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REGIONAL HERITAGE STRATEGIC PLAN

for the
**REGIONAL DISTRICT OF
OKANAGAN-SIMILKAMEEN**

16 July 2015



REGIONAL HERITAGE STRATEGIC PLAN

REGIONAL DISTRICT OF OKANAGAN-SIMILKAMEEN



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1.0 THE HERITAGE STRATEGIC PLAN

The communities of the Okanagan-Similkameen region share a varied and beautiful landscape and a rich heritage encompassing stories and places from the natural environment, first nations, and multi-cultural and non-aboriginal activities over past centuries. The strategic plan identifies and recognizes the broad range of heritage values and resources in the Regional District and suggests strategies that can be implemented to protect and promote the heritage and history of the area.

The historical context focuses on identifying the historical and cultural context of the RDOS using a thematic framework. It used various methods to gather information including community engagement, research, site visits and interviews.

The strategic plan articulates a values-based way forward for sustaining heritage assets and integrating heritage conservation into all areas of regional district planning. The strategy was developed in consultation with the community and is a long term view.

The strategic plan is intended to function as heritage manual. It includes:

1. Strategies and direction for **implementing the heritage program** over one, five and ten years
2. Guidance on **managing heritage opportunities or issues** that may arise on a day-to-day basis through the course of RDOS planning or business and integrating heritage conservation into the work of other RDOS departments
3. As a source of **general information**, background and reference material

1.1 GUIDE TO USING THE HERITAGE STRATEGIC PLAN

For Heritage Program Implementation

Section of Heritage Strategic Plan	Use it for
Section 2.2: Heritage Thematic Framework The seven heritage themes identified for the RDOS summarize the key ideas for describing the history and processes which have contributed to the evolution and character of the RDOS.	Moving the heritage conservation program forward by ensuring all themes are represented in identified heritage place, and as a resource for understanding the values of a particular heritage site.
Section 2.3: Regional Planning Context Outlines the key planning documents, such as community plans, bylaws, strategies and reports in the RDOS, their content and function.	Understanding and reference to how heritage can fit into the wider planning policies and initiatives in the RDOS.

Section of Heritage Strategic Plan	Use it for
Section 2.4: Emerging Trends in Heritage Conservation A summary, description and case studies of the current key trends in heritage conservation.	Use as a reference and review periodically to see which trends are appropriate to the RDOS heritage program and to ensure that the RDOS is up to date in heritage thinking. This section should be reviewed and updated over time.
Section 2.5: Emerging Trends in Heritage Tourism A summary, description and technical information of the current key trends in heritage tourism.	Use as a reference to apply appropriate trends and initiatives to the RDOS heritage program and to ensure that the RDOS is up to date in heritage tourism thinking.
Section 3.1: Community Heritage Values A synthesized record of the values the community holds for heritage in the Okanagan-Similkameen region.	To ensure the implementation of the heritage program is taking into account values identified by the community.
Section 3.2: Vision, Mission and Goals The vision sets the preferred future for heritage Okanagan-Similkameen, the mission defines the purpose of the heritage program and the goals set targets for meeting the desired outcome of the heritage program.	To ensure the implementation of the heritage program is meeting the identified vision, mission and goals.
Section 3.3: Heritage Policies and Recommendations Outlines the over-arching policies, strategies implementation time frame and for the implementation of the heritage program including the heritage register.	Implementing the heritage program through this strategic longer-term framework that serves as the over-arching basis for heritage conservation and management in the RDOS over the next 10 years.
Section 3.5: Assessment of Regulatory Impacts Sets out the implications of the heritage program on planning activities and staff time, and describes how heritage conservation can be integrated into other RDOS departments.	Integrating heritage into all aspects of the RDOS and understanding the use of heritage tools.
Section 3.6: Performance Measures A set of measurable criteria to see if the strategies are being implemented.	Evaluating the progress of the heritage program.

Section of Heritage Strategic Plan	Use it for
Section 3.7: Heritage Advisory Commission Outlines the terms of reference for the Heritage Advisory Commission.	Establishing and administering the advisory process and running the Commission.
Section 4.0: 5-year Implementation A step by step implementation of the heritage strategy over one to five years.	Guide decision-making on a year-to-year basis about implementing heritage programs and initiatives.
Section 5.2: Financial Estimate An estimate of the resources, including staff time and budgets, for implementing the heritage program year to year.	Setting budgets and staff time with regard to heritage conservation planning, projects and initiatives.
Section 5.3: Partnerships Outlines the role of diverse community partners in heritage conservation and management and the opportunities, benefits and costs the support of heritage assets and management by non-profit organizations.	Developing collaborative partnerships to undertake a wide range of heritage projects and programs, and when seeking or providing support from or to heritage partners.
Section 5.1: Marketing and Promotion A plan that sets out guidelines, strategies and actions for marketing and promoting the RDOS heritage plan, and heritage sites and activities in the region.	As a guide to implementing marketing and promotional initiatives for heritage in the RDOS.
Appendix B: Regional Heritage Sites and Places A table of heritage resources that have been identified through the process of completing the heritage strategy, and their associated values, organized by theme and grouped by Electoral Area. It identifies whether a resource has been included on the regional heritage register.	A reference to which heritage resources have been identified in a particular Electoral Area and their values, to identify potential new additions to the heritage register. It is a living document with new resources expected to be added over time, using the evaluation criteria in Section 3.4.

For Day-to-day Heritage Guidance

Section of Heritage Strategic Plan	Use it for
Section 2.2: Heritage Thematic Framework The seven heritage themes identified for the RDOS summarize the key ideas for describing the history and processes which have contributed to the evolution and character of the RDOS.	Understanding the context and value of a heritage place.
Section 2.3: Regional Planning Context Outlines the key planning documents, such as community plans, bylaws, strategies and reports in the RDOS, their content and function.	Understanding and reference to an individual heritage place, a heritage initiative or proposed heritage project fits into the wider planning of the RDOS.
Section 3.3: Heritage Policies and Recommendations Outlines the over-arching policies, strategies implementation time frame and for the implementation of the heritage program including the heritage register.	As a context of a longer-term framework that serves as the over-arching basis for heritage conservation and management in the RDOS over the next 10 years.
Section 3.4: Evaluation Criteria for Future Sites A set of evaluation criteria for heritage sites based on national standards.	Understanding the heritage value of a place, evaluating heritage proposals and statements of significance, and for adding newly identified sites to the heritage register.
Section 3.7: Heritage Advisory Commission Outlines the terms of reference for the Heritage Advisory Commission.	Appointing and administering the Heritage Advisory Commission and as a guide for referring projects, policies or initiatives to the Commission.
Appendix F: Case Studies Write up of a series of eight case studies of heritage resources, one from each Electoral Area, as discussed at the Board workshop in June 2015, identifying heritage values and potential conservation measures and tools.	Reference precedent and example of applying the heritage conservation planning process and available tools to sites in the RDOS.

Section of Heritage Strategic Plan	Use it for
Appendix H: Heritage Conservation Approaches A list and description of the various conservation approaches and description of how each approach, or a combination of approaches can be applied to heritage projects. The list ranges from restoration to simple preservation or managed decline.	Developing conservation plans or options for heritage sites.
Appendix I: Heritage Conservation Tools A comprehensive list, description and application of heritage conservation tools available to regional districts.	As a reference for decision-making for determining the best method of retaining the heritage value of a heritage place, site or building.

For Background and References

Section of Heritage Strategic Plan	Use if for
Physical Context of Okanagan-Similkameen Provides an introduction to the physical attributes of the Okanagan-Similkameen region, its municipalities, electoral areas and First Nations territories, and its land uses.	General introduction to the region.
Appendix A: Historical Chronology of Okanagan-Similkameen Provides a detailed chronology of the history of the Okanagan-Similkameen through five historical phases. It includes the historical event and the impact on the region of a particular event.	As a reference for key dates and events in Okanagan-Similkameen history.
Appendix B: Regional Heritage Sites and Places A table of heritage resources that have been identified through the process of completing the heritage strategy, and their associated values, organized by theme and grouped by Electoral Area. It identifies whether a resource has been included on the regional heritage register.	A reference to which heritage resources have been identified in a particular Electoral Area and their values, to identify potential new additions to the heritage register. It is a living document with new resources expected to be added over time, using the evaluation criteria in Section 3.4.

Section of Heritage Strategic Plan	Use if for
Appendix C: Bibliography Provides a list of reference and resource material consulted in the preparation of the strategic plan. It is divided into Technical Resources which are useful reference tools for heritage conservation, and Historical Resources related to the history of Okanagan-Similkameen and other areas of B.C.	Finding information about heritage conservation planning and general references for historical information. Where available, internet links have been provided.
Appendix D: Extracts from Official Community Plans Contains the content from Electoral Area OCPs that relates to heritage conservation. This supports Section 2.3, Regional Planning Context.	A comparison of the differences in heritage content between the various OCPs and a baseline for strengthening heritage conservation language in the future.
Appendix E: Summary of Community Engagement Transcripts from the community workshops, interviews, online questionnaire and submitted documents regarding heritage in the region.	Ongoing reference and understanding of what the community values about heritage in the region at the time of the strategic plan completion.
Appendix F: Case Studies Write up of a series of eight case studies of heritage resources, one from each Electoral Area, as discussed at the Board workshop in June 2015, identifying heritage values and potential conservation measures and tools.	Reference precedent and example of applying the heritage conservation planning process and available tools to sites in the RDOS
Appendix G: Glossary of Terms A list of terms and their definitions relating to heritage conservation.	A list of terms and their definitions relating to heritage conservation.
Appendix H: Heritage Conservation Approaches A list and description of the various conservation approaches and description of how each approach, or a combination of approaches can be applied to heritage projects.	Developing conservation plans or options for heritage sites.
Appendix I: Heritage Conservation Tools A comprehensive list, description and application of heritage conservation tools available to regional districts.	As a reference for decision-making for determining the best method of retaining the heritage value of a heritage place, site or building.

2.0 HISTORICAL CONTEXT

The task in this Historical Context section is to bring together community input and historical and cultural research to form a greater understanding of the historical, physical and intangible components of the Okanagan-Similkameen region. This section develops an overall view of the physical context of the area, and develops historical themes that, with information from the communities and regions of the RDOS lead to an understanding of the area's heritage.

The Okanagan-Similkameen exemplifies and demonstrates the best of British Columbia. Generations have worked hard to secure its material and written heritage as evidenced by local history and heritage organizations, the almost century-old journal *Okanagan History*, and the detailed South Okanagan-Similkameen Records Survey.

It is also the case that nature's bounty, local ingenuity, entrepreneurship, and Okanagan-Similkameen's other distinctive attributes have not been as well known beyond the regional district as they might. For all of the region's vitality, it is remarkably bereft of provincially and nationally recognized heritage designations. While numerous sites, many to do with mining, have provincial stop-of-interest roadside markers, only one location, the Keremeos Grist Mill, appears to have a provincial heritage designation. Just 21 Okanagan-Similkameen sites, 16 of them in Penticton, are among the over 12,500 entries in the Canadian Register of Historic Places.

This historical context reflects the shift in heritage conservation that embraces the values-centred management of historic places. This approach allows the community to identify its heritage values – the unique qualities of people, events, places, and eras – that have made it the place it is today. And, it ensures that the places identified as heritage are true representations of those values.

Using a thematic framework specific to the area, the historical context begins to identify the major factors and processes that have influenced the community's evolution through the development of a. The identification and synthesis of historical patterns and themes enables the community to articulate its heritage values and identify its heritage resources based on these values.

A detailed historical chronology can be found in Appendix A.

2.1 PHYSICAL CONTEXT OF OKANAGAN-SIMILKAMEEN

The Regional District of Okanagan-Similkameen consists of four First Nations, eight Electoral Areas and six municipalities.

First Nations:

Upper Similkameen Indian Band
Lower Similkameen Indian Band
Osoyoos Indian Band
Penticton Indian Band

Each of the Bands has traditional territory, reserves and administration offices within the RDOS. All of the Bands are part of the larger Okanagan Nation Alliance which is a consortium of seven Bands.

Electoral Areas:

Area 'A' Osoyoos Rural
Area 'B' Cawston
Area 'C' Oliver Rural
Area 'D-1' Kaleden-Apex Southwest Sector
Area 'D-2' East Skaha Vaseux
Area 'E' Naramata
Area 'F' Okanagan Lake West Bench
Area 'G' Keremeos Rural / Hedley
Area 'H' Rural Princeton

Municipalities:

City of Penticton
District Municipality of Summerland
Town of Osoyoos
Town of Oliver
Town of Princeton
Village of Keremeos

Climate

In spring, temperatures warm up rapidly in the Okanagan-Similkameen region, with April daytime highs reaching 20°C in the Okanagan Valley.

The Okanagan, Similkameen and Thompson river valleys experience BC's hottest summers, with temperatures often in the 30s °C, occasionally rising above 40°C. Temperatures are cooler further north in the high mountain ranges, with average daily highs in the low 20s °C.

By late October, average daily highs range from 8-13°C, with lows reaching freezing. In December, communities in the southern half of the region have average daytime highs just above freezing.

During the winter months most of the region's average daytime highs hover around near-freezing. Daytime lows of -10°C are common. The region's mountains are renowned for their dry, fluffy powder snow.

Physiographic region

The Okanagan-Similkameen Regional District straddles two BC ecoregions and touches three ecosections. The Ecoregion Classification system is used to stratify British Columbia's terrestrial and marine ecosystem complexity into discrete geographical units.

The Northern Cascade Ranges ecoregion is a mountainous area that varies from rugged to rounded uplands that lies in the strong rain shadow created by the southern Coast Mountains and the northern Cascade Mountains.

The Okanagan Highland Ecoregion is a transitional mountain and basin area lying between the Columbia Basin to the south, The Okanagan Valley to the west and the Columbia Mountains to the east

To the east, where the district encompasses a portion of Manning Park, is the rugged mountainous area of the *Hozomeen Range ecosection*. The mountains consist of metamorphosed sedimentary and volcanic rock with some granitic batholiths and show the effects of intense alpine glaciation. The area drains southeast into the Similkameen River by the Lawless, Tulameen and upper Similkameen streams.

Subalpine forests and rugged alpine dominate the higher slopes and dry montane forests dominate the lower elevations and moist Douglas-fir and western hemlock forests occur in most southwestern valleys. Manning Park Lodge and highway headquarters in Manning Park is the only settlement.

The *Southern Okanagan Basin* ecosection is a wide trench located between the Okanagan Ranges to the west and the Southern Okanagan Highlands to the east. It is underlain by mainly metamorphic rocks. It extends from south of Kaleden and just north of Okanagan Falls to the international border.

This ecosection is drained by the Okanagan River and Park Rill Creek.

This ecosection has some of the hottest and driest climates in BC, which is reflected in the extensive grassland communities. These grasslands, while often referred to as a 'Pocket Desert', are a northern extension of the sagebrush -steppe from further south in the Columbia Basin. South Okanagan and Similkameen grasslands are composed of sagebrush and native bunch grasses such as bluebunch wheatgrass, needle-and-thread grass and sand dropseed. Antelope-brush needle-and-thread shrub steppe grasslands are found mainly from Osoyoos to Skaha Lake, characterized by the large gnarled Antelope-brush. This shrub is a source of food for deer and bighorn sheep, and

was and still is very important to the Syilx (Okanagan) nation.¹

Okanagan Falls, Oliver and Osoyoos are the main communities.

The *Okanagan Range ecosection* is characterized by high mountains in the south, with deep, dry valleys in the centre and south, lowering to rounded summits north of the Similkameen River.

This ecosection is drained by the Tulameen, Similkameen, Alison, Otter, Hayes, upper Trout, Hedley, Ashnola, Ewart, Keremeos and Snohumption streams.

Subalpine forests and rolling alpine tundra dominate the upper slopes, while sagebrush-steppe habitats occur in the wide, low elevation basins, at Princeton, lower Similkameen and Methow Basin, mainly on the eastern side of the ecosection.

The major population centres include Princeton, Tulameen, Hedley, Keremeos and Cawston.

Major lakes and rivers

The major hydrological feature of Okanagan-Similkameen is Okanagan Lake which is composed of three basins, a larger north basin, a central or mid basin, and a southern basin. The lake is drained by the Okanagan River, which exits the lake's south end via a canal through the city of Penticton to Skaha Lake, and continues southwards through the South Okanagan into Okanagan County, Washington.

Okanagan River flows out of the southern end of Okanagan Lake, which is on the north side of the city of Penticton. It flows south past Penticton, through Skaha Lake, past Okanagan Falls, through Vaseux Lake, and past Oliver to Osoyoos and Osoyoos Lake, which spans the Canada – United States border and has its outlet into the Okanagan River at Oroville, Washington, finally joining the Columbia River.

Southwest Okanagan-Similkameen is traversed by the 200-kilometre Similkameen River which begins at the edge of Manning Park and flows past Princeton, Hedley, Keremeos, and Cawston before crossing the international boundary. Indicative of the river's authority, an 1872 arrival evoked its "narrow valley surrounded with steep and rugged mountains" and "benches with sage brush and cactus"². Bromley Rock, Cathedral, Keremeos Columns, Manning, and Sternwinder provincial parks give opportunities to know more, as does placer gold mining or prospecting in a long historical tradition or, more generally, driving Crowsnest Highway 3 paralleling the Similkameen River.

Natural vegetation

Five different biogeoclimatic zones³ are found within the Okanagan ecological

1 <http://www.soscp.org/wp-content/uploads/2013/02/Spotlight-on-Antelope-brush.pdf>

2 Nicholson, 29-30

3 Meidinger and Pojar, 1991



Fisheries &Oceans Canada, Okanagan Nation Alliance, BC Ministry of Water Land & Air Protection

region:

- Bunchgrass zone: Low elevation, arid grasslands dominated by bunchgrass and sagebrush. Few trees are present. In Canada, this habitat is only found in the Thompson, Okanagan, and upper Fraser valleys.
- Ponderosa Pine zone: Dry, low elevation forests, dominated by Ponderosa Pine.
- Interior Douglas Fir: Low- to mid-elevation forests composed predominantly of Douglas Fir. Also some grassland regions produced by soil type, topography, and fire history.
- Montane Spruce: Middle elevation forests with a cool climate. Stands of spruce and sub alpine fir predominate.
- Engelmann Spruce - Sub Alpine Fir: High elevation forests. Engelmann spruce and sub alpine fir.

