteq \)	
1.	LOCATION	Yes □ No □ N/A □	
	Location is the place activity or event occ	e where an historic resource was constructed or the site where an historic curred.	
	Statement of Integri	ty:	
2.	DESIGN	Yes □ No □ N/A □	
	Design is the combi resource.	nation of elements that create the form, plan, space, structure and style of a	
	Statement of Integri	ty:	
3.	ENVIRONMENT	Yes □ No □ N/A □	
		physical setting of an historic resource. Whereas location refers to a specific refers to the character of the place in which a resource played its historic role.	
	Statement of Integri	ty:	
4.	MATERIALS	Yes □ No □ N/A □	
	Materials are the physical elements that were combined or deposited during a particular period(s) or time frame and in a particular pattern or configuration to form an historic resource.		
	Statement of Integri	ty:	

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5.	WORKMANSHIP	Yes 🗌	No 🗌	N/A 🗌	
		s important l		afts of a particular culture or people during any t can provide information about technological	
6.	FEELING	Yes 🗌	No 🗌	N/A 🗆	
	The feeling of permanency historical feel.	and confide	ence at the	e time of construction continues to retain a	
	Statement of Integrity:				
7.	ASSOCIATION	Yes 🗌	No 🗌	N/A 🗌	
	Association is a <i>direct link</i> or event, or an institution o		historic res	esource and a significant historical theme, activity	у
	Statement of Integrity:				

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Draft Application for Municipal Historic Resource Designation

1. Common Name of t	he Resource (e.g., "The Smith Residence")			
2. Historic Name of the	Historic Name of the Resource (if known)			
3. Civic Address / Leg	al Description of the Resource			
4. Construction Date	of Resource and Architect (if known)			
5. Name and contact i property	nformation for the registered owner(s) of the evaluated			
PHOTOGRAPHS				
CURRENT				
HISTORICAL				
STATEMENT OF SIGNI	FICANCE			
DESCRIPTION				
HERITAGE VALUES				
CHARACTER- DEFINING ELEMENTS				

CURRENT AND FUTURE RESOURCE INFORMATION

CURRENT USE	
FUTURE USE	
STATEMENT OF INTEGRITY OR LIST ANY ADDITIONS/RENOVATIONS TO THE RESOURCE AND DATES	
FUTURE PLANNED RENOVATIONS, ADDITIONS OR ALTERATIONS TO THE RESOURCE	
As provided, I hereby submit	this application for Municipal Historic Resource Designation.
Signature of Registered Ow	vner(s)
Date	
Signature of Municipal Con	tact
Position	
Date	

Municipal contact information

Town of Okotoks
5 Elizabeth Street
Okotoks, AB T1S 1K1
c/o [Name of Contact and Role accepting the Application Form]
[Phone Number of Contact]
[Email of Contact]

A BYLAW OF THE TOWN OF OKOTOKS to designate property as a Municipal Historic Resource.

WHEREAS the Historical Resources Act, R.S.A. 2000 c. H-9, as amended (the 'Act') permits the Council of the Town of Okotoks to designate as a municipal historic resource real property, including land and buildings, features and structures upon the land, whose preservation the Council considers to be in the public interest because of their heritage value;

AND WHEREAS the owner of this proposed municipal historic resource has been given sixty (60) days written notice of the Council's intention to consider passing this Bylaw in accordance with the Act:

NOW THEREFORE THE MUNICIPAL CORPORATION OF THE TOWN OF OKOTOKS, IN COUNCIL ASSEMBLED, ENACTS AS FOLLOWS:

SHORT TITLE

1. This Bylaw may be cited as the "[Name of Historic Resource] of Okotoks Municipal Historic Resource Designation Bylaw".

BUILDINGS AND LAND DESIGNATED AS A MUNICIPAL HISTORIC RESOURCE

2. The property, including all land, buildings, features and structures, municipally described as [Address of Historic Resource], in the Town of Okotoks in the Province of Alberta and legally described as:

PLAN BLOCK LOT EXCEPTING THEREOUT ALL MINES AND MINERALS [Plan, Block, Lot] is collectively known as the "the Historic Property".

- 3. The location of the Historic Property is visually represented in Schedule 'A', entitled 'Map Showing the Historic Property '.
- 4. The heritage value of the Historic Property is hereby described in the attached Schedule 'B', entitled the 'Historic Property Statement of Significance'.
- 5. The specific elements of the Historic Property considered to possess heritage value are specifically described and identified in the attached Schedule 'C', entitled, 'The Regulated Portions of the Historic Property' and are hereby known as the "Regulated Portions".
- 6. The Historic Property is hereby designated a Municipal Historic Resource as defined in the Act. Council may, in its sole discretion, revoke this designation at any time by repealing this Bylaw in accordance with the Act.
- 7. Council may, by resolution, appoint a person to administer the matters described in section 26 (6) of the Act.

