

**Kelowna Heritage Grants Program (KHGP)**  
**City Council Presentation**  
**Monday, February 16 @ 1:30pm**

**Presenter: Larry Foster, KHGP Committee Member, COHS Board Representative and Retired City of Kelowna Planner**

Introduction of Committee Members & Program Manager

Background on the Kelowna Heritage Foundation (KHF) and the change into the new Kelowna Heritage Grants Program (KHGP) in 2007 managed by COHS

Acknowledgement of the \$20,000 annual allotment by the City of Kelowna for the Heritage Grants Program

Grants Approved: (Power Point Presentation of Photographs of Projects, Grant Amount Awarded, Work covered by Grant)

Included for background information for Council Package:  
***Attachment of City of Kelowna Annual Report: 2008 PDF***



# **KELOWNA HERITAGE GRANTS PROGRAM**

## **City of Kelowna Annual Report: 2008**

The Kelowna Heritage Grants Program (KHGP) replaced the Kelowna Heritage Foundation (KHF), which was established as a registered non-profit society in 1991. The City of Kelowna awarded COHS with the set-up and administration of the new Heritage Grants Program for 2008. The Kelowna Heritage Grant Program has continued the KHF's mandate of encouraging the preservation of heritage buildings in Kelowna and of raising public awareness of the significance of our irreplaceable heritage resources.

Over the past year, the Kelowna Heritage Grants Program has observed that many residents of our community are interested in the conservation of our heritage buildings and in raising public awareness of the heritage of our community. Owners of heritage homes and heritage advocates have obtained the financial and advisory assistance from the Heritage Grants Program.

The following summarizes the Kelowna Heritage Grant Program's activities for the past year.

### **Committee Members**

The KHGP is composed of five regular members and a maximum of four alternate members as outlined below:

- a) One person from the Central Okanagan Heritage Society Board;
- b) One person from the architectural field;
- c) One person from the construction industry;
- d) Private Citizens.

All new regular KHGP Committee members will have an orientation prior to their attendance at the set grant meetings. As 2008 was the inaugural year of the program, an orientation meeting was held in March for the Committee members. *(Refer to the attached Orientation Meeting Minutes)*

The following lists the names of the 2008 KHGP Committee Members.

### **Kelowna Heritage Grants Program Committee (2008)**

Julie Cosgrave, *Committee Chair*

(Writer and Heritage Advocate)

Larry Foster, *COHS Board Representative*

(Retired City Planner and Heritage BC Board Member)

Aldis Arajs (served until June 2008 when he passed away)	(Retired Architect)
Bill Scutt	(Local Developer and Heritage Buildings Owner)
Alasdair Smith	(Heritage Builder and Contractor)
*Gordon Hartley	(Architect and Past Heritage BC Representative)
&	
*Peter Chataway	(Building Designer and Heritage Advocate)
*(alternates until June 08, when they replaced Uldis and shared the committee position for the rest of the year)	
Ben Lee, alternate	(Founding KHF member and Retired City Councilor)
R.J. Bennett, alternate	(Founding KHF member, Retired Developer)

## Grant Summary

The Kelowna Heritage Grants program had four regular meetings (*Refer to the attached Regular Meeting Minutes*) to review grant applications for heritage building conservation and for initiatives that raise awareness of Kelowna's heritage. During 2008, the Grant Program issued seven (7) heritage grants for a total of \$19,150.40. Grants ranged in value from \$1,500 to \$5,000.

The Grant Program also reviewed and administered the three (3) grants that were approved by the Kelowna Heritage Foundation (KHF) in November 2007, after which the KHF was later dissolved. These heritage grants totaled \$18,850. Grants ranged in value from \$3,850 to \$10,000.

A compilation of figures on the KHGP and KHF approved grants from November 2007 and 2008 are provided in **APPENDIX A: Grants Approved and Administered**.

### Approved Grants November 2007 (KHF)

#### 1842 Abbott

#### COMPLETED November 2008

The KHF awarded a grant for a new red asphalt shingle roof, similar to the existing roof.

#### 721 Bernard Avenue

#### COMPLETED September 2008

The First United Church was given a grant by the KHF for a new roof on a portion of the church building.

#### Fleming House in Brentsmill Heritage Park

#### EXTENSION GRANTED

The Fleming House received a KHF grant for a new cedar shingle roof and for restoration work on the windows and doors of the building.

