

Grant Policies

Introduction

The Oak Bay Heritage Foundation was established in 1992. One of the purposes of the Foundation is to provide cost-sharing grants to owners of buildings listed on the official Oak Bay Community Heritage Register and to owners of *designated heritage buildings*. Buildings protected under a *Heritage Revitalization Agreement* may also be eligible for the Heritage Restoration Grants program.

1 General Guidelines

The following are general guidelines that applicants should consider in their application:

1. When restoration and preservation are contemplated, the owner should conduct research in order to ensure that the proposed work maintains and contributes to the heritage significance of the building. The staff at the Oak Bay Municipal Archives can assist in this process.
2. The proposed work should enhance the long-term viability of the building including structural repairs and earthquake resistance.
3. The proposed work must conform to the relevant building code and all bylaws.
4. Attention should be paid to identifying and restoring the architectural features which led to the heritage listing or designation of the building.
5. Every effort should be made to maintain and enhance the original character of the building, including paint colours.
6. It is normally preferable to repair original features rather than replace them.
7. Alterations to the original building may be eligible for funding if these alterations have heritage significance.

2 Eligible Preservation, Maintenance, and Restoration

The types of heritage-related work for which Heritage Foundation grants are available for the *preservation, maintenance and restoration of buildings, structures, sites and land of heritage value*¹ are defined as:

- chimneys and masonry work
- designated features
- fascias, gutters and downspouts
- foundations
- knob-and-tube wiring
- paint - external

¹ The purposes of the Society, bylaw section 2(a)

- roofs
- seismic upgrading
- stucco
- wall surfaces - external
- windows and doors – external
- woodwork and trim - external
- other important heritage work not included in the above at the sole discretion of the Foundation

5.3 Amount of Grants

The amount of a grant will be determined by the following guidelines:

1. The Foundation will, by resolution, determine the total annual grant maximum amount during the forthcoming calendar year.
2. The amount of grants will normally be up to 10% of the total cost of the project for buildings listed on the official Oak Bay Community Heritage Register, and up to 25% of the total cost of the project for designated buildings. The Foundation will determine the percentage granted.
3. A single grant will normally not exceed \$1,000 for a building listed on the official Oak Bay Community Heritage Register and \$10,000 for a designated building.
4. Priority will be given to designated buildings.
5. Applicants are restricted to one application per calendar year.
6. Over a 10-calendar year period, total grants for one property are limited to a maximum of \$10,000 for a designated home and \$3,000 for a home on the Register. Grants will be awarded at the sole discretion of the Foundation.

4 Eligibility

For the Foundation to consider a grant application, the following requirements must be met:

1. The building must be designated under the bylaws of, or otherwise protected by, the Municipality, and/or the building must be listed in the Oak Bay Community Heritage Register.
2. The real property taxes must not be in arrears.²
3. The building must be fully insured.
4. There are to be no liens on the building.
5. A Heritage Alteration Permit, if required, must be approved for designated homes before the Foundation will award a grant.
6. The proposed work must not have commenced before submitting a grant application.

² Deferred taxes do not affect the status of an application for heritage. The Province pays deferred taxes to the municipality; therefore, there is no shortfall of tax revenue within the municipality as a result of tax deferrals

7. All authorizations and permits required by the Municipality of Oak Bay must have been obtained and all work must be done in compliance with Oak Bay bylaws.
8. The Foundation may accept a grant application where an application for registration or designation is in progress, and may approve the grant subject to the registration or designation confirmation.

5 Obligations of Grant Recipients

1. Designated properties are required to have the designation plaque displayed at the front of the building.
2. The Oak Bay Heritage sign must be displayed on the property in a visible location for a period at the discretion of the Foundation during the work and/or within 30 days following receipt of grant funds.
3. Oak Bay Heritage reserves the right to photograph the restoration while in progress and upon completion and to use the photographs for public awareness of heritage in Oak Bay.

6 Application Process

Applicants should complete a Heritage Restoration Grant Application, available from the Oak Bay Municipal Hall or the municipal website, and forward it to the Oak Bay Heritage Foundation. Grant applications will be accepted from January 1st through May 31st and the Foundation will notify applicants as to whether or not their grant application has been approved by June 30th.

Notwithstanding the above, if the Foundation has not exceeded the annual grant maximum amount by June 30th, additional applications may be accepted and processed as received between July 1st and October 31st.

The completed application form should be accompanied by the following:

1. A detailed restoration plan explaining and itemizing the work to be undertaken, the techniques to be employed, and the expected date of completion.
2. A budget outlining the costs involved.
3. Normally, three independent estimates for the cost of all work to be undertaken (owner labour is not eligible for a grant).
4. Photographs of the building where the proposed work is to be undertaken.

Once the application is submitted:

1. Receipt of the application will be acknowledged in writing or by email.
2. The applicant will be advised if additional information is required.

