

## DRAFT CONSULTANT REPORT

June 9, 2017

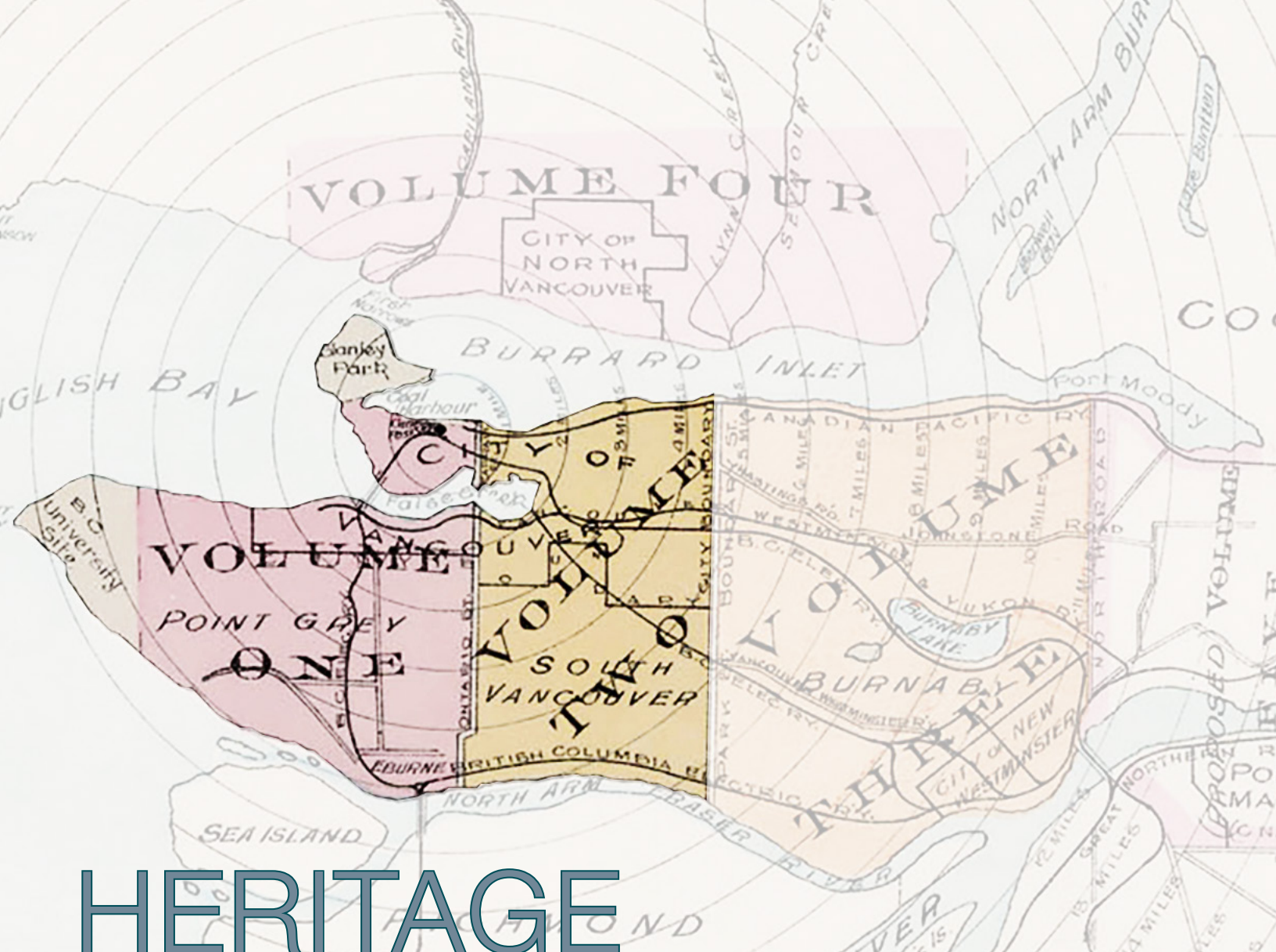
### *Heritage Conservation Program Review*

Donald Luxton and Associates Inc.

Dated June 2017

#### Notice to Reader:

- The attached report was prepared as part of the Heritage Action Plan to inform the update of the Heritage Conservation Program. This work includes updating and improving the way the city identifies, manages and supports the conservation of historic places.
- Review of this report is underway by staff, stakeholders and the public. Feedback received will inform staff recommendations to City Council on the Heritage Action Plan.
- To keep updated on this work please join the email list by visiting the project website at [vancouver.ca/heritage-action-plan](http://vancouver.ca/heritage-action-plan) or call 3-1-1.



