

## CITY of KELOWNA HERITAGE GRANTS PROGRAM

### Annual Report: 2011

The City of Kelowna Heritage Grants Program (CoKHGP) is completing its fourth year under the management of the Central Okanagan Heritage Society (COHS). During this period, the mandate of the program has become focused primarily on informing the public about the program, administering the application process 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 committee is composed of five regular members and a maximum of five 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 2011 CoKHGP committee members.

Janet Digby, <i>Committee Chair</i>	(Architect)
Lorraine McLarty, <i>COHS Board Representative</i>	(Retired Health Administrator, Heritage Advocate)
Peter Chataway	(Building Designer, Heritage Advocate)
Marietta Lightbody	(Local Historian, Heritage Advocate)
Alasdair Smith (until September 2011)	(Heritage Builder, Contractor)
Ian Crichton (November 2011, replaced Alasdair Smith)	(Retired Carpenter, Heritage Building Owner)
Lorri Dauncey, <i>program manager, non-voting</i>	(Heritage Conservation Consultant)
Ben Lee, alternate	(Founding KHF member, Retired City Councilor)
Gordon Hartley, alternate	(Retired Architect, Past Heritage BC board member)

Julie Cosgrave, alternate  
R.J. Bennett, alternate  
Bill Scutt, alternate

(Writer, Heritage Advocate)  
(Founding KHF member, Retired Developer)  
(Local Developer, Heritage Building Owner)

**Grant Summary:**

The City of Kelowna Heritage Grants program committee had four regular meetings (*Refer to: Attached CoKHGP Regular Meeting Minutes for 2011*) to review grant applications for heritage register buildings. During 2011, the grant committee approved fifteen (15) heritage grants for a total of \$47,764.89. There were two (2) grant applications that were declined a grant. There was one grant that will be brought to the first meeting in 2012, due to lack of funds left at the November 2011 meeting. Grants ranged from \$1,136.50 to \$5,000.

A compilation of figures on the CoKHGP approved, declined and withdrawn grant applications for 2007 (Kelowna Heritage Foundation), 2008, 2009, 2010 and 2011 is provided. (*Refer to: Appendix 1: City of Kelowna Heritage Grants Program Approved Applications 2007-2011*)

**Grants Requests Reviewed ~ 2011**

379 Park Avenue

Declined

A grant request towards the replacement of all the original wood windows and storms (in good to very good condition) with new double-glazed wood windows on the G. L. Dore House was declined at the April 5<sup>th</sup> meeting.

2796 KLO Road

Active

A grant towards the repair, prep and painting of the exterior of the KLO House was approved at the April 5<sup>th</sup> meeting.

4856 Lakeshore Road

Completed

A grant for a new asphalt shingle roof on the Second Mallam house was approved at the April 5<sup>th</sup> meeting.

732 Dehart Avenue

Active

A grant towards the prep and painting of the front porch, for the installation of new eaves troughs and new wood storm windows on the main floor of the Pettigrew house, a municipally designated heritage building, was approved at the April 5<sup>th</sup> meeting.

2704 East Kelowna Road

Active

A grant towards a new asphalt shingle roof on the East Kelowna Community Hall was approved at the April 5<sup>th</sup> meeting.

3685 Benvoulin Road

Active

A grant towards a new cedar shake roof (shakes treated with fire retardant as in a fire interface area) on the McDougall House, a provincially designated heritage building, on the Father Pandosy Mission Site was approved at the April 5<sup>th</sup> meeting.

429 Park Avenue

Active

A grant for a new asphalt shingle roof on the Reekie house was approved at the April 5<sup>th</sup> meeting.

2083 Abbott Street

Active

A grant towards the repair of the front concrete entry steps and painting the existing wood windows and storms, building trims and fascia boards on the Abbott Street house was approved at the April 5<sup>th</sup> meeting.

