



# Heritage Incentive Program Guidelines



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**City of Charlottetown**

2017

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## Heritage Incentive Program

The Charlottetown Heritage Incentive Program includes both monetary and non-monetary incentives for development of individually designated properties and/or properties located in the Heritage Preservation Area. The program is designed to provide financial assistance as well as recognition for the appropriate development of heritage resources within the City. A grant and awards programs, as well as the elimination of the building permit fee, have all been adopted by City Council to foster the positive restoration and maintenance of our heritage resources.

Owners of properties designated as heritage resources in the City of Charlottetown are eligible to receive incentives toward the development of their property. Heritage resources include individually designated properties as listed in Appendix “A” and all properties located in the Heritage Preservation Area identified in Appendix “H” in the *City of Charlottetown Zoning and Development Bylaw*.

The Heritage Incentive Program includes the following incentives:

- Grants for exterior alterations are offered at 30% of total eligible costs to a maximum of \$5,000 for major renovation projects. General maintenance may be funded to a maximum of \$1,000. Grants for signage are offered at 50% of total eligible costs to a maximum of \$1,000. Window replacements may be funded at 50% to the \$5,000 maximum.
- A graduated tax freeze on the increase in the municipal portion only of the assessed value for a period of five years is offered to heritage resource properties.
- Building permit fees for all heritage applications reviewed by the Heritage Board and approved by City Council are eliminated.

- Heritage Awards are presented annually to individuals or groups who have made significant contributions to the heritage of the city. This may have been achieved through building restoration, publications, public spaces or landscapes, or heritage activities. Nominations are accepted.

These incentives are offered by the City of Charlottetown to provide property owners of heritage resources with the assurance of tangible community support as well as the financial means necessary to assist with the restoration and maintenance of our heritage resources to the benefit of the community as a whole.

## Heritage Grants

Heritage Grants are made at 30% of total eligible costs, to a maximum grant of \$5,000. Grants for maintenance work have a maximum value of \$1,000. If final costs are less than those estimated on the application, then the final disbursement will reflect an overall maximum 30% support of the total eligible project costs. Signage may be funded at 50% eligible costs to a maximum of value of \$1,000.

### **Eligible Properties**

Grants may be available to property owners whose property is a designated heritage resource and/or a resource located in the Heritage Preservation Area, which is not tax delinquent. Heritage resources owned or used by government agencies are not eligible except where a non-profit, community group has assumed, by long-term lease or legal agreement, responsibility for maintenance of the building. In these cases, that organization may make application.

### **Eligible Work**

Work eligible for funding is limited to the exterior of the building and may include:

- structural and foundation repair and restoration, and repair of original architectural elements within the landscape which form an integral part of the heritage property;
- architectural and engineering services, cost estimates, preparation of drawings where the proposed project is approved and construction completed;
- ongoing maintenance, which minimizes the need for extensive repairs;
- repair and restoration of exterior building fabric façade, including conservation or repair of original elements, approved cleaning, cladding, roof repairs, chimney work, approved window repair or replacement, appropriate painting, restoration of significant architectural detail, removal of inappropriate materials

and appropriate use of signs and awnings.

### **Signage**

Signage Grants may be available at 50% of eligible costs to a maximum grant value of \$1,000 for funding of appropriate signage.

### **Painting**

Funding for painting is limited to 30% costs to a maximum of \$1,000 (unless included as part of an overall restoration). Appropriate historic colour samples must be provided.

### **Window Replacements**

Funding for window replacements is intended to assist in offsetting the potentially higher cost associated with wooden windows. Windows grants may be available at 50% of eligible costs to the full grant maximum of \$5,000. It is not the intention of this program to assist in replacing original wooden windows with vinyl replacements or other non-historical units.

### **Building Maintenance**

Building maintenance (e.g. gutters, downspouts, foundation work, non traditional roofing, etc.) may at the discretion of the grant awards committee be funded at 30% eligible costs to a maximum of \$1,000(unless part of an overall restoration project).

### **Ineligible Work**

- improvements to energy efficiency such as insulation;
- new additions or accessory buildings unless they are an accurate reconstruction from documented evidence;
- improvements to meet building codes including mechanical or electrical systems or any interior work.