# HERITAGE ACTION PLAN

## CITY OF VANCOUVER HERITAGE CONSERVATION PROGRAM REVIEW

JUNE 2017

**DONALD LUXTON  
AND ASSOCIATES INC**





# TABLE OF CONTENTS

Executive Summary	4
1. Introduction	6
1.1 City of Vancouver Heritage Conservation Program Structure	9
2. Current Situation	10
2.1 Global Best Practices	11
3. A Vision for Renewal	16
3.1 Guiding Principles	17
4. Program Review	20
4.1 Permit Processing and Fees	21
4.1.1 Permit Requirements	21
4.1.2 Development and Building Permit Fee Schedules	22
4.1.3 Processing Times	23
4.2 Regulations	24
4.2.1 Zoning and Development Bylaw	24
4.2.2 Vancouver Building Bylaw	25
4.2.3 Subdivision Bylaw	28
4.2.4 Heritage Procedure Bylaw	29
4.2.5 Heritage Property Standards of Maintenance Bylaw	30
4.2.6 Heritage Conservation Area Official Development Plan	31
4.3 Policies, Tools and Incentives	32
4.3.1 Heritage Policies and Guidelines Document	32
4.3.2 Civic Heritage Stewardship	33
4.3.3 Transfer of Density	35
4.3.4 Heritage Designation/Heritage Revitalization Agreement (HRA)	36
4.3.5 Heritage Processes in Downtown Eastside (DTES)	37
4.3.6 Heritage Building Revitalization outside Downtown Eastside (DTES)	38
4.3.7 Heritage Incentive Program	39
5. Conclusions	42
5.1 Summary of Recommendations	43
Acknowledgements	46
Appendix A: Global Best Practice Review	48
Appendix B: UNESCO <i>Historic Urban Landscape</i>	74
Appendix C: Financial Incentives for Heritage in Vancouver	80



# EXECUTIVE SUMMARY

On May 15, 2013, Vancouver City Council passed a motion requesting that Staff report back on a review the City's Heritage Conservation Program and that improvements to the Program be considered. The motion reads as follows:

## WHEREAS

1. Heritage buildings are highly valued by Vancouver residents, and are an important component of neighbourhood character;
2. There are many pressures on retention of both commercial & residential buildings in Vancouver;
3. The City of Vancouver is required to compensate building owners for heritage designations by the Province under the provisions of the Vancouver Charter;
4. The City has tools in place, such as Heritage Revitalization Agreements and Heritage Density Transfers, to protect heritage buildings;
5. The Vancouver Heritage Register has not been updated since it was adopted in 1986.

THEREFORE BE IT RESOLVED THAT staff report back to Council on:

- The role of the City in retaining or protecting privately-owned heritage buildings;
- Existing heritage retention programs and information on how they are performing;
- The use of deconstruction, both to preserve heritage features and divert waste from the landfill;
- How heritage is defined for the purposes of these programs;
- Potential improvements to these programs, based on best practices in other cities.

A Heritage Action Plan report was approved by City Council in December 2013.

Maintaining and protecting heritage resources can be challenging. The high cost of retention as compared to new construction, complications in the underlying conditions of a heritage building, Building Bylaw upgrade requirements, high and rising land costs, and extended processing times for applications involving building retention are all factors that can result in threats to heritage resources. In areas of low-density residential zoning with outright permitted development, these factors can compound on one another, resulting in situations where new development "out competes" for retention or redevelopment of existing heritage resources. For example, permits for new houses may be issued within weeks of submission, whereas a Heritage Revitalization Agreement may take six months or potentially even longer to process, and a rezoning to integrate new development with a heritage building can take nine months or more.

In some cases, changing social and economic factors can result in pressure to redevelop sites with historic buildings on them. For example, the economic viability of theatres and performance venues is diminishing rapidly, and, as a consequence, such heritage and cultural resources are under considerable redevelopment pressure. Similarly, industrial and office buildings may not meet current industry standards. Taken together, these overall pressures indicate that it is timely to review the state of the Heritage Conservation Program to ensure it is best equipped to support the conservation of a variety of heritage resources and areas across Vancouver.

The starting point for renewal is that Vancouver's Heritage Conservation Program already provides a robust and effective platform for heritage conservation, developed since the 1960s, with substantial financial and Staff commitments. The Program functions extremely well given the challenges that it faces, but like any program that has grown over time, there are slippages, misalignments and missed linkages that can be addressed to improve efficiency. Notably, the provision of incentives has not kept pace with the costs of land and construction.

A guiding vision for Vancouver's Heritage Conservation Program has never been clearly articulated. As part of this program review, a Vision, Goals, Strategic Directions and Guiding Principles were developed to direct the renewal process. The Vision states:

*The City of Vancouver's Heritage Conservation Program encourages and fosters the retention and conservation of historic places across the city, while supporting the ongoing sustainable development of its neighbourhoods.*

A series of recommendations have been developed that outline a comprehensive renewal process for the Vancouver Heritage Conservation Program, which build on its strong history and prepare it for the future.