## **Approved Grants 2008 (KHGP)**

### **2279 Benvoulin Road**

**COMPLETED September 2008**

The Kelowna Heritage Grants Program gave a grant for the preparation and painting of the Benvoulin Church in the existing colour scheme.

### **3685 Benvoulin Road**

**COMPLETED September 2008**

The KHGP gave a grant for a new cedar shake roof on the Blacksmith Shop on the Father Pandosy Site.

### **763 Bernard Avenue**

**ACTIVE**

The heritage grant committee awarded the Muirhead House with a grant towards a new cedar shingle roof, similar to the existing roof.

### **1024 Rutland Road North**

**ACTIVE**

A grant was given for the preparation and painting of this house in an appropriate heritage colour scheme chosen by the homeowner.

## **Heritage Awareness Grant Program and Initiatives**

The Kelowna Heritage Grants Program helped cover costs associated with expenses incurred from projects that advance the knowledge and appreciation of Kelowna's history. The committee also met in early September to further discuss public awareness and educational initiatives that they would like to pursue in the future. *(Refer to: Special Meeting Notes on September 9, 2008)* There were also a number of expenditures associated with the heritage awareness grant program and initiatives undertaken by the Committee. A compilation of figures on the 2008 Program Expenditures is provided in **APPENDIX B: Program Expenditures**.

### **Two Walking Tour Brochures (Abbott Street and Marshall Street Heritage Conservation Areas)**

The Kelowna Heritage Grants Program provided David Lovell of the Kelowna South-Central Association of Neighbourhoods (KSAN) with a grant to assist in the costs associated with printing the walking tour brochures of the Abbott Street and the Marshall Street Heritage Conservation Areas. The brochure was designed for both tourists and local residents, and provides information about a variety of historic buildings in the two areas.

### **100<sup>th</sup> Year Birthday Party for Kelowna's Heritage Buildings**

The KHGP provided Kelowna South-Central Association of Neighbourhoods (KSAN) with a grant to assist in the costs associated with a community celebration for a number of Kelowna's buildings that were built 100 years ago. The event featured a few homes opened for touring, refreshments and heritage tour booklets. This event helped promote heritage in Kelowna.

### **Online and Printed Index for the Okanagan Historical Society (OHS) Reports**

The KHGP gave a grant to OHS towards updating the printed and online index for the reports that have recorded Kelowna's history since 1926. The printed and online index will provide great benefit to researchers, citizens and even heritage building owners who want to find out more about Kelowna's people and buildings.

### **Kelowna Heritage Grants Program Website**

The defunct KHF website was re-activated and updated with the new program name, the new application form and guidelines and contact information. The website continues to provide information and heritage links for heritage building owners and interested people, including photographs and a brief description of Kelowna's Heritage Register Buildings. The website's new address is [www.kelownaheritagegrantsprogram.com](http://www.kelownaheritagegrantsprogram.com).

### **Heritage Plaque Program**

About seven years ago, the Kelowna Heritage Foundation purchased 25 bronze plaques to be used as part of the Foundation's Heritage Interpretation Plaque Program. Historic photographs and information were added to the plaques and placed on heritage buildings located in the downtown area. There are still a number of bronze plaques that have not been placed on heritage buildings.

The continuation of this plaque program has been discussed at both the regular meetings and at the September Special meeting to determine the direction that the committee would like to take. Redesigning the plaques to ensure that they are consistent with other existing and future City signage is being looked into.

### **Heritage Workshop**

The Committee has discussed putting on a Heritage Workshop. Different workshop ideas were and are being looked into through the Heritage BC Society (workshop leader funding can be applied for), other communities and past KHF workshops. The Committee is looking at hosting a possible workshop prior to the Heritage BC Conference in Kelowna in June 2009 or in the fall.

### **"Getting the Word Out"**

One of the most important priorities identified by the committee was to inform the public and the owners of buildings on the City of Kelowna Heritage Register about the KHGP. These activities included: manager spoke about the new grant program at the COHS AGM in February; re-established and updated the defunct KHF website in May; sent out a press release to the media in May (at least one newspaper article followed); submitted a write-up for the two COHS Newsletters and the Kelowna Community Association's Newsletters; sent out contact information to the City of Kelowna Planning Department; created a City Bulletin for distribution; set up a mailing list of registered buildings from which a letter was sent out letting owners know about the program in late May; gave out information and answered questions about the program

at the COHS Heritage Fair in September; the manager and many of the committee members represented the KHGP at the Heritage BC Conference in June, the Provincial Heritage Strategy Stakeholder Input Workshop in August and at the *Transforming how we think of existing and heritage buildings: Green Rehabilitation and Sustainability Forum* in December.

