

**City of Kelowna Heritage Grants Program (CoKHGP)
City Council Presentation
Monday, February 21 @ 1:30pm**

Presenter: Janet Digby, Chair of CoKHGP Committee

- Introduction of Grant Committee Members, Program Manager & COHS Board Members in attendance
- Acknowledgement of the \$30,000 annual allotment received from the City of Kelowna for the CoKHGP in 2010 and in 2011.
- 2010 Grants Approved: (Power Point Presentation of photographs of projects funded by Program; including the grant amount awarded and what the grant was for)

A handwritten signature in black ink, located in the bottom right corner of the page. The signature is stylized and appears to be the name of the presenter, Janet Digby.

CITY of KELOWNA HERITAGE GRANTS PROGRAM

Annual Report: 2010

The City of Kelowna Heritage Grants Program (CoKHGP) is completing its third year under the management of the Central Okanagan Heritage Society (COHS). Over the past three years, the mandate of the program has become focused primarily on administering the grant process, informing the public about the program and educating heritage building owners on good heritage conservation practices.

Over the past year, the City of 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 buildings have obtained financial assistance and advice from the Heritage Grants Program on conserving their heritage properties.

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

Committee Members:

The CoKHGP 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) Interested private citizens.

All new regular CoKHGP Committee members receive an orientation prior to their attendance at their first grant committee meeting.

The following lists the names of the 2010 CoKHGP Committee Members.

Janet Digby, <i>Committee Chair</i>	(Architect)
Larry Foster, <i>COHS Board Representative</i>	(Retired City Planner and Heritage BC Representative)
Alasdair Smith	(Heritage Builder and Contractor)
Peter Chataway	(Building Designer and Heritage Advocate)
Marietta Lightbody	(Local Historian and Heritage Advocate)
Lorri Dauncey, <i>program manager, non-voting</i>	(Heritage Conservation Consultant)
Ben Lee, alternate	(Founding KHF member and Retired City Councillor)
R.J. Bennett, alternate	(Founding KHF member, Retired Developer)
Bill Scutt, alternate	(Local Developer and Heritage Buildings Owner)
Gordon Hartley, alternate	(Architect and Past Heritage BC Representative)

Grant Summary:

The City of Kelowna Heritage Grants program had four regular meetings (*Refer to: Attached CoKHGP Regular Meeting Minutes for 2010*) to review grant applications for heritage register buildings. During 2010, the grant program approved twelve (12) heritage grants for a total of \$38,244.50. There was one (1) grant application that was declined a grant. Grants ranged in value from \$325 to \$6,187.

A compilation of figures on the CoKHGP approved, declined and withdrawn grant applications for 2007 (Kelowna Heritage Foundation), 2008, 2009 and 2010 is provided. (*Refer to: Appendix 1: City of Kelowna Heritage Grants Program Approved Applications 2007-2010*)

Approved CoKHGP Grants 2010

757 Lawrence Avenue Completed

A grant towards the repair, prep and painting of the exterior of the Meikle House was approved at the March 23 meeting.

250 Leathead Road Active

A grant towards the prep and painting, gutter and downpipe repairs/replacement and a new roof for the Dudgeon Farm House was approved at the March 23 meeting.

1788 Ethel Street Active

A grant for the prep and painting of the exterior of the McGregor House was approved at the June 15 meeting.

2124 Pandosy Street Active

A grant for the repair, prep and painting of the exterior of the Cadder House was approved at the June 15 meeting.

710 Sutherland Avenue Active

A grant for the prep and painting of the exterior of the N.D. McTavish House was approved at the June 15 meeting.

2034 Pandosy Street Completed

A grant for the roof repairs on the Dr. Shepherd House was approved at the June 15 meeting.

567 Okanagan Boulevard Completed

A grant towards the woodwork repairs and the prep and painting of the exterior of this wartime house was approved at the June 15 meeting.

3685 Benvoulin Road Completed
A grant towards a new cedar shake roof (shakes treated with fire retardant as in a fire interface area) on the Barn on the Father Pandosy Mission Site was approved at the June 15 meeting.

4193 Gordon Drive Completed
A grant for the replacement of three sets of storm sashes for the protection of the original French doors on the Thomson farm house was approved at the June 15 meeting.

1852 Water Street Active
A grant towards the repair and partial replacement of the foundation of the Lewis house was approved at the June 15 meeting.

1826 Maple Street Completed
A grant for the prep and painting of the exterior of the Brown house was approved at the September 14 meeting.

429 Park Avenue Active
A grant for a new cedar shingle roof on the Reekie house was approved at the September 14 meeting.

