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Item No.
Heritage Advisory Committee
June 24, 2015

TO: Chair and Members of the Heritage Advisory Committee

SUBMITTED BY: Original Signed
Bob Bjerke, Chief Planner & Director, Planning and Development

DATE: June 4, 2015

SUBJECT: H00417: 2015/2016 Heritage Incentive Program

ORIGIN

On April 1, 2014, Regional Council approved Administrative Order Number 2014-002-ADM Respecting the Heritage Incentives Program. Applications for financial assistance under the terms of the order have been received for the 2015-2016 fiscal year.

LEGISLATIVE AUTHORITY

The *Heritage Property Act*, Section 22 Financial Assistance, and Administrative Order Number 2014-002-ADM

RECOMMENDATION

It is recommended that the Heritage Advisory Committee recommend that Halifax Regional Council:

- 1) Approve the recommended grants to the properties listed in Attachment A, and further approve those properties recommended as 'standby' as listed in Attachment B, conditional upon the applicants' compliance with section 29 through 35 of Administrative Order Number 2014-002-ADM (Attachment C).

BACKGROUND

Halifax Regional Municipality supports the conservation, preservation and promotion of municipally registered heritage properties through the Heritage Property Program. One of the principal aims of the program is facilitate the ongoing maintenance, restoration, reuse and rehabilitation of heritage properties through financial incentives. The heritage incentives program continues to meet this objective through grants that have been issued annually.

In April of 2014, Regional Council approved Administrative Order Number 2014-002-ADM, outlined in Attachment C, which sets out the conditions under which matching grants of up to \$10,000 can be approved for exterior conservation work to registered heritage properties.

DISCUSSION

Between January 1 and March 1 of 2015, staff received 37 applications for heritage grants. The applications were first evaluated by staff to determine if they met the eligibility criteria of the administration order. Thirty (30) applications met the eligibility criteria and could potentially receive grants under this program.

In an effort to prioritize applications all eligible applications were scored according to the system in Table 1.

Table 1 – Application Scoring Matrix for Heritage Incentives Program

Criteria	4 Points	3 Points	2 Points	1 Point
Location	Hfx County	Hfx North End	Dartmouth & Remainder of Hfx	Hfx South End and Downtown
Type of Work	Roof and Foundation	Masonry, Cladding & Window Repair	Window Replacement	Painting, etc.
Visibility	N/A	N/A	Front & Visible Sides	Rear & Non-Visible
Number & Amount of Previous Grants	N/A	First Time Applicants	Previous Grants <\$10,000 (cumulative)	Previous Grants >\$10,000 (cumulative)
Building Conservation Plan	N/A	N/A	N/A	Application Supported by BCP

The total value of the eligible grant applications is \$196,057. This exceeds the approved grant program budget of \$150,000 and accordingly some projects will not be recommended for funding at this time.

The twenty four (24) highest scoring applications can be recommended for award without exceeding the grant budget, these projects are listed in Attachment A. The six (6) projects that cannot be funded within the current grant budget will be placed on a standby list, as outlined in Attachment B.

Should an awarded property not proceed with the proposed project, or the actual expense of the project is less than the submitted estimate, staff will allocate the excess funds to the properties on the standby list.

Attachment D provides background information specific to each application.

FINANCIAL IMPLICATIONS

The recommended approval of \$150,000 for 2015-16 heritage incentive grants will be funded from the approved 2015-16 operating budget for cost centre C310 – Development Approvals.

COMMUNITY ENGAGEMENT

The administration of the heritage incentives program is an internal HRM process, which was adopted after a public consultation process consistent with the intent of the HRM Community Engagement Strategy. An information notice was sent in February 2015 to owners of registered heritage properties to increase awareness of the program.

ENVIRONMENTAL IMPLICATIONS

No implications have been identified.

ALTERNATIVES

The Heritage Advisory Council could forward a negative recommendation with respect to the awarding of the grants as outlined in this report.