### **Heritage Week**

Heritage Week offers a time for citizens across Canada to give recognition and pay special tribute to the heritage of their communities. The Heritage Week celebrations continue to be very successful and the many events that take place during the week provide the community with an opportunity to witness the strong commitment of Kelowna citizens towards raising awareness of the City's heritage resources.

In the past the KHF has taken part in Heritage Week by encouraging individuals and/or groups to apply for a grant towards a Heritage Week activity to promote heritage awareness and education in Kelowna. The KHF has also taken the opportunity to thank City Council for the money allotment to continue the grants program in Kelowna and to acknowledge the grant recipients from the past year during Heritage Week.

The newly formed KHGP was unable to take part in the 2008 Heritage Week as the KHF had done in the past. This was because the committee was in the process of being formed. The KHGP manager did attend the Central Okanagan Heritage Society AGM and spoke to its membership about the new heritage grants program. In 2009, the KHGP committee intends to continue this important heritage awareness endeavor during Heritage Week.

### **BC Heritage Society and Heritage Canada Foundation Membership**

The KHGP has become a member of the BC Heritage Society and plans to continue its membership. The committee has also approved becoming members of the Heritage Canada Foundation for 2009. Membership in these two heritage associations benefits the committee with providing current information on what is happening in the heritage community in BC and in Canada.

### **Heritage BC Conference**

There were three Committee members and the manager who represented the KHGP Committee and Kelowna in the Heritage BC Conference that was held in Langley/Fort Langley in June. This was a very good opportunity to network and find out what is happening in other parts of the province. Having four committee members and the manager attend the conference shows that there is not only a strong interest in heritage issues and education, but also there is a commitment to their positions on the KHGP committee and to heritage in our community. Although the conference fees were paid for by the KHGP, the attendees were not reimbursed for food, lodging, transportation or their time.



## **Transforming how we think of existing and heritage buildings: Green Rehabilitation and Sustainability Forum**

The Forum, held in early December, was organized by Cascadia and sponsored by the BC Heritage Branch. This event was again well attended by four committee members and the manager. This was another opportunity for the committee to get involved in heritage education and awareness. The manager played a role in helping to organize the event, as the local contact person. The manager received a complimentary registration to the event for her work on the workshop.

## **Administration Activities**

There were numerous activities in 2008 that were necessary to get the new KHGP set up and running. These activities included: dissolution of the KHF (final KHF meeting, paperwork to sign and send in, etc); transfer of funds to a new bank account with COHS signees; create an operational plan for the year; formation of the new committee; review, revise and update the KHF materials including updating the grant application and guidelines; set meeting dates (including orientation meeting); prepared and distributed agenda and meeting materials; recorded the minutes and distributed them; informed applicants of committee decisions; prepared paperwork and files for applicants; issued cheques as required; liaison for program answering inquiries on program and related heritage matters; helped with some of the planning for the Green Sustainability Forum held in December at the Benvoulin Heritage Park. Refer to ***APPENDIX C: Administration Hours & Activities 2008*** for a breakdown of the administration hours worked in 2008 by the manager.

## **KHGP Grant and Program Inquiries**

In 2008, there were approximately 30 new inquiries\* from home owners requesting information on the Kelowna Heritage Grants Program. Two or three of these inquiries were from building owners whose buildings were presently not on the Heritage Register. These inquiries were followed up with the process and contact information for inclusion on the Heritage Register. Out of the 30 inquiries, there were four building application grants received and grants awarded. There were three or four inquiries from homeowners in the fall, who expressed interest in putting in an application in 2009.

There were also four inquiries on grants for heritage awareness projects. Three heritage awareness applications were approved and completed in 2008.

In addition we received a couple of inquiries about St. Aidan in Rutland and the Cadder House on Pandosy Street.

The three projects that were approved by the KHF in 2007 have all required correspondence with the building owners re: their grants. The First United Church requested an increase in their

grant, COHS requested an extension to complete the work and 1842 Abbott's homeowner phoned numerous times over the year, including applying for a new grant in 2009.