Changes to the City of Kelowna Heritage Grants Program:

There were a number of changes that were implemented prior to and in 2010 by the city. These will be briefly mentioned.

City of Kelowna Branding: In 2010, the program was renamed: **City of Kelowna Heritage Grants Program (CoKHGP)** to be consistent with the city of Kelowna's rebranding. The city provided letterhead and envelopes with the new city logo and name.

Heritage Awareness and Education Grants: In 2010, the grant program no longer gave grants for heritage awareness and education. Heritage awareness and education had been a mandate of the Kelowna Heritage Foundation (KHF) and Kelowna Heritage Grants Program up until 2010.

Kelowna Heritage Grants Program Website: In 2010, the KHGP website was removed. The website had been created for the KHF and included the following: provided people with information on the grants program and contact information, information and photographs of Kelowna's heritage assets, links to heritage resources in BC and Canada. The newly revised 2010 CoKHGP Guidelines and Application form was put on the city of Kelowna website in the Heritage Management and Grants sections.

Community Heritage Workshop: In 2010, the city made the decision that organizing a heritage workshop in Kelowna would no longer be part of the grant committee's responsibilities.

Heritage Plaque Program: In 2009, the plaque program was dissolved. The remaining plaques were given to the city planning department. This was partially due to financial and committee time constraints, as well as the city wanting all interpretative plaques to be consistent with other existing and future city signage.

Heritage Recognition Plaques: The KHG gave a plaque to each building owner who received a city heritage grant. The plaque increased the exposure and awareness of the grant program and the city's role in heritage. The committee was in the process of having plaques designed and made for grant recipients of the KHGP. This initiative was cancelled for 2010.

New CoKHGP Guidelines and Application Form: A new streamlined version of the guidelines and application form was created by the city planning staff for 2010. There were many positive changes to the guidelines and application form. However, there were a number of changes that need to be considered for 2011. These are noted in the recommendations.

CoKHGP Manager and Committee Activities:

Committee Meetings and Follow up: There were four *Regular Meetings* (March 23, June 15, September 14 and November 9) to consider grant applications and other program business. A significant amount of the manager's time is spent preparing for each meeting (agenda, gathering up material and applications, ensuring there is a quorum), attending and recording the meeting, transcribing the minutes, writing letters to grant applicants re: the Committee's decisions and any other follow up required.

Committee Members: The manager is responsible for ensuring that there is a full committee. As a new committee member was needed in 2010, the manager sought out possible new members, which proved to be a time consuming task. A new member was found and oriented by the manager prior to the March meeting. There were five regular members and four alternate members of the committee.

Financials: The manager pulls together a review of the Grant Program's allotted funds prior to each meeting for the Grants Committee's information. This review indicates how much money has been allocated and how much is left for the rest of the year.

Program and Heritage Inquiries: The manager spends a significant amount of time each month answering e-mail and telephone inquiries about the program and other heritage-related questions. In 2010, there were approximately 35 new inquires (Note1) from property owners requesting information on the City of Kelowna Heritage Grants Program. Some of these inquiries lead to CoKHGP applications. Many people either do not end up applying or apply for a grant at a later date. With the various ways that the CoKHGP has been promoted to the public and specifically to Heritage Register Building Owners, we have seen a continued interest in the program. A significant portion of the Manager's time is used to set up and update files on each inquiry by building address.

(Note1: Each inquiry usually requires at least two to three (and sometimes even more) phone calls, e-mails and even meetings to answer the various questions and concerns.)

Planning, Meetings and Reports: A significant amount of the manager's time has gone into organizing the year, meetings with the COHS executive director and city staff, and compiling the yearend report to the city.

Committee Communications: The manager regularly passes on information to the grants committee on heritage events, workshops, forums, issues, etc. in Kelowna, the Okanagan, and BC.

Volunteer Appreciation Event: The COHS board and the grants committee got together for a pot luck dinner at Reid Hall in November. The COHS board president thanked the grants committee for their hard work and dedication to the program.

"Getting the Word Out": There were a number of opportunities to get out the word about the grant program in 2010. These activities included:

*The COHS executive director, Janice Henry, spoke about the grant program and showed a power point presentation (created by the program manager) at the COHS AGM in February 2010 during Heritage Week. (Note2)

* Janice Henry also showed the power point presentation on the grant program to City Council in February, along with thanking council for their continued support for heritage grants in Kelowna.

*The media published a couple of articles in the local papers following the COHS AGM and the City Council presentation during Heritage Week.