# CITY OF VANCOUVER

BRITISH COLUMBIA

## LEGEND

CITY BOUNDARY  
HARBOUR HEADLINE  
POSTAL BLOCK NUMBERS  
STREETS ARE NUMBERED EAST & WEST OF  
ONTARIO ST., NORTH AND SOUTH OF  
DUNDAS ST.



# INTRODUCTION

Since the late 1960s, heritage resource management has been recognized as a legitimate function of city planning, but the City lacked enabling legislation to pursue conservation initiatives. In 1971, the City asked the Province to designate Gastown and Chinatown as historic areas, as it had no ability to designate. In 1974, the City enabled the first Transfer of Density for heritage purposes, when unused onsite density was transferred from Christ Church Cathedral to an adjacent site. From 1974 to 1977, the City could designate without compensation, and passed designation bylaws on a number of key landmark sites. In 1977, the Heritage Conservation Act was passed, which required the provision of compensation. Vancouver's Heritage Conservation Program was formally established in anticipation of the City's Centennial in 1986. The Vancouver Heritage Resource Inventory was undertaken in two phases from 1983-86, and recognized that a significant historic legacy had accumulated, which represented the broad sweep of Vancouver's settlement, growth and development. Since 1986, the City has continued to increase its commitment to the Heritage Conservation Program, which has developed to include a wide range of management tools and conservation incentives. In 1994, new provincial legislation enabled a variety of new municipal conservation tools, notably heritage revitalization agreements, and these provisions have been added to the Vancouver Charter. In addition, subsequent studies have identified further value in specific resource categories such as heritage interiors, post-1940s sites, heritage areas and historic infrastructure, and schools. In 2003, the City began its participation in the Canadian Historic Places Initiative, documenting many sites through Statements of Significance and utilizing the *Standards and Guidelines for the Conservation of Historic Places in Canada*.

The City of Vancouver has stayed in the forefront of this evolving situation and is now in the process of reviewing and upgrading its Heritage Conservation Program to reflect its rapidly changing context. This review is part of the **Vancouver Heritage Action Plan**, and was undertaken in 2014-2017 by Donald Luxton & Associates Inc., lead consultant, with subconsultants: CitySpaces Consulting; Coriolis Consulting Corp.; Young Anderson Barristers & Solicitors; GHL Consultants Ltd.; Dr. Harold Kalman; Dr. Angela Piccini; and Dr. Julian Dunster. Separate reports have been submitted that address the **Character Home Zoning Review** and provide recommendations for the update of the **Vancouver Heritage Register**.

## Global Heritage Conservation

Examples of best practices for heritage conservation can be found across the world in various charters and doctrinal texts that define principles and initiatives across many different levels of authority. Similar to other cultural sector activities, heritage conservation follows a tiered organizational system, beginning at the global scale; UNESCO (United Nations Educational, Scientific and Cultural Organization) and ICOMOS (International Council on Monuments and Sites) provide the fundamental protocols of heritage conservation, which are intended for adoption by individual countries; Canada is a signatory State Party to the UNESCO World Heritage Convention. According to UNESCO protocols, there are a number of measures that governing bodies can undertake in order to ensure that the conservation of heritage sites, which contribute to authentic local identity, is incorporated into legislation:

- All official plans must provide for heritage conservation.
- Every government should empower an entity to advise it on endangered heritage property.
- Heritage protection should be binding on government agencies.
- Public agencies should orient their construction policies to renovating space in old buildings.
- Landscapes should be subject to protection.
- The areas around historic places should be subject to rules ensuring harmonization.
- Groups of modest buildings that are collectively of cultural value should be protected even if no individual one is noteworthy.
- There may be a quid pro quo for designation.
- Any policy for protection must be accompanied by a policy for revitalization.
- Owners of historic places should be encouraged by means of tax incentives.
- Governments should establish either special subsidies or a national conservation fund outside the normal budgetary process.
- Governments should make grants, subsidies, or loans available to municipalities, institutions, and owners to bring the use of historic places up to contemporary standards.
- A system should be established with public and private sector participation to provide rehabilitation loans with low interest and/or long repayment schedules.
- Rehabilitation projects should observe modern safety standards, but when building and fire codes interfere with conservation, alternate compliance should be considered.

## The Canadian Context

Canada has had a rich history of heritage conservation, despite its relatively young age. The heritage movement in Canada began prior to the advent of World War One, out of the concern for the condition, and future, of some of the country's earliest buildings. In 1919, the Historic Sites and Monuments Board of Canada was established. The development of the *Historic Sites and Monuments Act* followed in 1953. The Act was the first federal legislation created to allow the national designation of Canadian buildings, however, the Act, although supporting research and recognition of historic resources in Canada, does not provide any legal protection to heritage sites.