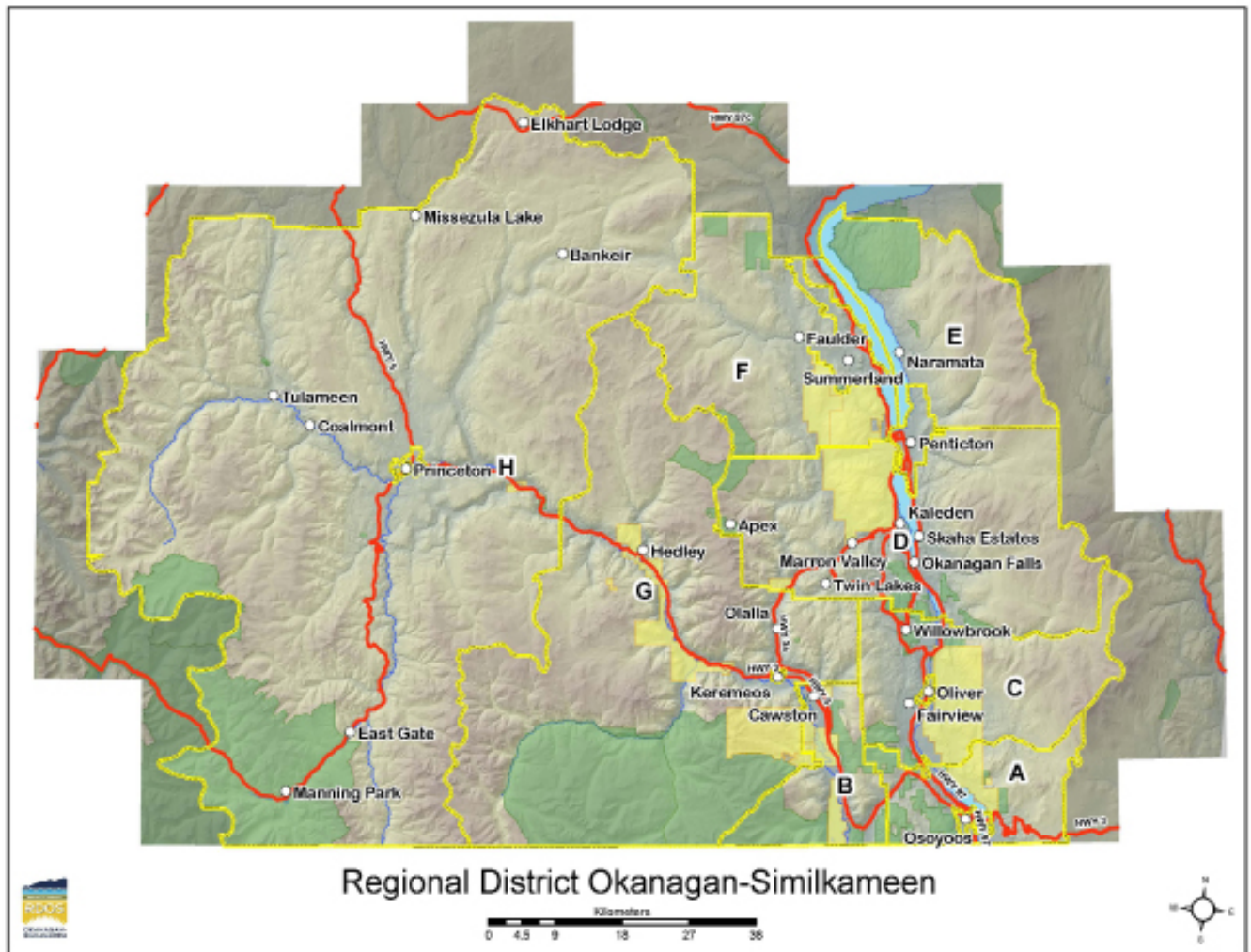
Major roadways

The major highways through the region include the east-west Trans-Canada Highway (Highway 1). The Crowsnest Highway (No. 3) passes through the region in the south from Manning Park in the Similkameen Valley connecting Keremeos with Osoyoos and Grand Forks. The Keremeos Kaleden Highway (No. 3A) connects the Similkameen and Okanagan valleys via the Marron Valley, and the Yellowhead South Highway connects Princeton with Merritt. The Okanagan-Vernon Highway (No. 97) extends from the international border north up the Okanagan Valley to Kaleden.

Provincial parks and protected areas

Provincial parks in Okanagan-Similkameen are Okanagan Lake, Okanagan Falls, Otter Lake, Allison Lake, Similkameen-Tulameen, Bromely Rock, Stemwinder, Vaseux Lake, Haynes Point, Inkaneep, Kettle River Recreation Area, and Kentucky-Alleyne. Protected areas include Cathedral and the adjacent Snowy and Brent Mountain and parks, South Okanagan Grasslands, White Lake Grasslands and Vaseaux.

MAP OF THE STUDY AREA



2.3 HERITAGE THEMATIC FRAMEWORK

A carefully designed thematic framework allows a variety of historical and community values to be taken into account when judgements are being made about how to manage a region's historic places.

Sometimes heritage places or things that may potentially deserve recognition are not currently in the public purview. A thematic framework can help to illustrate the place of such resources within the wider historical stories.¹

Introduction to the Thematic Framework

Historical themes are defined as key ideas for describing a major historical force or process which has contributed to the history and evolution of a place. A thematic framework is a structure that uses themes to help conceptualize past events and to place sites, people and events into their historical context.

Thematic frameworks have a number of interconnected uses in the management of heritage and are often considered to be a necessary tool for both a comprehensive contextual overview of heritage resources and for the comparative analysis of the relative significance of individual resources.

Use the thematic framework to:

- Determine a site's comparative significance in a local, regional, national or international context
- Identify and manage a range of sites that represent aspects of local or regional history
- Allow greater depth of interpretation
- Connect historic places to wider historical stories or events
- Promote the stories of minorities or overlooked groups in the management or interpretation of historic places
- Include heritage places that might otherwise go unrecognized

The themes below have been developed based on research into the history of the Okanagan-Similkameen region, through an analysis of the community consultation, and through the application of thematic framework development practices nationally and internationally.

¹ New Zealand Department of Conservation, *Historic Heritage Thematic Frameworks* 2008.

THEME A: A VISION OF PARADISE

- Earliest vision of the land by First Peoples
- Newcomer appreciation and transformation
- Summer and winter recreation
- Postwar boom in summer recreational infrastructure and culture
- Semi-rural retirement property development
- Agri-tourism
- Heritage institutions
- Volunteers

The Okanagan-Similkameen region is home to a range of educational, religious and arts institutions. A strong and thriving First Nations culture is sustained through the keeping of history passed down through generations as oral stories and songs, understanding the living land and teaching the younger generations.

The region's natural beauty and recreational opportunities are presented through a system of provincial, regional and local parks that has evolved over time. They include a portion of Manning Park established in 1941, the provincial parks of the Similkameen Valley and others. The Regional District of Okanagan-Similkameen operates nine parks that provide swimming, sandy beaches, hiking trails, historic sites, picnic areas, and baseball diamonds.

The region's postwar boom in summer recreational infrastructure and culture developed along the lakes with their sandy beaches and hot summer climate, resulting in a plethora of motel accommodation geared towards increasing travel by automobile. Lakeside recreation such as boating, waterskiing and swimming became popular. The winter climate of the region was also conducive to alpine sports, including the development of Apex Alpine ski area, beginning in the 1940s when intrepid downhillers trekked in for winter camping and skiing holidays, and with 600 cm of dry "Okanagan powder" each season.

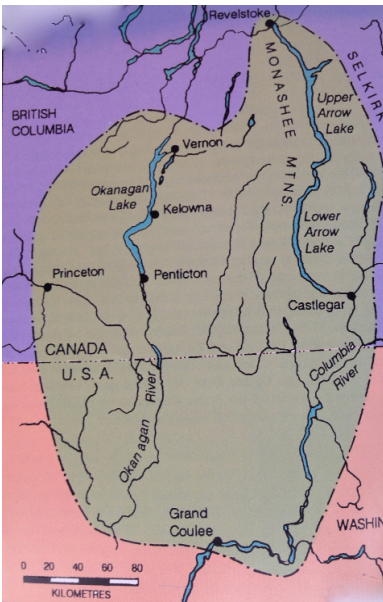
Agri-tourism is a growing business, originating in the roadside fruit stands that date back to the 1940s and '50s, winery tasting rooms and restaurants and wine festivals and tours. Tourists can engage in farm activities ranging from picking fruits to feeding animals, and from tasting wine to planting trees.

Not to be overlooked in the vision of paradise is Okanagan-Similkameen's appeal for retirees and seasonal visitors responding to nature's bounty. Their presence is indicated by the Okanagan-Similkameen's median age as of 2011 being 52 as opposed to its provincial counterpart of 41 years.

Community arts institutions are spread across the region and in the municipalities. The Okanagan School of the Arts is a non-profit society, established in 1960. Okanagan-Similkameen has festivals, galleries,

historical sites and museums that offer a wonderful insight to the past, present and future of the region. Artists & fine art artisans thrive throughout the Okanagan-Similkameen.

Events and festivals throughout the region have mattered alongside the everyday, one of the most enduring and popular being rodeos going back in time to the turn of the 20th century. More recent events include the Okanagan Wine Festivals showcasing wine and culinary tourism are held throughout the Valley during the summer, spring and fall and winter and Peach-fest originating in 1947, a five day festival that is attended by an estimated 70,000 people each year.



THEME B: DIVERSE LANDSCAPES

- The physical diversity of the land has given rise to a diverse human activities in the region
- Singularity in Canada as a pocket desert at the northern extension of the Great Basin shrub-steppe ecosystem
- Extremes of summer and winter
- Mountainous country laced with lakes and precious metals
- Geographical features: silt bluffs, volcanic action resulting in Giant's Head Mountain, lava bombs
- Extensive grasslands
- Significant, dependable rivers
- Unique and at-risk species and ecosystems

The Okanagan-Similkameen's natural setting is unique within British Columbia and Canada. The region is valuable for its great variety of eco-sections, important in their own right for their plant and animal species and as key parts of the North American ecosystem. A considerable part of the regional district's 10,400 square kilometres comprises an ecosystem noted for its sagebrush, dry grasslands, high summer temperatures, and low annual precipitation that has been evoked as the final northern extension of the Great Basin shrub-steppe ecosystem. The Osoyoos Band of the Okanagan people operates the Nk'mip Desert Cultural Centre while the Osoyoos Desert Society maintains an interpretive facility with a self-guided boardwalk tour. The South Okanagan Grasslands Protected Area set aside in 2001 similarly exemplifies the region's natural significance.

A counterpart is Okanagan-Similkameen's high country, notable for its cliffs, canyons, and granite outcroppings, some of which exist unto themselves, but others, such as Keremeos Columns Provincial Park, which have been recognized for their geological and aesthetic qualities.

The region is home to some of the greatest concentrations of species diversity and species at risk in Canada and is recognized as one of Canada's most

endangered natural systems. The dry climate and desert-like habitats of the Okanagan and Similkameen river valleys form an important corridor and a channel of movement for wildlife through to the interior grasslands of British Columbia.¹ The natural bounty of this diverse landscape abounds in Okanagan-Similkameen.

THEME C: LOCAL INGENUITY

- Living as the region's first inhabitants over 9,000 years
- Indigenous peoples' adaptation to a diverse environment
- Indigenous peoples' technologies pre-contact
- Impact of newcomer settlement
- Entrepreneurship and self-sufficiency
- Scientific endeavour: White Lake Observatory, Summerland Experimental Farm

The indigenous peoples of the region drew on nature's bounty, with the Okanagan-Similkameen forming only a part of the vast Syilx traditional territory. For thousands of years, the Okanagan people were self-reliant and well provided for through their own ingenuity; travelling the breadth and depth of their territory, hunting and fishing, growing and harvesting, crafting and trading. Responding to their environments, during the summer many lived in cone-shaped structures called matlodges and over the winter in semi-underground circular pithouses.

Fur traders, prospectors, gold miners and cattle drivers all disrupted the traditional patterns of human activity in the region. Newcomer practices dislocated the indigenous people from their way of life and from the resources they relied upon, but also built on traditional trading practices along long-established trading routes.

The red earth or ochre, called tulameen, found at Vermillion Bluffs near the confluence of the Similkameen and Tulameen rivers, is a very sacred and closely guarded resource. The black soapstone known as chopaka found west of present day Osoyoos is used for carving. Indigenous words also survive as place names, as with the sand spit called sooyoos in what is now called Osoyoos Lake and numerous others sprinkled throughout Okanagan-Similkameen.

Colonization divided the people from their way of life and from the resources they relied upon. In the face of loss of their territory and severe hardships as a result of the arrival of colonial newcomers - not least arrival of smallpox and other newcomer diseases - the indigenous peoples have persevered. While their traditional way of life and economy was forever impacted with the arrival of the newcomers, there is now a flowering of indigenous ingenuity and enterprise.

¹ South Okanagan Similkameen National Park Feasibility Study.



spiritdancercanoejourneys.ca

In 1968 the business oriented Osoyoos Band collaborated with the Department of Indian Affairs and a national wine distributor to experiment with high quality grapes imported from Europe on the way to today's Nk'mip Cellars wines based in Osoyoos. In 2004 the Upper Similkameen Indian Band of Hedley opened the defunct Mascot Mine for tourism; the Snaza'ist Interpretive Centre offers interpretation of First Nation Culture. In another part of Okanagan-Similkameen, the En'owkin Center opened in Penticton in 1979 as an indigenous creative arts, educational, and cultural institution offering post-secondary courses and having a publishing arm, Theytus Books, with stature across North America. The same year, 1979, the Okanagan people came together to protect the highly mineralized Spotted Lake west of Osoyoos as a sacred site. Okanagan elder Harry Robinson collaborated for a dozen years prior to his death in 1990 with ethnographer Wendy Wickwire to ensure his peoples' stories were not lost. As part of this, the story of the oppression of indigenous people and the collapse of their traditional economy in Okanagan-Similkameen deserves full interpretation.

THEME D: RIVER VALLEY SETTLEMENTS

- The first newcomers arrive: fur traders, prospectors, cattle drivers
- Newcomer settlements for mining, ranching and agriculture
- Post-WWII veteran resettlement
- Postwar population influx
- Development as a retirement and recreational destination

Part of the story of the Okanagan-Similkameen region is the successive waves of people arriving, beginning some 9,000 years ago with the ancestors of today indigenous people following the plants and animals behind the retreating continental ice sheet at the end of the last Ice Age.

Mid-19th Century gold rushes, later mining, cattle ranching, forestry and agriculture all drew whole new populations - including many Americans, and people of Chinese decent - into the region. Chinese Canadians played a major role in the development of the region working in the mines and orchards, running stores and establishing market gardens in Princeton and Penticton. Many newcomers moved on, but many others established themselves permanently in the region as mining and agricultural towns developed, and the backcountry opened up for rural settlement.

Following the general trend for the province, the Okanagan-Similkameen experienced a huge inflow of people after the Second World War. Newcomers included returning veterans and their young families offered newly-serviced agricultural land in Oliver.

The region is marked most recently by the arrival of retirees and seasonal residents, attracted by the beauty, relatively low cost of living, and the recreational possibilities of the region.

THEME E: TO MARKET!

- Indigenous peoples' economies
- Placer mining, and hard rock mining
- Cattle ranching and forestry in the hills
- Water sources for agriculture
- Fishing and hunting
- Fruit growing (orchards, then vineyards) in the valleys
- Itinerant workers and labour organizations
- Forging connections with markets, fruit marketing co-ops, fruit stands
- Recreation and tourism
- Internet economy

The Okanagan peoples' economy included the trade in valuable goods found in the region - the ochre from Tulameen was known to be traded as far away as the outer coast, east to the plains and south to the great basin. Chopaka and other valuable lithic materials were also traded as was dogbane hemp which was excellent for making nets. The trade in fur marked the beginning of an economy linked with the newcomers to the region.

With the placer gold finds in the Similkameen Valley and in the neighbouring Kettle Valley at Rock Creek, the region became a destination for settled economies. Boomtown economies support sudden huge influxes of people, while more long-term cattle ranching and agricultural economies developed on lands granted by the Crown to British settlers. Conventional mining economies developed in the Upper Similkameen and other outlying mountainous backcountry.

It was the confluence of warm growing season, a plentiful dependable water supply, and the exploding Lower Mainland market for BC produce that led to the development of the fruit growing industry in the region.

Rail, then more importantly, highway connection of the Okanagan-Similkameen to the Lower Mainland after the Second World War not only bolstered the fruit growing industry, but sparked the development of the region as the Coast's summer playground. Tourism became a significant segment of the regional economy.

The emergence of the fine wine industry and wine tourism marks the marriage of the region's agricultural and tourist economies, and is spreading to all areas in the region supporting the cultivation of superior vinifera grapes, such as the Cawston area in the Lower Similkameen Valley.

THEME F: CONNECTING AN ISOLATED REGION

- Indigenous peoples' seasonal pathways and trails (including south of the border)
- Fur trading, cattle driving routes
- Gulches as transportation routes
- Roads: Dewdney Trail, Dewdney Wagon Road, Crowsnest Highway
- Lake ferries, Kettle Valley Railway, airports

- Hope-Princeton Highway
- Developing governance of water use, policing and health care
- Rural settlements and town building
- Developing community services and infrastructure
- First Nations' administrative autonomy
- Physically isolated region off the original trans-continental route

The earliest routes connecting communities were the Okanagan peoples's trails connecting hunting, fishing, and seasonal settlements throughout the region, and naturally south into what is now part of the United States. The lakes, river systems and indigenous trails were used to gain access to the relatively inaccessible region and to connect the region with their establish trading posts to the north and south.

Four Native trails intersected at Summerland, the Granite City Waggon Trail, the Brigade Trail (used by indigenous peoples over 700 years), the Okanagan Valley-Nicola Valley trail and the Meadow Valley Trail. The original Southern Provincial Highway became the Hope-Princeton Highway.

Unique to BC, the Regional District system was implemented across the province in 1965 to provide regional governance and services for provincial regions as a whole.

Before the institution of the regional district system, a number of public institutions were responsible for the governance of the rural lands of the Okanagan-Similkameen region. This included entities such as the British Columbia Provincial Police Force established in 1871, whose duties included patrolling the land, waterways, and coastline, enforcing laws, maintaining peace, policing strikes and controlling smuggling, and which were housed in the Oliver Provincial Police station.

In the region's desert environment, water administration was and is key to agriculture, the economy and settlement. The South Okanagan Lands Project was established by the province in 1921 to administer water use and regulation. It was operated by provincial government employees until 1964 when the Oliver/Osoyoos Fruit Growers' Association formed the locally constituted South Okanagan Lands and Irrigation District which operated the system until 1989.

To deliberate on areas of common concern, the Okanagan Nation Alliance was formed in 1981 as the inaugural First Nations government in the Okanagan. The Alliance originally represented six member communities: the Okanagan Indian Band, Westbank First Nation, Penticton Indian Band, Osoyoos Indian Band and the Lower and Upper Similkameen Indian Bands; this group of six were later joined by the Upper Nicola Band and the Colville Confederated Tribes. Each community is represented through the Chiefs Executive Council (CEC) by their Chief or Chairman.