ATTACHMENTS

- Attachment A Table of Recommended Properties for Approval of Heritage Incentive Grant
- Attachment B Table of Recommended Properties for Standby List
- Attachment C Administrative Order Number 2014-002-ADM
- Attachment D Background Information on Applicant Properties

A copy of this report can be obtained online at <http://www.halifax.ca/commcoun/index.php> then choose the appropriate Community Council and meeting date, or by contacting the Office of the Municipal Clerk at 902.490.4210, or Fax 902.490.4208.

Report Prepared by: Erin MacIntyre, Heritage Planner, 902.490.4494

Report Approved by: Original Signed
Jacob Ritchie, Manager of Urban Design, Planning & Development, 902.490.6510

Financial Approval by: Original Signed
Bruce Fisher, Acting Director of Finance & ICT/CFO, 902.490.4493

Attachment A - Table of Recommended Properties for Approval of Heritage Incentive Grant

Grant Recommendations:

Score	Application No.	Address	Description of Work	Estimate	Recommended Grant
12	16-009	6881 Churchill St	Roofing	\$15,800	\$7,900
11	16-005	2125 Brunswick St	Roofing	\$8,909	\$4,454
10.5	16-029	85 Boscobel Rd	Roofing	\$12,900	\$6,450
10	16-004	2579 Creighton St	Chimney work, transom repair, 2 exterior wall repair	\$19,800	\$9,900
10	16-007	2548 Creighton St	Chimneys, exterior cladding	\$8,360	\$4,180
10	16-014	6080 South St	Front entrance and roofing	\$3,310	\$1,655
9.5	16-006	2062 Brunswick St	3 windows, front door, back roof replacement	\$9,697	\$4,849
9	16-002	2064 Brunswick St	Window replacement	\$3,771	\$1,886
9	16-012	29 First Ave	Chimney replacement	\$6,770	\$3,385
9	16-013	1041 Tower Rd	Cladding and roofing	\$39,287	\$10,000
9	16-017	5419 Portland Pl	Replace 3 dormers	\$8,000	\$4,000
8.5	16-034	5244 Smith St	Paint cladding and trim at front and rear, front step replacement	\$9,270	\$4,635
8.5	16-008	6201 Shirley St	Recladding, window replacement	\$17,474	\$8,737
8.5	16-028	5657 Inglis St	Roofing, windows	\$39,130	\$10,000
8.5	16-025	1293 South Park St	Cladding repair and painting	\$17,000	\$8,500
8	16-032	5266 South St	Cladding replacement	\$4,800	\$2,400
8	16-001	42 Summit St	Window replacement	\$4,581	\$2,290
8	16-010	5663 Inglis St	Roofing, removal of addition	\$17,839	\$8,919
8	16-016	1266 Queen St	Masonry repointing/repair	\$24,700	\$10,000
8	16-020	1073 Tower Rd	Front entrance	\$14,500	\$7,250
8	16-021	1071 Tower Rd	Front entrance	\$14,500	\$7,250
8	16-022	5136 Prince St	Replace two doors	\$8,500	\$4,250
8	16-035	1350-1356 Queen St	2 chimney replacements	\$19,088	\$9,544
8	16-026	5145 Morris St	Window replacement, deck replacement	\$36,000	\$7,566*

* Partial award of grant request to lowest scoring property in order not to exceed \$150,000 total

Attachment B- Table of Recommended Properties for Standby List

Score	Award No.	Appl. No.	Address	Description of Work	Estimate	Grant Request
7.5	1	16-011	15 Pine Street	Window/dormer replacement	\$3,980	\$1,990
7	2	16-018	1597 Dresden Row	Window replacement	\$27,325	\$10,000
7	3	16-003	5178 Bishop St	Window replacement	\$17,853	\$8,927
6.5	4	16-024	5660 Fenwick St	Windows and cladding	\$22,555	\$10,000
6.5	5	16-023	5675 Inglis St	Window replacement, porch repair	\$18,434	\$9,217
6	6	16-036	1328 Hollis St	Cladding repair/ replacement and painting	\$7,867	\$3,933