### **Consideration of Projects**

Projects considered for approval may include work which:

- serves to strengthen the block or area in which it is located;

- is consistent with City policy as outlined in the City of Charlottetown Official Plan;
- will encourage additional investment downtown;
- is part of a coordinated plan to revitalize a block or group of buildings;
- is consistent with the architectural and historical significance of the building;
- serves to enhance the exterior through restoration of significant architectural details, cleaning or painting of the exterior;
- proposed use and rehabilitation work complies with Standards for Heritage Preservation in Charlottetown and the City of Charlottetown Zoning By-law and relevant building and fire codes.

### **Documentation Required**

Plans or specifications should include:

- relevant archival photographs and historical documentation (if obtainable) and photographs of the project before commencement of work;
- detailed design drawings indicating the type of work and degree of finish proposed;
- at least two (2) competitive estimates for all labour and materials involved in the proposed work unless there is only one supplier of a particular product or service in Charlottetown (the lowest estimate will not necessarily be accepted);
- a statement detailing other grants or funding sought for the proposed work.

### **Administration**

An application for a Heritage Grant shall be made to the Heritage Office of the City of Charlottetown Planning Department.

Applications should be received at least six (6) weeks prior to the anticipated project commencement. Should an application be approved, it may be necessary to sign a development agreement with the City of Charlottetown before work begins. By signing the Heritage Grant application, the applicant certifies that no work eligible for grant funding has yet taken place.

Applications for grants received after work on the project has begun, will be held until all other eligible projects have been processed. At year-end, should additional funding remain available within the budget, applications received after work has been initiated will be reviewed.

The application must accompany at least two (2) cost estimates to complete the work. If the owner intends to do some or all of the work him/herself, the labour will not be eligible for funding. These estimates must be sufficiently detailed so as to clearly indicate the scope and nature of work on each item. If the proposed work includes both work eligible for a heritage grant and other work not eligible for a heritage grant, the cost estimates must clearly differentiate between eligible and ineligible work. In a case where it is not possible to obtain two (2) estimates, the City will use its discretion to allow a grant application to proceed with less than the required number of cost estimates.

Factors which will be considered include, but are not limited to:

- the availability of funds on an annual basis;
- the relationship of application to long-term conservation plans;
- the comparative costs of work prepared by two or more bidders;
- the use of historically appropriate materials.

The application may be granted either with or without conditions or it may be refused. The Planning Department shall advise the applicant of the decision.

### **Frequency of Grant**

Applications for funding for properties which have received a full grant of \$5,000 in the past year are not eligible. Where a property has not received the maximum grant value of \$5,000 in a previous year, an application may be made for the remaining amount to the full grant value. Properties

may again be eligible for grant funding two years after the last award period.

All grant monies must normally be disbursed within the fiscal year in which the grant is awarded. In exceptional cases, projects may extend into a second fiscal period. In such cases a written request, stating the reasons, must be submitted by the applicant and approved by the City. All grants are made subject to funding within annual program budgets.

Funds are not released until the approved project is completed and proof of the following has been submitted:

- the work must be completely paid for by the owners and the paid bills submitted to the City of Charlottetown as proof with a written request for payment of the grant;
- photographs of the completed project are submitted;
- the work must be inspected and deemed satisfactory by City of Charlottetown Heritage Officer, Development Officer and/or Building Inspector.

## Heritage Tax Freeze

The Heritage Tax Freeze Program allows for the temporary suspension of new municipal property taxes, which may result from an increase in the assessment following rehabilitation/construction work.\*

### **Eligible Properties**

A graduated tax freeze may be available to property owners whose property is a designated heritage resource and/or a resource located in the Heritage Preservation Area, which is not tax delinquent. Heritage resources owned or used by government agencies are not eligible except where a non-profit, community group has assumed, by long-term lease or legal agreement, responsibility for maintenance of the building. In these cases, that organization may make application.

