



PO Box 1749  
Halifax, Nova Scotia  
B3J 3A5 Canada

Heritage Advisory Committee  
May 30, 2007

**TO:** Chair and Members of the Heritage Advisory Committee

**SUBMITTED BY:**

A handwritten signature in dark ink, appearing to read "Paul Dunphy".

Paul Dunphy, Director of Community Development

**DATE:** April 16, 2007

**SUBJECT:** Review of Heritage Incentive Applications 2007-08

**ORIGIN**

This report originates with staff.

**RECOMMENDATION**

It is recommended that the Heritage Advisory Committee endorse:

- **Table One: List of Recommended Heritage Grants; and**
- **Table Two: List of Conditional Heritage Grants.**

## **BACKGROUND**

Halifax Regional Municipality supports the conservation, preservation and promotion of Municipally Registered Heritage Properties through The Heritage Incentives Program which offers financial assistance through matching grants. In 2006 Council adopted changes to this program, and this will be the first review of applications under the newly adopted Terms and Conditions (Attachment A) for the Heritage Incentives Program.

## **DISCUSSION**

Staff reviewed 39 applications which totalled \$219,554 in grant requests. With a total budget of \$150,000 an excess of \$69,554 could not be funded. Using the Terms and Conditions, staff created a scoring system upon which the applications were evaluated and prioritized. This scoring system was based on six criteria and those applications which scored highest are recommended for grants:

The highest possible score was 14 points, based on criteria and possible scores as follows:

| <b>Criteria</b>                    | <b>4 Points</b>    | <b>3 Points</b>                     | <b>2 Points</b>                           | <b>1 Point</b>                                |
|------------------------------------|--------------------|-------------------------------------|---|---|
| Location                           | Hfx County         | Hfx North End                       | Dartmouth                                 | Hfx South End                                 |
| Type of Work                       | Roof & foundations | masonry/shingling/<br>window repair | window replacement                        | painting, etc.                                |
| Visibility                         | N/A                | N/A                                 | front & visible sides                     | rear & non visible                            |
| Number & Amount of previous grants | N/A                | 1 <sup>st</sup> time applicants     | previous grants cumulative under \$10,000 | previous grants cumulative exceeding \$10,000 |
| Building Conservation Plan         | N/A                | N/A                                 | N/A                                       | application with BCP                          |

Table One (Attachment B) illustrates recommended applications ranked in order of their score. This chart gives a summary of the work, a cost estimate, and a recommended grant. The 9 shaded applications in this chart represent those grants which, because of their value and based on the Terms and Conditions, will be conditional on a Waiver of Demolition & De-registration to be filed at the Registry of Deeds prior to payment of grant by HRM.

Table Two (Attachment C) is a list of “standby” approvals staff would like to have in place should any approved grants not be completed or cost less than estimated. This would enable staff to reallocate surplus funds to any approved and completed “stand-by” project. The two shaded applications in Table Two indicate grants which would require the Waiver of Demolition and De-registration to be signed should the grant be issued.

Finally, there were 3 applications which did not meet the program criteria, and 6 which scored below the cut-off. These 9 applications were not recommended (Attachment D).

### **BUDGET IMPLICATIONS**

This report recommends approval of \$150,000 in Heritage Incentives Grants for the 2007-08 fiscal year. The funding for these expenditures is in place within the Council approved 2007-08 Operating Budget for Community Development from the C310 Cost Centre.

### **FINANCIAL MANAGEMENT POLICIES / BUSINESS PLAN**

This report complies with the Municipality’s Multi-Year Financial Strategy, the approved Operating, Capital and Reserve budgets, policies and procedures regarding withdrawals from the utilization of Capital and Operating reserves, as well as any relevant legislation.

