



# Historic Resource Conservation Grant Program

## Terms and Conditions

The Historic Resource Conservation Grant Program provides financial incentives for the restoration, preservation and rehabilitation of historic properties in Calgary that are protected as Municipal Historic Resources, or that are in the process of being protected. Applicants are eligible for up to 50% of approved conservation costs.

### Eligibility

#### Eligible Properties:

- a. Properties that are legally protected by a City of Calgary bylaw as a Municipal Historic Resource under Section 26 of Alberta's Historic Resources Act.
  - b. Properties which are in the process of being protected as a Municipal Historic Resource where an owner (or authorized representative) has formally requested protection, or has agreed to such protection, are eligible for conditional approval of grant funding; protection as a Municipal Historic Resource will be a condition of final grant approval.
- Work related to the restoration of significant heritage features which have been lost but can be restored based upon sufficient documentation.
  - Any work deemed necessary by Heritage Planning staff to promote the continued use or re-use of the property. This includes:
    - Work associated with the foundation, structural components, roof, heating, plumbing, electrical, mechanical, etc.;
    - Accessibility upgrades;
    - Any upgrades necessary to meet current building code requirements.

#### Who can apply?

- Owners of eligible properties, or authorized representative(s).

#### Eligible Work

*Note: All work must follow the **Standards and Guidelines for the Conservation of Historic Places in Canada***

- Work related to the restoration, rehabilitation or preservation of the exterior Regulated Portions of the Historic Resource, as defined in the bylaw protecting a property as a Municipal Historic Resource, or by other agreement. Funding for the conservation of interior Regulated Portions may also be possible if the elements are in a place with some degree of public access, at the discretion of Heritage Planning staff.

- Professional fees for architects, engineers and contractors and other professional consultants.
- Technical studies, as deemed necessary by Heritage Planning staff, for restoration, rehabilitation or preservation work associated with a grant-funded project.

## Ineligible Work

- Work that is undertaken before a grant application is approved, unless the work comprises professional or technical studies related to the application and is carried out in consultation with Heritage Planning staff.
- Common examples of ineligible types of work include, but are not limited to:
  - Alterations that do not involve the restoration, rehabilitation or preservation of historic elements;
  - Additions and new construction - unless the addition or new construction is required to accommodate current building code or accessibility requirements;
  - Improvements deemed unnecessary by Heritage Planning staff to promote the continued use or reuse of the property, including fixtures, inauthentic finishes or signage.

## Grant Funding

- Grant funding will be cost-shared, providing matching project funding for up to 50% of the total approved project cost, up to the maximum eligible amount specified by the grant program for either Residential or Non-Residential sites:

### Residential sites:

*Includes historic buildings that were originally constructed to contain only dwelling units, and not other uses/activities. This includes one or two-family buildings (ie. single-family, semi-detached, duplex) and multi-family buildings (ie. row-housing, apartments), but not historic mixed-use buildings or other types of resources.*

- The maximum matching grant value is \$125,000.
- Applicants will be eligible for approval once every five years, but within a 15-year period, the total grant amount cannot exceed \$125,000.

### Non-Residential sites:

*Includes all types of historic buildings or resources excepting those originally constructed to contain only dwelling units. Non-Residential sites include mixed-use, commercial, industrial, religious, or institutional buildings, and resources other than buildings.*

- The maximum matching grant value is \$1,000,000.
- Applicants will be eligible for approval once every five years, however Heritage Planning reserves discretion to refuse project funding to resources which have received a lifetime total of \$1,000,000 or more through the Historic Resource Conservation Grant Program.
- Applications for technical studies do not count against the limit of one application every five years.
- Applications will be considered on a first-come / first serve basis.
- The minimum application amount is \$5,000.
- Fifty percent (50%) of the approved grant amount must be invoiced and reimbursed within 2.5 years of the grant being approved. Otherwise, at the discretion of Heritage Planning, unused portions of the grant may be lost.
  - Additionally, grants for Non-Residential sites must commence portions of the approved scope of work within 18 months of a Grant Agreement being executed.
- The grant application 'receipt date' will be the date that ALL required application materials are received to the satisfaction of Heritage Planning staff.
- If there are insufficient funds in the Historic Resource Conservation Grant Program reserve fund, applications will be held and considered in the order they are received once funding is available.

## Application Requirements

### All applications must include the following:

- Completed 'Historic Resource Conservation Grant Program Application Form';
- Attached written descriptions of the project work to be undertaken, including specifications, and an explanation of why the work must be undertaken; associated plans/drawings of the proposed work, if available / applicable;
- Attached photos of the features to be affected (restored, rehabilitated or preserved) with associated captions and descriptions;
- Attached cost estimate of the work to be completed, prepared by a contractor or professional, as applicable (Heritage Planning staff may request cost estimates by more than one, and up to three, contractors or professionals as part of the grant application);
- Timeline for the project including phasing, completion date(s) and proposed grant payment schedule;
- Attached copy of The City of Calgary ("The City") property-tax notice for the subject property showing that taxes and levies have been paid for the year prior to application;
- Attached letter of authorization from the registered owners of the property authorizing a representative to act upon their behalf, if applicable;
- At the discretion of Heritage Planning staff, the applicant may also be required to provide additional information prior to or as part of the project, such as technical studies (i.e. building condition assessment reports, structural assessments) to inform / assist a proposed project.

