

CITY OF WHITEHORSE

COUNCIL POLICY

POLICY: HERITAGE RESTORATION INCENTIVE POLICY

AUTHORITY: Council Resolution # 2013-10-08 dated May 27, 2013

HERITAGE RESTORATION INCENTIVE POLICY

POLICY STATEMENT

The City of Whitehorse appreciates those Heritage Resources within its corporate boundaries and chooses to work in partnership with citizens who own a designated Historic Resource, or are interested in pursuing designation, to protect the history of Whitehorse and allow future generations to reflect on the legacy of the area's past.

PURPOSE

1. To provide incentives for the restoration, retention, and rehabilitation of heritage resources.
2. To set out the procedure for application and administration of the Heritage Restoration Incentive.

DEFINITIONS

"ACCOUNTABILITY STATEMENT" means a statement of revenues and expenditures for the project, filled out by the applicant that received the Heritage Restoration Incentive.

"APPLICANT" means the individual, group or organization submitting an application to be considered for a Heritage Restoration Incentive.

"AUTHORIZED AGENT" is an individual, group or organization authorized in writing by the owner to act as the applicant.

"CERTIFICATE OF STATUS" means a certificate from the Department of Community Services, Consumer and Safety Services Branch indicating that the organization is in good standing under the *Societies Act*.

"COUNCIL" means the Council of the City of Whitehorse.

"DESIGNATED OFFICER" means an employee of the City of Whitehorse or an authorised representative as designated in writing by the City Manager.

"GROUP" means an informal association of two or more individuals or an incorporated company that has come together for the purpose of undertaking a project.

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“HERITAGE REGISTRY” means the listing of the Heritage Resources in the City of Whitehorse as adopted by Council.

“HERITAGE RESOURCE” means an historic site, historic object, or any work or assembly of works that is on the Heritage Registry.

“HISTORIC INTEGRITY” means the degree to which the building has retained its historic elements including style, design and construction.

“MUNICIPAL HISTORIC SITE” means an area or place, parcel of land, building or structure, or the exterior or interior portion of a building or structure that is by itself or by reason of containing a heritage resource designated by Council as a Municipal Historic Site.

"ORGANIZATION" means a registered non-profit organization, in good standing under the *Societies Act* as evidenced by a Certificate of Status, whose purpose is to provide service to the community.

“OWNER” means the individual, group or organization that has, by law, the management, control or custody of the lot or building.

"PROJECT BUDGET" means a detailed estimate of income and expenses for the project. The income shall include all funding applied for, fund raising activities, donations and any financial reserves the individual, group or organization is able to call upon.

“REASONABLE PUBLIC ACCESS” means that the site can be included in walking tours and interpretive material.

“RETROACTIVE FUNDING” means the funding of an activity or project after it has commenced or is completed.

RESPONSIBILITIES

Council Responsibilities

1. Council:
 - (1) Shall consider all recommendations for Heritage Restoration Incentives and decide on the appropriate action to be taken.
 - (2) May, at its sole discretion, consider planning incentives, such as spot zoning, modified setbacks, reduced parking requirements and other planning issues, if required, to conserve a Heritage Resource.

Designated Officer Responsibilities

2. The Designated Officer:
 - (1) Shall administer the Heritage Restoration Incentive Policy.
 - (2) Shall assist the owner of a heritage resource with reviewing Building Code requirements and to identify equivalencies and/or alternative design proposals, if necessary, to ensure that the intent of the *National Building Code* is met.

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- (3) Shall consider all Heritage Restoration Incentive applications within four weeks following the application deadline.
- (4) Shall advertise application deadlines in the month of February.
- (5) Shall review all applications for completeness, accuracy, and compliance with this policy.
- (6) Shall review each application and make recommendations to Council.
- (7) Shall notify applicants in writing, within ten weeks after the application deadline, on the successfulness of the application.
- (8) Shall consider requests for changes in approved projects and may authorize requests falling within the approved Project Budget.

APPLICATIONS

Eligible Applications

3. Applications for the Heritage Restoration Incentive will only be considered for property that has been designated as a Municipal Historic Site, or is listed on the Heritage Registry and is in the process of designation.
4. Applications will only be considered for the following purposes:
 - (1) Restoration of heritage properties;
 - (2) Enhancement of heritage properties; and
 - (3) Renovation of heritage properties to meet code requirements.
5. The applicant must be the owner of the property or the Authorized Agent of the owner.
6. Applications for funding will only be considered for sites owned by individuals, Groups, or Organizations. Governments are not eligible.
7. All proposed work must conform to the *National Building Code* and all other government regulations while, at the same time, maintaining the historic integrity of the site.
8. Incentive recipients must agree to maintain, at acceptable standards, the improvements to their properties that result from the program contributions.
9. Applicants must agree to post during restoration work, in a conspicuous location, a sign provided by the City that will indicate the City's financial participation in the project.
10. Applicants must agree to allow Reasonable Public Access to the site once the project is complete.
11. Applicants must authorize the City to make a public announcement of the essential facts of the incentive award, including the name of the applicant, the location and nature of the project, and the amount of the funding.

