

Grant Guidelines

For all grants funded by the HERITAGE INCENTIVE RESERVE

A Note on Terminology and Use of Document

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 Guidelines are to be used in tandem with the Heritage Incentive Reserve Terms of Reference.

Terms and Conditions Applicable to All Grant Streams

1. The information provided in the grant application is collected for the purpose of evaluating eligibility for a grant from the Heritage Incentive Reserve. Any personal information collected in the grant application is collected pursuant to section 33(c) of the Alberta **Freedom of Information and Protection of Privacy Act**. All grant decisions, including the name of the grant recipient, the property to which it applies, and the amount of the grant will be available to the public. Any questions about the collection, use or disclosure of your personal information by the City of Calgary in relation to this program may be directed to the FOIP Program Administrator for Planning and Development at plngbldg@calgary.ca or by telephone at 403-268-5311.
2. The City shall not be liable for any damages, injury or any loss of use or profit to the grant recipient arising out of, or in any way related to, the grant recipient's operations or use of grant funds. The grant recipient shall indemnify The City, its officers, employees and agents, against all costs, damages and expenses incurred as a result of any type of claim or proceedings related to the grant recipient's operations or use of grant funds, unless such costs, damages or expenses arise from the negligence or willful act of an officer, employee or agent of The City.
3. Approval of a grant application does not affect the grant recipients' obligation to determine and obtain all other approvals and permits that are required to undertake the project.
4. The City is entitled, at any time, to impose such additional terms and conditions on the eligibility of a grant applicant or the use of grant funds which, at its sole discretion, it deems appropriate.
5. The grant recipient shall keep and maintain all records, invoices and other documents relating to the grant in a manner consistent with generally accepted accounting principles and clerical practices and shall maintain such records for a period of five (5) years from the last date that any funds advanced pursuant to a fully executed Grant Agreement have been paid to the grant recipient by The City.
6. The grant recipient authorizes Heritage Planning staff and its agents at all reasonable times to inspect and copy any and all records, invoices and documents in the custody or control of the grant recipient which relate to the grant, for a period of five (5) years from the last date that any funds advanced pursuant to a fully executed Grant Agreement have been paid to the grant recipient by The City. This right of inspection includes the right to perform a full or partial audit of these records, as considered appropriate by the Heritage Planning staff.

7. The grant recipient shall, at the request of Heritage Planning staff, repay to the City the whole or any part of the grant, if, as determined by Heritage Planning staff, the grant recipient:
 - a. has knowingly provided false information in their grant application;
 - b. uses grant funds for purposes not approved by Heritage Planning staff; or
 - c. breaches any of the Grant Guidelines or the terms of a Grant Agreement for any Grant Stream.

Grant Guidelines for the Historic Resources Conservation Grant – Residential and Non-Residential Grant Streams

Terminology

8. 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.
9. 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.
10. A Residential property is defined as a structure that was originally created for low density residential use. The property may have originally been a single family, semi-detached, or duplex residential home.
11. A Non-Residential property is any property that does not meet the definition of a Residential property including, but not limited to, commercial buildings, apartment buildings, multi-residential buildings with more than 2 units, and industrial buildings.

Grant Guidelines

Overview

The Residential and Non-Residential Grant streams of the Historic Resources Conservation Grant are intended to provide funds to support City-approved conservation projects for privately-owned Heritage Resources. Structures are classified as Residential or Non-Residential according to their original use rather than their current use.

A primary goal of the Residential and Non-Residential Grant stream is to encourage private owners to request to have their properties designated as a Municipal Historic Resource. Only after official designation is a property legally protected from demolition or major renovation which alter its historic character. As such, the Residential Grant stream is open only to properties which are included on the Inventory of Historic Resources and are either designated as Municipal Historic Resources or are in the process of obtaining municipal designation and have been protected in the interim by way of a legal agreement registered on title.

Funding Limits

The Residential and Non-Residential Grants are matching grants. The amount awarded is conditional, based on the amount contributed towards the project by the applicant.

Grants will cover a maximum of 50% of the approved project costs.

The maximum grant funding available:

- to Non-Residential Heritage Resources is \$1,000,000 in a 15-year period; and
- to Residential Heritage Resources is \$125,000 in a 15-year period.

Property owners or their authorized representative may apply for a grant once in a 5-year period. If an approved project receives less than the maximum funding available, the owners may apply for additional grants every 5 years, until the maximum is reached.

In exceptional circumstances, the Manager, City Planning, in their sole discretion, may approve additional funds above the 15-year maximum by subtracting the additional amount from the funds the Heritage Resource may be eligible for in future 15-year periods.

Grant Agreements

If a grant application is approved, a Grant Agreement will be executed between The City and the applicant that will outline the approved work and any additional specifications of the approval beyond the requirements of the Grant Guidelines. Final and formal grant approval is not effective until the Grant Agreement has been fully executed.

Grant Agreement Amendments

At the discretion of the Manager, City Planning, approved Grant Agreements may be amended to expand the approved scope of work and/or increase the total funding provided to the maximum applicable limit. The amendments may be subject to additional conditions at the discretion of the Manager, City Planning. Amended Grant Agreements must not provide funding above the maximum applicable limit.

Eligible Work

Grants are intended to assist projects which:

- aim to safeguard the character-defining elements of a Heritage Resource;
- help the Heritage Resource retain its heritage value;
- help to extend the physical life and improve the overall condition of a Heritage Resource.

Heritage Planning will review applications to determine if the proposed work is eligible.