THEME G: CLOSE-KNIT COMMUNITIES

- Spiritual and religious traditions, ceremonies and institutions
- Community arts councils, arts organizations and institutions
- Local festivals, fairs, traditions and seasonal rituals
- Parks, and recreational traditions
- Local shopping and businesses
- Main Streets

The historically isolated region has bred a culture of close-knit communities within the Okanagan-Similkameen. The communities have unique beginnings and histories, and distinctly different cultures that are cherished by their citizens for their uniqueness.

Among these communities are the various communities of indigenous peoples, who have persevered in spite of the loss of their traditional territory and the hardships endured as a result of the arrival of newcomers - not least arrival of smallpox and other newcomer diseases. While their traditional way of life and economy was devastated with the arrival of the newcomers, there is now a flowering of indigenous culture.

As the various small newcomer communities developed into towns, civic festivals, fairs, and seasonal rituals helped build a sense of connectedness and well-being. Churches, schools, and civic facilities all were built to support a civic life in the face of considerable isolation. Local shops and businesses drew a loyal clientele, and helped form bustling Main Streets in the various towns. Today, intangibles such as the Summerland Festival, Fall Fair, Festival of Lights and the Meadowlark Festival bring life to the communities of the region.

Arts organizations developed to enrich life. Amateur art and theatre groups provided cultural and intellectual outlets for many, and enhanced their connection to their fellow citizens.

The diversity of the Okanagan-Similkameen region, its history and people can foster a sense of and regional identity within Okanagan-Similkameen. Historical, cultural and social values held by citizens for both local and regional history and historic places create a personal identity with the place that transcend formal boundaries of governance. Today, significant heritage features and places can transcend boundaries and be important to both municipalities and the wider Okanagan-Similkameen region.

2.4 REGIONAL PLANNING CONTEXT

The regional planning context of the Okanagan-Similkameen is important to this heritage strategic plan because ...

The Regional District of Okanagan Similkameen is a corporation officially established in 1966 under the Municipal Act of British Columbia. It is led by a Board of Directors of eighteen members, eight rural and ten urban and has responsibility for a land mass that is 10,414 square kilometres.

The purposes of a regional district are broad :

- a. Providing good government for its community,
- b. Providing the services and other things that the board considers are necessary or desirable for all or part of its community,
- c. Providing for stewardship of the public assets of its community, and
- d. Fostering the current and future economic, social and environmental well-being of its community.

Under this mandate the stewardship of cultural heritage is a key area of responsibility.

The RDOS Regional Heritage Strategic Plan is integrated with the existing policy framework in a way that leverages current strategies and ensures consistency with the broader regional planning process.

The following legislation, reports, strategies and plans provide the regional planning context for this project.

Report / Strategy	Focus / Integration
Local Government Act – Part 25 regarding Regional Growth Strategies	Part 25 of the Local Government Act sets out fourteen goals focused on sustainable community development. Two of these goals are particularly pertinent to heritage: Number 6: Economic development that supports the unique character of communities; and Number 14: Good stewardship of land, sites and structures with cultural heritage value.
Local Government Act – Part 27 regarding Heritage Conservation	Part 27 of the Local Government Act is the key legislation that guides local government actions relating to heritage conservation. It focuses on the role of local government in heritage conservation. Regional Districts must first adopt an establishing bylaw if they wish to provide the heritage conservation services outlined in Part 27 of the Local Government Act. Currently, a heritage enabling bylaw exists in five of the eight RDOS Electoral Areas: A, C, D, G and H.
First Nations Protocol Agreement	The South Okanagan Similkameen Protocol Agreement was signed by the Penticton Indian Band, Osoyoos Indian Band, Lower Similkameen Indian Band and the Regional District of Okanagan-Similkameen (RDOS) on June 21, 2013. The signing was a momentous event for all of the Parties involved. The Protocol Agreement establishes a Government to Government relationship to identify, consult and address common concerns and interests of importance. The Parties work together in a spirit of common respect and cooperation by recognizing and celebrating diversity, while cooperating to achieve mutual prosperity. The Parties communicate and share information with each other regarding issues of shared interest.
Union Of British Columbia Indian Chiefs – First Nations Heritage Planning Toolkit 2013	This First Nations Heritage Planning Toolkit is intended to assist First Nations in developing their own cultural heritage management policies and becoming proactive in the management of their heritage sites. The toolkit is designed to work within existing government processes and provides background information on the archaeological permitting system and archaeological process within BC, together with an overview of the Heritage Conservation Act, other relevant provincial policy and legislative mechanisms currently available and the Permit Application Referral process. It will play a key role in developing recommendations to improve the protection, management and conservation of First Nations cultural and heritage sites, and as such, it provides an important framework for the RDOS Regional Heritage Strategic Plan.
RDOS Strategic Plan 2012-2015	The Strategic Plan outlines the vision for the RDOS: <i>We envision the Regional District of Okanagan-Similkameen as a steward of our environment, sustaining a diverse and livable region that offers a high quality of life through good governance.</i> This vision statement is grounded in an ethos that values the region's rich history and diverse culture.

Report / Strategy	Focus / Integration
RDOS Business Plan 2013	Key Success Driver 3 – <i>To Build a Sustainable Community</i> identifies the development of the Heritage Strategic Plan as a key element in developing the focus on Social Sustainability.
Regional Growth Strategy 2010	This broad-level planning tool operates at a regional scale, to facilitate the coordination of values, priorities, policy and action across the south Okanagan over a 20 year period in a framework that is linked to local government Official Community Plans. It incorporates the principle of good stewardship of land, sites and structures with cultural heritage value. POLICY S6: Support the education and lifelong learning, diversity of culture, heritage and a strong arts community. The key statements are as follows: • Work with providers of local heritage and cultural education programs to preserve and respect different cultural values. • Identify and protect important cultural places and structures through policies and other mechanisms.
Official Community Plans	All Community Plans were reviewed. The level of detail and commitment to the stewardship of heritage varies, with a number having specific policy statements, while others simply paying reference to heritage stewardship in general. The detailed heritage statements, objectives and policies can be found in the Appendix.
Community Heritage Register (Created in accordance with section 954, Part 27 of the Local Government Act) The CHR has statements of significance for 23 sites within the Regional District – each lists the heritage value of the site.	A Community Heritage Register (CHR) is an official list of historic places, specific to a community, which have been identified by the local government as having heritage value or heritage character. A CHR enables a local government to understand and identify the significance of a community's historic places, to monitor heritage properties for proposed changes, and to integrate heritage conservation activities into other local government land use planning processes. The RDOS views the Community Heritage Register as a planning tool that allows for the integration of heritage conservation activities into other local government land use planning processes. The Register provides formal recognition for historic places and may be created from a new list of historic places, or an existing inventory (the Regional District completed a Heritage Resources Inventory in May 1988).
Strategy for a Sustainable Similkameen Valley (2011-2020)	While the word 'heritage' does not appear in the document, there are references to the importance of socio-cultural sustainability. Mission statement: To establish a socio-cultural, economic and environmental sustainability strategy for the Similkameen Valley that will maintain and enhance the quality of our rural and small town lifestyle. Objectives include: • Celebrating the socio-cultural and bio-physical diversity of our Valley, and maintaining a physically, culturally and spiritually

Report / Strategy	Focus / Integration
<i>Regional District of Okanagan Similkameen Trails Master Plan, 2012</i>	The purpose of the Plan is to define future priorities and directions for the RDOS and its partners with respect to existing and potential future linear parks and trails within a regional trails network. - Action Item 11: Install Heritage Protection signage at all motorized access points to restored Heritage Trails. The prioritized recommendations included: - Promote the designation, restoration and marketing of Heritage Trails.
<i>Agricultural Land Commission Act</i>	The Agricultural Land Commission Act sets the legislative framework for the administration of the agricultural land preservati program. The ALC is concerned with the establishment and maintenance of farmland. Local and regional governments are expected to plan in accordance with the provincial policy of preserving agricultural land.
<i>RDOS Zoning Bylaws</i>	Zoning is the major tool by which the RDOS Board regulates the use, size and siting of land and buildings within the District. 'Land use designations' identified on Zoning Bylaw maps are more detailed than those of the OCP Bylaw, and are accompanied by text that outlines a specific range of permitted uses, densities, siting and building form. The purpose of the zoning land use bylaw is to provide for the orderly development of the community, and to avoid conflicts between incompatible land uses. As a heritage tool, zoning can be used to: - Regulate land uses, density, siting, and the subdivision of land, buildings and structures, including the shape, dimension and area of parcels - Regulate a heritage area to facilitate the conservation of heritage resources - Assist in making the conservation of heritage properties viable - Facilitates density bonusing, density transfers and amenity zoning
<i>Protected Areas Of British Columbia Act, Park Act, Ecological Reserve Act</i>	Empower a Land Use Committee of Cabinet to ensure that all aspects of the preservation and maintenance of the natural environment are fully considered in the administration of land use and resource development. Government has used this provision to establish protected areas.

Report / Strategy	Focus
<i>Embracing Our Potential: A Ten-Year Tourism Strategy for the Thompson Okanagan Region 2012-2022</i> TOTA, 2012	At the regional level, the Thompson Okanagan ten-year regional tourism strategy provides the strategic framework for the development of tourism within the region. The strategy has identified five experience-based themes that are now shaping priorities and actions moving forward and are core to positioning the Thompson Okanagan as a region of iconic and authentic quality experiences – destinations for passion, fulfillment and adventure. • Identifying the iconic – profiling and developing those truly outstanding experiences and activities associated with iconic landscapes will differentiate the region and set it apart from its competitors. • Enriching local flavours – strengthening the region’s growing emphasis on local flavours and building recognition for its culinary attributes. • Revealing the story – highlighting the local and regional stories in a way that will allow visitors to make a strong emotional connection with the destination. • Expanding personal horizons – identifying unique learning experiences and opportunities for self-development, recognizing that learners constitute 35% of the global travel market. • Building authenticity – focusing on creating a strong sense of place and opportunities for travellers to engage in immersive experiences with local communities and enjoy the sense of being where things are real and original. The latter three themes are particularly relevant to this RDOS Regional Heritage Strategic Plan and will shape the strategic marketing and development of heritage tourism. The Regional Strategy has also identified the importance of moving forward with the development of further strategic planning work on Aboriginal cultural tourism – and will ultimately be advanced by this Heritage Strategic Plan. The regional tourism strategy has adopted a new perspective on target markets based on TOTA’s recent adoption of the Canadian Tourism Commission’s Explorer Quotient® (EQ) tool. The market segments discussed in the marketing plan are based on this segmentation tool and highlight the importance of understanding the social and travel values that drive demand and the corresponding need to develop and position tourism product as experiences rather than commodities.

2.5 EMERGING TRENDS: HERITAGE CONSERVATION

The context in which heritage policy and strategies will be developed must be informed by an understanding of the latest emerging trends in heritage conservation, heritage planning, and cultural tourism.

Globalization is the predominant and common reality effecting all communities today, and various aspects of development threaten to degrade and destroy heritage and its inherent values. On the other hand, research is showing that this very vulnerable and endangered heritage, in the widest sense of the term, may be a crucial source for valuable contributions and far-reaching, constructive guidance in response to issues raised by development.

After conducting detailed national and international research on recent trends and strategies, we have evaluated the relevancy of their application to the current and future circumstances in the Okanagan-Similkameen regional district. Our research focused on examining the link between heritage planning and economic development and the ability of heritage values to inspire healthy, local development, while curbing the negative effects of globalization.

Heritage as Driver of Development

The five recommendations of the Paris Declaration of Heritage as Driver of Development from ICOMOS 2011¹ deal directly and specifically with the relationship between heritage and economic development. They identify the actions needed not only to protect heritage, but also to ensure that its use, its promotion and enhancement, and its economic, social and cultural value are harnessed to the benefit of local communities and visitors.

1. Heritage and Regional Development - Preserve, revitalize and maintain urban and rural heritage districts and open spaces
2. Return to the Art of Building - Conserve, reuse and adapt built heritage. Retain and teach traditional building skills and innovative architecture. Ensure the continued production of traditional building materials.
3. Tourism and Development - Develop all stakeholder, sustainable management plans and innovative programs for cultural tourism that build on the specific cultural, historical, environmental, aesthetic and memory values to be preserved and that are centred on authenticity, local participation and ownership.
4. Heritage and Economics - Foster a better understanding of the economic and social impact of maximizing the value of heritage. Promote and develop the economic impacts of heritage. Place heritage at the heart of

¹ International Council On Monuments and Sites (ICOMOS). XVII General Assembly. Paris, UNESCO headquarters, December 2011. The Paris Declaration on heritage as a driver of development.

overall development strategies.

5. Stakeholders and Capacity Building - Local residents, civil society, and elected officials play a key role in the design and implementation of heritage as a driver of development, and through raised awareness of heritage, will have ownership of the development process. To enable this, invest in professional training, legal frameworks, research and partnerships that support and sustain heritage programs.

Case studies:

The West Virginia Cultural Heritage Development Program, USA²

<http://www.pawv.org/wvchp/WVCHDP%20backgroundPB-Rev.pdf>

This program (2002- current) utilizes the state's historic, cultural, agricultural and natural resources to establish sustainable statewide cultural heritage programs serving community and multi-county efforts with the dual purposes of creating economic opportunities for businesses and communities, and preserving and conserving heritage resources. The organization defines Cultural Heritage Development as ... "the development of assets that will attract and serve Cultural Heritage Tourists, as differentiated from the end-product marketing that attracts tourists to the attractions once they are developed."

The program stimulates the local economy and enhances heritage assets through education and technical support for local businesses on cultural tourism, granting programs for local business initiatives, encouraging and facilitating local partnerships and networks, and the coordination of a region-wide Cultural Heritage Development Program.

The Alhambra Master Plan (2007-2015) , Alhambra and Generalife, Spain³

http://openarchive.icomos.org/1259/1/III-1-Article7_Yáñez.pdf

The plan's implementation has been able to diversify the use of the Alhambra, the most visited cultural property in Spain, and to ensure the comprehension and dissemination of its rich and diverse heritage values, while promoting its sustainable development. It has also successfully reoriented visitor's flows and extended overnights in Granada, also revitalizing many outstanding cultural properties that were neglected up to now as a result of the huge attractiveness of the Nasrid Monument and the lack of an effective collaboration between the Alhambra Council and public administrations to promote the city's heritage resources as a whole.

Grand Forks Sustainable Community Plan (2011)⁴ Grand Forks, BC

2 Preservation Alliance of West Virginia

3 Celia Martínez Yáñez. New Strategies for Cultural Tourism Planning: Quality and creativity as tools for development. ICOMOS Paris 2011. Theme 3, session 1 (Heritage as a Driver of Development)

4 Sustainable Cities International and C+S Planning Group. 2013. *The Dynamic Downtowns Workbook -Using Heritage to Build Strong, Vibrant Downtowns.*

http://www.for.gov.bc.ca/ftp/heritage/external/!publish/web/DynamicDowntownsWorkbook_Final.pdf

This plan involves an initiative of the Grand Forks' Economic Development Advisory Commission to focus on re-energizing the historic core of the city in order to drive economic development and attract new residents. After a community consultation process, the plan was adopted as a bylaw by Grand Forks City Council in 2011. A guiding principle in the plan directs development decisions to 'protect & enhance the heritage values of the community' using heritage design guidelines that reflect the community's values. This community driven, 'values-based' approach encourages and allows for unique and creative development in the historic core, encouraging local, collaborative proposals and revitalization of existing community and built resources.

Emerging Trends

a. Interpretive Activities

The ICOMOS Charter for the Interpretation and Presentation of Cultural Heritage Sites (2008)⁵ defines the basic principles of Interpretation and Presentation as

"...essential components of heritage conservation efforts and as a means of enhancing public appreciation and understanding of cultural heritage sites."

The utilization of new interpretive technologies in order to foster public awareness and engagement is especially applicable as most users today carry smart phones or arrive in smart cars offering access to digital data which could be integrated by the site or region.

Case studies:

Chester Walls Quest App Chester, England

www.imagemakers.uk.com/projects/apps/ and <http://vimeo.com/42260141>

An educational, guided adventure around Chester's city walls during which users complete challenges, score points and collect guild shields.

Mission Butterfly App Caerphilly, South Wales

<http://www.audiotrails.co.uk/mission-butterfly/>

A guided walk in Caerphilly (South Wales) nature reserves becomes an Augmented Reality adventure as the app helps users to track, identify and virtually 'collect' 15 local butterfly species.

Northwest Heritage Tours audio driving guides Washington State, USA

<http://www.washingtonfolkarts.com>

[http://www.preservationnation.org/information-center/economics-of-Government of BC Heritage Branch.](http://www.preservationnation.org/information-center/economics-of-Government-of-BC-Heritage-Branch)

⁵ *The Icomos Charter for the Interpretation and Presentation of Cultural Heritage Sites*, ICOMOS International Scientific Committee on Interpretation and Presentation of Cultural Heritage Sites. 16th General Assembly of ICOMOS, Québec, October 2008

revitalization/heritage-tourism/success-stories/culture-corridors-and-cars.html

Audio recordings which use the state's cultural heritage to enhance the experience of driving selected routes. Recorded local stories, music, crafts, songs, dances, and customs bring the invisible landscape alive in an area where the natural beauty is evident.

HistoryPin App Global

<http://www.historypin.com> and <http://wearewhatwedo.org/portfolio/historypin/>

A collaborative website and application, enabling users to share and explore personal archives and memories. Over 200 libraries, archives and museums are partners. Historypin is a global archive where millions of people can come together around the history of their neighbourhoods, from across different generations and cultures, to explore and create rich, communal archives and build stronger communities.

b. Cultural Routes

This trend considers a wider context of viewing the interactive, dynamic, and evolving processes of human intercultural links that reflect the rich diversity of the contributions of different peoples to cultural heritage. The ICOMOS Charter on Cultural Routes (2008)⁶ introduces the concept of Cultural Routes as a joint system which enhances the significance of and relationships between cultural heritage properties such as monuments, cities, landscapes, industrial areas, etc. Many of the aims and projected outcomes of cultural routes are related to the production of largely intangible goods: the recognition of historic figures, recording oral histories, managing and protecting heritage sites for future generations, and the education of visitors and local populations, all of which may help to build social cohesion. Another important outcome of cultural route projects is local economic development through the tourism that it is anticipated such routes will generate.

Case Studies:

Liberation Heritage Route, South Africa

<http://whc.unesco.org/en/tentativelists/5459/>
<http://www.liberationheritage.co.za>

The South African Liberation Heritage Route, as part of African Liberation Heritage, expresses a wide phenomenon involving millions of people as they struggled for emancipation from oppression.

