

### **1.0 INTRODUCTION**

The Heritage Grants Program was established in 1991 and was administered by City staff with applications reviewed by a volunteer committee. 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 \$36,750 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 [Kelowna Heritage Register](#)

- Heritage Designated properties will be given first priority in the granting program. Followed by Residential properties listed on the Kelowna Heritage Register.
- Grants will not be given for work undertaken prior to a successful grant application. (Consideration may be given for exceptionally unusual situations such as emergency repairs)
- Municipal property taxes must be fully paid (if applicable).

### **5.0 APPLICATION DEADLINE**

Application deadlines are established at the start of each year. Check the Central Okanagan Heritage Society website or consult directly with the COHS to determine the next available intake. Please note: there is limited funding and an application does not guarantee support in whole or in part.

Grants applied for may be moved to the next funding intake.

### **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: re-roofing; prep & new paint\*; window, door, siding and porch conservation, will not exceed 50% of the cost of the work to be done (exclusive of applicable taxes), to a maximum of \$7,500 (Heritage Register) or \$12,500 (Designated) per 3-year period.

\*Heritage paint colour schemes using the *True Colours- Historical Paint Colours for Western Canada* palette are required. Exceptions MAY be considered on a case by case basis and as approved by the Committee.

**Grants for Foundation Work** will not exceed 50% of the cost of work to be done (exclusive of applicable taxes), 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 may be considered on a case by case basis.***

## 7.0 DOCUMENTATION (On-line Application)

### For All Applications:

1. All applicants need to complete the on-line application form and provide current photographs of the heritage property, and specifically of the area where the work is to be done.

### Grants for Exterior Painting:

As well as the required documents for all applications (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. True Colours Historical Palette is required.
- Estimate for cost of 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. The estimates should clearly indicate a minimum of two coats and that prep will NOT include pressure washing.

### Grants for Reroofing:

As well as the required documents for all applications (listed above), applicants applying for a grant for re-roofing 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." A certified roof inspection is required for all reroofing projects. A quote for the roof inspection may be submitted as part of the application.

### Grants for Exterior & Foundation Work:

As well as the required documents for all applications (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.

### 8.0 TIMELINE & PROCEDURES

1. Once an application has been received, it will be screened by the City of Kelowna Heritage Grants 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 established set of criteria and evaluation tool.
3. When an application is approved or declined by the Committee, the applicant will be advised in writing and by email.
4. Prior to the commencement of work, any required municipal building permits must be applied for.
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 and this requires approval by the Committee.
6. Upon the completion of the heritage building conservation project, the following must be submitted online by one of the deadlines for review by the committee before the grant will be paid out:
  - 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) Written warranties or inspections as required for re-roofing, foundation and exterior restoration work.
  - d) Demonstration that any other requirements, as described in the approval letter was met.
  - e) Site Inspection by Committee member or as required by the City of Kelowna.

***\*Completion documentation must be received by the Application Deadline to be approved and paid in that cycle.***

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

All documents submitted by applicants to the COHS/City become the property of the COHS/City. COHS and the City will make every effort to maintain the confidentiality of each application and the information contained therein except to the extent necessary to communicate information to staff and assessors for the purposes of evaluation, administration and analysis. General information about the project, including the funded amount and the property being funded under the program may also be released. COHS and the City will not release any additional information to the public except as required under the Province of British Columbia Freedom of Information and Protection of Privacy Act or other legal disclosure process.

### 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.

### 9.3 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](http://www.okheritagesociety.com) or contact Lorri Dauncey, Central Okanagan Heritage Society at 250-861-7188 or [lداuncey.cohs@telus.net](mailto:lداuncey.cohs@telus.net)