It should be noted that there were a couple of building owners who were preparing an application, but were unable to get the necessary number of quotes and so did not proceed with the application. There were also a couple of owners who had already completed work on their building and wanted to know if they would still qualify for a grant on the completed work.

**\*\*It should also be noted that each inquiry usually required at least two to three (and sometimes even more) phone calls, e-mails and even meetings to answer the various questions and concerns.**

## **Conclusion**

As the manager of the Kelowna Heritage Grants Program, I wish to acknowledge and thank the KHGP Committee members for their dedication and service during the past year. I would also like to thank the City of Kelowna for the ongoing financial commitment that enables heritage property owners and heritage advocates to undertake heritage rehabilitation projects and to raise awareness of Kelowna's heritage. It is worthy of noting that the financial reserves built up over the past sixteen years by the KHF has provided the KHGP the ability and flexibility to assist Kelowna residents in conserving Kelowna's built heritage and in raising awareness of Kelowna's past. The conservation of built heritage and the awareness of our past benefits the community in many ways, not the least of which is through the community's contribution to community character and public awareness of our collective pasts.

Respectively Submitted,

Lorri Dauncey, Manager, KHGP

**BA, Dip (Cultural Resource Management/Heritage Conservation), MA (Urban Planning/ Heritage Conservation)**



## Recommendations for 2009/2010

There are a number of recommendations that have come from the KHGP Committee, Lorri Dauncey the program manager and Janice Henry COHS Executive Director.

1. Update and revise the KHGP Application and Guidelines: to increase the amount of the maximum grant for both registered and designated buildings\*; and to ensure consistency in grant amounts based on type of work undertaken.

\*Note: A number of Heritage Register building owners have expressed that it is hardly worth their time to apply for the maximum \$5,000 grant. A new roof could cost \$15,000-\$30,000. The grant application is seen to be almost more work than it is worth. The Heritage Designated building owners' maximum is \$10,000, which is also a small amount of money for a major restoration/rehabilitation project. Building costs have drastically increased since 1991, especially in the last five years. This increase in costs has not been reflected in the maximum grant given by the KHF or the KHGP.

2. Letters promoting the Heritage Grant Program be sent out annually to owners of buildings on the Heritage Register to ensure they are aware of the KHGP. The letters will remind owners of the programs ability to help them maintain and conserve their heritage buildings.
3. Files will be set up for all program inquiries to track calls and responses.
4. The minimum required four meetings per year for 2008, was supplemented with two additional meetings. In March an orientation meeting was held for the new committee, and in September an additional meeting was held to discuss awareness and educational initiatives. In 2009 the committee is; planning to host a heritage workshop; design a plaque for building owners who have received a heritage grant; and looking into reviving the KHF educational plaque program. While the dissolution of the KHF, and the set-up of KHGP is now complete, the new work laid-out for 2009 may be even more time consuming. Our volunteer committee is small and has limited time to spare.

The hope is that there will be an increasing amount of interest in the program in 2009, which will take up any additional hours. The number of hours for the program has been reduced by 15 hours to allow for a cost of living wage increase and a small raise. It is recommended that for 2010 at a minimum the contract reflect a cost-of living increase.

5. While COHS believes that the program has gone well, and that the management of this program is a good fit for COHS, we will have to seriously consider carrying on the program in 2010. At this point we are barely breaking even, and if we did a more accurate accounting of oversight hours, the program would likely be costing COHS money. There are not many contractors who do work for zero profit dollars. COHS undertook the contract with the hope of building the program and the budget for its administration. An internal review from our perspective will take place in 2010.

6. At the close of 2008 a number of letters were received by the City of Kelowna showing support for an increase in the City's allocation for granting dollars through the KHGP. We are recommending that based on the Kelowna Heritage Strategy's recommendations, and the letters of support received, that the City again considers raising the dollars available to \$50,000 per annum. COHS and the manager of the program will be looking at other communities through-out the province and beyond to get a better sense of how other communities deal with their support of heritage properties.
7. It is very important to acknowledge the volunteer time and commitment by the KHGP committee. In the past, the volunteer Kelowna Heritage Foundation Board of Directors was thanked through two lunches a year, paid for by the grant program. In 2008, at the last meeting of the year, tea and cookies were provided out of the very tight administration budget. It is recommended that volunteer appreciation be considered and budgeted for as part of the program costs.
8. It is also very important to provide and budget for education opportunities for both the KHGP committee members and manager. This has been offered to the KHF Board members since it was formed in 1991. The Kelowna Heritage Foundation Board members regularly attended the annual BC Heritage Society Conference and some of the BC Heritage Society's regional conferences as well. The Board members represented both the KHF and Kelowna at these heritage events.