Northwest Heritage Tours, Washington State, USA

<http://www.preservationnation.org/information-center/economics-of-revitalization/heritage-tourism/success-stories/culture-corridors-and-cars.html#.UtcnW5Fsif0>

⁶ *The Icomos Charter on Cultural Routes*. International Scientific Committee on Cultural Routes (CIIC) of ICOMOS. 16th General Assembly of ICOMOS, Québec, October 2008

<http://www.washingtonfolkarts.com>

Audio recordings use the state's cultural heritage to enhance the experience of driving 10 selected routes. Recorded local stories, music, crafts, songs, dances, and customs bring the invisible landscape alive in an area where the natural beauty is evident.

Arroyo Seco Parkway National Scenic Byway, California

<http://engagingplaces.files.wordpress.com/2012/09/asb-interpretive-plan-final-2012-may-30-small.pdf>

<http://www.dot.ca.gov/dist07/travel/projects/details.php?id=6>

A 2012 Corridor Partnership Plan integrates a study called "Interpreting the Arroyo Seco Parkway." It is the first comprehensive tourism plan to interpret and market the historic Arroyo Seco Parkway (State Route 110), formerly known as the Pasadena Freeway, as a regional destination.

c. The Spirit of Place

This approach acknowledges the existence of tangible (sites, buildings, landscapes, routes, objects) as well as intangible elements (memories, narratives, written documents, festivals, commemorations, rituals, traditional knowledge, values, textures, colors, odors, etc.) in cultural heritage sites. The ICOMOS Quebec Declaration on the Preservation of the Spirit of Place (2008)⁷ defines principles and recommendations for expressing and preserving Spirit of Place.

Case studies:

Life Beyond Tourism

<http://www.lifebeyondtourism.org/t/en/The-Life-Beyond-Tourism-Manifesto>

A non-profit portal dedicated to promoting intercultural dialogue through tourism based on values, not just on consumer services. The organization conducts research on the topic, raises funds and holds events, both online and on site to promote familiarization with the 'spirit of a place', its past, its present and its future prospects.

Search for 'spirit of place' Project & Exhibit Hull, England

<http://www.arc-online.co.uk/hullness>

This community based, multi-stakeholder exploration project began in 2009 with a series of debates and surveys conducted by ARC, a Hull based planning and design firm. With support from English Heritage and the Heritage Lottery Fund, the Hull 'spirit of place' debate and research results were incorporated into an exhibit, a brochure and a blog titled 'Hullness'.

Needwonnee Walk, Melaleuca, Tasmania

⁷ Québec Declaration on the Preservation of the Spirit Of Place. 16th General Assembly of ICOMOS, Québec, October 2008

<http://www.parks.tas.gov.au/file.aspx?id=27810>

Sculptural installations along this remote trail interpret some of the historic stories and traditions of the Needwonnee people. Over time, the sculptures will naturally weather and deteriorate giving the community the opportunity to re-examine, refresh and rebuild the route. The 'spirit of place' is an ongoing message of hope, regeneration and renewal, of connection, sharing and identity.

d. Quality and Creativity

The notion of a heritage site as a backdrop and inspiration engine which drives development and tourism through the use of creative, high quality, diverse and capacity-appropriate experiences at a heritage site. Cultural heritage sites become the link between tradition and contemporary creation; offer new dimensions to heritage enjoyment and cultural industries based on heritage values, including the reinvention of traditions such as gastronomy, cultural and music festivals, media and design. Participatory and experiential activities significantly and augment deepen the visitor's engagement and understanding of the site.

Case studies:

Dig for a Day Archeological Seminars, Israel

<http://www.archesem.com/dig.asp> and <http://www.nbcnews.com/id/17595732/>

Participants do the 'dirty work' for a day, digging and sifting through the ruins, while their fees underwrite the more difficult parts of archaeological work: washing pottery shards, logging finds, site maintenance and academic research. The program financially supports the exploration and conservation of ruins while educating the public about archeology, history and the specific site through a participatory, personal experience.

Grape Harvest traditions Douro Valley, Portugal

<http://www.portugaldailyview.com/whats-new/harvest-grape-picking-in-douro-valley-home-of-port-wine>

Every September, the Douro Valley, a UNESCO world heritage site, offers a variety of programs enabling visitors to experience the region's traditions and techniques surrounding grape harvesting and the first stages of making Port wine. Alongside locals, visitors participate in and learn about grape-picking and the stomping of the grapes. Programs can include folklore shows, wine tasting and traditional meals.

2.6 EMERGING TRENDS: HERITAGE TOURISM

The significance of heritage tourism

Heritage tourism can be regarded as a sub-component of cultural tourism and has been defined as:

... an encounter with or an experience of being part of the history of a place through visiting historic sites, monuments, and landscapes. It focuses on learning and includes the experience of local traditions, social customs, religious practices and cultural celebrations. Historical tourism is a form of heritage tourism: its main focus is to stress the experiences of the past.

There is widespread consensus that culture and heritage have become major drivers of the tourism industry. This is particularly evident in Europe where considerable effort has gone into analysing and evaluating the social and economic value of cultural heritage and its impact on tourism. In the United Kingdom, for example, the heritage-based tourism economy accounts directly for at least £5 billion in Gross Domestic Product and 134,000 jobs. When indirect and induced effects are taken into consideration, this element of the UK tourism economy is estimated to account for £14 billion of GDP and almost 400,000 employees.

Within this province, the economic studies that have been undertaken show that collectively Fort Steele Heritage Town, the Fraser Valley heritage attractions at the Xa:ytem Longhouse Interpretive Centre, the Kilby Historic Site and Fort Langley National Historic Site, together with Barkerville Historic Town add \$32.2 million a year to the province's GDP, create a total of 627 full-time-equivalent jobs and raise \$14.1 million in taxes for all levels of government.

Marketplace trends

In developing this Regional Heritage Strategic Plan, and in looking at opportunities associated with a greater focus on heritage tourism, it is important to understand the wider social and market context. The following section highlights key factors and trends that need to be taken into consideration.

1. While increasing market competition from new and emerging destinations has created a very competitive marketplace, the advent of globalization in many aspects of daily life and travel has contributed to a sense of 'sameness' and a loss of local identity. Not surprisingly there is a counter trend towards localization that is making locality and local cultural heritage much more important in building strong destinations and visitor experiences, and in marketing these destinations. This work of the RDOS takes on a new level of significance in this context of strengthening and maintaining the region's distinctiveness in a global economy.
2. While some would argue that cultural heritage is a fourth pillar of

sustainability, it is perhaps more realistic to view it as a central pillar that plays a fundamental role in underpinning and strengthening the three existing pillars: social, economic and environmental. As the Suscult Project notes:

- a. 'Cultural heritage is economically creative': it generates jobs that are more cost-effective than those in other sectors, it allows communities to preserve assets that have a social and economic value; it attracts cultural tourists; and it can be a driver for economic development (e.g. intangible heritage or crafts as a source of inspiration for contemporary creativity).
 - b. 'Cultural heritage is socially creative': it provides 'socially-valuable leisure activities' that elevate people's thinking and contribute positively to their psychological and social well-being and enhance their sensitivity; heritage conservation and valorisation can also enrich the social environment with stimulating or pleasing public amenities, providing a collective 'memory' for a community and serving as a reservoir of creative and intellectual ideas for future generations; it can also foster social inclusion...and cultural diversity.
 - c. 'Cultural heritage is environmentally creative': the preservation of cultural heritage can allow the maintenance of a friendly and acceptable built environment.
 - d. We protect cultural landscapes not as an external treasure to be transmitted to posterity but as a part of our revolving identity and life . In this context, heritage conservation should be regarded as an economic, social and cultural investment.
3. When we look at tourism market trends, the trend that dominates is the growth in demand for 'experiences'. Today's travellers are seeking an engaging experience with participative learning in the arts, heritage or special character of a place in a way that allows them to make an emotional connection with the destination and local lifestyles. Seeing the sights is no longer sufficient – rather, there is a move toward truly experiencing the destination, diving deeper into authentic, local culture and making the event transformational by being absorbed in the experience. The Canadian Tourism Commission (CTC) realized that the quality, authenticity and uniqueness of visitor experience would be a core feature of Canada's brand to differentiate it in the international marketplace and has taken a global lead in developing tools that are designed to assist the tourism industry with developing, positioning and marketing their products as experiences rather than commodities, with the intent of building on its brand: Canada. Keep Exploring.
 4. Working on the premise that marketing tourism experiences should be

based on why people travel versus selling products, the CTC has undertaken extensive research with the Environics Research Group on peoples' travel and social values. This research provides the basis for the CTC's Explorer Quotient (EQ) consumer segmentation program and can be used to considerable effect in understanding the market place and the types of experiences that will appeal to today's travellers. This research indicates that 35% of key global markets can be characterized as 'learners'. These 'learners' are further segmented to assist the industry in developing appropriate visitor experiences and tailoring the marketing message. Thompson Okanagan Regional Tourism Association has identified three consumer target market segments for the region overall – two of which are prime targets for heritage experiences: the Cultural Explorers and the Authentic Experiencers. These market segments will be examined in more detail in the Marketing Plan.

5. With this growing demand for unique and meaningful experiences, the quest for 'authenticity' has become prevalent. As noted in the Thompson Okanagan 10-Year Tourism Strategy, the experience being sought refers to a desire to understand how a destination differs from one's own in terms of culture, heritage, history and identity, and the need to appreciate the 'essence' of the place and enjoy the sensation of being where things are real and original. This concept is core to a 'sense of place' and is an inherent value of a community's heritage. Building on this value and identifying appropriate opportunities to leverage heritage assets in an effective and dynamic manner is the key challenge facing owners and operators of tangible and intangible cultural heritage.
6. Story-telling has emerged as an integral element of experiential tourism and a vehicle to communicate authenticity. Stories engage people, and destinations need to have a clear narrative to make a particular place attractive to travellers. The importance of 'revealing the story' is a strategic focus of the Thompson Okanagan Tourism Strategy and is the basis for building a strong cultural heritage tourism industry. Examples of good story-telling highlight the value of developing strong themes, both at a specific site or visitor attraction and as a way of developing an integrated travel route. The development and successful growth of themed cultural routes in Europe, such as the European Route of Cistercian Abbeys and the Pyrenean Iron Route, and the work of the European Institute of Cultural Routes demonstrate the value of story-telling as a technique to engage visitors and the multiple social and economic objectives that can underlie cultural heritage programs:

The Cultural Routes encourage widespread community participation in cultural activities raising awareness of a common cultural heritage. Established on cultural and social principles, the Cultural Routes represent

a resource for innovation, creativity, small business creation, and cultural tourism products and services development .

In Canada the work of the Rideau Heritage Route Tourism Association in eastern Ontario illustrates the economic benefits to be gained from presenting heritage to travellers through a themed lens, and the ability to develop a multi-partner approach to strengthening the route as a visitor attraction. Likewise in BC, the work of the New Pathways to Gold Society reflects a similar mandate within a much more rural setting. The Society is seeking to develop a partnership approach to promote a grassroots reconciliation process between First Nations and communities based on a stronger understanding of shared history; encourage British Columbians to rediscover and explore BC's unique history; and, create heritage legacies that will generate new and sustaining tourism opportunities.

7. The recent growth in 'creative tourism' again reflects the visitor's need for an engaging and immersive experience. Creative Tourism is broadly defined as engaging visitors in a place's culture through active participation, offering travellers a chance to express themselves by becoming personally involved with a community's heritage. Creative tourism is travel directed toward an engaged and authentic experience, with participative learning in the arts, heritage or special character of a place, and it provides a connection with those who reside in this place and create this living culture. The concept is built on engaging curiosity within travellers rather than feeding them "pre-digested experiences".

With the growth in the creative economy, the 'creative class' is now estimated to represent 30% of the work force in most North American urban areas . This market segment holds considerable potential for the on-going growth of heritage tourism provided that the product offering is shaped to meet the interests of this group. Research undertaken on Ontario's cultural and heritage tourism concluded that, while traditional travel motivations like relaxation and escapism will persist; the creative worker is equally or more concerned about using travel as a means of improving his or her intellectual competencies. Capitalizing on this trend requires the development of new opportunities for creative participation, while at the same time enhancing the quality and distinctiveness of existing cultural and heritage attractions. The authors of the Ontario report observe that a combination of creativity and high quality consumption creates a unique experience that attracts a range of people who participate in different ways. Attractions that can provide visitors with an opportunity for professional and personal development that improves the experience on offer, while at the same time allowing others to engage in a more passive consumptive experience, will appeal to a wider range of visitors.

8. In looking at the characteristics of the visitor, it is not only important to understand the market shift toward experiential tourism and the associated social and travel values of the visitor, but it is also essential to assess heritage tourism opportunities from a socio-demographic perspective. Two key factors that need to be taken into consideration include:
 - i. The changing age structure of Canada and the dynamics of particular age-cohorts. The baby boomer generation has received considerable attention with the first baby boomer reaching 65 on January 2011. By 2031 all baby boomers will have reached 65 and the proportion of seniors will be approximately 23% compared to 15% in 2011. Those that are more affluent expect to remain healthy, travel and continue working (for fulfillment, if not necessity), and will continue to seek unique experiences. Multi-generational travel is on the rise. A second cohort that is gaining greater attention within the tourism industry is Generation Y or the Millennials – largely the children of baby boomers. With an increase of 20% in 2010 based on American Express Business Insights, this age bracket is the fastest growing segment for travel. It is a cohort that has grown up with technology and expects information to be instantly available, together with real time reporting of events through social media. This most highly educated and diverse generation has a real appetite for learning. Seventy-eight percent of this group says they prefer to learn something new when they travel, while 70% say they expect special places to offer immersive experiences, and look for interactive and hands-on participation (68%).
 - j. The changing ethnic composition of the Canadian population. Immigrants and visible minorities increasingly make up a significant element of the overall population mosaic. In the Vancouver Census Metropolitan Area, 40% of the total population (913,310) are foreign-born immigrants according to the 2011 National Household Survey – by way of contrast the national average is 21%. The top three countries of origin are China (17.4%), India (12.2%) and the Philippines (9.6%).

Conclusion

These factors and trends together reflect significant changes in the marketplace and highlight the challenges facing the heritage tourism sector in developing relevant and engaging visitor experiences.

Within the heritage sector, Parks Canada has been leading the way in understanding the complexity of the markets, the psychographic needs of the visitor, and the importance of adapting the experience and the marketing message to increase overall appeal of heritage sites. Through the use of the CTC's EQ program for product development and market analysis, together with further analysis of target markets using PRIZMC2 software, Parks Canada is

seeking to stem the decline in visitation rates and generate new approaches to building the level of interest in heritage and national landscapes. Work will shortly commence on developing a new master plan for the Halifax Citadel National Historic Site of Canada, for example, with the goal of realizing a 25% increase in paid visitation to the site within five years through the establishment of programs and services that are consistent with national and international best practices, and the creation of a visitor experience that is second to none. This initiative is indicative of the impact that market trends and visitor expectations are now having on the heritage tourism sector, and the corresponding need to assess existing sites and proposed attractions within this context.

3.0 HERITAGE STRATEGY

The heritage strategy is a values-based plan of action incorporating the vision and mission for heritage articulated with community input and engagement. It integrates emerging trends in heritage conservation and heritage tourism, and identifies the existing and future needs of the RDOS and its municipal partners to plan and implement a regional heritage program.

A successful strategy includes an understanding of heritage values, a community vision, strong policies and strategies, a plan of action to implement the strategies, sustainable funding for heritage actions, partnerships, community awareness and a regular measure of achievement.

3.1 Community Heritage Values

Societies the world over preserve the past because it is believed to have both intrinsic and extrinsic value. The past can have value in itself, such as telling a story about what went before us, or it can have values beyond itself, such as promoting increased tourism in a region. It can be represented through tangible remains in the form of records, artifacts, artwork, buildings and structures to entire cities and landscapes, or it can be transmitted through intangible expressions in the form of memories, traditions, laws, customs, songs, dances, stories and other ways of transmission. Often the two are interconnected with tangible resources acting as signifiers or locations for intangible heritage.

There isn't a one-size-fits-all heritage which meets the needs of all situations. Instead of a single set of values for all of society, today we recognize that there are multiple layers of different values, multiple heritages and multiple conceptions about what is important from the past, all interrelating with each other and sometimes conflicting with one another, even at a single site.

Understanding the community's heritage values in the RDOS is an important step towards the development of heritage strategies that will support what the community and local government find to be of heritage significance. Four workshops were held in communities in the RDOS in May 2014. Interviews were conducted in July 2014. Submissions were received by individuals and groups by email, and an online questionnaire was used to elicit information about community heritage values in the RDOS.

What we heard

The community heritage values workshops, questionnaire and interviews asked respondents for their thoughts regarding heritage values in the RDOS including aesthetic values, cultural and social values, historic values and natural history values. The survey also probed whether respondents felt preserving the heritage and history of the RDOS area is important, and whether they feel it is important to link heritage conservation and community economic development.

The following is the response to two key questions:

Do you feel that identifying and conserving the heritage of the Okanagan-Similkameen is an important part of planning for the region?

Yes 89.29% No 3.57% Not sure 7.14%

Do you feel that linking heritage conservation to economic and community development and to tourism is very important in the Okanagan-Similkameen?

Yes 85.19% No 3.70% Not sure 11.11%

A summary of the community engagement can be found in Appendix E.

General Synopsis of Values

The following is a synopsis or snapshot of some of the key heritage values identified during the community engagement that identifies communities' priorities and trends.

Historical value - relationship to events which happened in the past and the historical development of the community, area or region

While people mentioned their own communities as being historically significant (evolution of Oliver, Fairview area, Naramata, Coalmont, etc.), some embraced the concept of the heritage of the RDOS as being part of a whole. The contribution of all peoples, past and present, are considered an important part of the Okanagan and its heritage.

The notion of the area as a series of corridors and a celebration of the valleys and their history of settlement were cited as being important, historically and in the present day.

The diverse nature of the RDOS as a result of historical events is important to the community, leading to the identification of many structures, landscapes, communities and many other features that exemplify this history.

Mentioned were a wide range of resources that represent historical value, such as First Nations sites, the Hudson Bay Trail, Tulameen and Coalmont, packinghouses, mining sites, outdoor arenas, barns and cabins, parks, trails, ranching sites, West Bench lands, city halls in all the towns, and many other sites relating to the history and settlement of the place. Other historical values related to transportation systems, such as rail-bed trails and rock ovens.

Aesthetic value – visual appeal in design, form, structure, materials, or sense of place

Natural landscapes are valued in part for their aesthetic value, including lakes, rivers and wetlands and historical geographical features such as hillsides, cliffs and bluffs. Unparalleled scenery and views are considered important for their aesthetic values. Historical buildings were often mentioned for their aesthetic

values. The overall sense of place of the RDOS was also mentioned.