### **ALTERNATIVES**

None

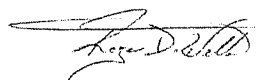
### **ATTACHMENTS**

|               |   |
|---------------|---|
| Attachment A: | Terms & Conditions for the Heritage Incentive Program |
| Attachment B: | Table One: List of Recommended Heritage Grants        |
| Attachment C: | Table Two: List of Stand-by Heritage Grants           |
| Attachment D: | Table Three: List of Not Recommended Heritage Grants  |
| Attachment E: | Illustrated Grant Request Summaries                   |

A copy of this report can be obtained online at <http://www.halifax.ca/commcoun/cc.html> then choose the appropriate Community Council and meeting date, or by contacting the Office of the Municipal Clerk at 490-4210, or Fax 490-4208.

Report Prepared by : Maggie Holm, Heritage Planner 490-4419

Report Approved by:



Roger Wells, Acting Manager, Planning Services 490-4373

Attachment A

## **HERITAGE INCENTIVES PROGRAM REVISED TERMS & CONDITIONS**

### **Program Aim**

The Halifax Regional Municipality (HRM) Heritage Incentives Program is administered by the Heritage Property Program (Community Development, Planning Applications) to encourage the conservation of privately-owned, municipally registered heritage properties in residential or commercial use. Within the limits of the annual approved budget, the Heritage Incentives Program provides matching grants of up to \$10,000 for eligible exterior conservation work.

### **Operational Criteria**

- The Heritage Incentives Program operates on a fiscal year basis from April 1<sup>st</sup> to March 31<sup>st</sup>.
- 25% of the annual heritage incentives budget is allocated to applications relating to commercial heritage properties. This is a proportionate allocation based on the fact that commercial buildings make up 25% of the HRM heritage registry. Any funds not used by commercial applications will be made available to residential applications.

### **Application Requirements**

- Applications will be accepted between January 1<sup>st</sup> and March 1<sup>st</sup> and may be submitted to:

HRM Heritage Property Program  
P.O. Box 1749, Halifax, NS B3A 3J5

or by hand delivery to:

Heritage Property Program  
HRM Planning & Development Services  
West End Mall, 6960 Mumford Road  
Telephone: (902) 490-4419

- Email or faxed applications will not be accepted.
- Late or incomplete applications will not be reviewed.

### **Applications must include:**

- A completed application form.
- Recent photographs of all sides of the building, with close-ups of the areas of work for which the grant is applied for.
- Two contractor estimates for the proposed work.

### **Eligibility of Property**

- Property must be a privately-owned, registered municipal heritage property located in HRM.
- Property must be in residential or commercial use.
- Property owner must be in good standing with HRM and shall not have unpaid taxes or any other legal claim outstanding.

### Eligible Work & Materials

Projects which restore exterior architectural elements significant to the heritage character of the registered heritage property, including any of the following:

- **Preservation** of existing exterior architectural elements. This includes, for example, repair of deteriorated windows and doors, cladding, roofing, foundation, cornices, moldings, architectural trim, and other significant features.
- **Replacement** of architectural features which still exist but which are beyond preservation or repair. This includes replacement in kind of deteriorated doors and windows, cladding, roofing, cornices, moldings, architectural trim, and other significant features, using accurate reconstruction and materials, sizes, and configurations that match the original.
- **Restoration** of significant architectural features which have been lost but for which the appearance can be clearly determined from physical evidence or documentary sources such as historic drawings or photographs.
- **Painting** in colours appropriate to the period of the heritage property. Generally, colours from the heritage palette of the major paint manufacturers are preferred.
- **Preservation/restoration of historic outbuildings or landscape features**, such as fences, walls or gates which form part of the original, documented heritage character of the property.
- Projects must use traditional materials (wood, stone, brick, etc.) and traditional designs.

### Ineligible Work & Materials

- Modern materials such as vinyl or aluminum clad windows, steel doors, vinyl siding, or EFIS cladding.
- Short-term, routine maintenance. Including minor repairs to non-original siding or roofing
- Poor or defective work.
- Work carried out prior to submission of the application.
- Owner Labour.

### Project Evaluation

Projects will be evaluated using the HRM *Heritage Building Conservation Standards* and the *Parks Canada Standards and Guidelines for the Conservation of Historic Places in Canada*.