All proposed work on the eligible property must, unless otherwise waived in writing by Heritage Planning, conform to standards and best practices as expressed in the Standards and Guidelines for the Conservation of Historic Places in Canada, as amended from time to time.

Grant recipients must obtain all required regulatory approvals, including building and development permits, before start of work

Grant funds are intended to be awarded prior to conservation work being completed. In exceptional circumstances, the Manager, City Planning may approve funding for previously completed work that fulfills the goals of the programs and meets other eligibility requirements.

Ineligible Work

New construction not directly required for the continued use of the Heritage Resource, e.g., additional floors, is not eligible for grant funding.

The grant recipient shall at their own expense correct any work that in the opinion of Heritage Planning staff does not conform to the approved project scope. No grant funds shall be paid for these purposes.

Applications

Applicants will submit their applications to The City in accordance with a format established by the Manager, City Planning. Heritage Planning will review applications to determine if the proposed work is eligible.

Applications must include the following, to the satisfaction of Heritage Planning:

- plans, renderings (if applicable), and written statements of work to be completed;
- photos of the Heritage Resource's current condition;
- cost estimates for the work to be completed. Estimates must be provided by tradespeople with knowledge and experience in heritage conservation work.
- timeline of project milestones.

Payments

The work contemplated in the Grant Agreement, including all payments thereunder, must be completed within 5 years of the date of the executed Grant Agreement, unless an extension is provided by Heritage Planning in writing. Extensions may only be provided at the discretion of Heritage Planning.

The grant recipient shall notify Heritage Planning staff of any proposed changes to the nature of, or budget for, the project and shall use the grant for such altered activities only with prior written consent of Heritage Planning staff.

Any unused portion of the approved grant remains the property of The City.

Grant monies will be paid subject to completion of the work as verified by Heritage Planning, and in accordance with the terms of the Grant Agreement. In exceptional circumstances, payments may be issued before work has been completed, at the discretion of Heritage Planning. In these cases, completion of work will be verified by Heritage Planning at a later date, and funds paid to the applicant shall be returned to The City if work is found to be incomplete.

Heritage Asset Retention Incentive Grant Stream

Grant Guidelines

Overview

This goal of the Heritage Asset Retention Incentive grant stream is to encourage the retention of buildings with significant historic character which do not qualify for funding under the Residential or Non-Residential Grant streams. Many of these buildings will not meet the criteria to become Heritage Resources or Municipal Historic Resources but are still valued for their contributions to neighborhood character.

This grant will offer funds to private owners of Heritage Assets for conservation projects in exchange for their participation in a formal agreement precluding demolition or character-altering renovations for a period of 5 years.

Funding Limits

The maximum grant amount available per Heritage Asset is \$20,000.

The applicant is not required to provide matching funds for the grant amount they are awarded.

Applicants may receive a Heritage Asset Retention Incentive Grant only once per eligible property.

If an applicant receives less than the maximum grant amount for the eligible property, they may not apply again to receive additional funds for that property.

Heritage Resource owners who have reached the maximum funding limit under the Residential Conservation Grant for a 5- or 15-year period for their eligible property may apply for a Heritage Asset Retention Incentive Grant. Heritage Resources which have not received the maximum amount under the Residential Conservation Grant must first apply for additional funds under that grant program.

Applicants with open Residential Conservation Grants for the same Heritage Asset (i.e., with an executed Grant Agreement and pending the payment of grant funds) may not apply under the Heritage Asset Retention Incentive program.

Non-Residential Heritage Resources are not eligible for funding under the Heritage Asset Retention Incentive Grant.

Grant Agreement

If a grant application is approved, a Grant Agreement will be executed between The City and the applicant that will outline the approved work and any additional specifications of the approval beyond the requirements of the Grant Guidelines. Final and formal grant approval is not effective until the Grant Agreement has been fully executed.

Formal Agreement

To receive funds under the Heritage Asset Retention Incentive Program, applicants must enter into a Grant Agreement with The City, to the satisfaction of The City, and register a restrictive covenant on the subject property which bars demolition of or character-altering renovations to the Heritage Asset for a period of 5 years. If the conservation project is completed, or good faith attempts were made to complete the project, the restrictive covenant will be discharged at the end of the five-year period.

Grant Agreement Amendments

At the discretion of the Manager, City Planning, approved Grant Agreements may be amended to expand the approved scope of work and/or increase the total funding provided to the maximum limit above. The amendments may be subject to additional conditions at the discretion of the Manager, City Planning. Amended Grant Agreements must not provide funding above the maximum limit.

Eligible Work

Grants are intended to assist projects which:

- help preserve the historic character of Heritage Assets;
- assist in retaining the heritage value of Heritage Assets;
- help to extend the physical life and improve the overall condition of a Heritage Asset.

Grant funds are intended to be awarded prior to conservation work being completed. In exceptional circumstances, the Manager, City Planning may approve funding for previously completed work that fulfils the goals of the programs and meets other eligibility requirements.

Grant recipients must obtain all required regulatory approvals, including building and development permits, before commencing work

Applications

Applications will be submitted to The City in accordance with a format established by the Manager, City Planning. Heritage Planning will review applications to determine if the proposed work is eligible.

Payments

Grant monies will be paid after the Grant Agreement is signed and proof of registration of a restrictive covenant to the satisfaction of the City on title to the lands on which the Heritage Asset is located has been provided to Heritage Planning.

The grant recipient shall notify Heritage Planning staff of any proposed changes to the nature of, or budget for, the project and shall use the grant for such altered activities only with prior written consent of Heritage Planning staff.

Any unused portion of the grant remains the property of The City and must be returned to The City forthwith.