Cultural value - related to a distinct culture or cultural group or contribution to the overall culture or character of the region

Mention of cultural value was primarily related to First Nations, but also to other groups generally that have contributed to the growth and character of the place, such as Chinese immigrants. Also mentioned were cultural groups / museums and their archives and collections

Spiritual value – relates to supernatural phenomena with a belief in something greater than what is seen in the natural world

This value was primarily found in First Nations sites of importance, such as rock art and the En'owkin Centre, as well as in the meanings and beliefs behind the many local churches and cemeteries.

Social value – the collective attachment to places or events that embody meanings that are important to a community

The small town atmosphere of the region, the spirit of the locals and a real sense of community were mentioned as an important social values. First Nations art, stories, celebrations and legends are considered to have social value, as are the stories of early settlement and how people thought and lived. Local stories can help define a community. Community legends such as Ogopogo stories are important, as are festivals and such as fall fairs and May Days that create a thriving community.

Art in all its forms is valued in the region for linking the present and past, as being vital to cultural identity. Letters, stories and memories of old timers are considered important. Other social values include the freedom in the RDOS to live a lifestyle of your own choosing, self-sufficiency and volunteerism.

Scientific value – what knowledge or information about the past can be revealed by the heritage place?

Water was mentioned often as part of considering scientific values including the understanding of past irrigation practices and systems, dams and flumes. The mining and logging industries and their processes and artifacts are considered to have scientific value. The RDOS was identified as being a scientific hotbed. Agricultural innovations and research, and concepts such as slow food, organic farming and wineries and vineyards were also mentioned, as were all aspects of the natural world including geography, geology, wetlands, animals and plants.

Educational value – the potential of heritage to teach people about the past and create a vision for the future

First Nations stories and legends are considered an educational value, in part for the potential for youth engagement. Heritage generally - both cultural and

natural - was cited as having important educational values.

Economic value – potential for economic development, tourism, or relationship to the economic history of the area.

Many people value the economic potential of heritage in the RDOS. Several valued the idea of partners and sponsors in the heritage and tourism sectors. The idea of integrating heritage and economics was important, a give and take, such as allowing trails through private property, a winery preserving an endangered species, and businesses seeing economic advantages heritage conservation, at the same time making heritage attractive to economic investors.

Heritage walks, bike tours, tourism brochures, fruit stands, integration with wineries and local businesses were representative of economic values. For a few, heritage is not as important as current service needs such as water and fire protection.

Recreational values – recreational aspects of the RDOS, such as outdoor recreation, interpretation, events

Citizens of the RDOS highly value the recreational opportunities of the region, including the Kettle Valley Railway, hiking and biking trails, camping and parks, lake and river activities, skiing and other winter sports, and quadding.

Recreational values also included sports history and the venues where sports activities take place.

Environmental values – natural areas valued for their own sake, and the contribution of natural heritage to sustainability and quality of life

Protection of natural areas from development is seen as an important value. Natural values of the air, water and soil are important and should be carefully preserved, including features associated with pre-history and history. The lakes and rivers are particularly valued, as are wetlands, for wildlife and water purification. Phenomena such as landslides are also seen as a natural history characteristic of the region. The environment is valued for its qualities of healing, sustainability and connection between people, flora, fauna.

3.2 Current Situation

The first step in any strategic planning initiative is to understand what is currently happening in the RDOS with regard to heritage conservation.

Community heritage initiatives

While the RDOS is working towards a region-wide, formal heritage management program, there are several heritage initiatives currently underway in the region. Initiatives identified by participants at the community workshops are outlined below, along with local groups and societies that are involved in heritage conservation activities.

The existence of these active heritage-related groups and projects illustrate that heritage conservation is an important community activity providing a sound base for coordinated district-wide heritage conservation.

Examples of active RDOS heritage societies, groups or initiatives can be found in Section 5.2, Partnerships:

Enabling legislation

Local Government Act

Sections in the Local Government Act enable local governments to better integrate heritage conservation activities into local community planning by defining procedures for more powerful regulations and heritage incentives. The majority of legislative tools available to local governments to undertake heritage conservation activities are enabled under Part 27 of the Local Government Act.

In order for regional districts to take advantage of the tools and incentives provided by the LGA and the Charter, it must first pass enabling legislation to give itself the powers to undertake heritage conservation.

Heritage Conservation Act

The purpose of this Act is to encourage and facilitate the conservation for properties owned by the province or to archaeological sites, the management of which lies under provincial jurisdiction. Aboriginal traditional use sites and archaeological resources may be found on public and private lands within the jurisdiction of local governments, which are often the first to become aware of such heritage assets, which are of interest to the provincial Archaeology Branch.

Agricultural Land Commission Act

The Agricultural Land Commission Act sets the legislative framework for the administration of the agricultural land preservation program. The ALC is concerned with the establishment and maintenance of farmland. Local and regional governments are expected to plan in accordance with the provincial policy of preserving agricultural land.

Electoral Areas with Extended Heritage Service Legislation

Currently, five Electoral Areas in the RDOS have enacted extended service legislation to offer heritage conservation as a community service under the Regional District of Okanagan-Similkameen Electoral Areas A, C, D, G and H Heritage Conservation Service Bylaw No. 2367, 2007.

Official Community Plans

One of the objectives of the heritage strategy is to recommend the inclusion of heritage as an extended service in the RDOS's official community plans for all Electoral Areas as they come up for review. Heritage conservation will be identified as a broad-based, ongoing community activity by the adoption of a Regional District Board resolution acknowledging heritage as an important community value. Currently, RDOS has considered proposed wording changes to Area D-1 during the review of its OCP.

An amendment to the OCP requires an amendment bylaw, approval by the Regional District Board and a public hearing. As such, the community at large must accept heritage conservation as an important community asset. Heritage can be included in the OCP by:

- Acknowledgement of heritage as an important community activity
- Heritage value as expressed by the community
- A values statement that recognizes the historical context of the RDOS as defined by its communities

Land Tenures

An understanding of land tenures in the RDOS may determine approaches to heritage conservation and the tools available for a heritage resource that is located within a particular land use type. Examples of land tenures within RDOS boundaries:

Crown Land (including investigative permits, temporary permits, licences of occupation, statutory rights of way and leases)

- Indian Reserve lands
- Parks and Protected Areas
- Ecological Reserves
- Land within the Agricultural Land Reserve
- Municipal land
- Privately owned land

3.3 Vision, Mission and Goals

The vision is a description of the preferred future for heritage in the Okanagan-Similkameen Regional District. It has been developed from a synthesis of information gathered through the community engagement processes and discussions with the Working Group.

The mission defines why the heritage program exists and brings a clarity of purpose as to how the vision will be achieved. The mission helps define how human and financial resources will be applied to implement the heritage program.

Vision

- Over the next one, five and ten years, heritage in the Okanagan-Similkameen region will fully contribute to defining overall planning and development goals, objectives and actions for the region, with heritage embedded into all future planning initiatives.
- The heritage program will focus on recognizing and conserving all aspects of the history of the place, including natural heritage, First Nations and non-European cultural heritage.
- Heritage will always be considered when undertaking official land use planning processes, including archaeological and aboriginal traditional use sites.
- Urban sprawl in our region will be limited, and the conservation of natural and cultural lands will be achieved, by the understanding and application of effective heritage conservation policies.
- Heritage conservation will contribute to sustainability, economic development and tourism in our region.
- Heritage conservation will connect communities within the RDOS while maintaining the region as a collection of distinct settlements.

Mission

- To develop and implement a strong, inclusive, values-based heritage program for the RDOS, one that contributes to environmental, social and economic sustainability, and that celebrates the diversity of people and place, the character and differing traditions of its communities, its natural features and considerable heritage assets.

Goals

Goal 1: Understanding, recognition and support of a wide range of heritage resources

Promote a greater understanding of the region as a unique place which containing a rich and diverse collection of heritage resources that need recognition and support by all RDOS departments. Draw on heritage activities to promote revitalization, contribute to environmental, economic, and social sustainability, and bring in residents and visitors.

Goal 1 will be achieved through ***Administrative Policies and Strategies***.

Goal 2: Coordinating partnerships and educational opportunities

Use heritage conservation to strengthen community bonds, create partnerships

and reduce perceived and real geographic barriers. Encourage a greater degree of collaboration across all sectors and disciplines. Enhance the profile of the benefits heritage brings to a community.

Goal 2 will be achieved through ***Partnership Policies and Strategies***.

Goal 3: Conserving heritage resources to support regional identity and character

Develop a strong heritage identity for the Okanagan-Similkameen region through the conservation and promotion of all of its heritage resources, including its diverse history, architecture, character, and unique visual and natural features.

Goal 3 will be achieved through ***Resource Stewardship Policies and Strategies***.

3.3 Heritage Policies and Strategic Recommendations

Heritage conservation recognizes the need to understand heritage as a driver of development and sustainability to ensure its continued use and value to local communities and visitors. Resources require stewardship that both benefits the community and conserves the resource for future benefits.

Effective heritage conservation within the region is advanced by developing clear sets of policies for:

- Effectively administering a conservation service
- Working in partnership with interested groups including land and business owners, heritage societies and advocacy groups, historians, archivists and cultural organizations
- Providing direction on what is to be done with identified heritage resources of varying nature, accessibility and condition

The following table charts a strategic longer-term framework that will serve as the over-arching basis for heritage conservation and management in the RDOS over the next 10 years. It provides general expected outcomes over one, five and ten years (Y1, Y5 and Y10 in the table).

The implementation plan found in Section 4.0 is a more detailed action plan that will address how these general strategies can move forward through concrete actions over a five-year term.

Administrative Policies

No.	Policy	Strategy	Outcome
1	Promote a popular understanding of heritage in the RDOS that reflects the major historical themes, and represents the broad variety of resource types (buildings, landscapes, water features, events, etc.) and their connection to ongoing economic development	1.1 Place on community heritage registers important resources other than old buildings: landscapes, natural features, structures, events, intangibles 1.2 Publicize examples where heritage resources are directly responsible for economic vitality	Y1 List on community heritage registers of resources identified in community workshops (See appendix B) Publicized existence of non-building resources Y5 A full range of resources on the heritage register, including landscapes, natural features, and intangibles List of local examples of positive business cases leveraging value of heritage resources Y10 Heritage conservation is a central aspect of business plans in places with identified heritage value
2	Factor heritage conservation into day-to-day Regional District decision-making	2.1 - Make heritage planning a sustainable service 2.2 - Integrate heritage conservation into Official Community Plans 2.3 - Identify ways to inform stakeholders about heritage resources outside areas with Official Community Plans 2.4 - Regularly monitor work towards implementing strategies 2.5 - Regularly bring heritage conservation opportunities and issues to the Regional District Board	Y1 - Heritage a key component of community planning Y5 - Regular monitoring of implementation of all strategies Useful heritage conservation toolkit for planners and the public RDOS GIS system with map, - historical events layers for heritage resources in the region - Toolkit for permitting and conserving procedures accessible to staff and public Y10- Established inter-departmental protocol for heritage conservation
3	Practice heritage conservation in all Electoral Areas	3.1 - Support the passing of the by-law adopting the heritage service in the three remaining Electoral Areas 3.2 - Arrange all Electoral Areas representation on the Community Heritage Commission 3.3 - Engage heritage conservation thinking in communities through the Community Heritage Commission 3.4 - Identify early achievable conservation projects	Y1 - Full Electoral Area participation in heritage service - Distributed lists of heritage resources by Electoral Area Y5 - Fully functioning coordinated heritage service over the entire Regional District, with each electoral area having representation on the Community Heritage Commission - Popular easily completed conservation project identified as priority projects to undertake - Popular relatively easy conservation projects completed, which have established a working relationship among partners and stakeholders and the Regional District Y10- A sustainable culture of heritage stewardship throughout the Regional District

No.	Policy	Strategy	Outcome
4	Integrate heritage conservation with environmental, social and economic sustainability	4.1 - Position heritage conservation as environmental, social and economic sustainability	Y1 - Position heritage conservation as a sustainable initiative Y5 - Have a roster of heritage conservation projects that can easily be characterized as sustainable initiatives Y10- A sustainable development culture that includes heritage conservation as a matter of course

Partnership Policies

No.	Policy	Strategy	Outcome
5	Work with First Nations, non-European groups, non-profits, municipalities, heritage societies, chambers of commerce, tourism associations, private land owners and RDOS departments to develop a cohesive heritage program for the region and capitalize on opportunities to collaborate, support and co-promote heritage programs.	5.1 - Outreach to heritage contacts in the region, provide resources and support, facilitate a communication forum on heritage programs to provide collaboration and exchanges of ideas 5.2 - Identify a list of relevant contacts, programs and events and help them identify their shared heritage values, efforts and benefits in collaboration with each other. Offer support and resources to these contacts.	Y1 - List of relevant contacts, programs and events Y5 - A process and protocol for collaboration and partnerships and completed pilot projects including heritage partners Y10- Fully coordinated program among regional groups and ongoing collaboration on heritage projects
6	Work with First Nations to include aboriginal values into the heritage of the region and the resource list	6.1 - Establish a conversation with First Nations on the subject of the region's heritage, building on En'owkin Centre dialogue 6.2 - Develop a coordinated story of the peopling of the Region that meaningfully includes aboriginal and non-aboriginal histories 6.3 - Integrate aboriginal and non-aboriginal heritage values for conservation work	Y1 - Introduction of the issue of heritage into the ongoing dialogue with First Nations Y5 - Statements of significance and area context statements that reflect aboriginal and non-aboriginal values Y10- A body of resources with Statements and Conservation Plans that reflect aboriginal and non-aboriginal values
7	Work with non-aboriginal/non-European groups to include their heritage values into the heritage of the region and the resource list	7.1 - Add to regional community heritage register resources that represent non-aboriginal/non-European heritage values	Y1 - Incorporation of non-aboriginal/non-European histories of the region into Regional District heritage conservation work Y5 - Identification of resources on the community heritage register that represent the non-aboriginal/non-European heritage of the region Y10- A community heritage register that reflects the heritage of all people in the region - A body of resources with Statements and Conservation Plans that reflect values of all people in the region

No.	Policy	Strategy	Outcome
8	Work with municipalities on shared heritage values and resources	8.1 - Identify resources that involve both the Regional District and municipalities, in order to understand what cooperative measures will be needed for heritage conservation 8.2 Begin cooperative conservation efforts with projects requiring straightforward cooperation	Y1 - Identify conservation projects that the Regional District and municipalities can easily and usefully cooperate on Y5 - Build on the easy projects with those with more complex coordination requirements Y10- A cooperative coordinated culture of conservation
9	Support the community in future heritage identification and conservation efforts	9.1 - Assist local community groups in identifying sources of grant money for heritage research and conservation 9.2 - Develop conservation toolkits to assist communities in conserving their heritage	Y1 - Develop accessible web-based information on heritage conservation for the public Y5 - Build on early web-based material to increase community capacity for conservation efforts Y10- Comprehensive website and hard copy information to sustain an ongoing high level of heritage stewardship
10	Work with partners to identify economic development opportunities related to heritage	10.1 Identify partners and potential sites - Include policy acknowledging the economic importance of landscape heritage and character to economic future of region	Y1 - List of potential economic partners Y5 - Ideas incubated and business case established for small pilot project(s) Y10- Ongoing economic development opportunities related to heritage
11	Work with partners to identify and implement heritage outreach and education programs	11.1- Explore heritage curriculum with School Board and Okanagan College 11.2 Identify current efforts in the community to build on 11.3 Promote youth and family oriented programs 11.4 Look for non-traditional, creative education and outreach programming 11.5 Design and implement interpretive plan	Y1 - Key partnerships and potential creative programs identified Y5 - Outreach and education program in place, including information on website, newsletter or other initiatives Y10- A coordinated partnership of ongoing creative programming Ongoing implementation of interpretive program
12	Invest in professional training, legal frameworks and research that support and sustain heritage programs	12.1- Build expertise for ongoing heritage stewardship, including expertise among planners, engineers, architects, surveyors and others 12.2 Ensure ongoing attention to new thinking, innovative programs, administration and legislation in heritage conservation	Y1 - Commitment to future heritage training and education Y5 - Participation in training and educational programs Y10- Series of research documents that link trends in heritage conservation to RDOS heritage program

Resource Stewardship Policies

No.	Policy	Strategy	Outcome
12	Promote conservation of landscapes, lakes, rivers, streams, vegetation and corridors as a critical part of the regional heritage strategy	12.1- Identify landscape heritage resources where their conservation would result in popular experiential improvements 12.2- Identify a toolkit of bylaws that can be of service to the conservation of landscapes 12.3- Identify partnerships required for successful conservation, whether it be First Nations, departments of the Province of B.C., and/or municipalities	Y1 - Identify a list of landscapes for the region community heritage register, and conservation action (if any) required beyond listing Y5 - Development of a body of conservation projects that positively impact the community's experience of the landscape, involving cooperative partnerships as required Y10- A developed culture of stewardship of the natural landscape in partnership with others
13	Treat the conservation of heritage views and vistas as stewardship of the region's visual identity	13.1- Identify views and vistas key to the region's identity; list to be throughout the region 13.2- Work in partnership with others that could impact views and vistas to conserve values	Y1 - List on the regional community heritage register views and vistas that key Y5 - Develop a small body of projects of successful stewardship with partners Y10- Comprehensive conserved body of views and vistas that are key to the identity of the region
14	Preserve the spatial organizations and clustering of heritage resources where key to their heritage values	14.1- Identify resources where conservation of clusters or spatial organization are required (e.g. a town plan) 14.2- Identify tools to help conserve organization and/or clustering	Y1 - List of resources flagged for requiring conservation of clustering or spatial organization, and tools to enable their conservation Y5 - Body of conserved resources with complex organization and/or clustering Y10- Established culture of action and know-how for these more complex resources
15	Promote the use of heritage buildings and structures in order to maintain their vital roles; conserve their character-defining elements	15.1- Identify revitalizing uses for buildings and structures 15.2- Enable the revitalizing uses with toolkit that facilitates re-use	Y1 - Register buildings and structures that will benefit from registration to access conservation tools not otherwise available Y5 - Body of conserved resources that required revitalizing re-use Y10- Established culture of action and know-how for heritage revitalization
16	Retain evidence of past and present land use and promote new land uses that support the conservation of heritage value and character	16.1- Be ready to encourage land uses of places with heritage values that conserve those values 16.2- Have toolkit ready for change of use of lands where needed for conservation of heritage values	Y1 - Identify resources whose values are threatened by present or proposed land uses Y5 - Body of resources conserved through the application of change of use Y10- Established culture of action and know-how for changes of land use

No.	Policy	Strategy	Outcome
17	Promote cultural traditions that sustain a community's connection with the historical place	17.1 Identify existing traditions, and custodians of those traditions 17.2 Promote sustainable stewardship of traditions on RD website	Y1 - Compiled list of traditions that are heritage resources Y5 - Monitored body of traditions that are sustaining Y10- Continued monitoring and stewardship of traditions
18	Develop cultural tourism centred on authenticity, local participation and ownership	18.1- Develop and link local stakeholder lists of cultural centres and activities 18.2- Publicize the body of centres and activities within and outside the Regional District, linking it with the identity of the region 18.3- Develop sustainable management plans for these centres and activities 18.4- Develop cultural tourism programs	Y1 - Identified list of cultural centres and activities Y5 - Website and printouts linking centres and activities into an engrossing critical mass, organized for residents and visitors - Sustainable management plans for linked centres and activities Y10- Comprehensive network of centres and associated activities that together are an economic engine for the region
19	Develop an experience of archaeological sites	19.1- With First Nations and non-Europeans, identify sites that can help relate aboriginal, non-European and European histories and cultures in the region 19.2- Explore virtual and on-site interpretation that is not invasive of cultures and site	Y1 - Introduction of policy and strategy into the ongoing dialogue with First Nations - Exploration of possible sites with Chinese Canadian history Y5 - A small body of projects of successful stewardship with partners developed Y10- Comprehensive conserved body of views and vistas that are key to the identity of the region
20	Treat the region's small-scale features that contribute to its heritage and character as stewardship of the region's identity	20.1 Develop and link local stakeholder lists of small-scale features (hedgerows, fencelines, ditches, small structures etc.) Develop sustainable management plans for small-scale structures Develop cultural tourism programs	Y1 - Identified list of important small-scale features Y5 - Sustainable management plans for the linked centres and activities Y10 Continued monitoring of features

3.4 Evaluation Criteria for Future Sites

Evaluation criteria have been created using a values-based methodology. A historic place maybe considered for protection, conservation, inclusion on the heritage register, designation or other action if it is considered to have heritage value by the community based on the following criteria. The criteria are also used to evaluate the heritage significance of a resource.