Modern Canadian heritage planning is based on two significant tools: the Canadian Register of Historic Places and the Parks Canada *Standards and Guidelines for the Conservation of Historic Places in Canada*, both of which were originally developed under the Canadian Historic Places Initiative (HPI). Started in 2001, the HPI was formed through intergovernmental collaboration (between municipal, provincial, territorial, and federal levels of government) in order to establish a pan-Canadian culture of conservation. The Statement of Significance (SOS) tool, implemented as part of the HPI, remains the primary method of conveying the heritage value of historic sites across the country. Though the third tier of the HPI, the certification program for incentives, was never fully enacted, the *Standards and Guidelines* and Statement of Significance documentation remain Canadian best practice.



## The Provincial Level

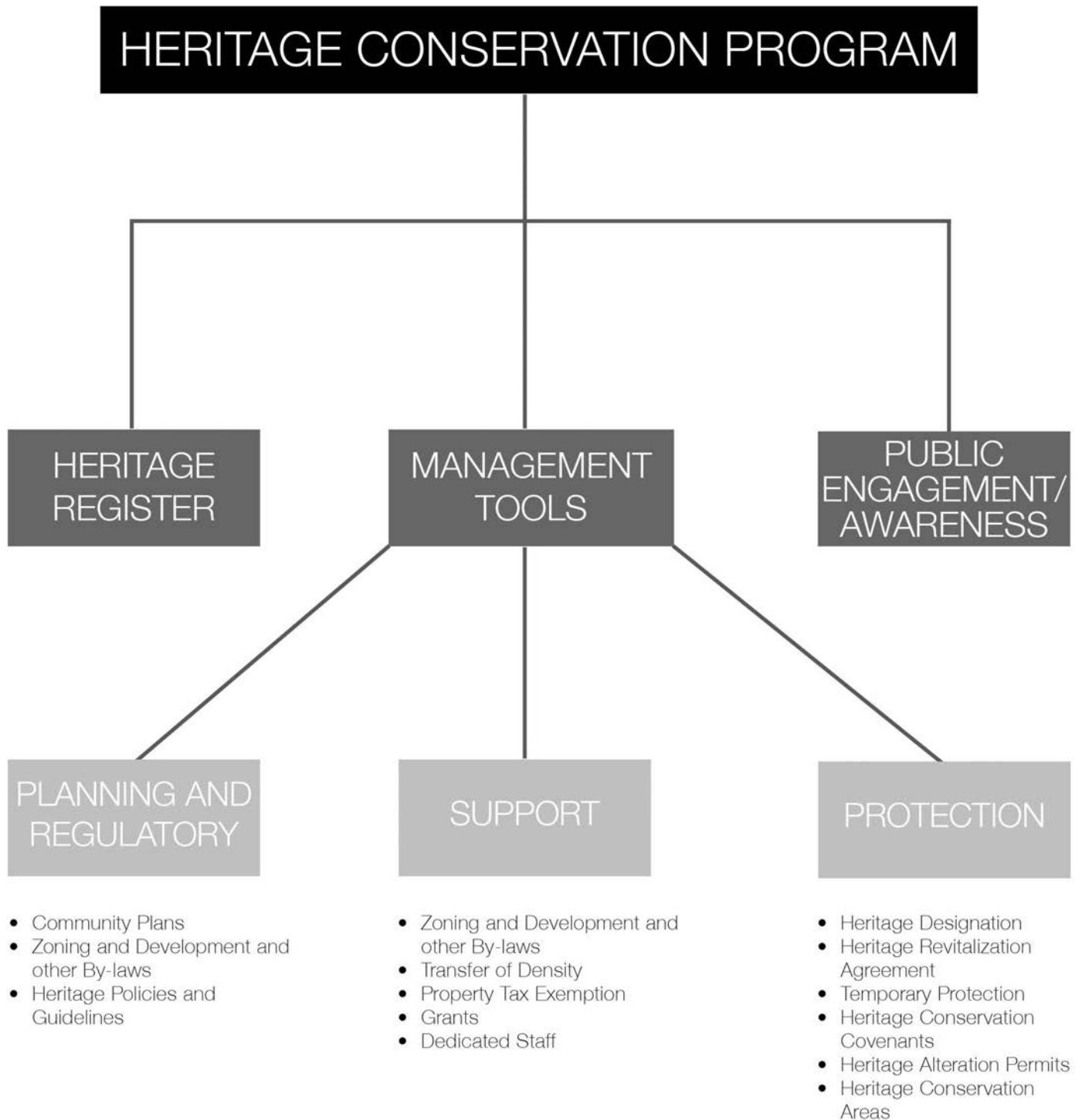
The *Heritage Conservation Act* was originally created in 1977 to manage and systematize heritage activities in British Columbia, as well as to advance the practice of heritage planning. The *Act* includes the mandate that the province must have a Provincial Heritage Register. The *Act* also gave the provincial government and municipal governments the power to legally designate historic resources.