In 2008, many of the KHGP Committee and the manager had a very good opportunity to attend the annual BC Heritage Society Conference in Fort Langley and the very rare opportunity to attend a Green Rehabilitation and Sustainability Forum put together by Cascadia and sponsored by the BC Heritage Branch and Canada's Historic Places Initiative. The committee members and the manager covered all of the additional expenses (except for the registration fees) and volunteered their time to attend these events. It is recommended that a formal budget for heritage workshops, conferences, and forums be included as part of the KHGP heritage awareness and education for both committee members and staff.

## **APPENDIX A: Grants Approved and Administered (November 2007-December 2008)**

### **Previously Approved Projects by the KHF (November 2007)**

H07-103:	1842 Abbott Street	\$5,000	Completed
H07-107:	First United Church	\$4,700	Completed
H07-104:	Fleming House/Brentsmill	\$10,000	Extension Granted

**Grant Total    \$19,700\***

\*\$9,700 has been paid out in 2008; \$10,000 has been allocated and has yet to be paid out

### **Approved Projects by the KHGP (2008)\*\***

\*\*(all of the applications received have been approved)

H08-101:	2279 Benvoulin Road	\$4,100	Completed
H08-102:	Abbott & Marshall Street Brochures	\$3,050.40	Completed
H08-103:	Blacksmith Shop on Father Pandosy Site	\$2,100	Completed
H08-104:	KSAN's 100 <sup>th</sup> B-Day Party	\$1,000	Completed
H08-105:	763 Bernard Street	\$5,000	Not Completed
H08-106:	1024 Rutland Road	\$1,500	Not Completed
H08-107:	OHS Online Index for Society Reports	\$1,500	Not Completed

**Grant Total    18,250.40\*\*\***

\*\$110,250.40 has been paid out in 2008; \$8,000 has been allocated and has yet to be paid out

**TOTAL APPROVED GRANTS: (as of Dec. 31, 2008)        \$38,000.40**

## APPENDIX B: Program Expenditures (Up to and including December 31, 2008)

Website:	277.94	(re-instate website & hosting fee)
	10.19	(Domain Name)
	183.75	(updates to website)
<b>Total:</b>	<b>\$471.88</b>	

Heritage BC Conference Registration Fees:	150	(Lorri Dauncey)
	175	(Julie Cosgrave)
	175	(Alasdair Smith)
	150	(Larry Foster)
<b>Total:</b>	<b>\$650</b>	

KHF Dissolution Fees and Postage:	55	(filing fees)
(since COHS took over)	24.26	(registered postage)
<b>Total:</b>	<b>\$79.26</b>	

Building Owner Letters:	17.04	(photocopies)
	106.60	(stamps)
	27.25	(address stamp)
	31.79	(envelopes & labels)
<b>Total:</b>	<b>\$182.68</b>	

Heritage BC Membership Fees:	<b>\$65.00</b>
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Bank Charges, etc.:	<b>\$129.54</b>	(cheque printing)
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Memorial Tree (for Uldis Arajis):	<b>\$100.00</b>
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Heritage/Green Forum Registration Fees:	161.44	(Julie Cosgrave)
	161.44	(Alasdair Smith)
	161.44	(Larry Foster)
	161.44	(Peter Chataway)
<b>Total:</b>	<b>\$645.76</b>	

**\*GRAND TOTAL: \$2,324.12**

\*(These are expenses incurred beyond the administration fee received by COHS. All the program expenses have been approved by the KHGP Committee.)