The heritage place has aesthetic, design or physical value such as

- Rare, unique, representative or early example of a style, type, expression, material or construction method
- Display of craftsmanship or artistic merit
- Demonstration technical or scientific achievement

The heritage place has historical, scientific, educational or associative value such as

- Direct association with a theme, event, belief, person, activity, organization or institution that is significant to a community
- Potential to yield information that will contribute to an understanding of the region's history
- Potential to yield information that contributes to an understanding of a process or system
- Demonstration or reflection of the work or ideas of an architect, artist, builder, designer or theorist who is significant to a community

The heritage place has contextual value such as

- Importance in defining, maintaining or supporting the character of an area
- Physical, functional, visual or historical links to its surroundings
- Landmark status

The heritage place has cultural or social value such as

- Yielding, or having the potential to yield, information that contributes to an understanding of a community or culture
- Has association with traditions, rituals or events important to the community
- The heritage place has heritage value and is under threat from damage or loss through proposed development, neglect or other reasons
- The heritage place helps fulfill the goal of full representation of the seven themes identified for the RDOS
- The heritage place helps fulfill the goal of identifying heritage resources that are geographically dispersed throughout the RDOS
- The place is important in demonstrating the evolution, theme, pattern or community identity in the history of the RDOS
- The heritage place has the potential to contribute to economic development and to be used in the everyday lives of people in the region
- The place has the ability to contribute to the social well-being of the community
- The place has the ability to contribute to the biodiversity of the community or region

Assessing heritage significance using the thematic framework

Themes guide judgements about what types of heritage resources might exist on a site or in an area, and what assistance might be required to assess their heritage significance. The use of major themes can draw attention to gaps in existing histories which could lead to an incomplete assessment or community heritage register.

The historical significance of a resource can be assessed by checking whether it physically demonstrates or fits into any of the historical themes which shaped the area in which the resource is located. The themes can be used to consider how the resource demonstrates or achieves other heritage values, such as technical excellence or educational potential. Themes may give clues as to why a community values a particular heritage resource.

To consider a heritage feature in its historical context, it is important to identify the links between information known from historical sources such as documents or oral histories, and physical evidence identified in the field. Themes can identify historical associations not physically apparent or previously identified in the field.

Themes can be integrated into the assessment of significance several ways:

- Identifying the significant theme(s) demonstrated by or associated with the heritage resource
- Contributing to the description of the physical elements and the systems or processes of the resource
- Creating a context for a resource such as how it was used, constructed or formed
- In conjunction with community heritage values, themes can be used in identifying the heritage values associated with an historic place using the thematic framework to provide multiple storylines for the place, and to assist in compiling a broader range of possible heritage values
- Using the thematic framework when writing the statement of significance to draw out significant historical aspects of the place
- Use of the thematic framework in a gap analysis to identify heritage resources, tangible and intangible, which may be under-represented on the heritage register.
- Use of the thematic framework to compare the similarities and differences of a specific type of resources or site
- Identifying the ways in which a place demonstrates the historical themes found to be significant
- Identifying significant associations with a person or group of people of historical significance

3.5 Heritage Conservation Tools

Behind the choice of governance model and selection of regulatory tools lies the issue of funding for heritage conservation. Some conservation tools have little impact on staff resource allocation, and other tools can be seen as a function of already-funded planning work. The purpose of this section is to outline all the tools available to a Regional District in BC, and note the impact on Regional District resources, whether it be increased staff time or other obligations with an impact on operating budgets.

It should be noted that it is within the powers of the Regional District to raise funds for heritage conservation through the addition of a tax line item. Additional tax money can fund the addition of a heritage planning budget - funding planning staff time devoted to heritage planning initiatives, and go to direct funding of conservation projects.

The following is a summary of the tools available to the RDOS. A full tool-kit can be found in Appendix H.

1. Planning and Regulatory Tools

The Regional District (as well as municipalities within the Region) can implement conservation of heritage values through planning policies and the regulation of improvements to properties, including site, building and sign design. The cost of implementing heritage conservation using these tools is Staff time, but can be rationalized as part of the cost of developing a comprehensive planned environment throughout the region.

Planning and Regulatory Tools:

- 1.1 Official Community Plan (including Area Plan)
- 1.2 Zoning By-law, Zoning Amendments (Rezoning)
- 1.3 Development Permit Area
- 1.4 Subdivision By-law and Approvals
- 1.5 Building Permits
- 1.6 Building Code Alternative Solutions
- 1.7 Design Guidelines
- 1.8. Sign By-law
- 1.9. Public Realm
- 1.10. Interpretation
- 1.11 Demolition Permits (withholding)

2. Heritage Protection Tools

These tools can be viewed by citizens either as enabling tools or an extra level of bureaucracy – or both. For an effective program of conservation, the challenge is to make heritage conservation an appealing option, rather than a burden. Every effort should be made to present protection tools as a way to improve the owner's situation.

Conservation plans sometimes need time to gel. Properties with threatened loss of heritage features can be subject to protection orders, leaving time to negotiate with property owners a means to conserve heritage.

Heritage Protection Tools:

- 2.1. Heritage Conservation Area
- 2.2. Heritage Register
- 2.3. Heritage Designation
- 2.4. Heritage Revitalization Agreement
- 2.5. Heritage Conservation Covenant
- 2.6. Heritage Alteration Permit
- 2.7. Heritage Site Maintenance Standards
- 2.8. Heritage Conservation Standards and Guidelines
- 2.9. Heritage Procedures By-law
- 2.10. Temporary Heritage Protection
 - 2.10.1. Withholding of approvals
 - 2.10.2. Temporary protection orders
 - 2.10.3. Temporary protection by-laws
 - 2.10.4. Temporary protection control periods
 - 2.10.5. Notification of Interest

3. Financial Tools

There are tools available to compensate property owners for shouldering the stewardship of heritage value, in the form of tax grants or relief (which cost the Regional District money) or financial incentives (which need not cause the Regional District to expend funds). Heritage resources can have local, provincial and/or federal importance, and can attract funding from any or all three levels of government.

Financial Tools:

Municipal

- 3.1.1. Cash Grants
- 3.1.2. Heritage Property Tax Exemptions
- 3.1.3. Commercial Property Tax Exemptions
- 3.1.4. Bonus Density
- 3.1.5. Residual Density
- 3.1.6. Transfer of Density (including density bank)

Provincial

- 3.2.1. Heritage Legacy Fund of BC
- 3.2.2. Community Heritage Register Program
- 3.2.3. Conservation and Feasibility Planning Program (currently not available)

TOOLS FOR LANDSCAPES

The community has identified many heritage resources that are essentially valued landscapes. For this reason, it is especially important to discover the regulatory tools that can best manage the conservation of heritage value of broad areas or vistas. Tools which can be of great use:

- 1.1 Official Community Plan (including Area Plan)
- 1.2 Zoning By-law, Zoning Amendments (Rezoning)
- 1.3 Development Permit Area
- 1.4 Subdivision By-law and Approvals
- 1.7 Design Guidelines
- 1.8. Sign By-law
- 1.9. Public Realm
- 1.10. Interpretation
- 2.1. Heritage Conservation Area
- 2.10.5. Notification of Interest
- 3.1.4. Bonus Density
- 3.1.6. Transfer of Density (including density bank)

3.6 Performance Measures

The purpose of these performance measures is to provide a consistent approach for systematically collecting, analyzing, utilizing and reporting on the performance of the RDOS heritage programs and activities. This creates a road map that outlines the linkage between allocated resources and expected outcomes and results for each of the areas outlined below. This charts the regional district's level of achievement and provides information for work plans and budgets. As initial strategic actions are completed and the heritage program matures, performance indicators should be reviewed yearly.

Outcomes	Performance indicator	Data source	Frequency	Responsibility
Heritage planning	Active community heritage commission meeting regularly and involved in projects	RDOS	Yearly	Planning staff
	Heritage bylaw includes all Electoral Areas	RDOS	Once	Planning staff
	Level of inter-departmental involvement in heritage conservation	RDOS	Yearly	Planning staff
	Amount of staff time devoted to heritage program	All RDOS departments	Yearly	Planning staff
	Stable funding for RDOS heritage program	RDOS	Yearly	RDOS Board
	Amount of trail development and interpretation completed	RDOS	Yearly	Planning staff
	Heritage conservation, management or outreach projects initiated or completed	RDOS	Yearly	Planning staff
	Number of users of RDOS heritage website	RDOS	Yearly	Planning staff
	Strengthened heritage wording in OCPs	RDOS	At OCP update	Planning staff
Vision, mission and goals	Review and update of vision and mission as needed	RDOS	Yearly	Planning staff
Heritage register	Number of resources placed on the heritage register	Heritage register	Yearly	Planning staff
	Resources reflect geographical, thematic and cultural diversity	Heritage register	When resources considered	Planning staff
	Ongoing identification of register-potential tangible and intangible resources	RDOS	When resources considered	Planning staff
Policy, strategy, implementation	Number of implementation plan actions completed	RDOS	Yearly	Planning staff
	Review/update of strategic actions completed	RDOS	Yearly	Planning staff
	Establishment of working group to explore sustainability and economic development initiatives	RDOS	Once / ongoing	Planning staff

Outcomes	Performance indicator	Data source	Frequency	Responsibility
Heritage partnerships	Level of ongoing engagement and involvement of First Nations	RDOS, First Nations	Yearly	Planning staff
	Number of local community groups or associations involved in RDOS heritage projects	RDOS, community groups	Yearly	Planning staff
	Diversity of community groups involved in heritage conservation	RDOS, community groups	Yearly	Planning staff
	Education and outreach program in place and active	RDOS	Yearly	Planning staff
	Number of collaborative projects or events initiated or completed	RDOS	Yearly	Planning staff
Marketing and promotion	Number of marketing and promotion plan actions completed	RDOS	Yearly	Planning staff
	Level of public interest in heritage sites and programs	RDOS	Yearly	Planning staff
	Level of understanding of heritage conservation by the public	RDOS heritage website	Yearly	Planning staff
	Improved and expanded sign and interpretive program	RDOS	Yearly	Planning staff
	Ongoing work on website and interactive map	RDOS	Yearly	Planning staff

3.7 Heritage Advisory Commission

Under Local Government Act Part 27 section 953 and section 143 of the Community Charter, a Regional District Board may, by bylaw, create a Regional Heritage Commission.

Local Government Act

Community heritage commission

953 (1) In addition to the authority under section 176 (1) (g) [corporate powers — regional district commissions] of this Act or section 143 [municipal commissions] of the Community Charter, a local government may designate an existing organization to act as a community heritage commission.

(2) In relation to an organization designated under subsection (1),

(a) when the organization is acting as a community heritage commission, the organization is deemed to be a commission established under the applicable provision referred to in subsection (1), and

(b) when a member of the organization is acting as a member of a community heritage commission, the member is deemed to be a member of a commission established under the applicable provision referred to in subsection (1).

Objective

The Regional District of Okanagan Similkameen Heritage Advisory Commission will assist and the RDOS Board on the management and implementation of community heritage conservation and activities.

Heritage Advisory Commission procedures shall be directed by the Local Government Act and the Regional District of Okanagan Similkameen Procedures Bylaw.

Local government creates or authorizes a community heritage commission by adopting a bylaw, which must include the commission's:

- Name
- Terms of reference
- Composition and appointment procedure
- Operating procedures

Process

The Regional District of Okanagan Similkameen Board reviews applications for membership and officially appoints members to the commission.

The Commission should be broadly based and structured with members that represent all of the Regional District. The Commission should include one member of the Regional District Board and one member of RDOS staff as non-voting members. A liaison from other municipal heritage advisory commissions within the area should be present at the RDOS commission meetings.

An annual schedule of meetings and teleconferences should be prepared at the beginning of each year.

Mandate

- To advise the Regional District Board on all matters related to cultural heritage
- To advise the Regional District Board on matters dealing with the maintenance and development of the Community Heritage Register, which includes heritage places that are both cultural and natural, and resources such as buildings and built features, as well as large regions and landscapes
- To advise the Regional District Board on the heritage aspects of development applications
- To make recommendations to the Regional District Board respecting the designation of heritage buildings, structures, and lands and the demolition, preservation, alteration, or renovation of those buildings, structures and lands
- To advise the Regional District Board on heritage services, programs, events and facilities occurring in the various parts of the region
- To support heritage activities and heritage programs undertaken by the Regional District or community organizations to facilitate the preservation and interpretation of natural features that have a cultural component or meaning, the preservation and interpretation of built heritage and cultural landscapes, and the preservation and interpretation of cultural heritage
- To provide a community perspective on services, programs, events, and facilities related to heritage conservation
- To facilitate the promotion, recognition, commemoration and awareness of the Regional District's heritage places as a reflection of their economic, social, cultural, environmental, spiritual and aesthetic values, and the positive role of history and culture in achieving a sustainable future

Meetings

The Commission will meet in person a minimum of 1 (one) time per year. The frequency of subsequent meetings will be determined by the needs and dictates of the workload and/or by the RDOS planning staff or by the Commission. These subsequent meeting may be held via teleconference on an as-needed basis or in person if possible.

Commission members shall receive no less than two weeks' notice of meetings, provided that notice may be waived by a unanimous vote of the Commission at such meeting called without two weeks' notice.

Notice shall be deemed delivered when delivered to the place of residence of the Commission members.

At the first meeting of the Commission each year, a Chair shall be elected, and shall hold office for 1 (one) year until re-elected or a successor named.

The duties of the Chair shall include the calling of, and presiding at, meetings of the Commission in accordance with any regulations of the Commission with respect thereto, and such other duties as the Commission may prescribe.

In the event of the absence of the Chair, the Heritage Advisory Commission will select from amongst its voting members an Acting Chair.

All questions before any meeting of the Commission shall be decided by a majority of the members present, including the Chair or the Acting Chair.

The Chair or the Acting Chair shall vote on all questions submitted and, in case of an equal division, the question shall be disposed of in the negative.

A quorum shall be 50% of current voting members.

An agenda will be set by the RDOS staff for each meeting. Delegates or persons wishing to make a presentation should contact the staff liaison in advance of the meeting date if they wish to be on the agenda.

The minutes of each meeting will be recorded by the recording secretary appointed by the RDOS staff.

The Heritage Advisory Commission will submit minutes for the RDOS Board's information following Commission meetings.

All Heritage Advisory Commission meetings will be open to the public.

The Heritage Advisory Commission may adopt rules of procedure and may, from time to time, vary such rules by vote of a majority of the members of the Commission.

The Heritage Advisory Commission may, by resolution, establish Advisory Sub-Committees to the Commission to advise or work on special topics or projects as directed by the Regional District Board.

Membership

The Regional District of Okanagan-Similkameen Heritage Advisory Commission shall consist of 8 (eight) voting members and five alternate members, all of whom shall be appointed by the Regional District Board and shall be selected as follows:

One regular member and one alternate member selected from each of the eight Electoral Areas (A-H) of the Regional District, with at least one member from each area residing in an unincorporated portion of that area, and three members-at-large.

The Commission should also include one person from the Regional District Board and one member of RDOS staff as non-voting members.

A liaison (non-voting) from other municipal heritage advisory commissions within the area should attend the RDOS Commission meetings.

One appointed Commission member shall be elected as Chair at the first meeting of the Commission each year, and shall serve a term of one year unless reelected or a successor named.

One member of the RDOS Board will serve as a Board liaison for the Heritage Advisory Commission. The Board representative will hold a non-voting seat and cannot serve as Chair.

One member of the RDOS planning staff will serve as the staff liaison for the Heritage Advisory Commission.

Each voting member of the Commission shall be appointed for a period of 2 (two) years commencing January 1 of the year of their appointment and terminating December 31 two years hence.

The maximum length of service for voting members to the Heritage Advisory Commission shall be 6 (six) consecutive years.

No member of the Commission shall receive compensation for services other than reimbursement for actual expenses necessarily incurred in the discharge of official duties of the Commission. Such duties to be authorized by the Board in advance.

In the event of a vacancy occurring among the appointed members of the Commission, the RDOS Board may appoint a new member to fill such a vacancy.

The RDOS Board may by a majority vote of members present remove a member of the Commission from office.

Financial Administration

The Regional District Board shall include in its budget such sums as it deems necessary to meeting the expenses of the Commission.

Staff Support

The RDOS will provide one staff liaison person as a representative to the Heritage Advisory Commission.

The RDOS will provide a secretary to record the resolutions and general events of the Heritage Advisory Commission meetings, contact members, make appointments, monitor membership, draft correspondence and generally assist with heritage events and activities undertaken by the Heritage Advisory Commission.

4.0 5-YEAR IMPLEMENTATION

This is a plan for action, showing a list of priority tasks that can realistically be implemented by the RDOS with the community over the next one to five years. This plan builds on current heritage initiatives in the RDOS and focuses on resources that make the RDOS unique in terms of its heritage.

