

TERMS OF REFERENCE

For the HERITAGE INCENTIVE RESERVE

A Note on Terminology and Document Use

The job titles, department names and reporting structure referred to in this document may change in the future. When this document refers to Heritage Planning it means any employees whose responsibilities include the administration of grants for privately-owned Heritage Resources and Heritage Assets. When this document refers to the Manager, City Planning it means the manager responsible for supervising employees with heritage planning and grant administration responsibility.

These Terms of Reference are to be used in tandem with the Grant Guidelines in administering grants funded by the Heritage Incentive Reserve. The Terms of Reference describes the purpose of each grant funded by the Heritage Incentive Reserve, while the Grant Guidelines contain instructions on how to administer the processes required when distributing Heritage Incentive Reserve funds.

These Terms of Reference are intended to supersede all previous Council direction respecting the administration of the Heritage Incentive Reserve.

Purpose

The Heritage Incentive Reserve (the Reserve) is an essential component The City of Calgary's efforts toward encouraging property owners to designate and conserve their heritage properties. The Reserve provides financial assistance to private owners acting as responsible stewards of Calgary's heritage.

The purpose of these Terms of Reference is to provide a basis to effectively administer the Reserve so it can provide a consistent mechanism to allow funding to be paid at the right time for approved projects to owners of heritage properties, in order to:

- promote the rehabilitation and economic re-use of privately-owned heritage properties,
- address inequities that property owners assume when rehabilitating heritage properties,
- revitalize and rehabilitate derelict or underutilized privately-owned heritage properties,
- promote the retention of heritage properties and their integration into evolving communities and commercial districts, and
- incentivize private owners of properties with identified heritage value to designate them as Municipal Historic Resources under the Historical Resources Act of Alberta.

The Reserve distributes grants to two types of heritage properties: Heritage Resources and Heritage Assets.

Heritage Resources are sites that have been identified as possessing significant heritage value, and whose preservation is considered to be to the greater benefit of Calgarians. Heritage Resources are included on the Inventory of Evaluated Historic Resources, a list of evaluated heritage properties managed by civic partner Heritage Calgary. Most Heritage Resources are residential, commercial, or industrial buildings, but they can also be landscaped features and open spaces.

A Heritage Asset is a privately-owned structure, typically constructed before 1945, that retains a significant portion of its original form, scale, massing, window and door pattern, style, design, architectural

details, and/or construction materials, as determined by visual assessment by Heritage Planning. A Heritage Asset may also be a Heritage Resource, but not all Heritage Assets are Heritage Resources.

Grant Streams

The Heritage Incentive Reserve funds the Historic Resources Conservation Grant Program and the Heritage Asset Retention Incentive.

The Historic Resources Conservation Grant Program provides funding to two grant streams:

1. The Residential Grant stream. This grant provides funds to support City-approved conservation projects for privately-owned Heritage Resources originally constructed for residential use. Current residential use is not required for eligibility in this stream.
2. The Non-Residential Grant stream. This grant provides funds to support City-approved conservation projects for privately-owned Heritage Resources not eligible for the Residential Grant stream.

The Heritage Asset Retention Incentive grant stream provides funds for projects which support the retention of Heritage Assets.

Grant Stream Conditions

1.0 The following conditions apply to both the **Residential Grant** stream and the **Non-Residential Grant** stream.

These grants are intended for Municipal Historic Resources designated under the Historical Resources Act, or Heritage Resources in the process of pursuing designation as a Municipal Historic Resource.

Grant Application Evaluation and Approval Process

Grant applications submitted by Heritage Resource owners to the Heritage Conservation Grant Program are accepted on an ongoing basis and assessed for eligibility by Administration.

Eligibility and Evaluation Criteria

To be eligible for the grant, the following criteria must be met:

- The applicant is the registered owner or is authorized to act for the registered owner of a Heritage Resource located within the municipal boundaries of the City of Calgary.
- The Heritage Resource must be designated as a Municipal Historic Resource under the Alberta Historical Resources Act or be subject to a legal agreement with The City which precludes the demolition of the resource and alteration of its character-defining elements.
- All municipal taxes and levies owing on the heritage resources must be in good standing at the time of application and the owner of the heritage resource must not have any other outstanding debts owing to the City of Calgary.

The following criteria must be used by Heritage Planning to evaluate all grant proposals in this stream:

- The grant application's adherence to heritage conservation best practices, in alignment with the Standards and Guidelines for the Conservation of Historic Places in Canada, as amended or replaced from time to time.
- The risk to the integrity or viability of the Heritage Resource at the time of application, as determined by Heritage Planning.
- The project's overall viability, including assessed risks, uncertainty associated with financing or the projected timeline, as determined by Heritage Planning.
- The order in which applications are received, with priority given to earlier applications.
- Any additional criteria established in the Grant Guidelines.

Grant Recommendations and Decisions

Final grant recommendations will be made by Heritage Planning and approved by the Manager, City Planning. Successful applicants must, with the owner of the heritage resource if the applicant is not the owner, enter into a Grant Agreement with The City of Calgary, to the satisfaction of The City of Calgary, which will clearly outline the terms of the grant, including accountability and reporting requirements.

2.0 The following conditions apply to the **Heritage Asset Retention Incentive Grant** stream.

Grant Application Evaluation and Approval Process

Grant proposals submitted by property owners to the Heritage Asset Retention Incentive program are accepted on an ongoing basis and assessed for eligibility by Heritage Planning.

Eligibility and Evaluation Criteria

To be eligible for the grant, the following criteria must be met:

- The applicant is the registered owner or is authorized to act for the registered owner of a Heritage Asset located within the municipal boundaries of the City of Calgary.
- All municipal taxes and levies owing on the Heritage Asset (and the legal parcel on which the Heritage Asset is located) must be in good standing at the time of application and the owner of the Heritage Asset must not have any other outstanding debts owing to The City of Calgary.

The following criteria must be used to evaluate all grant proposals in this stream:

- The risk to the integrity or viability of the Heritage Asset at the time of grant application, as determined by Heritage Planning.
- The estimated timeline for project completion and the feasibility of the proposed timeline, as determined by Heritage Planning.
- The project's overall viability, including assessed risks, uncertainty associated with financing or the projected timeline, as determined by Heritage Planning.
- Any additional criteria established in the Grant Guidelines.

Grant recommendations and decisions

Applications for grants will be assessed by Heritage Planning as they are received. Final grant recommendations will be made by Heritage Planning and approved by the Manager, City Planning. Successful applicants must, with the owner of the Heritage Resource if the applicant is not the owner, enter into a Grant Agreement with The City of Calgary, to the satisfaction of The City of Calgary, which will clearly outline the terms of the grant, including accountability and reporting requirements.

Grant Guidelines

The Manager, City Planning may establish one or more Grant Guidelines that are consistent with these Terms of Reference for the Historic Resources Conservation Grant, Residential Grant stream, the Non-Residential Grant stream, and the Heritage Asset Retention Incentive Grant. Grant Guidelines may set out additional criteria, terms and conditions for these grant programs funded by the Heritage Incentive Reserve.