In 1994, the *Municipal Act* (later the *Local Government Act*) was substantially amended to include a section on Heritage Conservation; now amended as Part 15. The available mechanisms in Part 15 have been similarly enabled for the City of Vancouver's use under the *Vancouver Charter*. One of the most effective best practice tools is the Heritage Revitalization Agreement (HRA). An HRA is a formal, voluntary written agreement negotiated by a local government and an owner of heritage property. An HRA outlines the duties, obligations, and benefits negotiated by both parties to the agreement. HRAs are intended to provide a powerful and flexible tool that enable agreements to be specifically written to suit unique properties and situations. They may be used to set out the conditions that apply to a particular property. This tool is suited to unique conservation situations that demand creative solutions. The terms of the HRA supersede local government zoning regulations, and may vary use, density, and siting regulations. Many other heritage regulations and incentives have also been enabled, including those listed under the 'Protection' category in the diagram on the right.

## City of Vancouver Heritage Conservation Program Components

- **Heritage Register:**
  - o More than 2,200 sites with heritage value have been included on the list; potential heritage sites are evaluated using a standardized methodology. Sites listed on the Heritage Register currently include buildings, structures, streetscapes, landscape resources, monuments, public works and archaeological sites.
- **Neighbourhood Planning:**
  - o **Heritage Zoning Districts** apply to the historic areas of Gastown, Chinatown and Yaletown.
  - o A **Heritage Conservation Area (HCA)** is an area designated for identified heritage value. In September 2015, First Shaughnessy was designated the City's first Heritage Conservation Area. This required the establishment of a Heritage Conservation Area Official Development Plan to enable the establishment of this HCA, and potentially others.
  - o **Zoning District and Design Guidelines** encourage the retention of heritage and/or character resources in neighbourhoods including Strathcona, Mount Pleasant and Kitsilano.
  - o Community Planning projects encompass the development of **Historic Context Statements** and **Thematic Frameworks**, which together illustrate the historic forces that have shaped neighbourhoods over time.
- **Protection Measures:**
  - o **Heritage Designation** on title protects heritage resources after they have been conserved in exchange for zoning or development relaxations or incentives.
  - o **Legal Protection** can also be provided through HRAs, Scheduling under an HCA or through Covenants.
  - o **Heritage Alteration Permits** are required for changes proposed to protected heritage properties.
- **Incentives:**
  - o A **Transfer of Density** program has allowed heritage resource owners to sell unusable development density (both residual onsite density or bonus density created as an incentive) in exchange for conservation and legal protection; this has resulted in the establishment of a Heritage Amenity Bank.
  - o The **Heritage Building Revitalization Program (HBRP)** was designed to encourage property owners in Gastown and Chinatown to conserve heritage buildings in exchange for incentives, including grants for the rehabilitation/restoration of historic façades and/or property tax exemptions.
  - o **Heritage Revitalization Agreements (HRA)** can be negotiated between property owners and the City. Through an HRA, the City is able to offer incentives, including relaxed zoning requirements and/or increased development potential, in exchange for the conservation and legal protection of a property.
  - o **The Vancouver Heritage Foundation (VHF)**, an arm's length organization that receives financial support from the City, awards modest grants to homeowners for the conservation of historic properties. The VHF also offers a range of heritage awareness and education programs for the public.

## 1.1 City of Vancouver Heritage Conservation Program Structure



\***Management Tools** are enabled by the *Vancouver Charter*





# CURRENT SITUATION

The City of Vancouver's Heritage Conservation Program began informally in the late 1960s, and was adopted officially in 1986. Since its establishment, it has grown into a robust policy and program framework that supports the conservation of historic places across the city. As the city has grown and matured, there have been shifting civic priorities and development patterns that have placed various and increasing strains on the heritage planning function. The rate of development has caused further pressure, as heritage projects are more complex than standard development projects and tend to take longer to complete. Land prices have also been increasing at a rate that jeopardizes many heritage sites, which are challenged to compete in a fast-paced market that favours new and larger buildings. Incentives designed to encourage the retention of heritage buildings have been employed successfully since the 1970s, however, due to current lofty real estate prices and carrying costs, they often fail to provide meaningful support to heritage projects.