Attachment C- Administration Order Number 2014-002-ADM

HALIFAX REGIONAL MUNICIPALITY
ADMINISTRATIVE ORDER NUMBER 2014-002-ADM
RESPECTING THE HERITAGE INCENTIVES PROGRAM

WHEREAS pursuant to *Heritage Property Act*, R.S.N.S. 1989, c. 199, the Council of the Halifax Regional Municipality may provide financial assistance in respect of municipal heritage property to any person to assist in the restoration or renovation of such property upon such terms and conditions as the Council deems fit;

BE IT RESOLVED AS AN ADMINISTRATIVE ORDER of the Council of the Halifax Regional Municipality as follows:

Short Title

1. This Administrative Order may be cited as Administrative Order Number 2014-002-ADM, the Heritage Incentives Program Administrative Order.

Purpose

2. To encourage the conservation of privately-owned, municipally registered heritage properties used for residential or commercial purposes. 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.

Interpretation

3. For the purposes of this Administrative Order, “municipally registered heritage property” has the same meaning as “municipal heritage property” in the *Heritage Property Act*, R.S.N.S. 1989, c. 199.

Financial Assistance Available

4. The Heritage Incentives Program operates on the Municipality's fiscal year, from April 1st to March 31st.

5. Twenty-five per cent (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 for commercial properties will be made available to residential applications.

6. Financial assistance is awarded on a 50% cost-sharing basis, exclusive of HST.

7. The maximum annual amount of financial assistance per property is \$10,000.00.

8. The minimum annual amount of financial assistance per property is \$500.00.

9. Each property is limited to one application for financial assistance per year, and two successful applications in any four year period.

Application Requirements

10. There is one intake period per fiscal year. Applications will be accepted between January 1st and March 1st for the following fiscal year.

11. All applications must be received by mail or in person. E-mailed or faxed applications will not be accepted. The address for submission of applications will be posted on www.halifax.ca prior to January 1st of each year.

12. Applications must include:

- (a) a completed application form;
- (b) recent photographs of all sides of the building, with close-ups of the areas of work for which the grant is applied;
- (c) two contractor estimates for the proposed work; and

- (d) where the applicant is a condominium corporation, a copy of the board of director minutes approving the submission of the grant application.
13. Late or incomplete applications will not be reviewed or considered.

Eligible Property

14. Only eligible property will be considered for financial assistance.
15. An eligible property must be:
- (a) a privately-owned, registered municipal heritage property within HRM; and
 - (b) in use for residential or commercial purposes.
16. A property is not eligible for financial assistance if the property is currently under investigation or prosecution for land-use, Building Code, Fire Code, or Heritage Property Act violations, or is subject to an order to comply under any Act or By-law, or has any liens or property taxes outstanding.

Work & Materials Eligible for Financial Assistance

17. Projects which restore exterior architectural elements significant to the heritage value of the registered heritage property, including any of the following, are eligible for financial assistance:
- (a) **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.
 - (b) **Replacement** of existing exterior architectural elements that 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.
 - (c) **Restoration** of exterior architectural elements 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.
 - (d) **Painting** in colours appropriate to the period of the heritage property. Generally, colours from the heritage palette of the major paint manufacturers are preferred.
 - (e) **Preservation/restoration of historic outbuildings or landscape features**, such as fences, walls or gates which form part of the original, documented heritage value of the property.
18. To be eligible, projects must use traditional materials (wood, stone, brick, etc.) and traditional designs.

Work & Materials Ineligible for Financial Assistance

19. The following work and materials are ineligible for financial assistance:
- (a) work that has been commenced or completed prior to submission of the application;
 - (b) modern materials such as vinyl or aluminum clad windows, steel doors, vinyl siding, or Exterior Insulation Finishing System cladding;
 - (c) short-term, routine maintenance including minor repairs;
 - (d) poor or defective work; or
 - (e) labour undertaken by the owner.

