OFFICE CONSOLIDATION

This is a consolidation of the Town's by-law to repeal and replace By-law No. 2010-065 being a By-law to establish the Designated Heritage Property Grant Program and the Designated Heritage Property Grant Review Group being By-law 2013-099 as amended by By-laws 2021-17, 2023-023 and 2023-091 prepared for reference and information purposes only. The following consolidation is an electronic reproduction made available for information only. It is not an official version of the by-law. Official versions of all by-laws can be obtained from the Town Clerk by calling (905) 584-2272. If there are any discrepancies between this consolidation and By-laws 2013-099, 2021-17, 2023-023 and 2023-091 the By-laws shall prevail.

THE CORPORATION OF THE TOWN OF CALEDON

BY-LAW NO. BL-2013-099

A by-law to repeal and replace By-law No. 2010-065 being a By-law to establish the Designated Heritage Property Grant Program and the Designated Heritage Property Grant Review Group

WHEREAS the Council of The Corporation of the Town of Caledon desires to repeal and replace By-law No. 2010-065 to reflect the amended changes in the Designated Heritage Property Grant Program Guidelines (the "Guidelines") and to address housekeeping items;

NOW THEREFORE the Council of The Corporation of the Town of Caledon HEREBY REPEALS By-law No. 2010-065 and ENACTS AS FOLLOWS:

1. A program known as the Designated Heritage Property Grant Program be and the same is hereby established in accordance with the Guidelines attached as Schedule "A".

2. The Designated Heritage Property Grant Review Group be and the same is hereby established to implement the Designated Heritage Property Grant Program.

3. The Designated Heritage Property Grant Review Group will recommend to Council awards of grants to owners of designated heritage properties for the purpose of paying for the whole or any part of the cost of alteration of such designated heritage properties.

4. The Designated Heritage Property Grant Review Group shall report to Council on a semi-annual basis, as needed, with its recommendations regarding the awards of grants based upon the applications received pursuant to the Designated Heritage Property Grant Program.

READ THREE TIMES AND FINALLY
PASSED IN OPEN COUNCIL
THIS 8th DAY OF October, 2013.

"Marolyn Morrison"

_____

Marolyn Morrison, Mayor

"Carey deGorter"

_____

Carey deGorter, Clerk

Schedule A: Amended by By-law 2023-091, effective October 24, 2023



Designated Heritage Property Grant Program Guidelines

TOWN OF CALEDON

Updated October 2023

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Section 1: Program Overview

Purpose of the Program

The Town of Caledon established the Designated Heritage Property Grant Program in 2006 to help owners conserve their designated heritage properties.

The General Conservation grants are to help with small to mid-size projects that conserve a property's key features, or Heritage Attributes.

The Special Project grants are to help with large-scale projects that entail conservation of multiple components or pertain to priority sites.

The program runs every spring, with a second application round in the fall if funding allows.

Grant Amount

The program funds matching grants of 50% of eligible project costs, subject to available funding, to a maximum of:

- six thousand dollars ($6,000) for General Conservation projects.
- fifteen thousand dollars ($15,000) for Special Projects.
    - To be eligible for this level of funding, your project must have multiple components and/or pertain to a Priority Site (see definition), and must be approved as a special project by Heritage staff prior to applying. All projects approved as a special project will have to demonstrate they are using best practices while protecting and conserving the heritage property.

Grant funding excludes refundable HST (13%) for applications associated with a business registered for HST with the Canada Revenue Agency (CRA).

Frequency of Grant

<u>General Conservation</u>
A Designated Heritage Property is eligible to receive two (2) General Conservation grants in the calendar year at the sole and absolute discretion of Council and subject to available funding.

If a second grant is approved, the Owner of the property waives the right to apply for a grant under the Designated Heritage Property Grant Program in the following calendar year for the same Designated Heritage Property.

Special Project

A maximum of two (2) Special Project grants will be awarded annually at the sole and absolute discretion of Council and subject to available funding.

