

KELOWNA HERITAGE FOUNDATION

1435 WATER STREET, KELOWNA, B.C. V1Y 1J4

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PLEASE SUBMIT ENQUIRIES AND CORRESPONDENCE
c/o PLANNING & CORPORATE SERVICES DEPARTMENT

**APPLICATION FORM AND GUIDELINES
FOR THE HERITAGE BUILDING AND HERITAGE AWARENESS
GRANT PROGRAM**

Grant applications are reviewed on a monthly basis by the Kelowna Heritage Foundation. Foundation meetings are held on the third Wednesday of each month. For application to be considered by the Foundation, they must be submitted two days in advance of a meeting.

June 2005

KELOWNA HERITAGE FOUNDATION

HERITAGE GRANT PROGRAM GUIDELINES

1. INTENT OF THE HERITAGE GRANT PROGRAM

The intent of the Kelowna Heritage Foundation's Heritage Grant Program is to:

- promote the preservation of residential, commercial, industrial, institutional and agricultural heritage buildings by assisting owners with grants for a portion of the expenses incurred in restoration work relating to the heritage character of their buildings. The program is limited to the exterior, foundations and roof structures of such buildings.
- assist persons or organizations with grants for a portion of the expenses incurred from advancing the knowledge and appreciation of the historical background of the Kelowna area.

2. ELIGIBLE HERITAGE BUILDINGS

Residential, commercial, institutional, industrial and agricultural properties are eligible to apply to the Kelowna Heritage Foundation for a restoration grant if:

- (a) The building is a Municipally Designated Heritage Site.
- (b) The building is listed in the Kelowna Heritage Register.
- (c) The building is 50 years of age or older and/or located within a Heritage Conservation Area. These buildings will be referred to the City of Kelowna Planning and Development Services Department to be evaluated for inclusion in the Kelowna Heritage Register. Buildings that qualify for inclusion in the Register will be eligible in accordance with Item 3(b).
- (d) Priority will be given to those structures and portions thereof which are readily visible to the general public from a public right-of-way fronting or flanking the building.
- (e) Taxes must be fully paid.
- (f) The building must be covered by current comprehensive insurance.
- (g) Grants will not be given for work already undertaken.

3. GRANTS

- a) Each year, the Foundation will set the total amount of funds to be disbursed;
- b) For protected heritage building, grants will not exceed 50% of the cost of work done to a maximum of \$10,000 other than in exceptional cases;
- c) For buildings listed in the Kelowna Heritage Register, grants will not exceed 50% of the cost of work done to a maximum of \$5,000 other than in exceptional cases;
- d) For projects that advance the knowledge and appreciation in the historical background of the Kelowna area, grants will not exceed 50% of the project cost.

4. CRITERIA FOR ALLOCATING HERITAGE GRANTS

Heritage Building Grants

Except for special circumstances, original materials are to be used. Sympathetic adaptation of modern materials, such as sealed window units set into wooden frames or roofing materials which copy original materials in texture and colour, will be considered on a case by case basis.

The order of priority, for heritage building grant funding, is as follows:

- (a) Exterior Restoration – Return to original condition and appearance, except as stated in General Guidelines No. 5 & 6. Exterior restoration grants will not exceed 50% of the cost of the work done.
- (b) Structural Repairs – Structural repair grants will not exceed 50% of the cost of the work done.
- (c) Exterior Repairs – Exterior repair grants will not exceed 50% of the cost of work done. Examples of exterior repairs include the replacement of stairs, chimneys, flashings, gutters, roofing, windows and siding with building materials similar to original building materials. Exterior repair grants which use substitute materials that copy original building materials in texture and colour will not exceed 30% of the cost of work done.
- (d) Exterior Painting – Exterior painting grants that are not part of an exterior restoration, structural repair or exterior repair grant will not exceed 25% of the cost of the exterior painting work done. Exterior painting grants that are part of an exterior restoration, structural repair or exterior repair grant will not exceed 50% of the cost of the exterior painting work done.

Heritage Awareness Grants

Priority for heritage awareness grants will be given to projects that:

- receives a high degree of exposure and increases the public's understanding and knowledge about Kelowna's heritage;
- enable the conservation of important heritage resources;
- have the potential to attract investment from other partners or encourage similar projects funded by others.

5. DOCUMENTATION REQUIRED FOR GRANT APPLICATIONS

For heritage building grant applications, the following must be submitted:

- (a) Foundation plan, floor plans, elevations and details as may be necessary in order to explain and identify existing conditions and the proposed work.
- (b) Any proposed works involving exterior painting whether part of the grant application or not, shall include colour scheme(s) with paint colour samples.
- (c) If re-roofing is proposed, either as part of the grant application or not, information on the proposed colour and roofing material is requested.
- (d) If the work is to be done by a contractor, three written estimates of the cost of the work is required. Estimates should be fully detailed as to both labour and materials for all aspects of the work to be performed. For example, if 5 windows require new sills and 10 linear feet of wall require a new foundation, these quantities should be identified. The Foundation reserves the right to request additional estimates.