Project Evaluation and Prioritization

20. Projects will be evaluated using HRM *Heritage Building Conservation Standards* as adopted by By-law H-200, or any other guidelines for the conservation of heritage properties that may be adopted by By-law H-200 from time to time.
21. The following criteria will be used to prioritize applications:
- (a) Preference given to first-time applications.
 - (b) Higher priority will be 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.
 - (c) Preference will be 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.
 - (d) Balance will be sought between applications from different parts of HRM, e.g., Halifax South End, Halifax North End, Dartmouth, Bedford, South-Western shore, Eastern Shore, etc.

- (e) Preference will be 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 shall be a drawing or report which reasonably illustrates all work required for the building.

Application Review Process

22. All applications will be screened by staff for basic eligibility as they are received. Applicants will be notified promptly if their application is ineligible.
23. Eligible applications will be evaluated and prioritized by staff and a report and recommendations will be prepared for consideration by the Heritage Advisory Committee, no later than June 30th each fiscal year.
24. The staff report will be reviewed by the Heritage Advisory Committee for recommendation to Regional Council.
25. Final approval of all applications for financial assistance, and their amount, is a decision of Regional Council in its sole discretion. Regional Council may:
- (a) approve the application;
 - (b) approve the application to be placed on a waiting list to be administered by staff in accordance with funds available in the program budget; or
 - (c) refuse the application.
26. Notification of the decision of Regional Council will be mailed to applicants after it is made.
27. Approval of financial assistance is conditional on Regional Council's approval of the annual program budget.
28. Due to limited funds, not all eligible applications may receive financial assistance.

Conditions of Approval & Payment of Financial Assistance

29. Projects must be completed within the fiscal year for which they are approved.
30. Financial assistance is conditional on satisfactory completion of approved work, photographic documentation of completed work, and submission of well-organized receipts and paid invoices.
31. Deadline for submission of receipts and paid invoices is March 1st each fiscal year. This is necessary to enable payments to be processed by end of fiscal year.
32. Financial assistance for projects not completed by the end of the fiscal year will be forfeited.
33. Financial Assistance is tied to specific approved work. Additional work beyond what is budgeted for and approved will not be funded.
34. 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. The authority to give such approval is hereby delegated to the Heritage Property Planner. Approval may be sought at any time in the fiscal year for which the financial assistance was approved, but must be sought prior to the submission of receipts and paid invoices. 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.
35. For projects which result in cumulative financial assistance of \$10,000.00 or more, no funds shall be paid until the applicant has signed an *Agreement to Waive Section 18 of the Heritage Property Act* and filed the agreement, at their cost, at the Registry of Deeds. Under the agreement, which runs with the property, the applicant agrees not to demolish or alter the exterior appearance of the property in any manner without the written consent of HRM and expressly waives its rights under section 18 of the Heritage Property Act for ten (10) years from the date of the agreement. Waivers must be filed at the Registry of Deeds within 6 months after the end of the fiscal year in which the financial assistance has been approved: failure to do so will result in forfeiture of funds.

Scope

36. Nothing in this Administrative Order shall be interpreted to limit or otherwise prescribe Council's general discretion to provide financial assistance under the *Heritage Property Act* or otherwise.

Effective Date

37. This Administrative Order comes into force beginning with applications for the 2015-16 fiscal year.

Done and passed in Council this 1st day of April, A.D. 2014.

Mayor

Municipal Clerk

I, Cathy Mellett, Municipal Clerk of the Halifax Regional Municipality, hereby certify that the above noted Administrative Order was passed at a meeting of Halifax Regional Council held on April 1, 2014.