### Priority Criteria

- Preference given to first-time applications.
- Higher priority given to preservation and restoration of historic structural and weatherproofing elements than to cosmetic improvements, e.g., restoration of cladding, windows, doors, or roof has greater priority than painting.
- Preference given to restoration of publicly visible features, e.g., an application for restoration of a front porch would have higher priority than a back porch restoration.
- Balance sought between applications from different parts of HRM, e.g., Halifax South End, Halifax North End, Dartmouth, Bedford, South-Western shore, Eastern Shore, etc.
- Preference given to applications supported by a Building Conservation Plan prepared by an architect, building inspector, engineer, or other qualified restoration professional. The Building Conservation Plan may be a drawing or report which reasonably illustrates all work required for the building.

### **Application Review Process**

- Applications will be screened for basic eligibility as they are received. Applicants will be notified promptly if their application is ineligible.
- Eligible applications will be reviewed and evaluated by Heritage staff in consultation with the Heritage Advisory Committee in March.
- Notification of approval or rejection will be mailed to applicants in April.
- Approval of grants will be conditional on approval of program budget and available funds.
- Due to limited funds, not all eligible applications may receive approval.

### **Maximum & Minimum Grants & Multiple Applications**

- Grants are awarded on a 50% cost-sharing, matching grant basis.
- The maximum annual grant is \$10,000.
- The minimum annual grant is \$500.
- The number of grants per property is limited to one per year and two in any four year period.

### **Conditions of Approval & Payment of Grant**

- Projects must be completed within the fiscal year for which they are approved.
- Grant payment is conditional on satisfactory completion of approved work, photographic documentation of completed work, and submission of receipts and paid invoices.
- Deadline for submission of receipts and paid invoices is March 15<sup>th</sup>. This is necessary to enable grant payments to be processed by end of fiscal year.
- Grant funding for projects not completed by the end of the fiscal year will be forfeited except in exceptional circumstances.
- Grants are tied to specific approved work. Additional work beyond what is budgeted for and approved will not be funded.
- The applicant shall notify HRM of any changes to the approved work prior to it being undertaken and shall not proceed with the work without supplementary approval by staff. Work that deviates from the approved work without a supplementary approval may not be eligible for funding and, at the discretion of HRM, such funding may be withheld and re-allocated to another heritage property.
- For projects which result in a cumulative grant of \$10,000 or more, no funds shall be paid until after the applicant has signed an *Agreement to Waive Section 18 of the Heritage Property Act* and filed the agreement at the Registry of Deeds. (See following Waiver).

### **Appeals**

- Refusal of a grant application or withholding of an approved grant payment may be appealed by the applicant within fourteen days of written notification of the decision.
- Appeals shall be in writing, addressed to the chair of the Heritage Advisory Committee c/o the Heritage Property Program and shall give reasons for the appeal.

## Attachment A

**HERITAGE INCENTIVES PROGRAM  
WAIVER OF SECTION 18 OF THE HERITAGE PROPERTY ACT**

THIS AGREEMENT made this          day of                                  , 2007  
BETWEEN:

ENTER NAME OF PROPERTY OWNER  
(hereinafter called the "Owner") .

OF THE FIRST PART

-and-

HALIFAX REGIONAL MUNICIPALITY.  
a municipal body corporate,  
(hereinafter called the "Municipality")

OF THE SECOND PART

WHEREAS the Owner owns certain lands in the Halifax Regional Municipality known as Civic Number \_\_\_\_\_ (hereinafter called the \_\_\_\_\_ Building"), more fully and particularly described in Schedule "A" hereto annexed;

AND WHEREAS the land and \_\_\_\_\_ Building have been registered in the Halifax Regional Municipality Registry of Heritage Property pursuant to the Nova Scotia Heritage Property Act, R.S., c. 199, s. 1. and Halifax Regional Municipality Bylaw H-200 (the Heritage Property Bylaw);

