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**Item No.**
**Heritage Advisory Committee**
**March 23, 2016**

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

**SUBMITTED BY:** Original Signed by

Bob Bjerke, Chief Planner & Director, Planning and Development

**DATE:** March 10, 2016

**SUBJECT:** **H00432: 2016/2017 Heritage Incentives 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 2016-2017 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 to 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 2016, 29 applications for heritage grants were received. The applications were first evaluated by staff to determine if they met the eligibility criteria of the Administrative Order. Twenty-seven (27) applications met the eligibility criteria and could potentially receive grants under this program.

In keeping with past practice, as a means of equitably distributing funding, a scoring matrix is used to evaluate properties based on five different criteria as shown in Table 1.

**Table 1 – Application Scoring Matrix for Heritage Incentives Program**

| Criteria | 4 Points | 3 Points | 2 Points | 1 Point |
|---|---|---|---|---|
| **Location** | former 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 $204,228. This exceeds the grant program budget of $150,000 and accordingly, some projects cannot be recommended for funding at this time. The amount of grant budget has been approved by Regional Council for the 2016/17 fiscal year.

The twenty (20) highest scoring applications can be recommended for award without exceeding the proposed grant budget; these projects are listed in Attachment A. The seven (7) 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 2016-17 heritage incentive grants will be funded from the 2016-17 operating budget for cost centre C002 – Urban Design.

## 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 December 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

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Report Prepared by Shilo Gempton, Heirtage Planner

Original Signed by:
Jacob Ritchie, Urban Design Program Manager
Bob Bjerke, Chief Planner and Director of Planning & Development
Ed Thornhill, Acting Director of Finance & ICT/CFO

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

**Grant Recommendations:**

| Score | Application No. | Address | Description of Work | Estimate | Recommended Grant |
|---|---|---|---|---|---|
| 12.5 | 17-011 | 1320 Old Sackville Rd | Restoration/repairs for pool house, garage and house | $26,856* | $10,000 |
| 11.5 | 17-015 | 5518 North St | Windows | $33,148 | $10,000 |
| 11.5 | 17-009 | 2720 Gottingen St | Roof, exterior walls, paint | $19,295 | $9,648 |
| 11 | 17-012 | 5529 Young St | Replace dormers | $32,500 | $10,000 |
| 11 | 17-013 | 5531/1533 Young St | Replace dormers | $32,500 | $10,000 |
| 10 | 17-008 | 15 Dorey Lane | Deck, door | $1,922 | $961 |
| 10 | 17-003 | 2579 Creighton St | Dormers, chimney, walls | $19,800 | $9,925 |
| 10 | 17-021 | 47 North St | Replace shingles, paint | $13,375 | $6,688 |
| 9.5 | 17-002 | 1459 Hollis St | Roof | $21,896 | $10,000 |
| 9 | 17-014 | 2062 Brunswick St | Repair window | $2,540 | $1,270 |
| 9 | 17-016 | 4 Albert St | Shingles/trim (cladding) | $23,468 | $10,000 |
| 9 | 17-017 | 6080 South St | Restore gables | $4,070* | $2,035 |
| 9 | 17-020 | 1871 Hollis St | Masonry, repair, painting | $9,250 | $4,625 |
| 8.5 | 17-001 | 1260 Blenheim Terr | New roof, steps, window, patio doors | $17,962 | $8,981 |
| 8.5 | 17-024 | 1091 Tower Rd | Shingles, windows, painting | $33,820 | $10,000 |
| 8.5 | 17-025 | 99 Ochterloney St | Windows, bargeboard | $20,036 | $10,000 |
| 8 | 17-005 | 5248 Morris St | Windows | $40,850 | $10,000 |
| 8 | 17-010 | 42 Summit St | Windows | $5,091 | $2,546 |
| 8 | 17-023 | 5136 Prince St | Doors | $8,500 | $4,250 |
| 8 | 17-027 | 5184 Bishop St | Windows | $28,137 | $8,121 (partial) |

*Amount requested that is eligible

**Attachment B-** Table of Recommended Properties for Standby List

| Score | Award No. | Appl. No. | Address | Description of Work | Estimate | Grant Request |
|---|---|---|---|---|---|---|
| 7.5 | BU #1 | 17-019 | 5759 Inglis St | Front porch | $5,944 | $2,972 |
| 7.25 | BU #2 | 17-004 | 1226 Hollis St | Roof repair, windows | $26,186 | $10,000 |
| 7 | BU #3 | 17-026 | 5145 Morris St | Dormers, roof | $25,142 | $10,000 |
| 6.5 | BU #4 | 17-007 | 5660 Fenwick St | Windows & shingles | $22,555 | $10,000 |
| 6.5 | BU #5 | 17-028 | 5178 Bishop St | Windows & rear entrance | $12,398 | $6,199 |
| 6.25 | BU #6 | 17-022 | 1260-62 Queen | Stucco & Windows | $16,099 | $8,050 |
| 6 | BU #7 | 17-006 | 175 St. Margaret's Bay | Painting | $5,740 | $2,870 |