228 Vimy Avenue

Completed

A grant for a new cedar shingle roof on the Fumerton Residence was approved at the April 5<sup>th</sup> meeting. Subsequent to the original approval, the homeowner requested a change in roof materials from cedar shingles to asphalt shingles, which was approved at the June 21<sup>st</sup> meeting.

732 Sutherland Avenue

Completed

A grant towards the repair, prep and painting of the exterior of the Coubrough House was approved at the April 5<sup>th</sup> meeting.

732 Sutherland Avenue

Active

A grant towards the leveling and the new concrete foundation for both the front enclosed porch and the rear sleeping porch on the Coubrough House was approved at the June 21<sup>st</sup> meeting. The homeowner requested a modification in the grant approval which would include the front porch only. This change was approved at the September 13<sup>th</sup> meeting.

768 Dehart Avenue

Active

A grant towards the repair, prep and painting of the exterior of the E. D. Alexander House was approved at the September 13<sup>th</sup> meeting.

1869 Maple Street

Active

A grant for a new asphalt shingle roof on the MacLean House was approved at the September 13<sup>th</sup> meeting.

732 Sutherland Avenue

Active

A grant towards new stairs and a landing area off the front enclosed porch and new storm windows on the Coubrough House was approved at the September 13<sup>th</sup> meeting.

2319 Pandosy Street

Active

A grant towards the repair, prep and painting of the exterior of the Pandosy Street house was approved at the November 15<sup>th</sup> meeting.

1852 Water Street

Declined

A grant request towards a new asphalt shingle roof and the replacement of the stucco siding with new Hardi lap siding on the Lewis Residence was declined at the November 15<sup>th</sup> meeting, as the project did not fall within the program's heritage conservation and maintenance objectives.

334 Beach Avenue

Active

A grant towards the replacement of the two badly deteriorated front dormer windows on the Cummings House was approved at the November 15<sup>th</sup> meeting.

702 Bernard Avenue

Deferred to 2012

A grant towards the repair, prep and painting of the exterior of the Christ Evangelical Lutheran Church (now known as the Centre Cultural Francophone) was deferred to the first meeting in 2012, due to lack of funds available.

### **Changes to the City of Kelowna Heritage Grants Program in response to the recommendations in the 2010 Year-end Report:**

#### ***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 were recommended in the 2010 Year-end Report by the manger and the committee, after a year of using the new document. A number of the recommendations were once again addressed at a follow-up meeting in June 2011 with city planning staff. These changes to the guideline and application form were implemented at the end of August 2011. These changes include the following:

***\*The maximum grant in a five (5) year period was reduced to a three (3) year period.*** This will help heritage register building owners, who have significant conservation work with their heritage buildings. By reducing the time period from five to three years, this will also help building owners with on-going maintenance of their heritage buildings and therefore will help owners take better care of their buildings. This will help to ensure the preservation of Kelowna's built environment and meet the objectives of the grant program.

***\* The maximum grant of \$2,500 per application for prep and painting has been removed.*** The only grant limit is the original \$5,000 maximum grant amount within three years for heritage register buildings or \$10,000 maximum grant amount for designated heritage buildings. This limit was a detriment to both larger buildings and to buildings that may not have been properly maintained and require significant prep and repair work.

***\*Changing the term 'window and door replacement' to window and door conservation to avoid any misinterpretation of intent.*** Replacement implies that the program will help fund 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.***

#### ***Annual Letter to City of Kelowna Heritage Register Building owners***

The committee and manager recommended that the annual letter send to heritage register building owners should be sent directly to them (name and home address), as a number of the letters sent out in previous years never made it to the building owners. In the 2011 mail-out (January 2010), city staff provided mailing labels with the building owner's name and address, envelopes and copies of the letter. The committee also felt that a list of properties that received a grant (since the inception of the revised program) should be included in the mail-out. The committee thought that this would encourage new applicants to apply. The success of these two changes may be seen in the large response in inquiries and applications at the first meeting in 2011 and in the year in general.