*Submitted articles on the grant program for the two COHS Newsletters and to Kelowna's Neighbourhood Associations for their newsletters, including KSAN, Rutland, and FRACHAS.

*For the third year, a letter about the grant program was sent out in March to each building on the heritage register.

*The manager, the committee, the COHS executive director, and the COHS Board took every opportunity to let the public know about the grants program. Opportunities included: Heritage BC conference in June (Note3); Society of Architectural Historians, Marion Dean Ross/Pacific Northwest Chapter Conference held in October (Note4); Harmonies for Heritage COHS Fundraiser held at the end of October.

*On the COHS website, there is a link to the City of Kelowna website and the CoKHGP guidelines and application form.

(Note2: 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.)

(Note3: The grant program has not renewed its membership in Heritage BC or with the Heritage Canada Foundation, due to funding cuts, however, the program still does receive the Heritage BC e-mails through COHS' membership)

(Note4: The grant committee and manager continue to take part in heritage conferences and workshops at their own financial and time costs. Two committee members attended the Heritage BC conference in Victoria in June. There were five committee members and the manager who took part in the Architectural Historian Conference in Kelowna in October. Four committee members and the manager also attended the City Heritage Conservation Workshop presented by Berdine Jonkers, BC Heritage Branch, in November. The committee continues to be very active heritage advocates in Kelowna, which is a huge benefit to the grants program).

Conclusion:

As the manager of the City of Kelowna Heritage Grants Program, I wish to acknowledge and thank the CoKHGP 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 to undertake heritage conservation projects and maintain their heritage buildings. It is worth noting that the financial reserves built up by the Kelowna Heritage Foundation, has now been fully allocated. The conservation of built heritage and the awareness of our past benefit the community in many ways.

"Caring for heritage buildings can contribute directly to wider sustainable development goals, through delivering economic, social, and environmental benefits." (Kate Clark, Only Connect –Sustainable Development and Cultural Heritage)

Respectively Submitted,

Lorri Dauncey, manager, CoKHGP

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

Recommendations to the CoKHGP for 2011

There are a number of recommendations that have been made by the CoKHGP committee, Lorri Dauncey the program manager and Janice Henry COHS executive director. These are recorded here for consideration.

Revised CoKHGP Guidelines and Application form in 2010:

The grants committee and the manager spent a considerable time in 2009 on recommendations for revisions to the guidelines and the application form that was used by the grant program in 2008 and 2009. However when the program was continued in 2010, the committee did not have an opportunity to have input into the new revised guidelines and form. In general, the committee found the guidelines and application to be more streamlined, clear, and useable by the public. However, there are a number of changes that are recommended for 2011. These include the following:

*Under the "Grants" section, a maximum grant (depending if designated or not) in a five (5) year period has been implemented. The committee is not against a time period, however feels that five (5) years is too long, as this will negatively affect the number of grants received in the future and will not allow building owners who have significant conservation work to have real help with their heritage buildings.

It should also be noted that in the past three years there have been a number of Heritage Register building owners that 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 CoKHGP. Therefore, it is recommended that consideration be given to reducing the five (5) year time period to three (3) years and/or increase the maximum grant from \$5,000 to \$7,000 for properties on the heritage register and from \$10,000 to \$14,000 for heritage designated properties.

* Under the "Grants for Exterior Conservation Work" section, a maximum grant of \$2,500 for painting has been implemented. The committee felt that this maximum should be raised to \$3,500, due to the higher costs of having the wood siding, windows, trims, and fascia boards properly prepped and painted, in order to maintain a heritage building (and many times simple wood repair work is necessary- which is usually in the cost of the quote for painting the exterior of the building)

*Under "Grants for Exterior Conservation Work" section, the term 'window and door replacement' is used. Window and door replacement is also used in the Administration section point number 4. This implies that the program will pay for the replacement of windows and doors, instead of the repair and/or restoration of these character-defining elements (as identified in many of Kelowna's Heritage Register SOS). According to Parks Canada's **Standards and Guidelines for the Conservation of Historic Places in Canada**, character-defining elements are repaired and only replaced if not repairable.

Standard #1 - Conserve the heritage value of a historic place. Do not remove, replace, or substantially alter its intact or repairable character-defining elements.

Standard #8 -Maintain character-defining elements on an ongoing basis. Repair character-defining elements by reinforcing their materials using recognized conservation methods. Replace in kind any extensively deteriorated or missing parts of character-defining elements, where there are surviving prototypes.