- (e) If the work is to be done by the owner, an estimate of the cost of materials, as noted in (d) above, is required.
- (f) New roofing shall bear a minimum warranty of one year for labour and materials and must be installed by experienced fully qualified roofers.
- (g) If performed by a contractor, general renovation work, labour and materials must be guaranteed for a minimum of one year.
- (h) All guarantees must be in writing and are to accompany the request for final payment.
- (i) Prior to commencement of works, photographs of all building elevations must be submitted, including photographs of specific areas where renovations are to occur.
- (j) Prior to commencement of works, historical photographs of the subject building are encouraged to be submitted.
- (k) Prior to commencement of works, a written statement explaining the rationale for a proposed restoration plan is encouraged to be submitted.

For projects that advance the knowledge and appreciation in the historical background of the Kelowna area, the following must be submitted:

- a) A letter that identifies the name, address and telephone number of the applicant, what the project involves, how it would advance the knowledge and appreciation of Kelowna's historical background and how long it will take to complete it.
- b) List all projected costs, including detailed notes supporting the individual items listed and where possible, supporting estimates.
- c) List all projected sources of revenue. Note that volunteer labour is an eligible source of revenue.

6. ADMINISTRATION PROCESS

- (a) Once an application has been received, it will be screened for eligibility.
- (b) If the total value of applications exceeds funds available, the applications will be prioritized by the Foundation's Board of Directors.
- (c) Once an application is approved by the Foundation's board of Directors, the applicant will be advised in writing.
- (d) When an application is approved, Municipal Permits must be applied for, as required.
- (e) The successful applicant must commence work within six months of the date of application, and will have one year in which to complete the work. Upon written request, the time limit for completion may be extended.
- (f) Upon completion of a heritage building restoration project, the following is required by the Foundation before a grant is paid:
 - (i) Submission of all bills showing "paid in full". (Costs of plans and related expenses may be included).

- (ii) The attached Statutory Declaration of Project Completion Form must be submitted to the Foundation.
 - (iii) All work must have been inspected and approved by the Foundation or its representatives.
 - (iv) Inspection of the work, as may be required by the City of Kelowna.
 - (v) Written warranties.
 - (vi) Submissions of photographs depicting building prior to commencement of renovation and after project has been completed.
- (g) Upon completion of a project that advances the knowledge and appreciation in the historical background of the Kelowna area, the following must be submitted:
- (i) A letter describing the outcome of the project, supporting documentation on how it advanced the knowledge and appreciation of Kelowna's historical background.
 - (ii) List all actual costs and include detailed documentation and invoices supporting the individual items listed.
 - (iii) List all sources of revenue. Note that volunteer labour is an eligible source of revenue.
 - (iv) If applicable, photographs of the completed project.
- (h) No application may in any manner be considered to form a contractual or other obligation on the part of the Foundation.
7. In the event a property previously approved for restoration in any form is sold prior to completion of the work, the Foundation reserves the right to rescind any or all funding until a new Grant Application by the new owner has been received and approved.
8. In the event that an improved property, for which a grant has been received, is demolished or altered such that the heritage character is destroyed within a five-year period following completion of the improvements, the total amount of the grant will be repaid to the Heritage Foundation.

PHILOSOPHY FOR REHABILITATION AND RESTORATION OF HERITAGE BUILDINGS IN KELONWA

These guidelines are to assist in making improvements to the exterior of eligible residential, commercial, industrial, institutional and agricultural heritage properties, and are not to be interpreted as bylaw requirements.

Guidelines for building rehabilitation and restoration have two objectives:

1. Ensuring the long term stability of the building, in terms of its economic viability, structural improvements and compliance with building codes when applicable.
2. Restoration and retention of the architectural features which caused the building to be approved for assistance in the first place.

At present, restoration of heritage buildings is being undertaken with limited archival information available either to design consultants or the Kelowna Heritage Foundation. Because of this, significant aspects of a particular building's design are often removed or altered inadvertently. Architectural research should, therefore, be a component of any proposal to restore a heritage building.

GENERAL GUIDELINES

These guidelines provide a general philosophical basis for dealing with a heritage building, and are as follows:

1. The original distinguishing qualities or character of a building, structure or site must not be destroyed. Removal or alteration of any historic material or distinctive architectural features must be avoided.
2. Distinctive stylistic features or examples of skilled craftsmanship which characterize a building should be treated with sensitivity.
3. Re-construction of all or part of a building shall be undertaken only when such work is essential to re-produce a significant missing feature in a historic precinct, and when a contemporary design solution is not acceptable. Re-construction should include measures to preserve any remaining original fabric, and should be done in such a way that the essential form and integrity of the original surviving features are unimpaired.
4. Building changes should be reversible if technically possible. This is especially true of finishes which may require correcting due to discolouration on surface decay.
5. Deteriorated architectural features should be repaired rather than replaced. If replacement is necessary, it must be based on accurate duplications of features, substantiated by historical, physical or pictorial evidence, rather than on conjectural designs or the availability of different architectural elements from other buildings.
6. Substitute roofing materials which copy the original material in texture and colour must be properly flashed in the valleys in a similar fashion to cedar shingle roofs.
7. All buildings, structures and sites are recognized as products of their history, changes which may have taken place in the course of time are evidence of the history and development of a building. These changes may have acquired significance in their own right, and it may be appropriate to respect this significance.

