

Terms of Reference

Heritage Grants Program

Updated 2018

1.0 INTRODUCTION

The Heritage Grants Program was established in 1991 and was administered by City staff with applications reviewed by a volunteer board. In 2008, the Central Okanagan Heritage Society (COHS) was awarded the contract to administer the grants program.

The intent of the program is to recognize the value of Kelowna's built heritage. Through the granting process, financial support is extended to assist with the upkeep of properties listed on the City of Kelowna's Heritage Register.

2.0 PURPOSE

The City of Kelowna's Heritage Grants Program promotes the conservation of residential, commercial, industrial, institutional and agricultural heritage buildings by assisting owners with grants for a portion of the costs incurred in conservation work.

3.0 AMOUNT OF MONEY AVAILABLE

Approximately \$35,000 in total is available for distribution annually from the City.

4.0 ELIGIBLE APPLICANTS

Any property listed on the Kelowna Heritage Register is eligible for this grants program. This program is limited to exterior and building foundation (stabilization) work.

The conservation work should recognize the importance of "Character-defining Elements" as documented in the Heritage Register Record for the property. This Record can be accessed at <https://www.kelowna.ca/our-community/arts-culture-heritage/heritage>

- Residential properties listed on the Kelowna Heritage Register and Heritage Designated properties will be given first priority in the granting program.
- Grants will not be given for work undertaken prior to a successful grant application.
- Municipal property taxes must be fully paid (if applicable).

5.0 2017 APPLICATION DEADLINE

Application deadlines: **March 27; June 5; Sept. 4; and Oct. 30.** Please note: there is limited funding.

Grants applied for later in the year *may* have to wait for the next funding cycle.

6.0 GRANTS

Buildings "Designated" heritage are eligible for grants to a maximum of \$12,500/ 3 year period.

Buildings listed on the Kelowna Heritage Register are eligible for grants to a maximum of \$7,500/ 3 year period.

Grants for Exterior Conservation Work including: reroofing; prep & new paint*; window, door, siding and porch conservation, will not exceed 50% of the cost of the work to be done, to a maximum of \$7,500 (Heritage Register) or \$12,500 (Designated) per 3 year period.

Terms of Reference

Heritage Grants Program

Updated 2018

**Heritage paint colour schemes, such as Benjamin Moore's "Historical True Colours for Western Canada" collection, are strongly recommended by this program.*

Grants for Foundation Work will not exceed 50% of the cost of work to be done, to a maximum of \$7,500 (Heritage Register) or \$12,500 (Designated) per 3 year period.

Except for special circumstances, original materials are to be used. Compatible adaptation of modern materials will be considered on a case by case basis.

7.0 DOCUMENTATION

For All Applications:

1. All applicants need to include current photographs of the heritage property, and specifically of the area where the work is to be done, in their application.
2. All applicants need to complete the attached application form.
3. At the completion of the work, the grant money will be allocated when the attached "Declaration of Project Completion" form and detailed requirements are submitted by the application deadline and the work is approved by the committee.

Grants for Exterior Painting:

As well as the required documents for all applications (1, 2 & 3 listed above), applicants applying for a grant for exterior painting of a heritage property need to include in their application:

- Colour scheme and paint colour samples. *Benjamin Moore Historical True Colour Palette is highly recommended.
- Estimate for cost if work is to be done by the owner (up to 100% for materials only).
- Two estimates if work is to be done by a contractor.

Grants for Reroofing:

As well as the required documents for all applications (1, 2 & 3 listed above), applicants applying for a grant for reroofing of a heritage property need to include in their application:

- Proposed colour and roofing material
- Estimates for cost from two contractors
- One year guarantee for labour and materials; a written copy needs to be provided with the "Declaration of Project Completion." *Roof inspection is highly recommended.

Grants for Exterior & Foundation Work:

As well as the required documents for all applications (1, 2 & 3 listed above), applicants applying for a grant for exterior and foundation work of a heritage property need to include in their application:

- Estimates for cost from two contractors
- One year guarantee for labour and materials MAY be required; a written copy may need to be provided with the "Declaration of Project Completion." If a guarantee for labour and/or materials is needed, this will be stipulated in the grant approval letter.

Terms of Reference

Heritage Grants Program

Updated 2018

8.0 TIMELINE & PROCEDURES

1. Once an application has been received, it will be screened by the City of Kelowna Heritage Grant Program manager (COHS) to ensure the application is complete.
2. The application will be reviewed by the City of Kelowna Heritage Grants Committee using an evaluation tool.
3. When an application is approved or declined by the Committee, the applicant will be advised in writing.
4. Prior to the commencement of work, any required municipal building permits must be applied for. A building permit is not required for exterior painting work or reroofing. A building permit may be required for other exterior conservation work.
5. The successful applicant must have the work completed within one year of the grant being awarded. An applicant can ask for an extension in the case of unforeseen circumstances.
6. Upon the completion of the heritage building conservation project, the following is required by the committee before the grant will be paid out:

****Completion documentation must be received by the Application Deadline.***

- a) Photographs showing the completed project.
 - b) Submission of all bills showing 'paid in full' with an authorized signature or showing a \$0 balance. Costs of plans and related expenses may be included.
 - c) The attached "Declaration of Project Completion" form must be submitted to the Committee.
 - d) Site Inspection by Committee member or as required by the City of Kelowna.
 - e) Written warranties as required for reroofing, foundation and exterior restoration work.
7. No application may, in any manner, be considered to form a contractual or other obligation on the part of the Committee.

9.0 PROGRAM CLAUSES

9.1 CONFIDENTIALITY OF INFORMATION

The COHS shall keep strictly confidential all information which in any way reveals the City's confidential business, financial or investment details, programs, strategies or plans, learned through the term of the Agreement. Information pertaining to the City obtained by the COHS as a result of participation in this Agreement is confidential and must not be disclosed without written authorization from the City.

9.2 CONFLICT OF INTEREST

As per the Central Okanagan Heritage Society Policy Statement, and as noted in the COHS Heritage Grants Program Administration Agreement.



Terms of Reference

Heritage Grants Program

Updated 2018

9.3 OWNERSHIP OF DOCUMENTS AND FREEDOM OF INFORMATION

All documents, submitted to the City become the property of the City. They will be received by the City and are subject to the provisions of the Freedom of Information and Protection of Privacy Act. For additional information, please go to:

http://www.cio.gov.bc.ca/cio/priv_leg/foippa/contracting/ppsindex.page

9.4 COHS PERFORMANCE RECORD

The City conducts a mid-point check-in and a year-end Performance Record for COHS which are part of the contract administration.

The Application form, Terms of Reference for the Heritage Grants Program, and other grant-related documents may be obtained online at www.okheritagesociety.com or contact Lorri Dauncey, Central Okanagan Heritage Society at 250-861-7188 or ldauncey.cohs@telus.net