REPAIRS AND REHABILITATION

8. No person shall destroy, disturb, alter, restore or repair or otherwise permanently affect the Regulated Portions unless that person has obtained the prior written approval of Council or the person appointed pursuant to section 7 of this Bylaw.

- 9. When considering any application under section 8 of this Bylaw Council, or the person appointed pursuant to section 7 of this Bylaw, shall take into consideration the terms of the Canada's Historic Places 2010 publication 'Standards and Guidelines for the Conservation of Historic Places in Canada' (as replaced or amended from time to time) as referenced and summarized in the attached Schedule 'D' entitled 'Standards and Guidelines for the Conservation of Historic Places in Canada'.
- 10. All portions of the Historic Property which are not specifically described or identified as Regulated Portions (the "Non-Regulated Portions") may be disturbed, altered, restored, repaired, or otherwise permanently affected provided that such action does not impact the Regulated Portions and that all permits or approvals required to do such work have been obtained from the authority having jurisdiction.
- 11. Any portion of the Historic Property that encroaches onto any adjacent land, other than land owned by the Town of Okotoks, shall be considered Non-Regulated Portions. Any portion of any building that encroaches onto the Historic Property shall not be affected by this Bylaw.

COMPENSATION

12. No compensation pursuant to the Act or otherwise is owing to the owner of the Historic Property.

SCHEDULES

13. Schedules "A", "B", "C" and "D" attached to this Bylaw form a part of it.

INTERPRETATION

14. The headings in this Bylaw are for ease of reference only and are not intended to be taken into account in the construction or interpretation of this Bylaw.

COMING INTO FORCE

15. This Bylaw comes into force at the beginning of the day it is passed.

READ A FIRST TIME in open Council on
READ A SECOND TIME in open Council on
READ A THIRD TIME in open Council on
SIGNED AND PASSED on
MAYOR – [Name]
SCHEDULE 'A'
MAP SHOWING [Name of Historic Resource]
SCHEDULE 'B'
THE HISTORIC PROPERTY STATEMENT OF SIGNIFICANCE

SCHEDULE 'C'

THE REGULATED PORTIONS OF THE HISTORIC PROPERTY

SCHEDULE 'D'

STANDARDS AND GUIDELINES FOR THE CONSERVATION OF HISTORIC PLACES





Draft Approval for Intervention to a Municipal Historic Resource

1. (Common Name of the Municipal Historic Resource (e.g., "The Smith Residence")
2. (Civic Address / Legal Description of the Municipal Historic Resource
	lame and contact information for the registered owner(s) of the evaluated perty
4. N	Municipal Bylaw designating the Municipal Historic Resource
	What kind of interventions / changes are being proposed to this Municipal toric Resource? (Please provide a brief summary of the proposed work)
	Why are these specific interventions / changes are being proposed to this nicipal Historic Resource? (Please check all that apply)
	To conserve the heritage value of the property To improve the functionality of the property To enable the adaptive re-use of the property Other
(Ple	ease provide a brief summary of the rationale for the proposed work)
	What conservation documents or other resources have been reviewed in cluating the proposed work? (Please check all that apply) Municipal Heritage Designation Program Statement of Significance Statement of Integrity Standards and Guidelines for the Conservation of Historic Places in Canada Designation bylaw

8. Municipal governments are responsible for safeguarding the heritage values of these properties. What "heritage values" and/or "character-defining elements" of the Municipal Historic Resource (described in the Statement of Significance), if any, would be impacted by the proposed work? How, specifically, would they be affected?

Heritage Values

☐ Maintenance agreement☐ Proposed work plan / drawings

☐ Other (please describe)

Character-Defining Elements

Potential Impacts

9. Applying the Standards and Guidelines for the Conservation of Historic Places in Canada helps to ensure that sound conservation principles are considered when reviewing potential changes to historic places. Please check whether the proposed work meets each standard.