AND WHEREAS Section 17 of the Heritage Property Act states that municipal heritage property shall not be substantially altered in exterior appearance or demolished without the approval of the Municipality;

AND WHEREAS Section 18 of the Heritage Property Act states that Notwithstanding Section 17, where the owner of municipal heritage property has made an application for permission to alter the exterior appearance of or demolish the property and the application is not approved, the owner may make the alteration or carry out the demolition at any time after one year from the date of the application, provided that the alteration or demolition shall not be undertaken more than two years after the date of the application;

AND WHEREAS Section 20 of the Heritage Property Act authorizes a Municipal Council to enter into agreements with the owners of the Municipal Heritage Properties respecting their use,



preservation and protection;

AND WHEREAS Section 22 of the Heritage Property Act authorizes a Municipal Council to grant financial assistance to owners of registered heritage properties on whatever terms and conditions they see fit;

AND WHEREAS the Municipality operates a Heritage Incentives Program which grants assistance to owners of municipal heritage property to encourage the conservation of said property;

AND WHEREAS the Owner has applied for a grant under the Heritage Incentives Program for \_\_\_\_\_  
\_\_\_\_\_ (description of work to be carried out under grant);

AND WHEREAS the Municipality has approved said grant under Application # \_\_\_\_ subject to the satisfactory completion of said work and subject to execution of this Agreement;

AND WHEREAS the Owner has completed said work to the satisfaction of the Municipality.

NOW THEREFORE THIS AGREEMENT WITNESSETH THAT in consideration of the sum of One Dollar (\$1.00) of lawful money of Canada now paid by the Municipality to the owner (the receipt of which is hereby acknowledged), and for other valuable consideration, the Owner and the Halifax Regional Municipality agree to the following terms and conditions:

1. The Owner covenants and agrees that it shall not demolish the \_\_\_\_\_ Building or alter its exterior appearance in any manner without the written consent of the Halifax Regional Municipality and the owner expressly waives its rights under Section 18 of the said Heritage Property Act to make any alteration or carry out demolition as provided therein, said waiver to be in effect for ten (10) years from the date of this Agreement;
2. The parties herein agree that this Agreement shall be recorded in the Registry of Deeds in and for the Municipality for the County of Halifax, and shall remain in full force and effect until the termination date.
3. The Owner shall immediately notify the Halifax Regional Municipality in the event that it divests itself of any interest in the \_\_\_\_\_ Building.
4. It is expressly understood that this agreement runs with the property and the rights and obligations of the owner as set out herein shall pass with the property to subsequent owners. As each owner divests himself of the property, he is relieved of all liability under this agreement.

5. The Municipality agrees to pay the sum of \$ \_\_\_\_\_ to the Owner as full payment of Heritage Incentives Grant # \_\_\_\_ .
6. Any notices to be given under this Agreement shall be delivered to the parties at their respective addresses, and their current addresses are:

The Owner:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The Municipality: Halifax Regional Municipality  
Box 1749  
Halifax, NS B3J 3A5  
Attention: Municipal Clerk

IN WITNESS WHEREOF the parties hereto have hereunto set their hands and seals on the day and year first above written.

SIGNED, SEALED AND DELIVERED  
in the presence of

\_\_\_\_\_

)  
) Owner  
)  
) Per \_\_\_\_\_  
)  
)  
) Per \_\_\_\_\_  
)  
) Per \_\_\_\_\_  
)

SEALED, DELIVERED AND ATTESTED

to by the proper signing officers  
of Halifax Regional Municipality  
duly authorized in that behalf in  
the presence of

\_\_\_\_\_

) HALIFAX REGIONAL  
MUNICIPALITY  
)  
) Per \_\_\_\_\_  
) Mayor  
)  
)  
) Per \_\_\_\_\_  
Municipal Clerk