## Application Assessment / Selection Criteria

Applications will be considered on a first-come / first-serve basis. However, approval of an application will be at the discretion of Heritage Planning staff. Heritage Planning staff may consider the merit of a project using any or all of the following criteria:

- The application demonstrates the highest standard of heritage conservation, and is in alignment with the **Standards and Guidelines for the Conservation of Historic Places in Canada**.
- Whether the integrity or viability of the subject property may be threatened if the proposed work is not undertaken.
- The ability of the applicant to complete the project, demonstrate that their funding is in place and that the project can be completed within a period of time acceptable to Heritage Planning staff.

The applicant will be notified within 4 weeks of the grant application receipt date whether the application has been accepted (no deficiencies or missing items). Heritage Planning will review accepted applications per the Assessment / Selection Criteria, and contact applicants to advise on approval for their requested funding.

## 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 Historic Resource Conservation Grant Program Terms and Conditions. Final and formal grant approval is not effective until the Grant Agreement has been fully executed.

Grant-funded work shall not commence until the Historic Resource Conservation Grant Program Grant Agreement has been fully executed.

## Payment of Grant

### Requirements for payment of grant:

Payment of the grant will be subject to the completion of the work described in the grant application, as approved by Heritage Planning staff, and the following documentation being received by Heritage Planning staff to their satisfaction:

- A report from the applicant to Heritage Planning staff demonstrating that all such work has been completed. If applicable, the report must include captioned photographs showing the completed work.

- Copies of all receipts and invoices, as proof of payment for the work and a Development Completion Permit issued by The City, if applicable.
- If the work has not been completed to the satisfaction of Heritage Planning staff, or if Heritage Planning staff have not received all required documentation to their satisfaction, a “Deficiency List” that outlines missing requirements for payment of the grant will be issued to the applicant and payment of the grant will be held until those requirements have been satisfied.

#### **Payment of grant process:**

- All grants may be paid out in a single payment or in a maximum of 3 phases over the course of a 5-year period, subject to prior approval.
- No funds shall be payable after five years from the date the Historic Resource Conservation Grant Program Agreement has been executed, unless Heritage Planning staff, in its sole discretion, decides to extend the period in which funds may be paid, and has provided the grant recipient prior written approval regarding the extension.
- Payment of the grant is subject to confirmation by The City that no outstanding taxes or fees on the property are owing to The City.

- The grant recipient shall notify Heritage Planning staff of any proposed material 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.
- The grant recipient shall not transfer or assign the grant or any part thereof to another organization or individual, without the prior written consent of Heritage Planning staff.
- Any unused portion of the grant remains the property of The City.
- Heritage Planning staff may, at any time in a project, require the grant recipient to identify any professionals (contractors, trades people, architects, engineers, and conservation consultants) engaged to undertake the project work or a portion of the work. Heritage Planning staff may, at any time in a project, request those identified professionals demonstrate their credentials/conservation experience.
- The grant recipient may be required to seek the approval of Heritage Planning staff for any project professionals (contractors, trades people, architects, engineers, and conservation consultants), as specified in the Grant Agreement.

## **Additional Terms and Conditions**

### **1. Use of the Grant**

- Funds awarded from the grant program shall be used only for the purposes approved by the City, as further described in the Historic Resource Conservation Grant Program Grant Agreement.
- 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.

### **2. Freedom of Information and Protection of Privacy Act**

- The information provided in the grant application is subject to the provisions of the **Freedom of Information and Protection of Privacy Act**. All granting decisions are publicly available. The **Freedom of Information and Protection of Privacy Act (the Act)** applies to all grant applications submitted to the City of Calgary. Grant applications will be received in confidence subject to the disclosure requirements of the **Act**.

### 3. Repayment of Grants

- The grant recipient shall, at the request of Heritage Planning staff, repay to the City the whole or any part of the grant as determined by Heritage Planning staff, if the grant recipient:
  - has knowingly provided false information in their grant application;
  - uses grant funds for purposes not approved by Heritage Planning staff;
  - breaches any of the terms or conditions of the Historic Resource Conservation Grant Program.

### 4. Accounting

- 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 date the Grant Agreement is fully executed.
- 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 date the Grant Agreement is fully executed. This right of inspection includes the right to perform a full or partial audit of the aforementioned records, as considered appropriate by the Heritage Planning staff.

### 5. Acknowledgement of Funding

- To acknowledge grant funding, the owner of the Municipal Historic Resource may be required to erect a sign at a prominent location on the site, or within 4.5m of the site between the site and a public roadway.

- If required, the sign shall be erected upon commencement of the work to be funded by the grant and shall be displayed until the work is completed, or for a minimum of 6 months.

### 6. Limitation of Liability and Indemnification

- 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. The grant recipient shall indemnify The City, its officers, employees and agents, against all costs, damages and expenses incurred as a result of a claim or proceedings related to the grant recipient's operations, unless such costs, damages or expenses arise from the negligence or willful act of an officer, employee or agent of The City.

### 7. Further Conditions

- Approval of the grant does not affect the grant recipients' obligation to obtain all other approvals and permits that are required to undertake the project.
- The City shall be entitled, at any time, to impose such additional terms and conditions on the eligibility of a grant application or use of the grant which, at its sole discretion, it deems appropriate.
- Heritage Planning staff may inspect the project at all reasonable times until release of the grant award.