



## THE CORPORATION OF THE CITY OF VERNON REPORT TO COUNCIL

**SUBMITTED BY:** Geoff Mulligan, Manager  
Infrastructure Systems

**COUNCIL MEETING:** REG ☐ COW ☒ I/C ☐

**COUNCIL MEETING DATE:** Apr 22, 2024

**REPORT DATE:** April 4, 2024

**FILE:** 5700-3

**SUBJECT:** HISTORIC O'KEEFE RANCH HERITAGE CONSERVATION PLAN AND  
CAPITAL & OPERATIONS MANAGEMENT PLAN

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**PURPOSE:**

To present to Council the findings of the Historic O'Keefe Ranch Heritage Conservation Plan and Capital & Operations Management Plan.

**RECOMMENDATION:**

THAT Council receive for information the report titled "Historic O'Keefe Ranch Heritage Conservation Plan and Capital & Operations Management Plan", dated April 4, 2024 and respectfully submitted by the Manager, Infrastructure Systems.

**ALTERNATIVES & IMPLICATIONS:**

N/A

**ANALYSIS:**

**A. Committee Recommendations:**

N/A

**B. Rationale:**

**1. Background**

In the interest of providing safe and sustainable services to the public, Council at its Regular Meeting of June 12, 2023 directed Administration to prepare an Asset Management/Heritage Conservation Plan for the Historic O'Keefe Ranch. Council's direction also included the division of the plan into three separate phases, providing Council the opportunity to review each phase independently and assess and decide on the progression of subsequent phases.

- **Phase 1:** Conduct a Facility Condition Assessment (FCA) of the site (Attachment 1) including a brief Statement of Significance to provide guidance to the assessment (**completed**). The FCA provides a per-building and a per-systems approach to understanding the site and the various capital needs of the buildings and the building systems, and provides recommendations. Recommended work was risk prioritized and separated into phased programs and projects with associated costs.
- **Phase 2:** Prepare a Heritage Conservation Plan (HCP) with reference to the Canadian Standards and Guidelines for Heritage Conservation that will give the City guidance in preparing budgets and programs for ongoing maintenance and renewal of the Historic O'Keefe Ranch.

- **Phase 3:** Prepare a detailed 1-10-year Capital and Operations Management Plan, defining a maintenance, renewal, and improvement program for the site assets.

## 2. Heritage Conservation Plan

The purpose of a Heritage Conservation Plan is to explain how the historical significance of the Historic O'Keefe Ranch can be sustained, and to guide alterations, repair, and management. It is important to note that the HCP for the Historic O'Keefe Ranch does not include any consideration of or information relating directly to the heritage and traditional values of the Indigenous neighbours to the site. Council may wish to consider this as part of future planning for this site.

The HCP utilizes a simple thinking process which starts with describing what is there, the condition of each component, what is proposed to happen to the historic place and its components, and the principles by which it will be managed (following the Standards and Guidelines for the Conservation of Historic Places in Canada).

Through the completed Statement of Significance, it is clear that practically all structures, landscape elements, and artifacts in some way embody and contribute to the heritage value of the O'Keefe Ranch. The question is, do they all need to be conserved and to what degree?

The methodology to determine applicable conservation strategies involved analyzing the character-defining elements of the site while considering:

- **The requirements arising from the Statement of Significance.** Does the feature require conservation based on its level of heritage value and its role in the larger heritage narrative of the site?
- **The City's/Society's requirements.** Is the feature required for site programming?
- **The physical condition of the feature.** Do we know enough about the condition of the feature to plan for its conservation, and is its heritage conservation significant enough to require investment?
- **The requirements imposed by external factors.** Do safety and environmental considerations impact the decision to conserve a feature, if at all and how?

Based on this triaging approach, it was recommended whether a component is to be preserved, removed or relocated, restored, or rehabilitated. The HCP recommends a practical approach to conservation while heavily relying on preservation for the site, with some buildings considered for restoration or rehabilitation. The objective of preservation is simply to protect the heritage value through maintenance or stabilizing with an approach of minimal intervention.

Within the HCP, each character defining element of the site has been assigned a proposed conservation treatment. In addition, recommendations and future considerations have been provided. Conservation guidelines and principles have also been provided for the treatments specifically related to roofing, windows, and cladding.

When planning for the conservation of the Historic O'Keefe Ranch, it is important to understand the stakeholder's (City of Vernon, and the O'Keefe Ranch and Interior Heritage Society) vision and mission with regards to planning. In the HCP it was noted that in the past 6 years, a multitude of feasibility, strategic, land-use, and business plans have been commissioned that recommend different priorities and strategies to achieve these purposes in a financially sustainable manner. In addition, there have been significant changes to the Society's organizational structure post-pandemic, including the loss of a curator. It was

included in the HCP that a clear path forward be established to help ensure financial sustainability of the site.

### **3. Capital and Operations Management Plan**

The purpose of the Capital and Operations Management Plan (COMP) is to operationalize the Facility Condition Assessment and the Heritage Conservation Plan for the Historic O'Keefe Ranch. It provides a guideline of typical maintenance and renewal activities that, if carried out, will extend the service life of the assets at the Ranch while protecting the heritage value.

These associated budgets are focused solely on renewal and maintenance activities for building capital assets and do not account for operating expenses incurred by the O'Keefe Ranch and Interior Heritage Society such as insurance, utilities, payroll etc.

Considering the conservation approaches and recommendations provided in the Facility Condition Assessment and the Heritage Conservation Plan, two scenarios have been prepared.