Attachment B

**Table One: List of Recommended Heritage Incentive Applications**

| Item No. | App No. | Address                 | Description of Work   | Score | Estimate  | Recommend Grant |
|----------|---------|-------------------------|---|-------|-----------|-----------------|
| 1        | 08-008  | 782 East Chezzetcook Rd | WINDOWS & CLADDING: replace 20 windows, re-shingle & 3 doors.           | 13/14 | \$23, 100 | \$10,000*       |
| 2        | 08-005  | 2128 Brunswick St       | STEPS: restore front stairs.  | 13/14 | \$12,002  | \$6,000         |
| 3        | 08-004  | 2698 Gottingen St       | ROOF: replace roof & gutters.   | 12/14 | \$9,988   | \$4,990         |
| 4        | 08-001  | 2370 Moran St           | ROOF: replace entire roof.  | 11/14 | \$4,770   | \$2,380         |
| 5        | 08-002  | 1137 Ketch Harbour Rd   | ROOF & DORMERS: replace roof & repair 2 dormers.                        | 11/14 | \$21, 491 | \$10,000*       |
| 6        | 08-018  | 2031 Creighton St       | ROOF, DORMERS & WINDOWS: cedar shingled roof, repair 4 dormers.         | 11/14 | \$50,000  | \$10,000*       |
| 7        | 08-036  | 1894 Hollis St          | STOREFRONT RESTORATION: windows & doors.                                | 11/14 | \$6,250   | \$3,120         |
| 8        | 08-006  | 6549 Coburg Rd          | ROOF: replace entire roof.  | 10/14 | \$22,083  | \$10,000*       |
| 9        | 08-015  | 287 Portland St         | ROOF: replace entire roof.  | 10/14 | \$15,830  | \$7,910*        |
| 10       | 08-027  | 119 Prince Albert Rd    | ROOF: replace entire roof, & gutters.                                   | 10/14 | \$5,000   | \$2,500         |
| 11       | 08-028  | 2323 Princess Pl        | WINDOWS: 4 window replacements.   | 10/14 | \$4,176   | \$2,080         |
| 12       | 08-033  | 6941 Tupper Grove       | ROOF: repairs to roof.  | 10/14 | \$25,000  | \$10,000*       |
| 13       | 08-011  | 5675 North St           | PAINT & CLADDING: paint entire house, & re-shingle front.               | 9/14  | \$7,946   | \$3,970         |
| 14       | 08-017  | 1348 Hollis St          | ROOF: replace entire roof.  | 9/14  | \$13,400  | \$6,700*        |
| 15       | 08-020  | 50 Summit St            | PORCH: repairs to porch & gutters.                                      | 9/14  | \$7,931   | \$3,960         |
| 16       | 08-029  | 5759 Inglis St          | PAINT & STORM WINDOWS: paint sides and rear, repair all storm windows.  | 9/14  | \$4,949   | \$2,400         |
| 17       | 08-030  | 5675 Inglis St          | PAINT & PORCH: repair storm porch, paint front & replace storm windows. | 9/14  | \$19,800  | \$10,000*       |
| 18       | 08-032  | 5528 Hennessey Pl       | WINDOWS & DOORS: replace 3 front and 4 rear window, & replace 2 doors.  | 9/14  | \$14,000  | \$7,000         |

| Item No. | App No. | Address        | Description of Work  | Score | Estimate | Recommend Grant  |
|----------|---------|----------------|--|-------|----------|------------------|
| 19       | 08-010  | 1226 Hollis St | PAINT & WINDOWS: replace 15 windows & paint entire building.       | 9/14  | \$21,900 | \$10,000*        |
| 20       | 08-009  | 5137 Morris St | DORMERS & CLADDING: repair 4 dormers & remove vinyl siding (rear). | 8/14  | \$17,343 | \$9,000          |
| 21       | 08-012  | 34 King St     | WINDOWS: replace 9 windows.  | 8/14  | \$9,321  | \$4,660          |
| 22       | 08-022  | 1225 Queen St  | PAINT & WINDOWS: 3 windows & paint building.                       | 8/14  | \$10,125 | \$5,000          |
| 23       | 08-023  | 50 Queen St    | PAINT: entire building.  | 8/14  | \$8,732  | \$4,300          |
| 24       | 08-034  | 5 Camden Rd    | PAINT: entire building.  | 8/14  | \$9,100  | \$4,030          |
|          |         |                | <b>TOTALS (24 applications)</b>                                    |       |          | <b>\$150,000</b> |