The COKHGP guidelines should use the term ***window and door maintenance, repair or restoration*** instead of replacement. Wood storm windows may also be included as the use of storm windows provides protection from the elements for the original windows and create a double pane window to help with heat loss. This is a better choice than sealed thermal units, which have a short lifespan and are not an efficient replacement option to original wood windows with the use of storms.


These are the major points in the program guidelines that should be addressed as soon as possible.

Letter to City of Kelowna Heritage Register Building owners:

The committee felt that the COHS address should be included in the letter. The committee also thought that it could encourage new applicants to apply, by including a list of the properties that have received a grant since the program began three years ago. The committee was also very pleased that city staff will provide the manager with the registered owner's names and address for the annual mail out, instead of a general mail out to each heritage register property address.

City of Kelowna Website:

The grant program information (PDF of CoKHGP Guidelines and Application Form) was put on the city of Kelowna website in 2010. There were changes needed, as the program was still referred to as the Kelowna Heritage Foundation. A list of these changes was sent to the program contact at the city early in 2010. It does not appear that all the changes were made. In the **Heritage Management** section, the KHF does not exist, and COHS manages the program, as well the grants are no longer for education and awareness projects. It is recommended that this section be updated as soon as possible.

The City also annually allocates funds to the Kelowna Heritage Foundation, which is a registered society that provides grants to homeowners for heritage restoration and education/awareness projects. To view the grant guidelines and application form, see the [Heritage Grants Program](#)  package.

Heritage Conservation Workshop:

It is recommended that the grants program organize a training workshop for heritage building owners at the end of 2011 or in 2012. There is a need for this type of opportunity for heritage building owners and other interested persons in Kelowna. This would continue the tradition of the Kelowna Heritage Foundation, who would host periodic workshops. There is funding assistance available through Heritage BC and the HBC Workshop Program.

A maximum of \$2,000 is available per award, one award per year. Funds are provided for the professional fee and return travel expenses of a workshop leader. The maximum support for the professional fee is \$750. When travel time is extensive, involving an overnight stay for example, there is an additional allowance of up to \$250. All other costs are the responsibility of the applicant.

There would be additional costs, which may be partially recovered through a registration fee.

Increase Allotment Grant:

The committee recommends that the annual allotment should continue to increase each year until it reaches \$50,000, the amount recommended and approved in the updated 2007/2008 Heritage Strategy by Donald Luxton. The program started with \$20,000 from 1991 until 2009. The amount was increased to \$30,000 in 2010. The last two years have shown that there is a demand for the grant money and that the program has the potential to continue to grow each year.

**Appendix 1: City of Kelowna Heritage Grants Program Approved Applications 2007-2010
Updated December 2010**

Previously Approved Projects by the KHF (November 2007)

H07-103:	1842 Abbott Street	\$5,000	Completed
H07-107:	721 Bernard Ave (First United Church)	\$4,700	Completed
H07-104:	2128 Leckie PI (Fleming House/Brent's Mill)	\$10,000	Completed

2007 TOTAL GRANTS ALLOTTED AND PAID OUT: \$19,700

2008 Approved Projects:

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 th B-Day Party	\$1,000	Completed
H08-105:	763 Bernard Street	\$5,000	Completed
H08-106:	1024 Rutland Road	\$1,500	Completed
H08-107:	OHS Online Index for Society Reports	\$1,500	Completed

2008 TOTAL GRANTS ALLOTTED AND PAID OUT: \$18,250.40

2009 Approved Projects:

H09-201	274 Bernard Avenue	\$2,772	Completed
H09-202	228 Lake Avenue	\$2,977	Completed
H09-203	1049 Borden Avenue	n/a	DECLINED
H09-204	368 Cadder Avenue (\$2,700 approved; 411 saved)	\$2,289	Completed
H09-205	1912 Abbott Street	\$3,037	Completed
H09-206	1056-1060 Cameron Avenue	\$5,388	Completed
H09-207	730 Lawson Avenue (\$2,363 approved; 457 saved)	\$1,906	Completed (2010)
H09-208	1825 Richter Street	\$5,000	Completed
H09-209	795 Lawrence Avenue	\$1,153	Completed
H09-210	3685 Benvoulin Road (Mission Caretaker's Quarters)	\$2,835	Completed
H09-211	4870 Chute Lake Road (Mallam Barn)	\$5,000	Extension Granted
H09-212	228 Vimy Avenue	\$5,000	Completed
H09-213	1815 Maple Street (\$1,944 approved; 760 saved)	\$1,184	Completed (2010)
H09-214	4464 Lakeshore Road (\$2,541 approved; 59 saved)	\$2,482	Completed
H09-215	845 Lawrence Avenue	\$735	Completed
H09-216	1842 Abbott Street (\$2,403 approved; 1010 saved)	\$1,393	Completed (2010)
H09-217	COHS Heritage Fall Fair	n/a	WITHDRAWN
H09-218	2079 Pandosy Street	\$3,465	Completed
H09-219	Father Pandosy Mission 150 th Birthday Celebration	\$1,600	Completed