Cathy Mellett, Municipal Clerk

Notice of Motion:
Approved:

March 18, 2014
April 1, 2014

Attachment D- Background Information on Applicant Properties

<p>Application Number 16-001</p> 	<p>Address: 42 Summit Street, Dartmouth Name: John Salisbury house Age: c. 1830 Proposed Work: Replacement of windows in front shed dormer Score: 8/14 Estimate: \$ 4,581 Recommended grant award of: \$ 2,290</p>
<p>Application Number 16-002</p> 	<p>Address: 2064 Brunswick Street Name: Churchfield Barracks Age: c. 1901 Proposed Work: replacement of 2 windows in front façade Score: 9/14 Estimate: \$3772 Recommended grant award of: \$1886</p>
<p>Application Number 16-003</p> 	<p>Address: 5178 Bishop St Name: C. H. Willis House Age: c. 1862 Proposed Work: replacement of several windows Score: 7/14 Estimate: \$17,853 Recommended placement No. 2 on Stand-by list (grant amount of \$8,972)</p>
<p>Application Number 16-004</p> 	<p>Address: 2579 Creighton Street Name: Busch House Age: c. 1872 Proposed Work: chimney repointing, window replacement, exterior façade repair Score: 10/14 Estimate: \$19,800 Recommended grant award of: \$9,900</p>

Application Number 16-005



Address: 2125 Brunswick Street
Name: Charles F. DeWolfe House
Age: c. 1869
Proposed Work: reshingling front and rear roof
Score: 11/14
Estimate: \$8,909
Recommended grant award of: \$4,454

Application Number 16-006



Address: 2062 Brunswick Street
Name: Churchfield Barracks
Age: c. 1901
Proposed Work: replace 3 windows, front door replacement, roof repair
Score: 10.5/14
Estimate: \$9,697
Recommended grant award of: \$4,849

Application Number 16-007



Address: 2548 Gottingen Street
Name: Leo Fultz House
Age: c. 1894
Proposed Work: chimney repointing, exterior façade repair
Score: 10/14
Estimate: \$8,360
Recommended grant award of: \$4,180

Application Number 16-008



Address: 6201 Shirley Street
Name: James Rose House
Age: c. 1920
Proposed Work: exterior façade repair, window replacement
Score: 8.5/14
Estimate: \$17,474
Recommended grant award of: \$8,737

Application Number 16-009



Address: 6881 Churchill Drive
Name: Blink Bonnie Building
Age: c. 1865
Proposed Work: roof shingling replacement
Score: 12/14
Estimate: \$15,800
Recommended grant award of: \$7,900

Application Number 16-010



Address: 5663 Inglis Street
Name: Fraser House
Age: c. 1894
Proposed Work: removal of rear addition, façade repair, step/stair replacement, roofing
Score: 8/14
Estimate: \$17,839
Recommended grant award of: \$8,919

Application Number 16-011



Address: 15 Pine Street
Name: George Meisner Building
Age: c. 1864
Proposed Work: dormer replacement
Score: 7.5/14
Estimate: \$7,960
Recommended grant award of: \$3,980

Application Number 16-012



Address: 29 First Avenue
Name: Knight House
Age: c. 1902
Proposed Work: reconstruction of two chimneys
Score: 9/14
Estimate: \$6,770
Recommended grant award of: \$3,385

Application Number 16-013



Address: 1041 Tower Road
Name: Victorian Era Streetscape
Age: c. 1875
Proposed Work: wood cladding replacement, roof shingle replacement
Score: 9/14
Estimate: \$39,287
Recommended grant award of: \$10,000

Application Number 16-014



Address: 6080 South Street
Name: Acacia Cottage
Age: c. 1816
Proposed Work: partial roof replacement, front porch repair
Score: 10/14
Estimate: \$3,310
Recommended grant award of: \$1,655

Application Number 16-016



Address: 1266 Queen Street
Name: Mary Queen of Scots Building
Age: c. 1861
Proposed Work: masonry repair and repointing
Score: 8/14
Estimate: \$24,700
Recommended grant award of: \$10,000