8. Alterations which have no historical basis are unacceptable.
9. Surface cleaning should be undertaken with the gentlest means possible; sandblasting and other damaging processes may not be used.
10. Adjoining archaeological or historic properties must be protected.
11. The preparation of a "Restoration Plan" may be useful for extensive work involving several phases over many months or several years. The Restoration Plan is an overview of all proposed work together with the expected date of commencement. See example below.
12. Retail paint stores may be able to provide applicants with a "heritage colour scheme chart" often supplied by paint manufacturers. Applicants are advised to utilize only premium grade paints as the quality is superior and the cost of labour is no greater.

EXAMPLE

RESTORATION PLAN FOR:
 (owner's name)
 (address)
 (telephone number)

SCOPE OF WORK

It is our intention to restore fully this 1922 residence which is badly in need of repair. Depending on costs, the work may take from 3 to 5 years. We will do all the interior work ourselves and perhaps some of the exterior, but major systems such as roof, windows, steps, etc. will be contracted out.

ITEMIZATION OF WORK AND EXPECTED STARTING DATES:

- | | | |
|-----|---|-------------|
| 1. | Replace asphalt shingles with cedar shingles. | June, 2000 |
| 2. | Repair, replace gutters on south and west sides | June, 2000 |
| 3. | Shore up southeast corner of house and repair or replace cracked foundation wall | June, 2000 |
| 4. | Replace lattice around rear porch and install new doors for trash and recycling boxes | July, 2000 |
| 5. | Open up walled-over window on east side and replace to match existing | March, 2000 |
| 6. | Replace front picture window with windows to match those on west side | March, 2000 |
| 7. | Remove 1970 sunporch, repair wall and replace windows to match existing | March, 2000 |
| 8. | Install leaded windows in dining room to match those in entry hall | March, 2000 |
| 9. | Install large windows in basement for game room <u>Note:</u> we seek your advice for this) | March, 2000 |
| 10. | Replace siding on south side and part of west side to match existing | April, 2000 |
| 11. | Replace entry steps and railing <u>Note:</u> we seek your guidance for this as we do not know what the original steps looked like, but we know that the existing ones are <u>modern</u>) | April, 2000 |
| 12. | Paint entire exterior | May, 2000 |

KELOWNA HERITAGE FOUNDATION
HERITAGE BUILDING GRANT APPLICATION FORM

Kelowna Heritage Foundation
1435 Water Street
Kelowna, BC
V1Y 1J4

Date: _____

I hereby make application for a grant to aid in the restoration of the following heritage building or structure:

ADDRESS: _____

LOT _____ BLOCK _____ SECTION _____ PLAN _____

OWNER _____ ADDRESS _____

INSURANCE COMPANY _____ POLICY NO. _____

TOTAL VALUE OF ALL WORK INCLUDING SUB-TRADE \$ _____

ARCHITECT (if applicable) _____ ADDRESS _____

- THREE CONTRACTOR'S ESTIMATES REQUIRED – ATTACH ALL CONTRACTORS' ESTIMATES
- PROPOSED COLOUR SCHEME AND COLOUR SAMPLES FOR ANY EXTERIOR PAINTING AND/OR ROOFING.
- PHOTOGRAPHS – DEPICTING BUILDING PRIOR TO COMMENCEMENT OF RENOVATION

DETAILS OF WORK PROPOSED: (continue on reverse side if necessary)

I, the undersigned being the (owner ____/duly authorized agent ____) for the above property, hereby consent to this application.

NAME _____ ADDRESS _____

_____ POSTAL CODE _____

SIGNATURE _____ TELEPHONE _____

KELOWNA HERITAGE FOUNDATION

1435 WATER STREET, KELOWNA, B.C. V1Y 1J4

PHONE: (250) 862-3304 FAX: 862-3320

STATUTORY DECLARATION OF PROJECT COMPLETION

I, _____, of _____,
do solemnly declare that the following work relating to my Application for a Grant to the
Kelowna Heritage Foundation, dated _____, 20_____, has now been
completed:

(a)

(b)

(c)

(d)

(e)

(f)

(continue on back if necessary)

Photographs have been submitted depicting the building prior to renovation
works and current photographs of building after completed work.

I further declare that all Bills and Invoices for labour and/or materials for the above work
have been paid in full, that all provisions of the Builders Lien Act have been duly
satisfied, and that taxes on the above property are not in arrears or delinquent.

Sworn before me at City of Kelowna,
in British Columbia,
this ____ day of _____, 20_____.

Signed by original Applicant:

Commissioner for taking Affidavits for
British Columbia