**ATTACHMENT C: ADMINISTRATIVE ORDER NUMBER 2014-0020-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

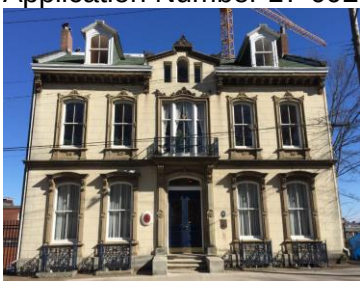
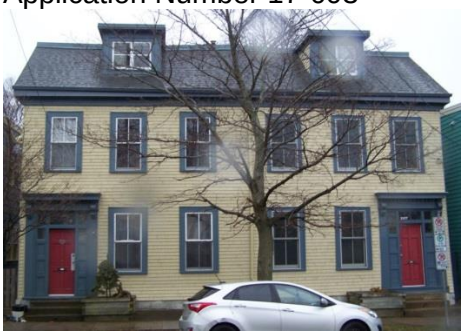
_____
Municipal Clerk

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: March 18, 2014
Approved: April 1, 2014

**Attachment D**- Background Information on Applicant Properties

| | |
|---|---|
| Application Number 17-001<br> | Address: 1260 Blenheim Terrace<br>Name: Blenheim Cottage<br>Age: c. 1872<br>Proposed Work: Roof replacement, front exterior steps, basement window<br>Score: 8.5/14<br>Estimate: $ 17,962<br>**Recommended grant award of:$8,981** |
| Application Number 17-002<br>  | Address: 1459 Hollis Street<br>Name: Benjamin Wier House<br>Age: c. 1863<br>Proposed Work: Roof replacement<br>Score: 9.5/14<br>Estimate: $21,896<br>**Recommended grant award of: $10,000** |
| Application Number 17-003<br>  | Address: 2579-81 Creighton Street<br>Name: Henry Busch House<br>Age: c. 1872<br>Proposed Work: Dormer window replacement, window refurbishing, chimney weather detailing, exterior wall upgrades<br>Score: 10/14<br>Estimate: $19,800<br>**Recommended grant award of: $9,900** |
| Application Number 17-004<br> | Address: 1226 Hollis Street<br>Name: Hon. William Annand House<br>Age: c. 1870<br>Proposed Work: Roof repair and window replacement<br>Score: 7.25/14<br>Estimate: $26,186<br>**Recommended placement No. 2 on Stand-by list (grant amount of $10,000)** |

Application Number 17-005

Address: 5248 Morris Street
Name: Crofton-Uniacke House
Age: c. 1816
Proposed Work: Windows
Score: 8/14
Estimate: $40,850
**Recommended grant award of: $10,000**

Application Number 17-006

Address: 175 St. Margaret's Bay Road
Name: Craigmore
Age: c. 1908
Proposed Work: paint trim on house, paint shed and original garage
Score: 6/14
Estimate: $5,740
**Recommended placement No. 7 on Stand-by list (grant amount $2,870)**

Application Number 17-007

Address: 5660 Fenwick Street
Name: Cahill House
Age: c. 1895
Proposed Work: replace/restore 6 windows, reshingle wall
Score: 6.5/14
Estimate: $22,555
**Recommended placement No. 4 on Standy-by list (grant amount of $10,000)**

Application Number 17-008

Address: 15 Dorey Lane
Name: Dorey House
Age: c. 1848
Proposed Work: Board replacement on veranda and door
Score: 10/14
Estimate: $1,922
**Recommended grant award of: $961**

Application Number 17-009

Address: 2720 Gottingen Street
Name: H.R. Silver House
Age: c. 1896
Proposed Work: New shingle roof, exterior walls and painting
Score: 11.5/14
Estimate: $19,295
**Recommended grant award of: $9,648**

Application Number 17-010

Address: 42 Summit Street
Name: James A. Lawlor House
Age: c. 1830
Proposed Work: Windows
Score: 8/14
Estimate: $5,091
**Recommended grant award of: $2,546**

Application Number 17-011

Address: 1320 Old Sackville Road
Name: Olands Farm
Age: c. 1870
Proposed Work: New roof, restoration work, chimney work
Score: 12.5/14
Estimate: $26,856
**Recommended grant award of: $10,000**

Application Number 17-012

Address: 5529 Young Street
Name: Emporium Company Store
Age: c. 1920
Proposed Work: Dormer replacement/ repair and window
Score: 11/14
Estimate: $32,500
**Recommended grant award of: $10,000**

Application Number 17-013

Address: 5531/33 Young Street
Name: Emporium Company Store
Age: c. 1920
Proposed Work: Dormer replacement/ repair and window
Score: 11/14
Estimate: $32,500
**Recommended grant award of:**
$10,000