*\* Denotes applications which have cumulatively exceeded \$10,000 and will require the Waiver of Demolition & De-registration to be filed at the Registry of Deeds prior to payment of grant by HRM.*

**Attachment C**

**Table Two: List of Stand-by Heritage Incentive Applications**

| <b>Item No.</b> | <b>App No.</b> | <b>Address</b>     | <b>Description of Work</b>                         | <b>Score</b> | <b>Estimate</b> | <b>Recommend Grant</b> |
|-----------------|----------------|--------------------|--|--------------|-----------------|------------------------|
| <b>1</b>        | 08-035         | 62 Rockingstone Rd | FENCE: replace historic post-and-rail fence.       | 8/14         | \$6,640         | \$3,320                |
| <b>2</b>        | 08-013         | 5522 Hennessey Pl  | WINDOWS: replace three rear windows.               | 8/14         | \$4,050         | \$2,020                |
| <b>3</b>        | 08-021         | 47 Pleasant St     | PAINT & WINDOWS: 3 windows & repairs/paint garage. | 8/14         | \$8,000         | \$4,000                |
| <b>4</b>        | 08-003         | 7 Newcastle St     | DOOR: Restore front entry.                         | 8/14         | \$3,700         | \$1,850*               |
| <b>5</b>        | 08-024         | 1731 Rosebank Ave  | PAINT: entire building.                            | 7/14         | \$7,995         | \$3,990                |
| <b>6</b>        | 08-019         | 1043 Tower Rd      | WINDOWS: replace 21 windows.                       | 7/14         | \$18,710        | \$9,350*               |
|                 |                |                    | <b>TOTAL (6 applications)</b>                      |              |                 | <b>\$24,530</b>        |

Attachment D

**Table Three: List of Not Recommended Heritage Incentive Applications**

| Item No. | No.    | Address            | Description of Work   | Score | Estimate | Comments  |
|----------|--------|--------------------|---|-------|----------|---|
| 1        | 08-038 | 1057 Tower Rd      | PAINT: re-painting front of building  | 6/14  | \$5,200  | Cosmetic work, low score,                         |
| 2        | 08-007 | 1047 Tower Rd      | RESTORE FRONT PORCH: 4 windows, repair and re-parch porch foundation, paint entire porch. | 7/14  | \$17,855 | 1 previous grant, low score.                      |
| 3        | 08-016 | 5765 Inglis St     | PAINTING: entire building.  | 6/14  | \$10,099 | 1 previous grant, low score.                      |
| 4        | 08-026 | 296 Portland St    | WINDOWS: 2 Attic & 1 kitchen windows.   | 6/17  | \$7,995  | 1 previous grant, low score.                      |
| 5        | 08-014 | 95 King St         | WINDOWS & CLADDING: replace 3 windows & remove vinyl siding.                              | 7/14  | \$15,000 | 3 previous grants, low score.                     |
| 6        | 08-025 | 5188-90 Morris St  | MASONRY REPAIR: restore three elevations and rebuild chimney.                             | 6/14  | \$33,900 | 4 previous grants, non-visible work.              |
| 7        | 08-031 | 5663 Inglis St     | WINDOWS: vinyl window replacements  | 0     | 0        | Vinyl windows are not eligible.                   |
| 8        | 08-037 | 1222 Barrington St | ROOF: Repairs to truncated portion of roof.   | 0     | 0        | Work was completed prior to application deadline. |
| 9        | 08-039 | 17 George St       | ROOF & DORMERS: Restoring mansard roof and dormers.                                       | 0     | 0        | Work was completed prior to application deadline. |

*Please note: Applications 1 to 6 in table three total \$90,049. While these applications are not recommended they would have accounted for grants in the amount of \$45,024 had they been recommended.*