#### ***City of Kelowna Website***

The grant program information (i.e. PDF of CoKHGP Guidelines and application form and program information) was put on the city of Kelowna website in 2010, after the CoKHGP's website was removed. There was erroneous information on the city website that was noted in the 2010 Year-end Report and recommended that these changes be made as soon as possible. After much follow up by both the COHS executive director and the grants program manager, these changes were completed in the spring of 2011.

#### ***Heritage Conservation Workshop***

The 2010 Year-End Report recommended that the grants program manager (with the committee input) organize a training workshop for heritage building owners at the end of 2011 or in 2012. It was felt that there was a need for this type of opportunity for heritage building owners and other interested persons in Kelowna. This would also continue the tradition of the Kelowna Heritage Foundation, who would periodically host workshops. Even though this activity was no longer funded directly by the heritage grants program, it was strongly encouraged by some city councilors and the mayor during Heritage Week events in 2011. The heritage grants manager and the committee along with the COHS executive

director and board, decided to apply for a Heritage BC Workshop grant in order to put on a heritage workshop in the fall of 2011. (Refer to: **CoKHGP Manager and Committee Activities** for further information on the workshop)

### **CoKHGP Manager and Committee Activities:**

#### ***Committee Meetings and Follow up***

There were four *Regular Meetings in 2011* (April 5, June 21, September 13 and November 15) to consider grant applications and other program business. A significant amount of the manager's time was spent preparing for each meeting (agenda, gathering up material and applications, ensuring 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 new committee members were needed in 2011, the manager sought out possible new members, which proved to be a time consuming task. A new COHS board representative (Lorraine McLarty) was appointed for 2011. A returning grants committee member (Julie Cosgrave) became an alternate member in the spring. A second committee member (Alastair Smith) left Kelowna at the end of August and was replaced with a new member (Ian Crichton) in October. There were five regular members and four to five alternate members of the committee during 2011.

#### ***Financials***

The manager pulled together a review of the Grant Program's allotted funds prior to each meeting for the Grants Committee's information. This review indicated how much money had been allocated and how much was left for the rest of the year. City planning staff requested an *Estimate of Grant Requests and Grant Approvals from the CoKHGP* in June 2011. This information has been updated and included in this report. (Refer to: Appendix 2: Estimate of Grant Requests and Grant Approvals for the CoKHGP City of Kelowna 2009-2011)

#### ***Program and Heritage Inquiries***

The manager spent a significant amount of time each month answering e-mail and telephone inquiries about the grant program, new applications, approved applications and other heritage-related questions. In 2011, there were approximately 45 inquiries (Note1) from property owners requesting information on the City of Kelowna Heritage Grants Program and/or other heritage related questions. 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 many even more) phone calls, e-mails and even meetings to answer the various questions and concerns.)

### ***Applications Process***

The manager spends a significant amount of time with people interested in applying for a heritage grant (some of which end up submitting an application, while others don't or do so at a later time). This process includes many emails and/or phone calls back and forth to ensure that all the criteria have been met. Like anything, there are some applications that go fairly smoothly and only require a minimum of work, while others require a lot of time and follow-up.

### ***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 year-end 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.

### ***Putting on a Heritage Conservation Workshop***

The workshop entitled, *Wood Windows: A Balancing Act*, was organized during 2011. Even though there no longer was money available in the grants program to put on a community heritage conservation workshop, it was felt that this was an important initiative to follow up on. In partnership with COHS, the manager applied for a workshop grant from Heritage BC. The application was successful and was the last workshop in BC to be funded, as the program was cut (due to financial cutbacks) after the approval in June 2011. The workshop, which took place on October 30, was a very successful, well-attended educational community event in Kelowna. (Refer to: Appendix 3: Excerpt from Wood Windows: A Balancing Act Workshop Report)

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

There were a number of opportunities to get out the word about the grant program in 2011. These activities included the following:

\*For the fourth year, a letter about the grant program was sent out to each building (owner in 2011) on the heritage register. The mail out was completed in late January 2011, earlier than in previous years.

