

REPORT

Planning and Development Council

Meeting Date: June 12, 2023

FROM: Planning Services Department

DATE: May 30, 2023

SUBJECT: 2023 Heritage Grant Program Recommendations

LOCATION: Town-wide

WARD: Town-wide

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RECOMMENDATION:

That the 2023 funding allotment as attached in 'Appendix A - Recommended Grant Projects and Maximum Approved Amounts' to the report titled 2023 Heritage Grant Program Recommendations dated May 30, 2023, be approved.

KEY FACTS:

The following are key points for consideration with respect to this report:

- This is the tenth year of the Heritage Grant Program, which is an annual program with \$120,000 available in funding.
- Additional funds of \$17,965 are available for this project year from unused grants from previous years.
- 55 project applications were received requesting over \$460,000 in funding for conservation work on designated heritage properties. In total, 47 projects are recommended to receive funding.
- Restoration projects that improve structural stability and preserve exterior systems such as walls, roofs and windows were given priority during the evaluation process to ensure that the program funding supports the projects most necessary to preserve heritage buildings.
- Including this program year, the Heritage Grant Program will have provided \$944,000 in heritage grants to assist with more than 215 restoration and conservation projects worth more than \$6 million.

BACKGROUND:

This is the tenth year of the Heritage Grant Program, which Council approved on an annual basis on May 16, 2016, following the successful completion of a three-year

pilot program. The grant program was developed to provide funding for owners of properties designated under Part IV or Part V of the *Ontario Heritage Act*.

The program sets out criteria for eligible conservation work, and defines what projects are not eligible to receive funding. Grants can be applied for as matching funding up to a maximum contribution of \$15,000.

The program offers a total of \$120,000 in funding each year through the Town's operating budget but occasionally additional funds are available from unused grants, developer contributions or heritage fees.

The following chart provides an overview of the Heritage Grant Program statistics to date:

Program Year	Number of Projects	Requested Funding	Funding Available	Value of Projects
2014 (pilot)	28	\$235,000	\$80,000	\$500,000
2015 (pilot)	26	\$172,000	\$80,000	\$466,000
2016 (pilot)	23	\$138,000	\$80,000	\$370,000
2017	25	\$181,000	\$90,000	\$402,000
2018	19	\$164,000	\$90,000 + \$5,000	\$478,000
2019	51	\$379,000	\$90,000 + \$25,175	\$1,000,000
2020	25	\$207,000	\$90,000	\$510,000
2021	39	\$253,000	\$90,000 + \$53,275	\$740,000
2022	32	244,000	\$120,000 + \$26,834	\$827,000
2023	55	\$485,000	\$120,000 + &17,965	\$2.1 million

This report provides recommendations for the allocation of the 2023 heritage grant funding and demonstrates the ongoing success of the program.

The Heritage Oakville Advisory Committee endorsed the recommendation for the 2023 Heritage Grant Program at their meeting on May 30, 2023.

TECHNICAL & PUBLIC COMMENTS:

2023 Heritage Grant Program Recommendations

The 2023 Heritage Grant Program had a record setting number of applications and requested funding. Heritage planning staff received more than 70 inquiries about the program and 55 applications requesting over \$460,000 in grant funding.

The 2023 program was launched in March 2023 and applications were received until April 28, 2023. The tenth year of the Heritage Grant Program continues the success of the program, with the combined value of the proposed projects at more than \$2.1 million.

Heritage planning staff and five members of the Heritage Oakville Advisory Committee formed a working group to evaluate the applications. As with previous years, the working group had the choice to fund six to eight applications to the maximum requested amount or to distribute the grant money to a maximum number of applicants.

Given that many of the applications were for similar projects (i.e. stucco repairs, historic roof replacement, window restorations), the working group felt it was important to distribute the available funding to as many eligible projects as possible. This is consistent with the approach to grant allocation for the past program years.

