



## REPORT

### PLANNING AND DEVELOPMENT COUNCIL MEETING

MEETING DATE: MAY 15, 2017

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**FROM:** Planning Services Department

**DATE:** April 25, 2017

**SUBJECT:** Heritage Grant Program 2017

**LOCATION:** Town wide

**WARD:** Town wide

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#### RECOMMENDATION:

That the 2017 funding allotment as attached in 'Appendix A - Recommended Grant Projects and Maximum Approved Amounts' to the report titled *Heritage Grant Program 2017*, dated April 25, 2017, from the Planning Services department, be approved.

#### KEY FACTS:

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

- This is the fourth year of the Heritage Grant Program, which has been consistently oversubscribed each year.
- The Heritage Grant Program is an annual program with \$90,000 available in funding each year.
- 25 applications were received requesting over \$181,000 in funding for conservation work on designated heritage properties.
- Restoration projects that improve structural stability and preserve exterior systems such as walls, windows, and roofs were given priority during the evaluation process to ensure that the program funding supports the projects most necessary to preserve heritage buildings.
- This year of the Heritage Grant Program builds on the success of the three-year pilot program, through which the town provided \$240,000 in heritage grants to assist with 68 restoration and conservation projects worth more than \$1,022,500.
- The Heritage Oakville Committee supports the Heritage Grant Program and endorsed the proposed funding allocation at its meeting on April 25, 2017.

#### BACKGROUND:

This is the fourth 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

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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 be 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 \$90,000 in funding each year through the Town's operating budget.

This report provides recommendations for the allocation of the 2017 heritage grants and demonstrates the ongoing success of the program.

### **COMMENT/OPTIONS:**

#### 2017 Heritage Grant Program Recommendations

The 2017 Heritage Grant Program continues to be very well-received by owners of heritage designated properties. Heritage planning staff received more than 34 inquiries about the program and 25 applications. The number of applications received this year is consistent with previous years; between 23 and 28 complete applications were received each year of the pilot program.

The 2017 program was launched the second week of January 2017 and applications were received until March 20, 2017. The fourth year of the Heritage Grant Program continues the success of the three-year pilot program, with 25 applications requesting over \$181,000 in funding for projects that are valued at more than \$402,000.

Heritage planning staff and three members of the Heritage Oakville Advisory Committee formed a working group to evaluate the applications. 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 repair, window restorations, repairs to woodwork), the working group felt it was important to distribute the available funding to as many worthy projects as possible. This is consistent with the approach to grant allocation taken in previous 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. These projects include work to roof systems, support beams, and foundations necessary to the stability of the historic building.
- Projects that restore existing heritage attributes that are integral to the preservation of the superstructure (wall systems, roof) of the heritage building. Many of these projects involve restoration of historic windows and

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replacement/new wood storm windows, as well as significant repairs to historic stucco, wood siding, and masonry.

Due to the high number of applications received, projects identified as lower priority are recommended for a lower amount of funding or no funding. Low priority projects were considered as:

- Repair of elements not integral to the preservation/stability of the exterior systems of the building.
- Projects that were considered to be owner-initiated changes that, while appropriate for the building, were not considered necessary work.
- The repair and restoration of hard landscaping features, including walls and fences.

The working group has recommended that 22 of the 25 applications receive some level of funding from the Heritage Grant Program. Of the three applications that did not receive funding, two were for maintaining hard landscaping features and one did not meet the eligibility criteria. The recommended projects are attached to this report as Appendix A. The entire \$90,000 available for 2017 has been allocated according to property and project. 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. There are no appeals to the Heritage Grant Program. Where the funding provided was reduced from what was requested/eligible, a reduction to the minimum scope of work has been provided wherever possible and will be stated in the approval letter.

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.

As outlined in the Heritage Grant Program Procedures MS-SPR-002-005, grant monies will be provided 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

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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.

Heritage planning staff consider the interest in the fourth year of the Heritage Grant Program a success and look forward to the improvements that will be made to Oakville's heritage properties as a result of this important program.

### Conclusion

The fourth year of the Heritage Grant Program has built upon the overwhelming success of the three-year pilot project and has demonstrated the value of financial support and incentives for property owners who are stewards of Oakville's cultural heritage resources.

On April 25, 2017, the Heritage Oakville Committee endorsed the 2017 heritage grant amounts as attached in Appendix A for Planning and Development Council approval.

### **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**

Heritage planning staff will continue to work with the Finance Department to approve and release the dedicated funding for the Heritage Grant Program as required. To date, the internal process has worked satisfactorily.

#### **(D) CORPORATE AND/OR DEPARTMENT STRATEGIC GOALS**

This report addresses the corporate strategic goal to:

- continuously improve our programs and services
- provide outstanding service to our residents and businesses
- enhance our cultural environment
- be valued/celebrated for outstanding service
- be the most livable town in Canada

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**(E) COMMUNITY SUSTAINABILITY**

This report generally complies with the sustainability objectives of the Livable Oakville Plan.

**APPENDICES:**

Appendix A – Recommended Grant Projects and Maximum Approved Amounts

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