\* Janet Digby, the grant committee chair, gave a power point presentation (created by the program manager) on the grant program to City Council in February, along with thanking council for their continued support for heritage grants in Kelowna. A number of committee members attended the council meeting to show their support.

\*The COHS executive director, Janice Henry, spoke about the grant program at the COHS ~ AGM in February 2011 during Heritage Week. (Note2)

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

\*Submitted press releases and paid advertising on the Wood Window Workshop (October 2011), which included recognizing the support from the grants program (city of Kelowna logo), COHS and Heritage BC.

\*Articles on the heritage grants program were included in the two COHS newsletters.

\*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: Kelowna Fusion Festival in August; Heritage BC conference in September (Note 3 & 4); Wood Windows: A Balancing Act Workshop; the three fundraisers for COHS

\*On the COHS website, there is a link to the City of Kelowna website and the CoKHGP guidelines and application form. In 2011, a page on the COHS website, has been dedicated to information about the grants program.

(Note 2: 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.)

(Note 3: 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.)

(Note 4: The grant committee and manager continue to take part in heritage conferences and workshops on their own time and own expense. Two committee members attended the Heritage BC conference in Burnaby in September. Five committee members attended the Wood Window Workshop at the end of October. The committee continues to be very active heritage advocates in Kelowna, which is a huge benefit to the grants program.)

### **Recommendations for the Program ~ 2012:**

The main recommendation of the CoKHGP committee members, Lorri Dauncey the program manager and Janice Henry COHS executive director is to continue to increase the allotment grant until it reaches the amount recommended in the *2007/2008 Heritage Strategy*. The committee recommends that the annual allotment continue to increase each year until it reaches \$50,000. The program began in 1991 with \$20,000 an amount that remained unchanged till 2009. The amount was increased to \$30,000 in 2010. The last three 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.

### **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.



The conservation of built heritage and the awareness of our past benefit the community in many ways. The following quotes, by Richard Moe, president of the National Trust for Historic Preservation, are on the Government of BC Website, in the introduction to heritage and sustainability.

"It makes no sense for us to recycle newsprint and bottles and aluminum cans while we're throwing away buildings and sometimes even entire neighborhoods. Historic buildings are inherently sustainable. The preservation of these buildings is extremely important to curbing climate change and other negative impacts on the environment. Consider this statement by architect Carl Elefante: *the greenest building is the one that is already built*. We need to think differently about green building. We can't build our way out of the global warming crisis. We have to conserve our way out. This means we have to make better, wiser use of what we've already built."... "The responsible and respectful rehabilitation of buildings and neighbourhoods will lead to vibrant and sustainable communities."

(Source: [http://www.for.gov.bc.ca/heritage/sustainability/sust\\_intro.htm](http://www.for.gov.bc.ca/heritage/sustainability/sust_intro.htm))

Respectively Submitted,

Lorri Dauncey, manager, CoKHGP

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

## Appendix 1: City of Kelowna Heritage Grants Program Approved Applications 2007-2011

Updated December 2011

### 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 Pl (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 <sup>th</sup> 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
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	RESCINDED (June '11)
H09-212	228 Vimy Avenue	\$5,000	Completed
H09-213	1815 Maple Street (\$1,944 approved; 760 saved)	\$1,184	Completed
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
H09-217	COHS Heritage Fall Fair	n/a	WITHDRAWN (Oct '09)
H09-218	2079 Pandosy Street	\$3,465	Completed
H09-219	Father Pandosy Mission 150 <sup>th</sup> Birthday Celebration	\$1,600	Completed