Application Number 17-014

Address: 2062 Brunswick Street
Name: Churchfield Barracks
Age: c. 1901
Proposed Work: Repair back window
Score: 9/14
Estimate: $2,540
**Recommended grant award of:**
**$1,270**

Application Number 17-015

Address: 5518 North Street
Name: Walter J. Busch House
Age: c. 1896
Proposed Work: Windows
Score: 11.5/14
Estimate: $33,148
**Recommended grant award of:**
**$10,000**

Application Number 17-016

Address: 4 Albert Street
Name: William Wentzell House
Age: c. 1893
Proposed Work: New siding
Score: 9/14
Estimate: $23,468
**Recommended grant award of:**
**$10,000**

Application Number 17-017

Address: 6080 South Street
Name: Acacia Cottage
Age: c. 1816
Proposed Work: Repair gables
Score: 9/14
Estimate: $4,070
**Recommended grant award of:**
**$2,035**

Application Number 17-019

Address: 5759 Inglis Street
Name: Late Victorian Streetscape
Age: c. 1901
Proposed Work: Replace front porch
Score: 7.5/14
Estimate: $5,944
**Recommended placement No. 1 on Stand-by list (grant award of $2,972)**

Application Number 17-020

Address: 1871 Hollis Street
Name: Fishwick & Co. Building; Shaw Building
Age: c. 1861
Proposed Work: Repairs of panels and siding; masonry
Score: 9/14
Estimate: $9,250
**Recommended grant award of: $4,625**

Application Number 17-021

Address: 47 North Street
Name: L. M. Leadly House
Age: c. 1890
Proposed Work: Cedar shingles on house and garage
Score: 10/14
Estimate: $13,375
**Recommended grant award of: $6,688**

Application Number 17-022

Address: 1260-62-64 Queen Street
Name: Collins-Archibald House
Age: c. 1865
Proposed Work: Stucco repair, windows
Score: 6.25/14
Estimate: $16,099
**Recommended placement No. 6 on the Stand-by list (grant award of $8,050)**

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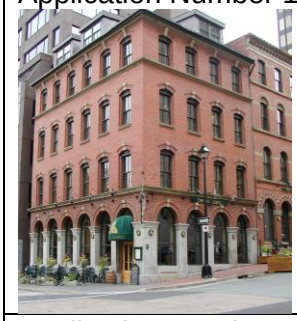
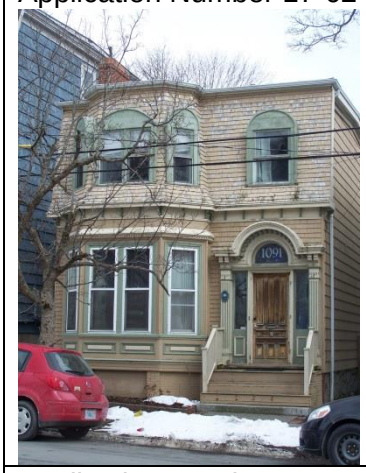
|---|---|
| Application Number 17-023<br>  | Address: 5176 Prince Street<br>Name: Geldart Building<br>Age: c. 1862<br>Proposed Work: Replacement doors<br>Score: 8/14<br>Estimate: $8,500<br>**Recommended grant award of: $4,250** |
| Application Number 17-024<br>  | Address: 1091 Tower Road<br>Name: Victorian Streetscape<br>Age: c. 1885<br>Proposed Work: Shingles, front entry, windows, painting<br>Score: 8.5/14<br>Estimate: $33,820<br>**Recommended grant award of: $10,000** |
| Application Number 17-025<br> | Address: 99 Ochterloney Street<br>Name: Henry Elliot House<br>Age: c. 1875<br>Proposed Work: Windows, bargeboard<br>Score: 8.5/14<br>Estimate: $20,036<br>**Recommended grant award of: $10,000** |
| Application Number 17-026<br> | Address: 5145 Morris Street<br>Name: E.B. Strickland House<br>Age: c. 1869<br>Proposed Work: Dormers and roof<br>Score: 7/12<br>Estimate: $25,142<br>**Recommended placement No. 3 on Stand-by list (grant amount $10,000)** |

| | |
|---|---|
| Application Number 17-027<br> | Address: 5184 Bishop Row<br>Name: W.M. Fraser House<br>Age: c. 1862<br>Proposed Work: Windows<br>Score: 8/14<br>Estimate: $28,137<br>**Recommended partial grant award of: $8,121** |
| Application Number 17-028<br> | Address: 5178 Bishop Street<br>Name: C.H. Willis House<br>Age: c. 1862<br>Proposed Work: Windows and rear entrance<br>Score: 6.5/14<br>Estimate: $12,398<br>**Recommended placement No. 5 on Stand-by list (grant amount $6,198)** |