### **Terms of Tax Freeze**

The tax freeze program allows the temporary graduated suspension of the increase only of the municipal portion of the assessed value of properties for a period of five (5) years. Any increase in the mill rate levied by the City of Charlottetown during the term of the program will not be covered or included in the tax freeze. Any increase in the property tax assessment, which is not directly attributed to work approved by a Building Permit from the City of Charlottetown, is not eligible under this program.

This program allows for the tax rate for the five years following rehabilitation to be frozen at the rate prior to renovation on a graduated basis of 100% the first year, 80% the second, 60% the third, 40% the fourth and 20% the fifth. In the sixth year, the tax rate would return to its new assessment level.

Notwithstanding the normal five (5) year period over which the diminishing incentive applies, Council may in its sole discretion enter into Agreements which provides for the diminishing incentive on the municipal

portion of the increased assessment in Year 1 to be extended for up to ten (10) years.

### **Application**

A Heritage Tax Freeze application must be received by the City of Charlottetown within one year from the date of issue of the relevant building permit to be eligible. In cases where work is ongoing beyond one year from the date of issue of the building permit, written acknowledgement from the City of Charlottetown is required by this date.

### **Documentation Required**

At the time of application, the applicant must provide:

- verification that no taxes are owing on the property;
- an approved City of Charlottetown building permit for work completed on the property;
- a statement detailing other sources of funding for the project;

### **Administration**

Funds will not be released for approved projects until the following have been completed:

- proof of a change in the tax assessment of the property following work approved under the building permit issued by the City;
- proof of taxes paid is submitted to the City of Charlottetown with a written request for reimbursement under the Tax Freeze Program.

### **Frequency of Application**

Application for the Heritage Tax Freeze Program is limited to one (1) application per ten-year period. Application forms and information are available from the Heritage Office of the Planning Department.

\* A freeze on the provincial portion of property taxes is not included in the Heritage Tax Freeze Program.

## **Heritage Awards**

The Heritage Awards Program of the City of Charlottetown is intended to recognize the achievements of property owners for the positive contributions made to the retention of the City's heritage resources. Awards may also be awarded for other contributions to the city's heritage.

### ***Eligibility***

Eligible properties include municipal heritage resources either individually designated and/or located in the Heritage Preservation Area that have had projects reviewed by the Heritage Board and approved by Council within the last five (5) years or have been significantly well maintained. . Any municipal property may be considered eligible with an application from the owner or other. Government-owned properties are not eligible. Individuals or groups who have contributed significantly to the heritage of the city are also eligible for consideration of a heritage award.

### ***Awards***

The Heritage Board serves as jury and selects the winners in the various categories. The awards may not necessarily be awarded each year unless merited. It is expected one award would be available from each of the following categories:

1. Commercial/Institutional (large)
2. Commercial/Institutional (small)
3. Residential
4. Sites/Landscapes

### ***Presentation***

The Heritage Awards are presented on Heritage Day in February.

### ***Application***

Consideration for a Heritage Award is automatic where a heritage resource has made application for alterations, which have been reviewed by the Heritage Board over

the previous five-year period. Nominations for properties, which have been significantly well maintained and have not been reviewed by the Heritage Board in the previous five (5) years may be made at the Planning Department.

## **Building Permit Fee**

Fees associated with acquiring a building permit from the City of Charlottetown are not collected for applications reviewed by the Heritage Board and approved by Council. This applies to all heritage resources whether individually designated and/or located in the Heritage Preservation Area.

Permit fees for projects not requiring review by the Heritage Board and approval of Council are collected under the standard fee schedule.

## Standards for Heritage Preservation

The importance of our built legacy has been recognized by the citizens of Charlottetown for generations as evidenced through the retention of much the early building stock. Although a number of internationally accepted standards for the conservation of heritage buildings exist, there is no single national set of standards in Canada. Some provinces, in addition to Parks Canada have developed documents for their own use. The following “Standards for Heritage Preservation” in Charlottetown are largely based on the international standards and are given consideration in the administration of heritage resource applications.

### *1. Compatible Use*

Every reasonable effort shall be made to encourage a compatible use of the historic structure, which requires minimal alteration to the exterior and does not adversely affect the character.