<b>2009 TOTAL GRANTS ALLOTTED:</b>	<b>\$50,913*</b>
*( <u>\$43,216</u> adjusted total of grants allotted; as \$2,697 saved when paid out)	<b>-\$2,697</b>
<b>2009 TOTAL GRANTS RESCINDED:</b>	<b>-\$5,000</b>
<b>2009 TOTAL GRANTS PAID OUT (by November 2010):</b>	<b><u>-\$43,216</u></b>
<b>2009 TOTAL GRANTS STILL TO BE PAID OUT:</b>	<b>\$0</b>

**2010 Approved Projects:**

H10-301	757 Lawrence Avenue	(\$1,250 approved; 368 saved)	\$882	Completed
H10-302	250 Leathead Road		\$5,000	Extension granted (Nov '12)
H10-303	1788 Ethel Street		\$2,250	RESCINDED (June '11)
H10-304	2124 Pandosy Street		\$1,800	Extension granted (June '12)
H10-305	710 Sutherland Avenue		\$2,500	Extension granted (June '12)
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	RESCINDED (June '11)
H10-311	1826 Maple Street		\$1,000	Completed
H10-312	858 Lawrence Avenue		n/a	DECLINED
H10-313	429 Park Avenue		\$5,000	RESCINDED (June '11)

<b>2010 TOTAL GRANTS ALLOTTED:</b>	<b>\$38,244.50*</b>
*( <u>\$37,196.50</u> adjusted total of grants allotted; as \$1,048 saved when paid out)	<b>-\$1,048</b>
<b>2010 TOTAL GRANTS RESCINDED:</b>	<b>-\$12,250</b>
<b>2010 TOTAL GRANTS PAID OUT (by December 2011):</b>	<b><u>-\$15,646.50</u></b>
<b>2010 TOTAL GRANTS STILL TO BE PAID OUT:</b>	<b>\$9,300</b>

*For the calendar year 2010, \$38,921 was available for grant distribution. (This included 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.*

**2011 Approved Projects:**

H11-401	379 Park Avenue		n/a	DECLINED
H11-402	2796 KLO Road		\$2,500	
H11-403	4856 Lakeshore Road		\$5,000	Completed (Sept '11)
H11-404	732 Dehart Avenue		\$2,125	
H11-405	2704 East Kelowna Road		\$5,000	
H11-406	3685 Benvoulin Road- McDougall House		\$3,000	
H11-407	429 Park Avenue		\$4,800	
H11-408	2083 Abbott Street		\$5,000	
H11-409	228 Vimy Avenue	(original approval \$5,000 Apr'11)	\$2,182	Completed (Nov '11)
H11-410	732 Sutherland Avenue	(\$2,500 approved; saved 27.89)	\$2,472.11	Completed (June '11)
H11-411	732 Sutherland Avenue	(original approval \$2,030 Jun'11)	\$1,136.50	
H11-412	768 Dehart Avenue		\$3,100	
H11-413	1869 Maple Street		\$4,500	
H11-414	732 Sutherland Avenue		\$1,391.39	
H11-415	2139 Pandosy Street		\$3,790	
H11-416	1852 Water Street		n/a	DECLINED
H11-417	334 Beach Avenue		\$1,740	
H11-418	702 Bernard Avenue		n/a	MOVED TO 2012 (not enough funds left for full grant amount)

<b>2011 TOTAL GRANTS ALLOTTED:</b>	<b>\$47,764.89*</b>
* (\$47,737 adjusted total of grants allotted; as \$27.89 saved when paid out)	<b>-\$27.89</b>
<b>2011 TOTAL GRANTS PAID OUT (December 2011):</b>	<b><u>-\$9,654.11</u></b>
<b>2011 TOTAL GRANTS STILL TO BE PAID OUT:</b>	<b>\$38,082.89</b>

*For the calendar year 2011, \$49,551.33 was available for grant distribution. (This included the \$30,000 allocation, interest in 2010, \$17,250 in rescinded grant and any rollover from previous years). A total of \$47,764.89 was allocated in grants to heritage register property owners.*