The Owner of the property receiving a Special Project grant waives the right to apply for any grants under the Designated Heritage Property Grant Program in the following calendar year for the same Designated Heritage Property.

Definitions

Conservation: the preservation, rehabilitation, or restoration of the Heritage Attributes of a Designated Heritage Property to retain its cultural heritage value/interest and extend its physical life.

Cultural Heritage Value/Interest: the aesthetic, historic, scientific, cultural, social, or spiritual importance or significance of a Designated Heritage Property for past, present, or future generations, embodied in its Heritage Attributes.

Designated Heritage Property: real property that is designated by municipal by-law as being of cultural heritage value/interest either as an individual property under Part IV of the *Ontario Heritage Act* or as a contributing property in a heritage conservation district under Part V of the *Ontario Heritage Act*.

Eligible Work: work that conserves Heritage Attributes and does not detract from or diminish the cultural heritage value/interest of the Designated Heritage Property.

Designated Heritage Property Grant Review Group: the group that reviews the Designated Heritage Property Grant applications, comprised of Heritage Staff and members of Heritage Caledon.

Heritage Attributes: features that contribute to the cultural heritage value/interest of a Designated Heritage Property and are identified as heritage attributes in the designating by-law or the statement of cultural heritage value/interest where a list of heritage attributes is not included.

Heritage Conservation District: a defined geographic area designated under Part V of the *Ontario Heritage Act* for its cultural heritage value/interest.

Owner: the person or persons registered on title as the owner(s) of the Designated Heritage Property.

Preservation: the act of maintaining the existing form, integrity and materials of a Designated Heritage Property or its Heritage Attribute(s).

Priority Site: a Designated Heritage Property that is considered a community landmark; is located on a corner lot; is unique in the Town for reason of its architecture/material/use; or, is located within a hamlet or village that is not supported by a Community Improvement Plan.

Rehabilitation: the sensitive adaptation of a Designated Heritage Property or its Heritage Attributes for a continuing or compatible use, while protecting its cultural heritage value/interest.

Restoration: the process of accurately revealing, recovering, replicating, or representing the state of a Heritage Attribute at a particular period in its history, while protecting the cultural heritage value/interest of the Designated Heritage Property.

Town: The Corporation of the Town of Caledon.

Section 2: Eligible Properties

Eligible Properties

To be eligible, the property must be:

- Located within the Town of Caledon
- A Designated Heritage Property

The property is **not** eligible if it is:

- **Not** a Designated Heritage Property
- Approved for a Heritage Property Tax Rebate for the same taxation year
- Subject to compliance and enforcement orders issued by the Town
- Owned by any level of government (except where a non-profit or community group is responsible for the maintenance of the property)

Designated Heritage Properties eligible for a Town of Caledon Heritage Tax Rebate cannot receive both a Grant and a Rebate for the same taxation year.

The Designated Heritage Property cannot be in tax arrears, unless a provincial state of emergency is declared, or subject to compliance and enforcement orders including, but not limited to, those issued under property standards and maintenance by-laws, the Ontario Fire Code, etc.

Designated Heritage Properties owned by any level of government are not eligible, except where a non-profit, community group has assumed responsibility for maintenance of the Designated Heritage Property by long-term lease or legal agreement. In such cases, that organization may make an application.

Section 3: Eligible and Ineligible Work

Eligible Work

Eligible Work conserves a Designated Heritage Property's Heritage Attributes and does not detract from or diminish the cultural heritage value/interest of the Designated Heritage Property.

Eligible Work includes the costs of labour, materials, and equipment, as well as fees for the preparation of architectural and engineering drawing services and feasibility studies, for the heritage portion of a Designated Heritage Property. The grant is based on the owner's expenses supported by paid invoices and receipts. Donated labour and materials are not considered part of the project costs.

Only the heritage portion of a Designated Heritage Property is eligible for the grant funding. Non-heritage additions/features are ineligible for grant support.

The Town administers separate Community Improvement Plan (CIP) grant programs. Designated Heritage Property Owners with commercial properties located within a CIP area can apply for both programs so long as the grant programs support separate scopes of work.