The following major, overarching themes were expressed during the extensive consultation process that was concurrent with this three-year project, including comments received from the *Public Advisory Committee*, which was established to assist with the **Heritage Action Plan**. There was also direct consultation with the public through City-hosted Open Houses and discussions with practitioners, heritage experts, and stakeholders. In addition, the project team participated in: City Staff workshops; presentations to a variety of civic advisory bodies, such as the Vancouver Heritage Commission, Gastown Historic Area Preservation Committee and the Chinatown Historic Area Planning Committee; and presentations to community groups such as the Shaughnessy Heights Property Owners Association. There was a general agreement that the current challenges to the conservation of heritage sites included:

- Very high and rising land costs
- High cost of retention as compared to new construction
- Contemporary market preference for new houses over heritage homes
- Extended processing times and additional fees for permit applications involving building retention as compared to new construction
- Onerous Building Bylaw upgrade requirements

- Complications and uncertainties in the underlying condition of a heritage building
- Other civic priorities (Greenest City, social, affordable and rental housing, etc.) taking precedence over heritage conservation
- Insufficient incentives for heritage projects

While refinements to the City's Heritage Conservation Program cannot specifically address all of these issues, there are ways to mitigate these factors and lessen their impact on heritage conservation efforts. As these concerns were documented, this work informed the further study of other jurisdictions across the world to understand how comparable jurisdictions encourage heritage conservation. Further consultation with the City and the Public Advisory Committee helped establish a renewed Vision, along with Goals and Strategic Directions for Vancouver's Heritage Conservation Program. This provided the platform for a detailed and extensive review of each program component, with the objective of offering specific recommendations that will allow the Heritage Conservation Program to more effectively react to the current situation and better prepare for an evolving future.

## 2.1 Global Best Practices

The starting point for the Heritage Action Plan's goal of reinforcing the Heritage Conservation Program was a review of global best practices. Globally, the accepted approach to heritage conservation is a values-based approach, mandated by UNESCO protocols and adopted by major conservation authorities, both at the international level (including the UNESCO World Heritage Centre and the Getty Conservation Institute) and at a national level (including Australia, the United Kingdom, the United States and Canada). In Canada, the *Standards and Guidelines for the Conservation of Historic Places* follow a values-based approach. An introduction of broader, values-based metrics represents a shift away from the traditional emphasis on architectural typologies and aesthetics, and recognizes emerging trends in urban development, such as the significance of intangible cultural heritage and the need to integrate more sustainable city-building methods.

A number of municipal heritage programs from Canada, the United States, Asia and Australia were reviewed in order to determine which of their heritage planning practices were potentially applicable to the City of Vancouver. Although they respond to many different factors including different legal frameworks, these municipal programs provided lessons and aspirational examples of potential policy directions for Vancouver. In general, the most successful municipal heritage programs include a number of key elements:

- **Predictability:** successful programs have proven to be reliable, sustainable, and predictable over time. In order for the program to be effective, applicants need to trust that the incentives and tools on offer will remain available and constant through the duration of their project, and beyond.
- **Diversity:** a combination of incentives (both financial and non-financial), planning and regulatory tools, and public education should be available in order to engage the greatest number of users and protect the most historic places.
- **Versatility:** due to the ever-changing and evolving nature of heritage conservation, as well as the broadening definition of what constitutes an 'historic place', a successful program must be adaptable. Programs are considered versatile when they offer applicable and desirable incentives and recognition tools for a wide range of sites, as well as remaining flexible in regards to emerging technologies for conservation techniques, program information management, and education and awareness initiatives.
- **Marketability:** the components of a heritage conservation program must be relevant and desirable to the local community; for example, over-size and out-of-scale infill or additions may not be appropriate in sensitive heritage areas. A heritage conservation program should be tailored to the local context, recognizing development and market trends and responding to the changing needs of communities.

Though no one municipal program is directly applicable, there are components of many municipal programs, which are summarized on the following pages, that can be used to inform and improve Vancouver's Heritage Conservation Program.

The current City of **Vancouver** Heritage Conservation Program boasts a diverse program that offers a wide range of management tools and conservation incentives, including:

- **Heritage Register:** lists more than 2,200 sites (including buildings, structures, streetscapes, landscape resources and archaeological sites).
- **Neighbourhood Planning:** incorporates heritage zoning districts, zoning guidelines, and community planning projects.
- **Protection Measures:** include heritage designation; Heritage Revitalization Agreements (HRAs); Heritage Conservation Area scheduled properties and Covenants; changes to legally protected properties administered through Heritage Alteration Permits.
- **Incentives:** include the Transfer of Density program, the Heritage Building Revitalization Program (HBRP), and HRAs.
- **The Vancouver Heritage Foundation (VHF):** provides modest grants and heritage awareness and education.