<b>TOTAL PROGRAM EXPENSES (2008):</b>	<b>\$2,324.12</b>
<b>TOTAL COMPLETED GRANTS (2008):</b>	<b>\$19,950.40</b>
<b>TOTAL GRANT \$ COMMITTED (2009):</b>	<b>\$18,000.00</b>

Notes: Amount transferred from the KHF was \$56,834.54  
City Annual Allotment for 2008 was \$20,000  
Interest accrued to account was \$1,303.34  
Member Reward was \$70.64

## APPENDIX C: Administration Hours & Activities 2008

<b>January</b>	3 hours (Office set up and supplies)
<b>February</b>	30 hours (KHF dissolution activities; administration/set up of KHGP)
<b>March</b>	25 hours (Set up of KHGP- updating KHF materials; orientation meeting agenda, minutes follow-up from meeting)
<b>April</b>	23.5 hours (administration activities; grant inquiries and applications, getting out the word, website; agenda May meeting)
<b>May</b>	35.5 hours (administration activities; grant inquiries and applications; preparing for meeting and follow-up, homeowner letters and address list)
<b>June</b>	*24.5 hours (administration activities; homeowner letters; grant inquiries and applications; preparing for meeting and follow-up) *Staff Representative at the 2.5 day BC Heritage Society Conference- registration fee paid but not paid for time/travel/accommodations
<b>July</b>	18 hours (administration activities; grant inquiries)
<b>August</b>	**19 hours (administration activities; grant inquiries; City report) **Includes 1.5 hours paid to attend half day BC Heritage Strategic Plan Workshop
<b>September</b>	29.5 hours (administration activities; grant inquiries and applications; preparing for two meetings and follow-up; work on the <i>"Transforming how we think of existing and heritage buildings: Green Rehabilitation and Sustainability Forum"</i> )
<b>October</b>	9.5 hours (administration activities; grant inquiries,
<b>November meeting</b>	17 hours (administration activities; grant inquiries and applications; preparing for and follow-up)
<b>December</b>	33.5 hours (administration activities; grant inquiries; meeting follow-up; helping with and attending the <i>Green Rehabilitation and Sustainability Forum</i> , Year End Report for City of Kelowna) *Includes 4 hours paid to attend 2 day Heritage/Green Forum

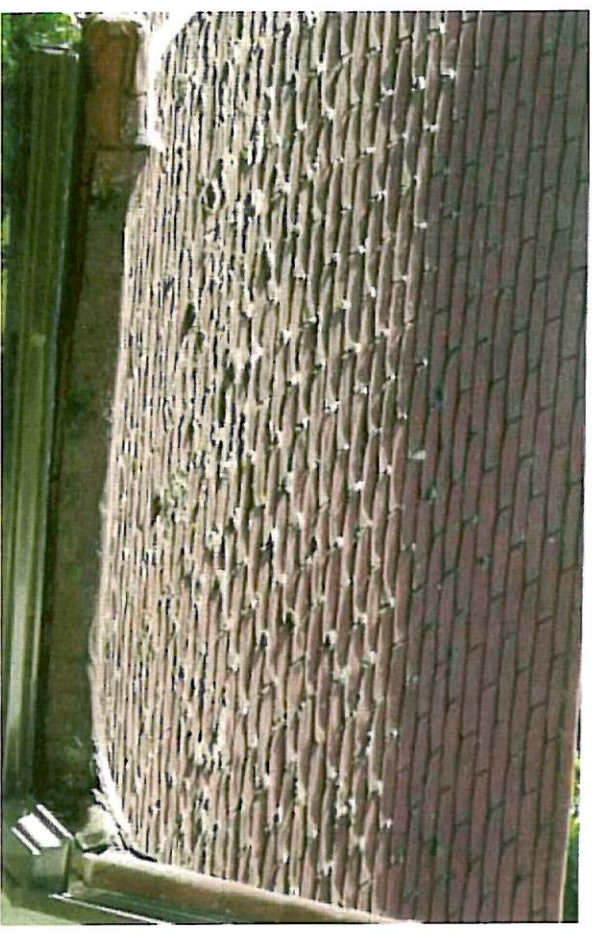
**Total hours worked= 268 hours in 2008\*\*\***

\*\*\*The hours indicated are for Lorri Dauncey (Manager, KHGP). Janice Henry (COHS Executive Director) has had input and supervisory responsibilities which average 3-4 hours per month (24 hours for the year was budgeted, however the hours Janice Henry put into the program was closer to 45-50 hours)