### *2. Original Character*

The original, distinctive qualities and character of an historic resource shall be preserved. The removal or alteration of any historical materials or distinctive features shall be avoided.

### *3. Style and Craftsmanship*

Distinctive stylistic features or examples of skilled craftsmanship shall be treated with sensitivity.

### *4. Historic Period*

All historic resources shall be recognized as products of their own time. Alterations that have no historical basis and which seek to create an earlier appearance shall be discouraged.

### *5. Changes*

Changes to an historic resource, which may have taken place over the course of time, are evidence of its development and history.

These changes may have acquired significance in their own right. The valid contributions of all periods to an historic resource must be respected.

When an historic resource includes the superimposed work of different periods, the exposure of the underlying state is only justified when what is removed is of little interest and when the material which is revealed is of historical value. Evaluation of the importance of the elements is the decision of the Heritage Board.

### *6. Methods and Materials*

Wherever possible, deteriorated architectural features shall be repaired, not replaced. In the event replacement is necessary, the new material shall match the original in composition, design, colour, texture and other visual qualities.

Repair or replacement of missing architectural features shall be based upon accurate duplication of features substantiated by historic, physical or pictorial evidence rather than on conjectural design or the availability of different architectural elements from other buildings or structures.

### *7. Environmental Control*

Systems of insulation, environmental control and other services shall be upgraded in ways which respect the existing and traditional equilibrium and do not set in motion processes of deterioration.

### *8. Surface Cleaning*

In all cases, surface cleaning shall be undertaken with the gentlest means available. Many cleaning methods damage historic buildings and should not be undertaken without thorough testing prior to use. Sandblasting is NOT recommended on brick, stone or wood. In all instances, it should be ascertained before undertaking the work that a building exterior is truly in need of cleaning.



### *9. Archaeological Resources*

Every reasonable effort shall be made to protect and preserve archaeological resources affected by, or adjacent to, any historic resource under construction.

### *10. Contemporary Design*

Contemporary design for alterations and additions to existing properties shall be encouraged when they will not destroy significant historical, architectural, or cultural material, and when such design is compatible with the size, scale, colour, material and character of the property, neighborhood or environment. Additions in particular should echo contemporary ideas while respecting and enhancing the spirit of the original.

### *11. Reversibility of Work*

Wherever possible, new additions or alterations to historic resources shall be done in such a manner that if they were to be removed in the future, the essential form and integrity of the resource would be unimpaired.

### *12. Relocation*

Dismantling and relocation of an existing historic resource shall be employed only as a last resort, and only when protection cannot be achieved by any other means.

### *13. Reconstruction*

Reconstruction shall be limited to specific depleted details and shall be based upon sound documentary evidence. Reconstruction of the entire historic resource shall be discouraged.

### *14. Recording*

Prior to undertaking any alterations, particularly in cases where alterations may threaten the historic resource, a record of the threatened element shall be compiled. Measured drawings and photographs may prove invaluable if major features are damaged or lost during construction.

### *15. Changing Construction Detailing*

In some historic structures, poor construction methods have resulted in rapid deterioration of certain elements. In these instances, accurate reconstruction of the original detail will inevitably contribute to the failure of the element again. Reconstruction, therefore, may be undertaken in such fashion as to duplicate the original as closely as possible while using sound construction practices.

### *16. Building Codes*

At no time should the life and safety of occupants be deemed of less importance than the preservation of the original fabric of the resource. The required life and safety standards are those specified in the current National Building Code and Life Safety Code. Notwithstanding these Code requirements, however, where the essential character of the resource is threatened by changes for Code reasons, every effort shall be made to find an equivalent safer standard by alternative means so as to minimize the impact on the historic fabric.

## **Rehabilitation Information and Advice**

Prior to beginning the rehabilitation of a heritage resource, it is important to ensure proper procedures are followed to help make sure a quality project will be achieved. The Heritage Officer of the Planning Department is an immediate source for information and advice. The Heritage Officer will advise potential applicants as to whether a property is designated or located in the Heritage Preservation Area and may provide advice on the status of an application for the Heritage Incentive Program. It may also prove advantageous to discuss small-scale technical matters prior to making formal application for proposed work on a heritage resource.