#### **Scenario 1 - Restoration Approach**

This scenario follows the recommendations derived from the FCA and adds recommendations that were identified in the HCP. This provides the City with a plan if a traditional capital renewal approach is selected with a conservation approach more aligned to that of restoration. This scenario is a typical predictive maintenance approach and provides a benchmark for comparison.

- Year 1,2 – Two years of large capital projects of \$550,000 and \$410,000 primarily focused on high priority projects and programs identified in the FCA.
- Years 3 through 10 – Follow a capital maintenance approach, primarily focused on identified programs and at reduced funding levels, totalling \$2,280,000.

The ten-year total projected cost is \$3,240,000.

#### **Scenario 2 – Preservation Focus**

Scenario 2 follows a similar framework to Scenario 1 but considers shifting to a focus on preservation, based on findings of the HCP. This plan results in higher frequency and an increase in ongoing maintenance with capital projects remaining where required to address items that impact the life safety or importance to the site programming.

- Year 1 – Maintenance and completion of recommended assessments/evaluation activities necessary to perform subsequent rehabilitation work, totalling a budget of \$90,000.
- Year 2 – Undertake a capital renewal program with a budget of \$700,000 primarily focusing on high priority projects and programs identified in the FCA and considering HCP approaches.
- Years 3 through 10 – Follow a capital maintenance approach, primarily focused on identified programs and at reduced funding levels, totalling \$1,230,000.

The ten-year total projected cost is \$2,020,000.

Depending on Council's direction in regards to the next steps with the Historic O'Keefe Ranch, Administration would recommend that Council consider using Scenario 2 – Preservation Focus philosophy for future planning and cost calculations for this site.

**C. Attachments:**

Attachment 1 – Historic O’Keefe Ranch Facility Condition Assessment  
Attachment 2 – Historic O’Keefe Ranch Heritage Conservation Plan  
Attachment 3 – Historic O’Keefe Ranch Capital and Operations Management Plan

**D. Council’s Strategic Plan Alignment:**

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|--|---|
| <input checked="" type="checkbox"/> Governance & Organizational Excellence | <input type="checkbox"/> Livability     |
| <input type="checkbox"/> Recreation, Parks & Natural Areas                 | <input type="checkbox"/> Vibrancy       |
| <input type="checkbox"/> Environmental Leadership                          | <input type="checkbox"/> Not Applicable |

**E. Relevant Policy/Bylaws/Resolutions:**

1. At its Regular Meeting of March 27, 2023, Council passed the following resolution:

*“THAT Council receive the memorandum titled “O’Keefe Ranch Presentation”, dated March 14, 2023 and respectfully submitted by the Manager, Financial Planning and Reporting;*

*AND FURTHER that Council directs Administration to determine the cost of a high level building report and asset management plan which would include a historical value assessment;*

*AND FURTHER that Council approve additional funding for O’Keefe Ranch & Interior Heritage Society for \$100,000, funded by the 2022 Prior Year Uncommitted Unexpended Balance.”*

2. At its Regular Meeting of June 12, 2023, Council passed the following resolution:

*“THAT Council receive for information the memorandum titled “O’Keefe Ranch Asset Management/Heritage Conservation Plan” dated May 10, 2023 and respectfully submitted by the Manager, Infrastructure Systems;*

*AND FURTHER, that Council authorize the expenditure of up to \$70,000 for the Conservation Plan and Asset Management Plan of the O’Keefe Ranch, to be funded by the 2022 Unexpended Uncommitted Balance;*

*AND FURTHER, that Council direct Administration to separate the Conservation and Asset Management Plans into three phases, with an option to not proceed based on the findings in each phase.”*

3. At its Regular Meeting of January 22, 2024, Council ratified the following from the January 22, 2024 Committee of the Whole meeting:

*THAT Council receive for information the report titled “Historic O’Keefe Ranch Facility Condition Assessment”, dated January 4, 2024 and respectfully submitted by the Manager, Infrastructure Systems and the Manager, Financial Planning & Reporting;*

*THAT Council direct Administration to proceed with the budgeted phases 2 and 3 and complete the O’Keefe Ranch Heritage Conservation Plan and Capital & Operations Management Plan;*

*AND FURTHER, that Council direct Administration to review and report back to Council at a future meeting.”*

**BUDGET/RESOURCE IMPLICATIONS:**

N/A

**FINANCIAL IMPLICATIONS:**

- ☒ None      ☐ Budget Previously Approved      ☐ New Budget Request  
(Finance Review Required)

Prepared by:

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Approved for submission to Council:

  
Patricia Bridal, CAO

Date: April 16, 2024

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**REVIEWED WITH**

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|---|---|---|
| <input type="checkbox"/> Corporate Services     | <input type="checkbox"/> Operations           | <input type="checkbox"/> Current Planning                     |
| <input type="checkbox"/> Bylaw Compliance       | <input type="checkbox"/> Public Works/Airport | <input type="checkbox"/> Long Range Planning & Sustainability |
| <input type="checkbox"/> Real Estate            | <input type="checkbox"/> Facilities           | <input type="checkbox"/> Building & Licensing                 |
| <input type="checkbox"/> RCMP                   | <input type="checkbox"/> Utilities            | <input type="checkbox"/> Engineering Development Services     |
| <input type="checkbox"/> Fire & Rescue Services | <input type="checkbox"/> Recreation Services  | <input checked="" type="checkbox"/> Infrastructure            |
| <input type="checkbox"/> Human Resources        | <input type="checkbox"/> Parks                | <input type="checkbox"/> Transportation                       |
| <input type="checkbox"/> Financial Services     |   | <input type="checkbox"/> Economic Development & Tourism       |
| <input type="checkbox"/> COMMITTEE:             |   |   |
| <input type="checkbox"/> OTHER:                 |   |   |