The City of **Edmonton** has a robust heritage program with an emphasis on predictability and marketability, offering sustainable and attractive incentives to encourage conservation, including:

- **Heritage Register:** provides valuable information on each building, including date of construction, architect, owner, etc.
- **Planning Tools:** the City of Edmonton incorporates heritage conservation into its overall planning framework, and has developed several plans and policies to manage heritage sites and development growth directly, including: *Historical Resources Management Plan*; City Policy C-450B: *A Policy to Encourage the Designation and Rehabilitation of Historic Resources in Edmonton*; *The Art of Living: A Plan for Securing the Future of Arts and Heritage in the City of Edmonton 2008-2018*; and *They Way We Grow*, a development plan.
- **Incentives:** include a fund to provide financial compensation for the designation of Municipal Historic Resources and the continued, long-term maintenance of designated resources, direct grants, property tax rebates and non-monetary incentives.

The City of **Victoria** offers a marketable and predictable program, which encourages active participation and buy-in from Victoria residents. The salient program components include:

- **Planning and Regulatory Tools:** include the Heritage Register (listing approximately 1,100 historic sites), Heritage Inventory, use of Heritage Alteration Permits, *Heritage Strategic Plan For The City of Victoria*, the creation of 13 heritage conservation areas (HCA), and the *Official Community Plan*, which has adopted the *Standards and Guidelines for the Conservation of Historic Places in Canada*.
- **Incentives:** include grants provided through two foundations, the Victoria Heritage Foundation (House Grants Program) and the Victoria Civic Heritage Trust (Building Incentive Program), a Tax Incentive Program for Downtown Heritage Buildings, and the Illuminate Downtown Grant, offered by the DVBA.
- **Education:** heritage conservation is promoted through various organizations across the city including the Victoria Heritage Foundation, the Victoria Civic Heritage Trust, the Hallmark Society, the Victoria Historical Society, and the Old Cemeteries Society, as well as the ongoing publication of *This Old House: Victoria's Heritage Neighbourhoods*.

The City of **Toronto** offers a predictable, diverse and marketable heritage program with a focus on neighbourhood character and the creation of sustainable heritage conservation districts. Tools include:

- **Heritage Conservation Districts (HCD):** allow City Council to administer guidelines designed to protect and enhance the special character of groups of properties; the character is established by the overall heritage quality of buildings, streets and open spaces as seen together; Toronto has sixteen HCDs.
- **Heritage Easement Agreements:** identify elements of a building to be retained in perpetuity, and may also set out permitted alterations and development.
- **Financial Incentives:** include the Toronto Heritage Grant Program and the Heritage Property Tax Rebate Program.



The City of **Montreal** offers the most diverse program examined, due to its broad definition of what constitutes heritage and its focus on intangible heritage, in particular. The city also benefits from strong provincial policies and programs of support for cultural resources. The most significant components of the Montreal program include:

- **Planning and Regulatory Tools:** include Tangible Cultural Heritage (including public art, archaeological heritage, archival heritage, and built heritage); Moveable Heritage (including artistic, archaeological, documentary, ethno-historical and scientific collections, as well as landscaped heritage); Intangible Cultural Heritage (including traditions, arts, knowledge, and memory – also referred to as ‘living heritage’).
- **Incentives:** include restoration education, grants and home ownership assistance.
- **Education Tools:** include Urban Heritage Interactive Publications, which provide tools, tips, and strategies to help owners take care of Montreal’s Urban Heritage.

Heritage conservation programs in the United States have developed under a strong federal policy framework, dating back to the *National Historic Preservation Act* of 1966 that established a federal mandate for preservation, supported by a network of State Historic Preservation Offices. In order to deliver heritage programs at the local level, the Certified Local Government program was developed, jointly administered by the National Park Service and State Historic Preservation Offices. Through the certification process, local governments make a commitment to historic preservation, enabling access to program funding. In order to participate in the program, a Certified Local Government must meet the following minimum goals:

- Establish a qualified historic preservation commission.
- Enforce appropriate legislation for the designation and protection of historic properties.
- Maintain a system for the survey and inventory of local historic resources.
- Facilitate public participation in local preservation.

The City of **San Francisco** offers many tools governed by the State of California and the Federal Government, or offered through the non-profit society SF Heritage, demonstrating predictability and diversity. The creation and promotion of new programs expresses versatility as consumer demand changes:

- **Planning and Regulatory Tools:** include New Window Replacement Standards and an FAQ page, which offers quick and accessible guidance for residents.
- **Incentives, State and Federal jurisdiction:** include Mills Act Property Tax Reduction, Federal Tax Credits, Preservation Easements, California Historical Building Code (CHBC), Preservation Loan Program (PLP)/ Preservation Loan and Technical Assistance Program (PLTAP).
- **SF Heritage Program:** includes the Historic Property Inventory, which addresses the continued erosion of the historic downtown core.