# **KELOWNA HERITAGE GRANTS PROGRAM (KHGP)**



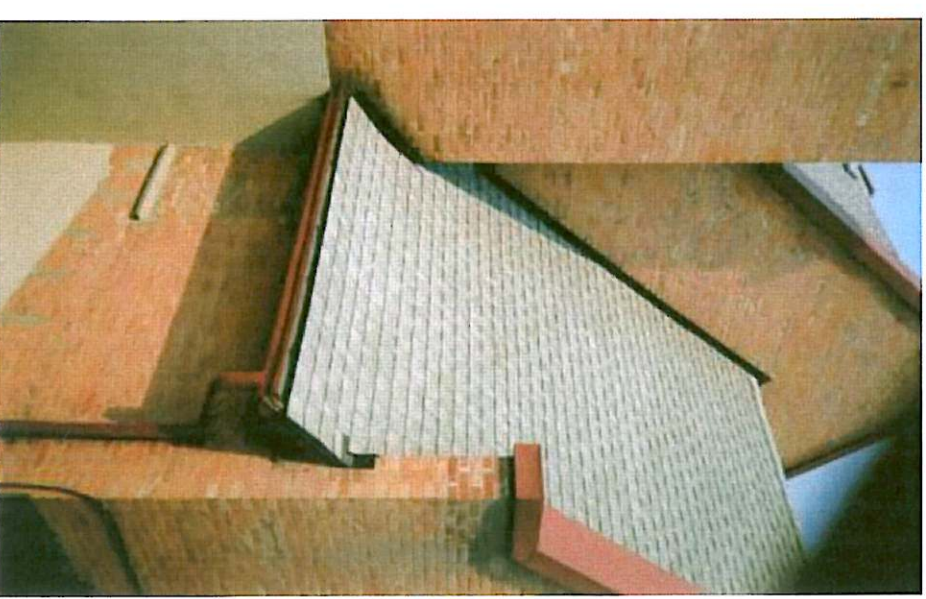
# 1842 Abbott Street \$5,000 (Roof)