<b>TOTAL GRANT MONEY AVAILABLE to be ALLOCATED IN 2011 (adjusted July '11)</b>	<b>\$49,551.33</b>
<b>TOTAL GRANT MONEY ALLOCATED IN 2011 (adjusted Dec '11)</b>	<b>\$47,764.89</b>
<b>TOTAL GRANT MONEY NOT ALLOCATED IN 2011</b>	<b>\$1,786.44</b>

**Appendix 2: Estimate of Grant Requests and Grant Approvals for the CoKHGP  
City of Kelowna 2009-2011** **Updated December 2011**

I have compiled an estimate of the amount of the grant requests, based on the highest quote submitted. This is the maximum amount that could have been awarded, if the committee had based their decision on the highest quote. The grant committee usually gives a grant based on the lowest or the mid-quote (if there are more than two quotes submitted), unless there is a good reason to go with the higher bid. I have also included the declined and withdrawn requests.

**2009 Requests (\$20,000 annual allotment and surplus/rollover)**

Number of Grants Received:	19
Approved Grant Total:	\$50,913
<b>Grant Request Total:</b>	<b>\$78,500 (Based on highest quote)</b>
Declined & Withdrawn Requests:	\$6,500 (Included in requests total)

**2010 Requests (\$30,000 annual allotment and surplus/rollover)**

Number of Grants Received:	13
Approved Grant Total:	\$38,244.50
<b>Grant Request Total:</b>	<b>\$45,600 (Based on highest quote)</b>
Declined Requests:	\$5,000 (Included in requests total)

**2011 Requests as of November Meeting (\$30,000 annual allotment and surplus/rollover)**

TOTAL GRANT MONEY TO BE ALLOCATED IN 2011	\$49,551.33 (increased due to 3 grants being rescinded in April and June 2011)
Number of Grants Received:	18
Approved Grant Total:	\$47,764.89
<b>Grant Request Total:</b>	<b>\$73,601.39 (Based on highest quote and deferred request)**</b>
Declined Requests:	\$10,000 (Included in requests total)

\*\*Note: (The grant request total would have increased by \$5,000 and the approved grants may have also increased by this amount if there was not a \$2,500 maximum for paint grants in effect at the April and June meetings. The \$2,500 paint maximum was removed in August 2011.)

### **Appendix 3: Wood Windows: A Balancing Act Workshop Report (Submitted to Heritage BC in November 2011 as part of grant completion process)**

In June 2011, the Central Okanagan Heritage Society (COHS), along with the City of Kelowna Heritage Grants Program (CoKHGP), received approval for a grant to put on a heritage window workshop. With this funding, the society and grants program were able to bring Jim Stiven, Principal of Vintage Woodworks in from Victoria. This workshop was timely in Kelowna, as many heritage and older buildings are having their original wood windows removed and replaced with new double-glazed window units as part of building renovation projects. Many of these wood windows are in good condition and likely could have been repaired and been used in conjunction with storm windows. The workshop was a good opportunity to bring together building owners, contractors, craftsmen and other interested persons to learn what is appropriate for a heritage building and how to do repairs with a number of hands-on demonstrations.

The workshop took place on Saturday, October 29<sup>th</sup>, 2011 from 9:00 am – 3:30 pm (Jim stayed until 4:30 answering questions). The lecture style section took place in Reid Hall in the Benvoulin Heritage Park (COHS's site and buildings). The window demonstration took place at the McIver House (located behind the hall, on the Benvoulin site). The church and hall's windows were also used as part of the hands on approach. The cost was \$35 a person (\$20 for COHS members) which covered some of the additional expenses; such as advertising, the use of the hall, the two coffee breaks, etc.