2009 TOTAL GRANTS ALLOTTED:	\$50,913*
*(\$48,216 adjusted total of grants allotted; as \$2,697 saved when paid out)	-\$2,697
2009 TOTAL GRANTS PAID OUT (by December 2010):	<u>-\$43,216</u>
2009 TOTAL GRANTS STILL TO BE PAID OUT:	\$5,000

2010 Approved Projects:

H10-301	757 Lawrence Avenue	(\$1,250 approved; 368 saved)	\$882	Completed
H10-302	250 Leathead Road		\$5,000	
H10-303	1788 Ethel Street		\$2,250	
H10-304	2124 Pandosy Street		\$1,800	
H10-305	710 Sutherland Avenue		\$2,500	
H10-306	2034 Pandosy Street		\$ 325	Completed
H10-307	567 Okanagan Boulevard	(\$3,250 approved; saved 680)	\$2,570	Completed
H10-308	3685 Benvoulin Road		\$6,187	Completed
H10-309	4193 Gordon Drive		\$4,682.50	Completed
H10-310	1852 Water Street		\$5,000	
H10-311	1826 Maple Street		\$1,000	Completed
H10-312	858 Lawrence Avenue		n/a	DECLINED
H10-313	429 Park Avenue		\$5,000	


2010 TOTAL GRANTS ALLOTTED:	\$38,244.50*
*(\$37,196.50 adjusted total of grants allotted; as \$1,048 saved when paid out)	-\$1,048
2010 TOTAL GRANTS PAID OUT (by December 2010):	<u>-\$15,646.50</u>
2010 TOTAL GRANTS STILL TO BE PAID OUT:	\$21,550


For the calendar year 2010, \$38,921 was available for grant distribution. (This includes the \$30,000 allocation, interest in 2009, and any rollover from previous years). A total of \$38,244.50 was allocated in grants to heritage register property owners.

CITY OF KELOWNA HERITAGE GRANTS PROGRAM (CoKHGP)



THE BENEFITS COHS PROVIDES BY MANAGING THE CITY OF KELOWNA HERITAGE GRANTS PROGRAM

- **Fourth year administering the program**
 - **Grants Manager is a heritage consultant**
 - **Grants Committee is comprised of a select group of heritage specialists**
- 

- **Four Committee meetings a year**
 - **Committee members keep up to date on heritage issues in Kelowna, British Columbia and Canada**
 - **Answering inquires on heritage matters**
 - **Advocates for the program**
- 

GETTING THE WORD OUT

- **Annual mail out to Heritage Register building owners**
- **City Council presentation**
- **COHS AGM display**
- **COHS newsletters**
- **Kelowna Residential Associations'**
- **City of Kelowna Website**
- **Promoted at local heritage events**

GRANTS APPROVED 2008 - 2010

Total Approved Grants 2008	\$18,250
Total Approved Grants 2009	\$50,913
<u>Total Approved Grants 2010</u>	<u>\$38,244.50</u>
TOTAL APPROVED GRANTS 2008-1010	\$107,407.50

757 Lawrence Avenue - Meikle House

\$882 (new paint) Completed



250 Leathead Road- Dudgeon Farm House
\$5,000 (new roof, paint and gutters)



1788 Ethel Street – McGregor House

\$2,250 (new paint)



2124 Pandosy Street – Cadder House

\$1,800 (wood repair, paint)



710 Sutherland Avenue – McTavish House

\$2,500 (new paint)



2034 Pandosy Street – Dr. Shepherd House

\$325 (roof repairs) Completed



567 Okanagan Boulevard – NE Prototype #1

\$2,570 (wood repairs, paint) Completed



3685 Benvoulin Road
Father Pandosy Mission Barn
\$6,187 (new roof) Completed



4193 Gordon Drive –Thomson Farm House
\$4,682.50 (three sets of new storm windows)
Completed



1852 Water Street – Lewis Residence

\$5,000 (repair foundation)



1826 Maple Street –Brown House

\$1,000 (new paint) Completed



429 Park Avenue – Reekie House
\$5,000 (new roof)



CITY OF KELOWNA HERITAGE GRANTS PROGRAM (CoKHGP)