# 721 Bernard Avenue \$4,700 (Portion of Roof)



# Fleming House Brentsmill Site

## \$10,000 (Roof, Windows & Doors)



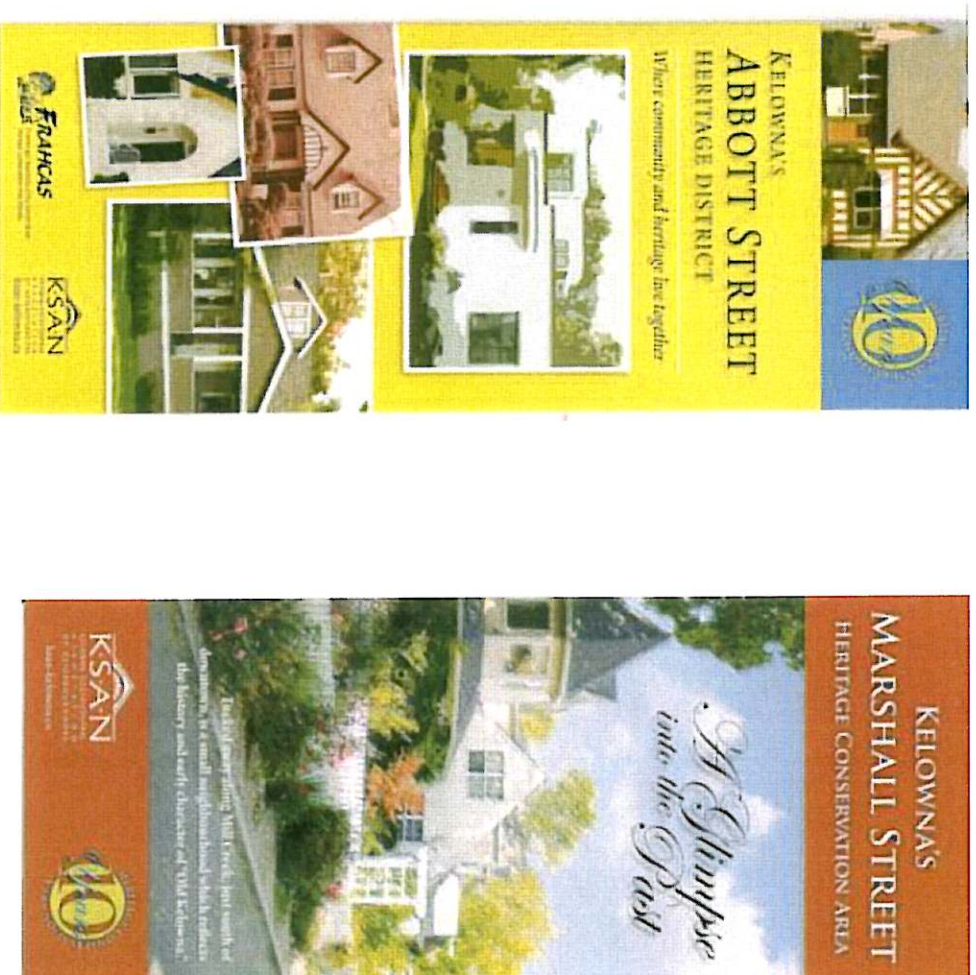


# 2279 Benvoulin Road \$4,100 (Painting Exterior)



# Abbott & Marshall Street Brochures

\$3, 050.40 (Printing Costs)





# Blacksmith Shop on Father Pandosy Site \$2,100 (Roof)



# KSAN's 100<sup>th</sup> B-Day Party

## \$1,000 (Community Event Costs)

### *With Thanks*

Many thanks to our community partner – the residents who opened their homes for this event.

The research of David Dendy for the Kelowna Heritage Register is used extensively in this booklet.

The City of Kelowna Heritage Grant Program provided matching funding for KSAN's 100th Birthday Celebration.  
[www.kelownaheritagegrantsprogram.com](http://www.kelownaheritagegrantsprogram.com)



### *Celebrating 100 Years*



### **Birthday Party and Heritage Home Tours**

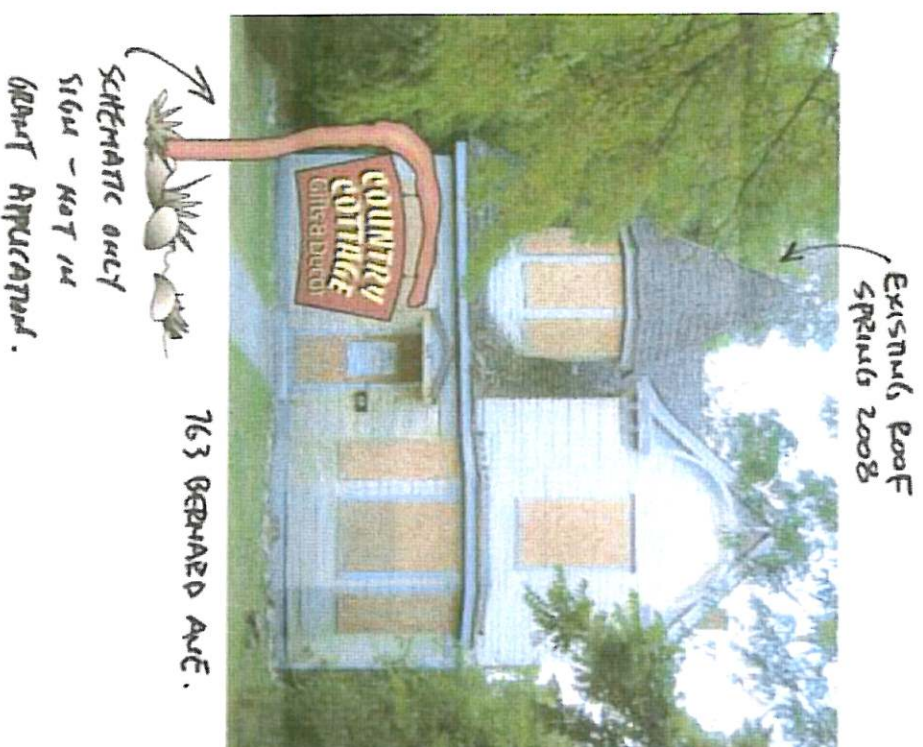
**Knowles Park • September 14, 2008 • 1:00-4:00 pm**  
885 Bernard Ave., Kelowna



City of Kelowna Heritage Grants Program  
[www.kelownaheritagegrantsprogram.com](http://www.kelownaheritagegrantsprogram.com)

# 763 Bernard Avenue

## \$5,000 (roof)





# 1024 Rutland Road \$1,500 (Painting Exterior)



# OHS Online Index for Society Reports

\$1,500 (Costs for Index)