5.1 Administrative Policy

Year	No.	Policy	Actions	Implementation Resources
Year 1	1	Promote a popular understanding of heritage in the RDOS that reflects the major historical themes, and represents the broad variety of resource types (buildings, landscapes, water features, events, etc.) Undertake heritage projects that support and communicate this understanding	Select five resources to add to the heritage register that further represent the area's historical themes Select resources for that are a variety of types, not just buildings Partner with the Working Group to prepare the statements and hold a one-day statement of significance workshop with the Working Group facilitated by Heritage BC	RDOS staff • Heritage Heritage Advisory Commission Working Group Heritage BC Cost \$1,200.00 plus travel and expenses Budget Source Heritage Conservation Fund
			Grow the heritage-specific page on the RDOS website to promote the heritage program, provide heritage information, be a means of communication, and collect and disperse material from other heritage associations and groups Dedicate personnel to regularly update the website and the interactive heritage map and add to the website in the coming years	RDOS staff • Heritage • Information • Communications Cost N/A (internal) Budget Source Information Services
			Heritage program to synergize with and contribute to Trails Strategy with research, content and budget for trail signs, markers, wayfinding Retain sign fabricator and outside consultant if needed	RDOS staff • Heritage • Information • Communications Cost N/A (internal) Budget Source Community Services (Heritage, Regional Trails) or Apply for a Heritage Legacy Fund grant for signage fabrication http://www.heritagebc.ca/funding/heritage-legacyfund or from the Okanagan-Okanagan-Similkameen Parks Society

5.1 Administrative Policy cont'd.

Year	No.	Policy	Actions	Implementation Resources
Year 1 cont'd			Utilize in-house expertise for marketing and promotion, such as the preparation of informational, interpretive and heritage tour brochures Partner with South Okanagan Heritage Alliance and local Chambers of Commerce	RDOS staff • Heritage • Inform. Tech, Communications Cost N/A (internal) Budget Source Community Services (Economic Development)
			Provide support for an oral history project through staff expertise, budget allocation or grant applications Partner with First People's Cultural Council http://www.fpcc.ca/about-us/ and train staff or volunteers through the Oral History Centre online workshops http://oralhistorycentre.ca/workshops	RDOS staff • Heritage Cost \$ 60 per staff member for a 3-series workshop that will allow the RDOS to train for the project and register as an affiliate of the Oral History Centre \$200 for recording equipment Budget Source Community Services (Rural Projects)
			Partner with the Granite Creek Preservation Society to provide heritage advice, technical support and a brochure Incorporate information on the Granite Creek project on the heritage website	RDOS staff • Heritage • Communications • Planning • Public Works Cost N/A (internal) Budget Source Community, Information, Public Works and Development Services
	2	Factor heritage conservation into day-to-day Regional District decision-making	Adopt the <i>Standards and Guidelines for Heritage Conservation in Canada</i> to guide heritage activity	RDOS staff • Heritage Board Cost N/A (internal) Budget Source Development Services
			Establish an inter-departmental protocol for integration of heritage into RDOS business	RDOS staff • Heritage Board Cost N/A (internal) Budget Source Development Services

5.1 Administrative Policy cont'd.

Year	No.	Policy	Actions	Implementation Resources
Year 1 cont'd			Utilize other departments to support heritage integration into projects - engineering, parks, public works etc. - through staff time and budget allocation	RDOS staff • Heritage Board Cost N/A (internal) Budget Source Development Services
	3	Practice heritage conservation in all Electoral Areas	Identify heritage resources in each Electoral Area for inclusion on the heritage register	RDOS staff • Heritage Board Cost N/A (internal) Budget Source Heritage Conservation Fund
			Amend the bylaw to establish all Electoral Area participation in heritage service	RDOS staff Board Electoral Area B, E, F Directors Cost N/A (internal) Budget Source Development Services
			Establish a region-wide Heritage Advisory Commission	RDOS staff Board Cost N/A (internal) Budget Source Community Services (Rural Projects)
	4	Integrate heritage conservation with environmental, social and economic sustainability	Include heritage in RDOS documents that discuss future sustainable development Identify potential sources of funding for heritage projects, eg. grants Include heritage as a sustainable part of capital projects	RDOS staff Board Cost N/A (internal) Budget Source Development Services (Regional Growth Strategy)
Years 2 - 5	1	Promote a popular understanding of heritage in the RDOS that reflects the major historical themes, and represents the broad variety of resource types (buildings, landscapes, water features, events, etc.)	Continue to add resources to the heritage register taking care to address all the historical themes	RDOS staff • Heritage Heritage Advisory Commission Working Group
			Develop online resources: • Create map layers for heritage on the RDOS GIS site • Create a calendar of heritage events • Include maps, walking / cycling tours, trails and other heritage information	GIS layering Web-based information • Heritage calendar • Heritage mapping • Touring guides

5.1 Administrative Policy cont'd.

Year	No.	Policy	Actions	Implementation Resources
Years 2 - 5 cont'd			Develop an online tool to provide guidance on sources of heritage information and resources	RDOS staff - Heritage - Inform. Tech, Communications
			Heritage program to continue contribution and synergy with Trails Strategy with research, content and budget for trail signs, markers, wayfinding	RDOS staff - Heritage - Inform. Tech, Communications Outside consultant Sign fabricator
			Continued support for an oral history project through staff expertise, budget allocation or grant applications (if needed)	RDOS staff Heritage Budget allocation to conduct oral history project
			Support efforts to establish additional and improved signs, public art, markers or other elements to interpret and identify heritage places and destinations	RDOS staff - Heritage - Communications - Planning - Public Works
	2	Factor heritage conservation into day-to-day Regional District decision-making	Develop inter-departmental integration of heritage into RDOS business	RDOS staff
			Develop methodologies that will trigger or red flag heritage issues in areas of the RDOS without an OCP	RDOS staff Inform. Tech.
			Identify areas in the region that may benefit from the establishment of a form and character Development Permit Area	RDOS staff - Heritage - Planning Services
			Allocate a portion of DCCs towards heritage planning and conservation	RDOS staff - Heritage - Tax and Assessment
			Implement the use of available conservation tools on development projects	RDOS staff - Heritage - Planning Services - Building Inspection
			Adopt use of form and character development permit area for conservation where needed	
			Adopt use of special measures in the BC Building Code	

Year	No.	Policy	Actions	Implementation Resources
Years 2 - 5 cont'd			As required, implement and grow the regional heritage program through a centralized heritage office at the RDOS If needed, create a heritage coordinator position to manage the implementation of the regional heritage program and to be a centralized resource for heritage programs and inquiries in the regional district	RDOS staff • Heritage or Apply for a provincial grant to fund a test of a one-year part-time position
	3	Practice heritage conservation in all Electoral Areas	Complete the preparation of a heritage conservation reference manual specific to the heritage opportunities and issues in each Electoral Area	RDOS staff • Heritage • Communications
			Identify and conserve sites in all electoral areas	RDOS staff
	4	Integrate heritage conservation with environmental, social and economic sustainability	Identify, initiate and support projects that demonstrates sustainability through heritage conservation	RDOS staff

5.2 Partnership Policy

Year	No.	Policy	Actions	Implementation Resources
Year 1	5	Work with First Nations, non-European groups, non-profits, heritage societies, chambers of commerce, tourism associations, private land owners and all RDOS governments to identify and develop a cohesive heritage campaign for the region and capitalize on opportunities to collaborate on, support and co-promote heritage programs	Outreach to heritage contacts in the region, provide resources and support, facilitate a communication forum on heritage programs to provide collaboration and exchanges of ideas Identify a list of relevant contacts, programs and events and help identify shared heritage values, efforts and benefits in collaboration with each other. Offer support and resources to these contacts	RDOS staff - Heritage - Communications Working Group members Advocacy group Cost N/A (internal) Budget Source Community Services (Rural Projects)
	6	Work with First Nations to include aboriginal values in the heritage understanding of the region and the resource list Focus on making aboriginal voices front and centre	Continue coordination through meetings and information sharing between Working Group members and regional organizations	RDOS staff Working Group members Advocacy group Cost N/A (internal) Budget Source Community Services (Rural Projects)
			Continue outreach to En'owkin Centre dialogue to discuss First Nations' engagement with the heritage program	RDOS staff First Nations En'owkin Centre Cost N/A (internal) Budget Source Community Services (Rural Projects)
	7	Work with non-aboriginal / non-European groups to include their heritage values into the heritage of the region and the resource list	Identify themes and stories to add to the heritage picture in the region, for example: Chinese Canadian history	RDOS staff - Heritage - Tax and Assessment Cost N/A (internal) Budget Source Community Services (Regional Growth Strategy)
	8	Work with municipalities on shared heritage values and resources	Identify shared resources between RDOS and municipalities that can be visually or physically impacted by one party or another	RDOS staff - Heritage - Planning Services Municipalities Cost N/A (internal) Budget Source Community Services (Regional Growth Strategy)

5.2 Partnership Policy cont'd.

Year	No.	Policy	Actions	Implementation Resources
Year 1 cont'd	9	Support the community in future heritage identification and conservation efforts	Identify resources that would benefit from coordinated conservation efforts with partners, such as First Nations, arts and culture groups, recreational groups, private landowners etc.	RDOS staff - Heritage - Planning Services Municipalities First Nations Province of BC Heritage Branch Cost N/A (internal) Budget Source Community Services (Regional Growth Strategy)
	10	Work with partners to identify economic development opportunities related to heritage	Work with local wineries, agricultural producers, fruit stand owners etc. to develop economic business cases for continued use of heritage resources, for example Heritage orchard tours, grafting and budding workshops, sale of rootstocks or new trees, innovative business incubator etc.	RDOS staff Private business Community advocates Cost N/A (internal) Budget Source Community Services (Rural Projects)
	11	Work with partners to identify and implement heritage outreach and education programs	Plan for publications (brochures or online content) and programs (heritage tours) that emphasize the relevance and benefits of heritage to everyday life Promote citizen action and involvement in heritage recognition and conservation through a photographic contest of best heritage landscape eg. favourite view	RDOS staff Cultural heritage organizations, area municipalities, destination marketing organizations and industry stakeholders Cost N/A (internal) Budget Source Community Services (Rural Projects)
	12	Invest in professional training, legal frameworks, research and partnerships that support and sustain heritage programs	Approach Okanagan College regarding future heritage-related curricula Identify other sources of training and education eg. University of Victoria	RDOS staff Okanagan College Trade apprenticeship providers Cost N/A (internal) Budget Source Development Services

5.2 Partnership Policy cont'd.

Year	No.	Policy	Actions	Implementation Resources
Years 2 - 5	5	Work with First Nations, non-European groups, non-profits, heritage societies, chambers of commerce, tourism associations, private land owners and all RDOS governments to identify and develop a cohesive heritage campaign for the region and capitalize on opportunities to collaborate on, support and co-promote heritage programs	Ongoing outreach to heritage contacts in the region, provide resources and support, facilitate a communication forum on heritage programs to provide collaboration and exchanges of ideas Add to the list of relevant contacts, programs and events. Continue support and resources to these contacts	RDOS staff • Heritage • Communications Working Group members Advocacy group Cost N/A (internal) Budget Source Community Services (Rural Projects)
	6	Work with First Nations to include aboriginal values into the heritage of the region and the resource list	Working group works on specific projects that integrate values	RDOS staff First Nations' En'owkin Centre Working Group members Advocacy groups
	7	Work with non-aboriginal/non-European groups to include their heritage values into the heritage of the region and the resource list	Working group works on specific projects that integrate values	RDOS staff • Heritage • Tax and Assessment
	8	Work with municipalities on shared heritage values and resources	Create a mechanism (possibly through the Heritage Commission) to dissolve municipal boundaries with regard to heritage	RDOS staff • Heritage • Planning Services Municipalities
	9	Support the community in future heritage identification and conservation efforts	Plan for a region-wide heritage/ culture event (such as Doors Open) beginning in year 2 that allows the public into a variety of public and private heritage facilities	RDOS staff • Heritage • Planning Services • Parks and Recreation
			Support and take part in festivals and events with a heritage component, for example: • Meadowlark Festival	RDOS staff • Heritage • Planning Services • Parks and Recreation
			Work with educational institutions to make heritage education a priority, through curriculum, field trips, museum personnel etc. Coordinate heritage education with local school districts	RDOS staff • Heritage • Planning Services Okanagan College School Board Archives, museums
			Investigate and support the identification and use of walkway and cycling trails between heritage attractions	RDOS staff • Heritage • Planning Services • Parks and Recreation

5.2 Partnership Policy cont'd.

Year	No.	Policy	Actions	Implementation Resources
Years 2 - 5 cont'd			Establish a dedicated representative for disseminating heritage information and outreach	RDOS staff • Heritage • Communications
			Collaborate with partners, such as First Nations, recreational groups and cycling groups to conserve and interpret identified heritage trails, tracks, and wagon roads	RDOS staff • Heritage • Planning Services • Parks and Recreation First Nations, municipalities
			Create an information tool to cross-market and share initiatives, such as a website, software or 1-800 heritage phone line	RDOS staff • Heritage • Communications
			Initiate a project to collect oral histories and stories around the region	RDOS staff First Nations' En'owkin Centre Working Group members Advocacy groups
	10	Work with partners to identify economic development opportunities related to heritage	Implement with local wineries, agricultural producers, fruit stand owners etc. the economic business cases for new and continued use of heritage resources	RDOS staff • Heritage Private businesses Community advocates
			Further identify similar economic opportunities related to heritage	
			Arrange a region-wide meeting with Chambers of Commerce to discuss their involvement in heritage promotion and conservation.	RDOS staff • Heritage Chambers of Commerce
	11	Work with partners to identify and implement heritage interpretation, outreach and education programs	Look for opportunities to partner to support emerging businesses and entrepreneurs related to heritage, for example, through an artisan fair or online initiatives	
			Support the reinvigoration of regional heritage initiatives such as the South Okanagan Heritage Association	RDOS staff • Heritage Private businesses Community advocates
			Develop heritage workshops that encourage multidisciplinary interaction and exchanges that extend beyond regional boundaries	RDOS staff • Heritage Private businesses Community advocates

Year	No.	Policy	Actions	Implementation Resources
Years 2 - 5 cont'd			Support interpretive initiatives already underway Develop an interpretive plan for heritage resources that investigates many means of interpretation: public art, markers, signs, brochures, technology	RDOS staff Heritage Private businesses Community advocates Working Group
	12	Invest in professional training, legal frameworks and research projects that support and sustain heritage programs	Identify opportunities for heritage training for RDOS staff and encourage participation Commitment to ongoing analysis of emerging trends Develop co-op program for heritage conservation work in the region	RDOS staff

5.3 Resource Stewardship Policy

Year	No.	Policy	Actions	Implementation Resources
Year 1	12	Promote conservation of landscapes, lakes, rivers, streams, vegetation and corridors as a critical part of the regional heritage strategy	Build consensus among communities for an initiative to list, register or designate high priority landscape features in the region	RDOS staff • Heritage Working Group Cost N/A (internal) Budget Source Development Services (Regional Growth Strategy)
			Select five high priority landscape resources for the heritage register that best demonstrate the diversity of the region such as those identified as priorities by the community, for example: • Cemeteries • Granite Creek • Twin Lakes Prepare statements of significance for selected resources	RDOS staff • Heritage Working Group Heritage Advisory Commission Cost N/A (internal) Budget Source Heritage Conservation Fund or Public Works
	13	Treat the conservation of heritage views and vistas as stewardship of the region's visual identity	Identify key views and vistas and whether they are at risk	RDOS staff • Heritage Working Group Heritage Advisory Commission Cost N/A (internal) Budget Source Community Services (Rural Projects)
	14	Preserve the spatial organizations and clustering of heritage resources where key to their heritage values	Identify places with important spatial organization or clustering that contributes to the heritage character of the place, for example: • Naramata Village • Haynes Ranch	RDOS staff • Heritage Working Group Heritage Advisory Commission Cost N/A (internal) Budget Source Community Services (Rural Projects)
	15	Promote the use of heritage buildings and structures in order to maintain their vital roles and conserve their character-defining elements	Develop a realistic conservation process (based on conservation approaches in Appendix H) for valued old cabins and buildings Encourage sponsorship for selected conservation measures Identify buildings that have a good potential for re-use, for example: • Kaleden Hotel	RDOS staff • Heritage Private businesses / landowners Community advocates Working Group Cost N/A (internal) Budget Source Community Services (Economic Development)

5.3 Resource Stewardship Policy cont'd.

Year	No.	Policy	Actions	Implementation Resources
Year 1 cont'd	16	Retain evidence of past and present land use and promote new land uses that support the conservation of heritage value and character	Identify key past and present land uses and whether they are at risk, for example: • Mining sites • The Ditch	RDOS staff • Heritage Working Group - Heritage Advisory Commission Cost N/A (internal) Budget Source Community Services (Rural Projects)
	17	Retain existing and promote new cultural traditions that sustain a community's connection with the historical place	Compile a comprehensive list existing events and traditions and identify who is responsible	RDOS staff • Heritage Community advocates - Working Group - Heritage Advisory Commission Budget Source Apply for a Building Communities Through Arts and Heritage Program grant http://www.pch.gc.ca/
	18	Develop cultural tourism centred on authenticity, local participation and ownership	Identify heritage themes that can be represented along tourism corridors	RDOS staff • Heritage Community advocates - Working Group - Heritage Advisory Commission - Local tourism associations Cost N/A (internal) Budget Source Development Services (Regional Growth Strategy)
	19	Develop an experience of archaeological sites	Identify with First Nations and others the important archaeological sites and investigate ways to experience them both physically and without actually going there	RDOS staff - First Nations' En'owkin Centre - Working Group members - Advocacy groups Budget Source Apply for a Heritage BC Heritage Legacy grant http://www.heritagebc.ca/funding/heritage-legacy-fund
	20	Treat the region's small-scale features that contribute to its heritage and character as stewardship of the region's identity	Identify key small scale features (fence lines, ditches, walls, structures, dykes etc.) that are key to the character of the region and evaluate their significance and condition	RDOS staff • Heritage Working Group - Heritage Advisory Commission Cost N/A (internal) Budget Source Community Services (Regional Trails)

5.3 Resource Stewardship Policy cont'd.

Year	No.	Policy	Actions	Implementation Resources
Years 2 - 5	12	Place conservation of landscapes, lakes, rivers, streams, vegetation and corridors at the centre of the regional heritage strategy	Continue to list, register or designate important landscape features in the region Prepare statements of significance for resources	RDOS staff • Heritage Working Group Heritage Advisory Commission
			Identify and conserve priority landscapes such as small cemeteries at Hedley, Twin Lakes, Fairview, Okanagan Falls Consult Cemeteries Act	RDOS staff • Heritage Working Group Heritage Advisory Commission Private businesses / landowners Province of BC
			For identified trails, identify jurisdiction, ownership, condition, stabilization measures, financial tools etc. to aid in conservation	RDOS staff • Heritage Working Group
			Initiate a scenic roads and character streets program that recognizes and conserves the natural, cultural heritage and recreational features of these corridors	RDOS staff • Heritage Working Group Heritage Advisory Commission Private businesses / landowners
	13	Treat the conservation of heritage views and vistas as stewardship of the region's visual identity	Undertake some shared projects and build on experience to apply to other places, for example: Spotted Lake • Do not build signs or structures to obscure views • Remove clutter between the road and the lake • Enact a conservation covenant • Create a roadside interpretive lookout	RDOS staff • Heritage Working Group Heritage Advisory Commission Private businesses / landowners First Nations En'owkin Centre Province of BC (depending on project)
	14	Preserve the spatial organization and clustering of heritage resources where key to their heritage values	Undertake projects that handle the conservation of spatial organization or clustering, which may require heritage conservation areas	RDOS staff • Heritage • Planning Services Board Heritage Advisory Commission
	15	Promote the use of heritage buildings and structures in order to maintain their vital roles; conserve their character-defining elements	Begin with obvious projects like the Kaleden Hotel and follow with other projects with increased challenges	RDOS staff • Heritage Heritage Advisory Commission Private businesses / landowners