The final determination of what constitutes eligible and ineligible work is at the discretion of the Town's Heritage staff in consultation with the Designated Heritage Property Grant Review Group. Owners should contact Heritage Staff at heritage@caledon.ca with questions regarding Eligible Work.

Preservation and Rehabilitation Projects

Preservation is appropriate when the existing Heritage Attributes and features are essentially intact.

The removal or replacement of intact or otherwise repairable Heritage Attributes on a Designated Heritage Property should always be avoided.

Occasionally rehabilitation may also be required if a Designated Heritage Property is to remain functional. Rehabilitation involves more intervention than preservation, usually by making carefully considered alterations.

Every effort should be made to retain and preserve the Heritage Attributes that contribute to the cultural heritage value/interest of the Designated Heritage Property, while permitting changes that are necessary to ensure the Designated Heritage Property remains usable.

Restoration Projects

'Restoration' is the process of accurately revealing, recovering, replicating, or representing the state of a Designated Heritage Property at a particular period in its history, while still protecting the Cultural Heritage Value/Interest of the Designated Heritage Property.

Restoration is the best approach when the importance of a Designated Heritage Property or a Heritage Attribute is tied to a specific period in its history.

Restoration accurately replicates decayed and missing architectural elements or reveals intact elements that were hidden. Restoration can also focus on removing inappropriate finishes and features that obviously diminish the Cultural Heritage Value/Interest of the Designated Heritage Property.

The merits and scope of a restoration project are based on documentary sources that are directly related to the Designated Heritage Property or based on historical research.

Restoration projects should not be guided by speculation, guess work, or current design trends.

Examples of Eligible Work:

- preparation of architectural and engineering drawings, and feasibility studies for the heritage portion of a Designated Heritage Property

- repair/preservation/rehabilitation/restoration of:
    - exterior architectural features such as porches, verandahs, cupolas, columns, brackets, shutters, soffits, and fascia
    - exterior cladding such as clapboard, wood shingles, pebbledash stucco, board and batten
    - windows, doors (including screen doors and storm windows) and other structural openings
    - decorative architectural detailing, millwork and trim
    - significant chimneys
    - interior Heritage Attributes (where identified in the designation by-law)
    - brick and stonework

- cleaning of brick and stone (using non-destructive cleaning methods); chemical or physical treatments, if appropriate, must be undertaken using the gentlest means possible. Treatments that cause damage to historic materials are not permitted.

- removal or replacement of non-heritage modern materials, such as insulbrick, vinyl siding, metal siding, and modern detailing. Replacement with high quality modern materials, such as cement board, may be eligible for grant support.

- critical structural/stabilization repairs, including repairs to the roof, exterior cladding, windows, foundation and drainage, serious structural faults, etc.

- new eavestroughs, downspouts, and ice guards

- repainting of wood or metal elements and other exterior painting using historically appropriate colours

- replacement of knob and tube wiring with code-compliant electrical work

- seasonal installation/removal of wood storm windows

- installation of interior storm windows

- removal of asbestos, mould, lead paint, urea formaldehyde and other contaminates, where determined appropriate by the Designated Heritage Property Grant Review Group.

- floodproofing/waterproofing of the foundation, where deemed appropriate by the Designated Heritage Property Grant Review Group

- roof re-shingling with modern materials that simulate a historic roofing material, and where the modern material does not replace a Heritage Attribute

- maintenance of trees, where these have been identified as Heritage Attributes

Examples of Ineligible Work

- previously commenced or completed work, except where agreed to in advance by Heritage staff and the Designated Heritage Property Grant Review Group as part of emergency work or a phased project

- work that is a duplicate of that which has already received a Community Improvement Plan (CIP) grant (for commercial properties located within a CIP area)

- work that involves features, additions, or accessory structures not identified as Heritage Attributes or not identifiable as historic, at the discretion of the Designated Heritage Property Grant Review Group