3. Members of the Foundation may conduct an inspection of the project site.
4. The applicant will be advised whether the application conforms to the Foundation's mandate and policies and consequently the work may commence
5. The application will be reviewed by the Foundation.
6. The applicant will be advised in writing or by email whether the grant was approved, the amount of the grant, and any further stipulations, conditions, or restrictions that may pertain to the grant.
7. If a grant application is approved, work must be completed within 12 months from the date the grant application is approved.
8. Directors of the Foundation, at their discretion, may make on-site inspections of the work for which the grant application has been approved while this work is in progress.
9. The decision of the Foundation regarding whether or not a grant is approved is final and binding.

When work is completed, the following information must be submitted to the Foundation before funds will be released:

1. All original bills for labour and materials, showing that the amounts have been paid in full (original receipts will be returned to the homeowner).
2. A written declaration confirming that the project is fully completed.
3. A photographic record of the progress and completion of the work undertaken.
4. Proof that all Municipal inspection requirements have been met.

The finished project will then be given a final inspection by Directors of the Foundation for compliance with the application. The grant funds will be released and forwarded to the applicant. Should the property to which the grant applies be sold or otherwise disposed of before the work is completed, the Foundation may rescind its approval for funding and require the new owner to submit a new grant application to the Foundation.

7 In the case of an Emergency

It is within the Foundation's sole discretion to consider a grant application at any time for emergency work on a designated home. Normally grants may be approved for up to 50% of the cost of repairs to a maximum of \$5000, or as otherwise determined by the Foundation.

The Foundation must be satisfied that the work was undertaken to address unpredictable or unforeseen building problems that pose an immediate threat to the designated building. The homeowner must provide the Foundation with a completed

grant application and other required documentation prior to the commencement of the restorative work.

Upon receipt of the application the Foundation shall undertake an immediate inspection. The Foundation recognizes that in some circumstances remedial or temporary measures may have been undertaken to prevent further damage. The Foundation may request permission to contact the homeowner's insurance adjuster to verify that the cost of the work is not covered by insurance.

8

OAK BAY HERITAGE FOUNDATION

**Application form for a grant for preservation, maintenance or restoration
of a heritage property**

This application form and supporting documents must be received by the Oak Bay Heritage Foundation by June 30th each year. Later applications will be considered if funds are available. I hereby make application for a grant to aid in the preservation, maintenance or restoration of the following heritage building or structure located in the Municipality of Oak Bay:

1 Address of heritage property

Street _____
Postal Code _____

2 Owner(s)

Name(s) PLEASE PRINT _____
Address(es) if different from the above
Street _____
City/Province _____ Postal code _____
Contact phone numbers _____
Email address: _____

The property is (tick status)

- registered
 - up to 10% of the cost of the work to a maximum of \$1,000
- designated
 - up to 25% of the cost of the work to a maximum of \$10,000
- designated under a Heritage Revitalization Agreement
 - up to 25% of the cost of the work to a maximum of \$10,000

3 Work

Summary description of the proposed work:

Estimated value of all work to be undertaken (three independent estimates):

Contractor (tick the box to indicate your preferred contractor)	Estimate
<input type="checkbox"/> _____	\$ _____
<input type="checkbox"/> _____	\$ _____
<input type="checkbox"/> _____	\$ _____

4 Information supporting the application

Please include the following information with your application:

- A plan explaining and itemizing the work to be undertaken, the techniques to be employed, and the anticipated start and completion dates.
- If the project includes new paint schemes, indicate paint colour and location and include paint chips.
- A budget describing the costs.
- Three independent estimates for the cost of all work (including taxes). Where the work requires special expertise, two estimates may be allowed (contact Heritage Foundation).
- Photographs of the house and areas requiring maintenance or restoration.

5 Application

As the owner(s) of the above property (check to confirm):

- I/we hereby state that all taxes and utility fees on the property are not in arrears (and agree for the Foundation to confirm this with the municipality), that there are no liens on the property, and that the property is fully covered by current comprehensive insurance.
- I/we undertake to obtain all necessary authorizations and permits from the Municipality of Oak Bay before work commences.
- I/we understand that I/we shall not involve the Oak Bay Heritage Foundation or the Municipality of Oak Bay in any action between any contractors, estimators, employees, workers or agents and the applicant arising from the work undertaken.
- I/we understand that the Foundation will display a sign on the property acknowledging the support provided by Oak Bay Heritage.
- I/we understand that the Oak Bay Heritage Foundation will not disclose any of my/our personal information; but the grant amount and address of the property will be included in the Foundation's annual report to Council, and the Foundation reserves the right to photograph the maintenance or restoration while in progress and upon completion, and to use the photographs for public awareness of heritage in Oak Bay.
- Should the grant be approved, I/we understand that the Foundation will award the grant once the maintenance or restoration are completed and the costs paid in full by the applicant(s) demonstrated by proof of payment by including the original receipts - which will be returned, and a letter from the applicant that the work is to their satisfaction.

Signature(s) _____

Date: _____

Please return the completed application to: Oak Bay Heritage Foundation
Municipal Hall, 2167 Oak Bay Avenue, Oak Bay, BC V8R 1G2.