5.3 Resource Stewardship Policy cont'd.

Year	No.	Policy	Actions	Implementation Resources
Years 2 - 5 cont'd	16	Retain evidence of past and present land use and promote new land uses that support the conservation of heritage values	Concentrate on key heritage parcels at risk and develop conservation measures, working with private property owners if necessary • Mining sites • The Ditch	RDOS staff • Heritage Heritage Advisory Commission Private businesses / landowners
	17	Retain existing and promote new cultural traditions that sustain a community's connection with the historical place	Prepare a calendar of cultural heritage events Identify sites that may be appropriate for new events as finding new uses supports conservation	RDOS staff • Heritage • Inform. Tech. • Communications
	18	Develop cultural tourism centred on authenticity, local participation and ownership	Produce a pilot heritage-based tour that connects various parts of the region, using wine tours as a model	RDOS staff • Heritage • Planning Services Community advocates Private businesses / landowners
	19	Develop an experience of archaeological sites	With First Nations produce interpretation for a significant site in the region that introduces reality of ancient habitation	RDOS staff • Heritage First Nations En'owkin Centre
	20	Treat the region's small-scale features that contribute to its heritage and character as stewardship of the region's identity	Produce conservation and interpretation program for one or more small scale features (fence lines, ditches, walls, structures, dykes etc.) that are key to the character of the region This may entail defining a heritage conservation area	RDOS staff • Heritage Heritage Conservation Area

5.0 HERITAGE AND ECONOMIC DEVELOPMENT

One of the key emerging trends in heritage conservation and heritage tourism is the role of heritage in the sustainability, economic development and tourism in a community or region. Heritage can have spill-over social and economic effects in other fields, such as agriculture, regional development, environment, science and education, tourism, technology, innovation, social cohesion, intercultural dialogue and others. All RDOS work in heritage conservation should consider economic development, such as helping inform businesses on how to capitalize on heritage values or deploying heritage sites as business incubators.

Heritage should be approached as an active resource in contemporary life and a starter of sustainable development through multi-disciplinary and multi-regional participation.

Studies over the last decade have identified five major measurables of the economic impacts of heritage conservation: 1) jobs and household income; 2) center city revitalization; 3) heritage tourism; 4) property values; and 5) small business incubation.

5.1 Funding for Heritage Conservation

Detailed research of the Regional District of Okanagan-Similkameen's financial statements and financial plans revealed that the RDOS regularly invests in heritage programs on many levels - categorically, each Electoral Area contributes annually into a formal Heritage Conservation fund but collaterally, the RDOS also provides significant and consistent support to heritage programs through several other departments and services.

The implementation strategies in Section 4.0 outline proposed sources of funding for recommended Year 1 actions of the heritage strategy.

The existing RDOS programs that regularly include, support or involve heritage programs are:

1. Community Services funds and oversees the administration of the operating budgets for 10 Parks and Recreation Functions that include 8 RDOS Board appointed Commissions and 2 Service Contracts with 60 active volunteers:
 - Okanagan Falls Parks & Recreation Commission
 - Similkameen Recreation Facility & Pool
 - Electoral Area 'F' Parks Commission (West Bench)
 - Sun Bowl Arena (Osoyoos)
 - Princeton & District Arena Board
 - Electoral Area 'E' Parks and Recreation Commission (Naramata)

- Oliver Parks & Recreation Society
 - Kaleden Parks & Recreation Commission
 - Woodlie Park Committee
 - Electoral Area 'B' Parks & Recreation Commission
2. Rural Services finance the Similkameen Valley Visitor Information Centre
 3. Regional Trails RDOS physically maintains over 150 Regional Trails and manages a promotional/educational data-base and website as outlined in the 2012 Regional Trails Master Plan : Click, Hike & Bike (<http://maps.rdos.bc.ca/SilverlightViewer/viewer.html?Viewer=trails>).
 4. Community Grants (Grants in Aid) support the establishment and the operations of non-profit organizations serving the residents of the RDOS.
 5. The Regional Growth Strategy , launched in 2004, updated in 2011, provides sustainable growth management and funding prioritizing inter-dependent relationship between economic, physical and social dimensions in the region. Heritage Development and Assets management are inherently linked to this process.
 6. Information Services manages three interactive maps of the district: Parcel Map, Trails Map and Naramata Cemetery Map

This financing which can / is used in part for heritage assets and programs was allocated in the 2014 budget as shown in tables on the following pages:

RDOS existing budgets that include, support or involve heritage programs

In the 8 Electoral Areas:

RDOS provides financing for some services to these areas involving heritage programs . These services are Regional Services (covering Regional Trails) and Recreational Services (covering halls, centres, parks and museum operations, as well as heritage and recreation commissions) and Rural Services (covering in some of the areas interpretive trail signage, economic development which can include agri-tourism, tourism and events development & marketing). The RDOS 2014 budget provides \$60,000 for heritage consultants and \$6,000 for heritage related wages and salaries.

	Regional Growth Strategy	Regional Trails	Heritage Grant	Parks	Museum	information centre	Economic Development
City of Penticton	\$14,350	\$31,091					
District Municipality of Summerland	\$4,562	\$9,884					
Town of <u>Osoyoos</u>	\$3,097	\$6,710			\$58,267		
Town of Oliver	\$1,702	\$3,687	\$68,680	\$135,727	\$123,195		\$15,000
Town of Princeton		\$1,909					
Village of <u>Keremeos</u>		\$929				\$13,000	

	Regional Growth Strategy	Regional Trails	Rural Projects (special grants and projects)	Parks	Museum	Grants in Aid (non-profit operations)	Heritage Conservation	information centre	Heritage Grant	Economic Development
Area 'E' <u>Nanaimo</u>	\$1,286	\$2,786	\$20,272	\$146,649* (includes facilities and programs)	\$6,000	\$7,500				
Area 'F' Okanagan Lake West Bench	\$586	\$1,921	\$7,246	\$54,519* (commission)		\$3,000				
Area 'G' <u>Keremeos Rural / Hedley</u>		\$1,278	\$27,991	\$4,000	\$2,000 (Hedley Heritage Museum Society) \$2,000 (South Similkameen Heritage Museum Society)	\$12,000	\$1,172	\$10,000	\$4,000	
Area 'H' Rural Princeton		\$4,249	\$35,440			\$38,399	\$3,897			

In the 6 municipalities:

RDOS provides financing for some services to these municipalities involving heritage programs . These services are Re-gional Services (covering Regional Trails for all municipalities and other aspects for 2014) and Regional Growth Study/Strategy for Penticton, Summerland, Oliver and Osoyoos. Economic Development funds, which can include agri-tourism, tourism and events development & marketing are sometimes provided.

	Regional Growth Strategy	Regional Trails	Heritage Grant	Parks	Museum	information centre	Economic Development
City of Penticton	\$14,350	\$31,091					
District Municipality of Summerland	\$4,562	\$9,884					
Town of Osoyoos	\$3,097	\$6,710			\$58,267		
Town of Oliver	\$1,702	\$3,687	\$68,680	\$135,727	\$123,195		\$15,000
Town of Princeton		\$1,909					
Village of Keremeos		\$929				\$13,000	

Comparison with other Regional Districts in BC - Regional District of Central Kootenay

The RDCK does not have a heritage conservation fund, commission or planner but in 2007-2009 received Provincial grants of \$10,000 each to map heritage resources, produce Heritage Context Reports for some areas and adopt a Heritage Conservation bylaw.¹ All the Official Community Plan processes for the various locations in the district include heritage considerations.

Many recent and current projects relating to infrastructure and development have been identified as having a heritage component which is thus funded through the department related to the project. One current example is in the context of Kootenay Lake development, the RDCK has partnered with the EAs and First Nation bands around Kootenay Lake to identify Kootenay Lake values through a Cultural Significance Study. Many of the values identified have been related to fishing traditions and sites and will be considered in development planning for the area.

On an infrastructure level, heritage resources have been identified while undertaking other projects such as mapping cemeteries and former railway trails as part of waterline upgrades and expansions. Some of these projects fall under Parks and others under the GIS mapping department.

¹ Interview and correspondence with Eileen Senyk, Planning Technician RDCK and Sangita Sudan, Development General Manager RDCK.

5.2 Partnerships

The RDOS already regularly invests in a wide range of programs that include, support or involve heritage conservation, although in most cases they are not traditionally or formally perceived as heritage programs. For example, the extensive work done with Regional Trails or Regional Interactive Maps is directly connected to the conservation of heritage assets and values unique to the Okanagan-Similkameen district. It would take only small steps to extend the existing, well established framework and financial commitment to programs such as these, to include a heritage conservation aspect. This straightforward, inexpensive expansion of existing RDOS programs through means such as research, education and promotion could be quite easily financed from within existing department budgets and would go great lengths in significantly developing the scope of heritage conservation efforts in the RDOS.

The Okanagan-Similkameen district is home to a breadth of heritage societies, programs, museums and alliances which are already doing extensive work in raising public awareness towards the district's heritage assets and values. As is the case with the RDOS administration, many local organizations, events and programs are not perceived as related to the heritage field and could reap immense benefits and contribute significantly to regional heritage conservation by identifying and promoting their inherent link to heritage, as well as by collaborating on this angle with the RDOS and with each other.

A broader, community led understanding of the heritage assets and values of this district, to include notions such as natural resources and landscapes, First Nations culture and traditions, agricultural, fishing and mining history and more recent traditions such as seasonal events and festivals can enable a more robust campaign to treasure and protect Okanagan heritage and promote it as an authentic, engaging way to experience the region, both as a tourist and as a resident.

The implementation strategy has recommended that the RDOS heritage program work with First Nations, non-European groups, non-profits, heritage societies, chambers of commerce, tourism associations, private land owners and all RDOS governments to identify and develop a cohesive heritage campaign for the region and capitalize on opportunities to collaborate on, support and co-promote heritage programs. This can be achieved through outreach to heritage contacts in the region, provide resources and support, facilitate a communication forum on heritage programs to provide collaboration and exchanges of ideas.

Governments, community groups, programs and events should be identified as part of this strategy, and shared heritage values, efforts and benefits undertaken in collaboration with each other.

Some heritage groups and initiatives in the RDOS include:

Organization	Role / capacity
Province of British Columbia, BC Heritage Branch	Heritage guidance, capacity-building
Heritage BC	Heritage programs, education and funding
En'owkin Centre	Ongoing outreach with all First Nations in the region
Okanagan Nation Alliance	Economic development
Nk'mip Desert Cultural Centre	Example of state-of-the-art interpretive centre run by Osoyoos Indian Band
Member municipalities	Partner in conservation efforts for resources that span municipalities and the district, and those in municipalities which are valued by the region as a whole Include projects such as trails, interpretation, revitalization and infrastructure, land-use decisions
Penticton Museum & Archives	Collaborative projects, information sharing, support
Thompson Okanagan Tourism Association	Partnering in tourism opportunities
Okanagan Similkameen Parks Society	Conservation of natural heritage and parkland, financial grants for natural and cultural preservation projects
Summerland Museum & Heritage Society	Collaborative projects, information sharing, support
Kettle Valley Railway Society	Collaborative projects, support for KVR trail development and interpretation
Osoyoos Museum Society	Collaborative projects, information sharing, support
Osoyoos Festival Society	Collaboration on regional events
Oliver & District Heritage Society Museum & Archives	Collaborative projects, information sharing, support
Festival of the Grape	Collaboration on regional events relating to the wine industry
Princeton & District Museum & Archives	Collaborative projects, information sharing, support
South Similkameen Museum Society	Collaborative projects, information sharing, support
Keremeos Museum Society	Collaborative projects, information sharing, support
Keremeos Grist Mill and Gardens	Provincially designated heritage site, collaboration on regional events and programs
Naramata Heritage Museum Society	Collaborative projects, information sharing, support

Organization	Role / capacity
Naramata Citizens Association	Planning initiatives with heritage component
Similkameen Valley Planning Society	Planning initiatives with heritage component
South Okanagan Heritage Alliance	
Hedley Heritage Museum	Interpretation and tours relating to Mascot Mine, collaborative projects, information sharing, support
Kaleden Museum Society	Collaborative projects, information sharing, support
Okanagan Falls Heritage & Museum Society	Collaborative projects, information sharing, support
Okanagan Historical Society	Collaborative projects, information sharing, support
Twin Lakes / Lower Nipit Improvement District	Conservation efforts related to Twin Lakes Watershed
Oliver and District Community Heritage Strategic Plan	Potential for joint strategic efforts
Haynes Ranch outbuildings	RDOS heritage initiative
Conservation of Spotted Lake	RDOS heritage initiative
Kettle Valley Railway acquisition	RDOS heritage initiative
Interpretation at Granite Creek	RDOS heritage initiative
South Okanagan Naturalists' Club	Conservation of natural heritage
Penticton Adventurer's Club	Conservation of natural heritage related to recreational activities
Nature Trust	Non-profit land conservation organization securing critical habitat across the province for wildlife, fish and plants
South Okanagan-Similkameen Conservation Program	A partnership of forty-eight organizations working together to maintain the unique natural areas of this region
Meadowlark Festival Society	Presents entertaining, engaging and educational programs that showcase the natural environment
South Okanagan Genealogical Society	Collects and preserves information and material relevant to genealogical research
Okanagan Vintage Car Club	Car-related and social activities and local driving tours

Opportunities and benefits

There are a number of opportunities and benefits for the RDOS in supporting partnerships with non-profit groups to assist in the management of heritage assets.

Eligibility for public and private grants

Nonprofit organizations are allowed to solicit charitable donations from the public. Many foundations and government agencies limit their grants to public charities.

Formal structure

A nonprofit organization exists as a legal entity in its own right and separately from its founder(s). Incorporation puts the non-profit's mission and structure above the personal interests of individuals associated with it.

Intrinsic rewards

The services that nonprofit organizations provide benefit communities and segments of the population that are often overlooked or under-served.

Employee commitment

Many employees who work for nonprofits have a personal interest in and commitment to the organization's cause.

Shared costs

Cost savings through aspects such as joint purchasing, shared use of transportation, shared expenses for facility rental, creating a consolidated preferred vendor program and joint staff training. There is potential for additional savings by sharing development and IT.

Enhanced programs

Programs can be amplified using resources from multiple sources, and more efficient outreach can be achieved. By working together organizations are often able to expand their offerings without increasing their budget.

Increased leadership skills

The non-profit sector is moving in a direction of external alliance-making. Future non-profit leaders will establish skills around how to effectively share information between organizations.

Guidelines for effective volunteer management

The Canadian Code for Volunteer Involvement was released in 2001, the International Year of the Volunteer. It was written for boards of nonprofit groups to prompt discussion about the role volunteers play in their organizations, how they are engaged, and how they are supported.

The Code advocates ten best volunteer management practices.

These ten best practices follow a natural progression. The first three focus on laying the foundation for an effective program. The next three deal with developing safe and appropriate volunteer jobs and getting the right people for the positions. The final four centre on creating an environment that provides successfully recruited volunteers with the skills, support, and desire to stay involved.

Best practice guidelines

Laying the Foundation

1. Valuing the role of volunteers
2. Defining rules and expectations
3. Developing volunteer management skills

Developing the jobs and getting the right people

4. Reducing client and group risk
5. Creating clear assignments
6. Reaching beyond the circle

Creating an environment where volunteers feel they belong and want to stay

7. Orienting and training volunteers
8. Providing supervision
9. Making volunteers feel they belong
10. Recognizing volunteer contributions

The full text of the Code can be found at www.volunteer.ca.

5.3 Marketing and Promotion

The objectives underlying the Marketing and Promotions Plan relate to the overall vision of the heritage strategy. In particular it focuses on:

- Raising the awareness of the significance of heritage within the process of defining overall planning and development goals, objectives and actions for the region and the need to embed heritage into all future planning initiatives.
- Enhancing the general understanding within the boundaries of the Regional District that heritage encompasses natural heritage, First Nations and non-European cultural heritage.
- Developing an appreciation for the linkages between heritage conservation and sustainability through strengthening local identity and connectivity between communities, and leveraging heritage to grow the tourism economy.

Target audiences

- Government elected officials and staff within all local and First Nation governments.
- The business community, with particular focus on the tourism industry
- Residents
- Schools
- Community non-profit organizations and heritage related interest groups
- Local media
- Community destination marketing organizations (DMOs).

Actions for all Regional District audiences include:

- Regional Connections Newsletter
- Heritage Week February
 - School competitions
- Create a new RDOS Heritage Fair as part of the province wide initiative
- Explore linkages with the school curriculum
- Establish a Doors Open event
 - Kick-off event associated with key heritage site
 - Theme-based bus tours
- Use of heritage sites as a backdrop for civic events

Targeting the leisure traveller

While direct marketing to the leisure market is not a role of the RDOS, there is a need to understand the leisure travel market and to use this market intelligence to work collaboratively in leveraging heritage as a tourism asset.

The Visitor Profile

- Top geographic markets to the Thompson Okanagan region – numbers and

spending percentages

- Visitors to the Thompson Okanagan - top factors in choosing a destination
- Numbers participating in heritage
- Explorer Quotient target audiences:
 - The Authentic Experienter
 - The Cultural Explorer
 - Cultural History Buff
 - Characteristics of each segment
- Trip planning behaviour and the role of the internet

The need to focus on product development

- Importance / satisfaction with heritage in the Thompson Okanagan – currently weak. This demonstrates the need for the development of compelling experiences and related
- Links to community and sub-regional tourism strategies
- Importance / satisfaction with heritage
 - Need compelling experiences
- Role of RDOS in product development:
 - Development of heritage routes
 - Support for current and new heritage related events
 - Interpretive planning – building on the themes
 - Development of heritage guides
 - Grants to assist with the development of new experiences
- Business mentorship role

Working collaboratively with community DMOs

- The role of RDOS in assisting community DMOs with marketing the heritage sector
- The need to integrate the heritage sector into existing community and sub-regional tourism plans and websites