Application Number 16-017



Address: 5419 Portland Place
Name: Walden Square
Age: c. 1864
Proposed Work: repair and replacement of three dormers
Score: 9/14
Estimate: \$8,000
Recommended grant award of: \$4,000

Application Number 16-018



Address: 1597 Dresden Row
Name: Bollard House
Age: c. 1835
Proposed Work: window replacement
Score: 7/14
Estimate: \$27,325
Recommended placement No. 1 on Stand-by list (grant amount of \$10,000)

Application Number 16-020



Address: 1073 Tower Road
Name: Victorian Era Streetscape
Age: c. 1890
Proposed Work: replacement of front door and surround
Score: 8/14
Estimate: \$14,500
Recommended grant award of: \$7,250

Application Number 16-021



Address: 1071 Tower Road
Name: Victorian Era Streetscape
Age: c. 1890
Proposed Work: replacement of front door and surround
Score: 8/14
Estimate: \$14,500
Recommended grant award of: \$7,250

Application Number 16-022



Address: 5136 Prince Street
Name: Geldert Building
Age: c. 1862
Proposed Work: replacement of front and side entrance and doors
Score: 8/14
Estimate: \$8,500
Recommended grant award of: \$4,250

Application Number 16-023



Address: 5675 Inglis Street
Name: Mitchell House
Age: c. 1894
Proposed Work: window replacement,
general repairs
Score: 6.5/14
Estimate: \$18,435
**Recommended placement No. 4 on
Stand-by list (grant amount of \$9,217)**

Application Number 16-024



Address: 5660 Fenwick Street
Name: Cahill House
Age: c. 1895
Proposed Work: window replacement
and cladding repair
Score: 6.5/14
Estimate: \$22,555
**Recommended placement No. 3 on
Stand-by list (grant amount of
\$10,000)**

Application Number 16-025



Address: 1293 South Park Street
Name: Victorian Era Streetscape
Age: c. 1897
Proposed Work: repair and replacement
of cladding, trim, wooden detailing
Score: 7.5/14
Estimate: \$17,000
**Recommended grant award of:
\$8,500**

Application Number 16-026



Address: 5145 Morris Street
Name: E.B. Strickland House
Age: c. 1869
Proposed Work: replacement of
windows, rear decking
Score: 8/14
Estimate: \$36,000
**Recommended grant award of:
\$10,000**

Application Number 16-028



Address: 5657 Inglis Street
Name: Sheehan House
Age: c. 1883
Proposed Work: roof and window replacement
Score: 8.5/14
Estimate: \$39,130
Recommended grant award of: \$10,000

Application Number 16-029



Address: 85 Boscobel Road
Name: Boscobel House
Age: c. 1860
Proposed Work: roof repair/replacement
Score: 10.5/14
Estimate: \$12,900
Recommended grant award of: \$6,450

Application Number 16-032



Address: 5266 South Street
Name: G. E. Ahern House
Age: c. 1870
Proposed Work: cladding repair
Score: 8/14
Estimate: \$4,800
Recommended grant award of: \$2,400

Application Number 16-034



Address: 5244 Smith Street
Name: Victorian Era Streetscape
Age: c. 1880
Proposed Work: paint cladding and trim at front and rear, front step replacement
Score: 8.5/14
Estimate: \$9,270
Recommended grant award of: \$4,635

Application Number 16-035



Address: 1350-1356 Queen Street
Name: Hoyt-Morrison House
Age: c. 1871
Proposed Work: reconstruction of two
front chimney stacks
Score: 8/14
Estimate: \$19,088
**Recommended grant award of:
\$9,544**

Application Number 16-036



Address: 1328/1332 Hollis Street
Name: Alexander MacLean House
Age: c. 1799
Proposed Work: cladding repair and
painting
Score: 8/14
Estimate: \$7,867
**Recommended grant award of:
\$3,933**