General Standards for all projects - "Preservation"

1.	Conserve the <i>heritage value</i> of a historic place. Do not remove, replace, or substantially alter its intact or repairable <i>character-defining elements</i> . Do not move a part of a <i>historic place</i> if its current location is a <i>character-defining element</i> .				
	□ Yes □ No				
2.	Conserve changes to a <i>historic place</i> which, over time, have become <i>charact defining elements</i> in their own right.	ter-			
	□ Yes □ No				
3.	Conserve heritage value by adopting an approach calling for minimal intervention.				
	□ Yes □ No				
4.	Recognize each <i>historic place</i> as a physical record of its time, place and use not create a false sense of historical development by adding elements from o <i>historic places</i> or other properties or by combining features of the same properties never coexisted.	ther			
	□ Yes □ No				
5.	Find a use for a <i>historic place</i> that requires minimal or no change to its <i>chara defining elements</i> .	cter-			
	□ Yes □ No				
6.	Protect and, if necessary, stabilize a <i>historic place</i> until any subsequent <i>intervention</i> is under-taken. Protect and preserve archaeological resources in place. Where there is potential for disturbance of archaeological resources, to mitigation measures to limit damage and loss of information.				
	□ Yes □ No				

7.	 Evaluate the existing condition of character-defining elements to determine the appropriate intervention needed. Use the gentlest means possible for any intervention. Respect heritage value when undertaking an intervention. 					
		Yes		No		
8.	<i>defin</i> meth	ning eleme nods. Rep	ents lace	r-defining elements on an ongoing basis. Repair character- by reinforcing their materials using recognized conservation in kind any extensively deteriorated or missing parts of elements, where there are surviving prototypes.		
		Yes		No		
9.	and	visually co	ompa	tion needed to preserve character-defining elements physically atible with the historic place, and identifiable upon close ent any intervention for future reference.		
		Yes		No		
Addit	ional	Standard	s Re	elating to " <u>Rehabilitation"</u>		
10	10. Repair rather than replace <i>character-defining elements</i> . Where <i>character-defining elements</i> are too severely deteriorated to repair, and where sufficient physical evidence exists, replace them with new elements that match the forms, materials and detailing of sound versions of the same elements. Where there is insufficient physical evidence, make the form, material and detailing of the new elements compatible with the character of the <i>historic place</i> .					
		Yes		No		
11	new work	additions	to a y an	age value and <i>character-defining elements</i> when creating any historic place or any related new construction. Make the new d visually compatible with, subordinate to and distinguishable ace.		
		Yes		No		
12	and			Iditions or related new construction so that the essential form istoric place will not be impaired if the new work is removed in		
		Yes		No		
Addit	ional	Standard	s Re	elating to " <u>Restoration"</u>		

Add

13. Repair rather than replace *character-defining elements* from the restoration period. Where *character-defining elements* are too severely deteriorated to repair and where sufficient physical evidence exists, replace them with new elements that match the forms, materials and detailing of sound versions of the same elements.

		Yes		No	
14.	14. Replace missing features from the restoration period with new features whose forms, materials and detailing are based on sufficient physical, documentary and/or oral evidence.				
		Yes		No	
10. Ap Appoi			Pern	itted or Not Permitted by th	ne Municipal Council or its
work n	neets the	s the stand	lards	of conservation described at	certified by that the proposed pove, and does not negatively ents of the Municipal Historic
				standards, work permitted) neet the standards, work not	permitted)
Provid	e pro	duct infor	matic	st any conditions that apply n that will be used for cleaning or review prior to proceeding	ng the paint from the building
12. Name and Position of Municipal Council Appointee / "Certification Officer"					
Name					
Positi	on:				
		Administrat opment Off			er
Town of 5 Eliza Okotol c/o [Na [Phone	of Ok beth ks, A ame Nu	Street B T1S 1K	1 and	Role preparing the Interventi	on Form]
of thes persor design	e pro sha ated	operties. S Il destroy,	ection distu	n 26(6) of Alberta's <i>Historica</i> rb, alter, restore, or repair an	afeguarding the heritage values I Resources Act requires that "no historic resource that has been I or a person appointed by the
		of Munici		ouncil Appointee	
Date					

APPENDIX E: RESOURCES

RESOURCES

The following provides a list of resources as reference for the implementation of the Municipal Heritage Designation Program:

- 1. Document: *Historic Resources Act (RSA 2000)* Chapter H-9, Published by Alberta Queens Printer. Online: https://www.culturetourism.alberta.ca/heritage-and-museums/programs-and-services/heritage-conservation-advisory-services/
- 2. Alberta Culture and Tourism, Heritage and Museums, Reference Documents and Heritage Conservation Advisors. Online: https://www.culturetourism.alberta.ca/heritage-and-museums/programs-and-services/heritage-conservation-advisory-services/
- 3. Alberta Culture and Tourism, Heritage Grants and Scholarships (Alberta Historical Resources Foundation) Online: https://www.culturetourism.alberta.ca/heritage-and-museums/grants-and-recognition/ and https://www.alberta.ca/alberta-historical-resources-foundation.aspx
- 4. Document: Standards and Guidelines for the Conservation of Historic Places in Canada Online: Canada's Historic Places, http://www.historicplaces.ca/en/pages/standards-normes.aspx

MUNICIPAL HERITAGE DESIGNATION

PROGRAM