The workshop was well attended. There were 26 registered for the course (the maximum number for the space and the number of people Jim Stiven felt would work for the workshop). Participants included: local contractors, carpenters, heritage home/building owners, Central Okanagan Regional District staff (who look after their own heritage properties), COHS staff and board members and CoKHGP committee members. The informal feedback that was received was all positive. The participants had a very good experience and many would like to take part in another workshop of this caliber. Even those of us who did not understand all the technical parts, gained a good general knowledge of the workings of wood windows and their importance to a heritage building.

The workshop was advertised in both of the local papers (Daily Courier and the Capital News) as well as on a number of on-line sites that promote local events. The Capital News also picked up the press release on the workshop and did an article. The workshop information was emailed out a couple of times to the COHS membership (included a large complimentary membership - such as all of the local city councilors in Kelowna, West Kelowna, Peachland and Lake Country and other special interest groups) and to building owners on the Kelowna Heritage Register to which we had email addresses for. All of the advertising included the Heritage BC logo and acknowledgement of the grant received to make the workshop possible.

## **CITY OF KELOWNA HERITAGE GRANTS PROGRAM (CoKHGP)**



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

- Expertise in administration (5<sup>th</sup> year)
- 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
- Promoters of the program

## **GETTING THE WORD OUT**

- Annual mail out to Heritage Register building owners
- City Council presentation
- COHS AGM display and during other COHS events throughout the year
- COHS newsletters
- Kelowna Residential Associations'
- City of Kelowna Website and COHS Website
- Promoted at heritage events (i.e. wood window workshop & Heritage BC conference)
- Press releases & paid advertising on the Workshop, which included recognizing the support from the grants program (city of Kelowna logo), COHS and Heritage BC.

**TOTAL GRANTS APPROVED  
2008 - 2011**

TOTAL APPROVED GRANTS 2008-2011	\$155,172
Total Grants Paid Out	\$86,760
Grants Outstanding	<u>+ \$47,383</u>
<b>TOTAL</b>	<b>\$134,143*</b>

\*\$21,029 DIFFERENCE: due to grants rescinded & grant savings

**2796 KLO Road  
\$2,500 (prep & paint)**

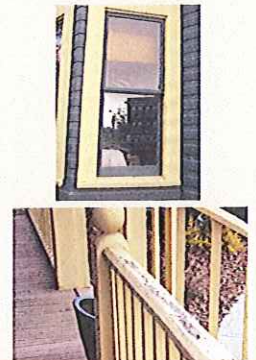


**4856 Lakeshore Road  
\$5,000 (new roof) Completed**



**732 Dehart Avenue**

**\$2,125 (paint, eaves troughs & storm windows)**





**2704 East Kelowna Road-**  
**East Kelowna Community Hall**  
**\$5,000** (new roof)



**3685 Benvoulin Road**  
**Father Pandosy Mission McDougall House**  
**\$3,000** (new roof)



**429 Park Avenue**  
**\$4,800** (new roof)



**2083 Abbott Street**  
**\$5,000** (repair of front steps & paint)



### 228 Vimy Avenue

\$2,182 (new roof) Completed



### 732 Sutherland Avenue

\$ 5,000 (prep & paint- Completed; new foundation front porch; new stairs & landing off front porch)



### 768 Dehart Avenue

\$3,100 (prep & paint)



### 1869 Maple Street

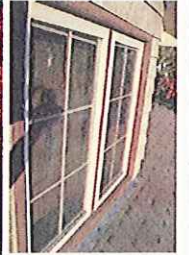
\$4,500 (new roof)



**2319 Pandosy Street**  
**\$3,790** (prep & paint)



**334 Beach Avenue**  
**\$1,740** (new dormer windows)



***Heritage Conservation Workshop***  
**Wood Windows: A balancing Act**



*“The responsible and respectful rehabilitation of buildings and neighbourhoods will lead to vibrant and sustainable communities.”*

Richard Moe, president of the National Trust for Historic Preservation

**CITY OF KELOWNA  
HERITAGE GRANTS  
PROGRAM (CoKHGP)**