- alterations, renovations, or repairs that do not conserve the Heritage Attributes of the property
- construction of a new additions or accessory structures
- work that might diminish the cultural heritage value/interest of the Designated Heritage Property
- repairs and upgrades resulting from a property standards order or other applicable by-laws, regulations, and legislation
- re-insulating, installation of new heating or cooling systems or other energy efficiency upgrades
- driveway paving and repairs
- exterior painting not using appropriate period paint colour schemes
- moving of structures
- new fencing or landscaping that is not based on historical research and that does not incorporate historically appropriate forms, finishes, elements, and materials
- sandblasting or other cleaning methods that may damage a Designated Heritage Property

Section 4: Application Process

When and How to Apply

There will be an annual spring application deadline and, if funds permit, a fall application deadline.

The Town will notify Owners of Designated Heritage Properties of the spring application deadline by email or letter early in the new year; similar notification will be sent in mid-summer if funding permits a second round of applications.

Owners can apply for the grant online at https://www.caledon.ca/en/living-here/designated-heritage-property-grant-program.aspx#Apply-for-a-grant or download the application form from the Town's website. Hard copy application forms can also be provided to a property owner upon request.

Pre-Consultation

Owners and/or their agents are encouraged to consult with the Town's Heritage staff prior to submitting a grant application. Pre-consultation helps ensure that applications are successful by confirming that the proposed work is eligible. Pre-consultation is mandatory for Special Project applicants.

As part of the pre-consultation and/or application review process, Heritage staff and the Designated Heritage Property Grant Review Group may request a site visit to the Designated Heritage Property to assess how the proposed work will conserve the property's Heritage Attributes.

Emergency Work:

Eligible Work undertaken for emergency purposes between grant application rounds (i.e., urgent structural repairs to foundation or roof) may be considered for grant support. In such instances, the Owner must consult with Heritage staff and receive support for the proposed emergency project prior to work starting.

All grant applications received for application rounds held during election periods will be considered emergency grants to allow conservation work to continue despite lengthy waits between submission and Council approval.

Application Requirements:

- Completed, signed, and dated application form

- Photographs of the Designated Heritage Property showing existing conditions of where the work will take place

- Copies of historical photographs, illustrations, or other documents, if available, especially for restoration projects

- Drawings (as necessary) that show the scope, method and location of work; Owner-prepared drawings are acceptable in many instances. Include architect/consultant drawings, if available

- Two (2) competitive cost estimates for all labour and materials:
    - Estimates must be for a similar scope of work
    - Cost estimates must separate eligible and ineligible work (where necessary)
    - If a project is to be phased, the Owner must clearly communicate the phasing to Heritage staff and the Designated Heritage Property Grant Review Group and identify a separate cost for each phase
    - Owners should select contractors/tradespeople with heritage experience for specialized work, such as masonry repair

  Heritage staff and the Designated Heritage Property Grant Review Group will determine if an application can proceed with only one quote based on factors such as the number of contractors contacted and how specialized the conservation work is.

- A summary of the project and how it will conserve the heritage attributes

- Other documentation that may be required to support the application

Applications will be reviewed using the following criteria:

- whether the Owner is a new or a repeat applicant (new applicants will be prioritized)

- the project conserves the cultural heritage value/interest of the Designated Heritage Property

- contractors have experience working with heritage properties

- use of historically appropriate materials and finishes

- availability of funds within the program budget

- the relationship of the application to the long-term conservation plans and priorities of the Town

- consistency with:
    - Cultural Heritage Value/Interest of the Designated Heritage Property
    - Town by-laws and policies, applicable regulations, and codes
    - best heritage conservation as set out in the *Standards and Guidelines for the Conservation of Historic Places in Canada* and other national and international standards

Application Review Process

1. Grant applications shall be submitted to Heritage Staff by mail or email, or in person (contact information provided in Section 6).

2. Heritage staff will screen applications to ensure they are complete. If any information is missing, Heritage Staff will give the Owners a deadline by which to provide the information. If the requested information is not provided by the deadline, Heritage staff will deem the application ineligible.

3. Heritage staff will acknowledge receipt of a complete application by email and/or hard copy letter.

4. The Designated Heritage Property Grant Review Group will review all eligible grant applications and recommend approval, in whole or in part, with or without conditions, or refusal.