In order to allocate grant funding consistently and fairly, the working group ranked priority projects in order to determine how much funding each project would receive. High priority projects were considered as follows:

- Projects that propose restoration work of a structural nature, such as foundation repair and stabilization.
- Projects that restore existing heritage attributes that are integral to the preservation of the superstructure (wall systems, roof) of the heritage building. This years' projects included the slate roof replacement at St. Jude's Anglican Church, stained glass windows at Knox Presbyterian Church and masonry repairs at St. John's United Church.
- Many of this years' projects involved restoration of historic windows and replacement/new wood storm windows, as well as significant repairs to historic stucco, wood siding and cedar roofing.

The working group has recommended that 47 of the 55 applications receive at least some level of funding from the Heritage Grant Program. Due to the high number of applications this year, only one project per property has been recommended (the program allows two projects to be applied for each year). The recommended projects are attached to this report as Appendix A.

Each approved project has been provided with a 'maximum grant amount', so that they may receive 50% of the costs of their approved projects to the maximum amount. Grant recipients will still be encouraged to complete their entire projects as proposed, but if they are not able to, a minimum scope of work will be required to be eligible for funding. As long as the grant recipient has met the approved minimum scope of work, the project will be eligible for 50% of the costs up to the maximum approved amount.

Following consideration by Council, all applicants will be notified of the decision regarding their application, and if applicable, the minimum scope of work to be completed.

As outlined in the Heritage Grant Program Procedures, grants funds will be paid to successful applicants at the satisfactory completion of their project. Grant recipients are required to contact heritage planning staff to arrange for an inspection to ensure that the completed work matches the approved project. If work does not meet the satisfaction of heritage planning staff, the grant funds will be withheld until the project does meet the satisfaction of heritage planning staff.

Invoices must also be presented at the inspection to ensure that grant recipients have covered 50% or more of their approved project costs. If a project is completed under budget and the maximum approved amount is more than 50% of the project costs, the grant recipient will receive only 50% of the final project costs.

Additional Funds

Additional funds were available for this program year from the following source:

- Unused grant funding from 2018 - \$17,965

Additional funds vary from year to year and are not a reliable source of funding for the Heritage Grant Program, but the additional funds are much appreciated when they are available.

Designation Incentive

With the town's designation project to designate as many listed properties as possible before January 1, 2025, the Heritage Grant Program is the town's biggest incentive for property owners. Staff has heard from property owners that financial incentives can help balance any perceived negative impacts from heritage designation. With the targeted increase in designations, a budget increase for the Heritage Grant Program may need to be considered in the future.

Conclusion

The tenth year of the Heritage Grant Program has built upon the achievements of the past nine years the program has been offered and is the largest intake to date for the program. The review of previous grant years demonstrates the value of financial support and incentives for property owners who are stewards of Oakville's cultural heritage resources. Additionally, the program is an incentive for property owners considering heritage designation.

Planning staff considers the tenth year of the Heritage Grant Program a success and look forward to the improvements that will be made to Oakville's heritage properties because of this important program.

CONSIDERATIONS:

(A) PUBLIC

All applicants to the Heritage Grant Program will be notified of the approval/rejection of their application and the grant amount, if approved, following Council approval.

(B) FINANCIAL

Funding for the Heritage Grant Program was approved through the town's annual budget process.

(C) IMPACT ON OTHER DEPARTMENTS & USERS

Planning staff will continue to work with staff from the Finance Department to award heritage grants following the completion of approved projects.

(D) CORPORATE STRATEGIC GOALS

This report addresses the corporate strategic goal(s) to:

- enhance our cultural environment
- be the most livable town in Canada

(E) CLIMATE CHANGE/ACTION

A Climate Emergency was declared by Council in June 2019 for the purposes of strengthening the Oakville community commitment in reducing carbon footprints. The Heritage Grant Program encourages the restoration of historic materials, which diverts waste from landfills. The greenest building is the one that already exists and the Heritage Grant Program helps owners of designated properties maintain their buildings.

APPENDICES:

Appendix A – 2023 Grant Recommendations

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