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Non-Eligible Applications for Heritage Incentives

12. Properties owned by a First Nation Government, the City of Whitehorse, the Government of Yukon, or the Federal Government.
13. Periodic cyclical maintenance activities such as painting, yard work, etc.
14. The purchase of land or structures.
15. Re-development, or any development not respecting the historic character and integrity of the site.
16. Taxes must not be in arrears or delinquent on subject properties.
17. No application will be entertained from an applicant with an outstanding Accountability Statement.
18. Heritage Restoration Incentives awarded under this policy are not transferable between projects or individuals/Groups/Organizations, and must be used for the specific purposes outlined and approved in each specific grant application.
19. Applications not complying with this policy will be deemed to be incomplete and will not be forwarded for further review.

INCENTIVES

20. The Heritage Restoration Incentive may be applied to once every ten years per property.
21. The City contribution for conservation projects shall be **50% of total project costs up to a maximum of \$20,000**. Contributions may include:
 - (1) Conservation Costs:
 - (a) Stabilization – This basic structural preservation includes, but is not limited to, the repair or replacement of roofs and foundations, sealing to the weather, installation of additional bracing or material conservation.
 - (b) Exterior Restoration – This includes, but is not limited to, repair or reproduction of doors and windows, repair or replacement of cladding, historically sensitive refinishing or, in general terms, returning the building's exterior to its original or historical period appearance.
 - (c) Exterior Interpretation – This includes funding for research and sign construction and installation.
 - (2) Construction Costs:
 - (a) The purchase of materials, rental of equipment and fees for skilled labour.
22. The applicant must demonstrate the ability to contribute 50% of the project costs and shall include personal financial contributions or approved funding from other sources. Applicants may not use volunteer labour as matching funding.

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23. If the application is approved, the applicant will be required to sign a contribution agreement that outlines the general conditions and commitments on the part of the City and the applicant.

PROCEDURES

24. All applications for the Heritage Restoration Incentive must be received by the City of Whitehorse prior to 4:30 p.m., **April 1st** of each year. Should the application deadline occur on a non-business day, the application deadline shall be 4:30 p.m. of the next business day.
25. Application forms are available from the Planning Services Department.
26. Organizations shall submit a Certificate of Status with their application.
27. Applications must be completed in full and shall contain the following, unless specified by the Designated Officer:
- (1) Completed summary cover page
 - (2) Proposal (not to exceed 8 pages) including:
 - (a) Project Summary
 - (i) Brief description of work to be done;
 - (ii) Start-finish dates; and
 - (iii) Rationale for project.
 - (b) Goals
 - (i) Short and long term goals of project;
 - (ii) Heritage benefits expected to be achieved; and
 - (iii) Measurement of goals.
 - (c) Importance of Project
 - (i) Local/global context; and
 - (ii) Explanation of how proposal will extend the life of the site.
 - (d) Integrity and Respect
 - (i) Describe how the historic integrity of the site will be respected.
 - (3) Project Budget.
 - (4) An appendix listing all elements of the project, with a detailed cost breakdown for each element.
 - (5) Plans or specifications.
 - (6) Historic documentation.
 - (7) Written permission from the owner to carry out the project (if applicable).

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Assessment Criteria

28. Applications will be assessed using the following criteria:
- (1) The risk of accelerated deterioration or collapse;
 - (2) The necessity for maintenance or improvement of structural integrity;
 - (3) The ability of the applicant to undertake the project;
 - (4) The clarity, accuracy and credibility of the proposal;
 - (5) The project shall be of direct benefit to the Historic Integrity of the site;
 - (6) The degree of benefit to the community; and
 - (7) The degree that design features, materials, and techniques duplicate the historic construction and configuration to the closest extent possible.
(Sympathetic use of modern materials may be acceptable.)

Accountability

29. An Accountability Statement shall be submitted to Planning Services by **March 1st** of the following calendar year.
30. The Accountability Statement must contain:
- (1) A detailed description of the completed project, including project evaluation, number of people involved, pictures, newspaper clippings, samples of print media produced, experience gained that could be of benefit to other applicants (if applicable);
 - (2) Copies of the receipts and/or cancelled cheques; and
 - (3) A financial statement for the project, listing all expenses and revenues pertaining to the project, and the exact use of funds awarded by the City. The signing officers of the applicant must sign the statement.
31. Any funds found to be surplus to the specific project and uses approved shall be returned to the City with the Accountability Statement.
32. Upon submission of a written request from the applicant prior to the deadline for the submission of the Accountability Statement, the Designated Officer may grant a six-month extension. If the Accountability Statement has not been received by the appropriate date, previously approved funds will be available for reallocation.

General

33. Funding for approved applications will be committed from the Heritage Fund.
34. The Heritage Restoration Incentive will be dispersed by providing 75% of the contribution amount at the start date identified on the application and the remaining 25% upon completion of all items listed in section 30.
35. A contribution agreement will be prepared for the incentive, and must be signed by the applicant prior to the release of funds.

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36. Retroactive funding will not be considered under any circumstances.
37. Assistance may be terminated at any time if, in the opinion of the City, the agreed upon conditions are not being met.
38. The applicant will assume responsibility for any deficit incurred as a result of project activities.
39. The City of Whitehorse may retain the services of experts to inspect construction progress.
40. Final payment will be contingent upon:
 - (1) Approval of the Accountability Statement;
 - (2) Final inspection and approval by the Designated Officer;
 - (3) Proof of inspection and approval by appropriate regulatory agencies; and
 - (4) Compliance with all terms and conditions of the contribution agreement.
41. Final payment will be made approximately 30 days after approval by the Designated Officer of the items listed in section 30 of this policy.

Policy Repeal

42. The Heritage Incentive Policy dated December 2002 is hereby repealed

■2013-05-28