5. Heritage staff will present the Designated Heritage Property Grant Review Group's recommendations to Council in a staff report.

6. Council will make the final decision regarding approval or refusal of grant requests.

7. Heritage staff will notify Owners of Council's decision by email and/or a hard copy letter.

When Work Can Start

Owners can start work once:

- Heritage staff confirm in writing, via email or mail, that the grant has been approved.
- Owners have fulfilled all conditions (if any were given) which had to be met prior to work starting

Section 5: Grant Administration and Release of Funds

Final Grant Amount

The program funds matching grants of 50% of eligible costs to a maximum of six thousand dollars ($6,000) for General Conservation grants and fifteen thousand dollars ($15,000) for Special Project grants, subject to available funding.

The final grant amount to be paid is based on the lower of the two following amounts:

- The amount approved by Council
- Total cost as shown in paid invoices and receipts

Changes to Approved Grant Work

The Owner must contact Heritage Staff if there are any proposed changes to the approved scope of work and shall not proceed with any changes to the scope unless they are approved by the Designated Heritage Property Grant Review Group.

Grant Payment Requirements

Before the Town releases funds for a grant, the Owner must:

a) complete the work as approved within three (3) years from the date of approval, to the satisfaction of the Designated Heritage Property Grant Review Group
    i. The Town, at its discretion, may extend the grant timeline under extenuating circumstances.

b) pay for the work in full and provide Heritage staff with a copy of the original invoices and proof of payment

c) permit the Designated Heritage Property Grant Review Group to inspect and photograph the completed project to ensure that the work was completed as approved.

Once the Owner fulfills all requirements, the Town will release the grant funds to the Owner(s) of the Designated Heritage Property. The Town will not pay the grant to the agent or contractors of the Owner(s) without express written authorization to do so from the Owner(s).

Remedial Actions

Should the Owner(s), in the opinion of the Designated Heritage Property Grant Review Group, fail to comply with the Guidelines, the Town will not release the grant funds. If the grant has

already been paid, the Owner will be required to forthwith repay the entire grant amount to the Town.

Failing immediate repayment following notice from the Town, the grant will be considered a loan, for which the amount of the loan together with interest (at the Prime Interest Rate as set out by the Bank of Canada as of the date of notice from the Town, plus 2%) may be added by the Town Clerk to the collector's roll and collected in the same manner as municipal taxes, and the amount and interest shall be a lien or charge on the property in respect of which the loan was made.

Section 6: Contact Information

Please contact Heritage staff at the following with any questions:

Heritage Staff
Strategic Policy Planning
Planning Department
Town of Caledon
6311 Old Church Road
Caledon, ON L7C 1J6

Phone: 905.584.2272
Email: heritage@caledon.ca

DHPG program information is posted on the Town's website:
Designated Heritage Property Grant Program - Town of Caledon

Appendix A: Examples of Eligible Conservation Work:



Image 1: Alton Mechanics Institute: repaired roof and flashing; repointed brickwork; replaced windows and front door



Image 2: Alexander Smith Farmstead: resided barn



Image 3: Bolton Heritage Conservation District: restored front porch elements



Image 4: Little-Webber House: repaired and repainted shutters



Image 5: 83 Kennedy Road: trimmed black willow tree.



Image 6: Belfountain Village Church (17258 Old Main Street): emergency grant foundation repair



Image 7: Sharpe Schoolhouse: repointed areas of exterior stonework



Image 8: Bolton Heritage Conservation District: repointed areas of Christ Church Anglican bell tower



Image 9: Claude Presbyterian Church: repaired front gable fascia and soffits; painted exterior wood trim and exposed rafters in eaves



Image 10: Silver Creek Schoolhouse: repaired fascia, soffits, and bell tower



Image 11: Patullo-McDiarmid Dry Stone Wall: restored using existing stone and new cedar shakes.



Image 12: Graham-Wilson-Pim House: restored wood windows with new wood storm windows.