The City of **Chicago**, like San Francisco, offers stable and reliable tools offered at the state and federal level, as well as some that are specific to the Chicago context:

- **Planning and Regulatory Tools:** include Demolition Delay Ordinance (90 days to explore alternative options) and Landmarks Ordinance (that gives the Commission the responsibility of recommending to Council which specific landmarks should be protected by law).
- **Incentives, Chicago and Illinois:** include Chicago Zoning Ordinance (which offers floor area bonuses for “adopting” an historic landmark), Permit Fee Waive for Chicago Landmark Properties, Class-L Property Tax Incentive (reduces the property tax rate for 12 years for rehabilitating a landmark building in a commercial or industrial use), Façade Rebate Program (for qualifying industrial and commercial buildings), and Property Tax Freeze for Historic Residences (enables homeowners who rehabilitate their landmark property to receive a freeze on their property tax assessment for eleven years).

Australian cities also exist within a framework of strong and supportive federal and state heritage policies and programs.

The City of **Melbourne** offers an evolving program, which embraces emerging technologies in order to engage a broader heritage audience. Significant components of the Melbourne heritage program include:

- **Planning and Regulatory Tools:** include the Heritage Overlay (required permits for work undertaken on historic sites within historic areas), Heritage Precincts (11 within the Capital City Zone), and the *Heritage Strategy* (outlining the direction of the program over the next 15 years); the *Heritage Strategy* also generated a separate *Indigenous Heritage Study and Strategy*.

- **Incentives:** include the Melbourne Heritage Restoration Fund.
- The **i-Heritage Database:** is an interactive piece on the city's website, which allows users to view multiple layers of information on more than 8,000 properties, as well as streets and laneways.

The City of **Perth**'s heritage program is focused on its marketability to the City's residents and developers and embraces a diverse definition of heritage:

- **Planning and Regulatory Tools:** include Heritage Agreements, Heritage Conservation Areas, and Conservation Plans.
- **Incentives:** include Heritage Grants, Heritage Rate Concession, Heritage Loan Subsidies (offered by the State Government), Transfer of Density, and Bonus Density.

The City of **Sydney** offers a marketable and diverse heritage program, which caters to the unique districts and neighbourhoods in the city, as well as the evolving attitudes toward heritage conservation:

- **Planning and Regulatory Tools:** include a Heritage Development Control Plan and Heritage Conservation Areas.
- **Incentives:** include a Heritage Floor Space Scheme (conservation and ongoing maintenance by allowing owners to sell unused development potential) and a Heritage works without consent policy (allowing owners to repair their building without need for development consent – includes repainting, or replacing gutters and down pipes).

In addition, Hong Kong was studied, as it shares many similarities with Vancouver, including high housing prices, coupled with a constrained land base.

The City of **Hong Kong** has long been considered a 'developers' city'. It relies, to a large extent, on incentives to attempt to address development-heritage conflicts. The City maintains several ongoing heritage programs, significant components of which include:

- **Planning and Regulatory Tools:** the Antiquities and Monuments Office (AMO) within the Leisure and Cultural Services Department (LCSD) focuses on identification and protection; the Commissioner for Heritage's Office (CHO) within the Development Bureau responds to pragmatic issues of development; the Development Bureau's Planning and Lands Branch is responsible for land-use planning, which includes zoning and the preservation of historic buildings; and the Urban Renewal Authority (URA), also within the Development Bureau, is mandated to undertake urban renewal. This includes constructing new buildings and rehabilitating historic buildings.
- **Incentives:** Two incentive programs have been initiated by the Development Bureau to assist properties that are publicly-owned, owned by an NGO, or owned privately. The programs are:
  - 'Revitalising Historic Buildings Through Partnership Scheme,' which assists the conservation and revitalization of Government-owned historic properties.
  - 'Financial Assistance for Maintenance Scheme,' which provides funds for maintenance for privately-owned graded historic buildings or non-profit-making Government buildings.

*Further details on relevant jurisdictional models are found in Appendix A.*









# A VISION FOR RENEWAL

The key model for development of a new Vision for Vancouver's Heritage Conservation Program is UNESCO's **Historic Urban Landscape** protocol, which is based on the application of a range of traditional and innovative tools adapted to local contexts. Notably, the key tools, suggested under the protocol are: *civic engagement tools*; *knowledge and planning tools*; *regulatory systems*; and *financial tools*. Vancouver's Heritage Conservation Program includes all of these tools, but some are more significantly developed than others. See Appendix B for further detail on the **Historic Urban Landscape** protocol.

As Vancouver's Heritage Conservation Program prepares for its next stage of development, the City is faced with a challenging set of real estate pressures and competing civic priorities. In order to define a clear path forward, a collaborative consultation process was undertaken to construct a renewed direction for the Heritage Conservation Program. The starting point for renewal is that Vancouver's Heritage Conservation Program already provides a robust and effective platform for heritage conservation, developed since the 1960s, with substantial financial and staff commitments. The Program is not broken, rather it functions extremely well given the challenges it faces. It already includes the components required for a successful heritage program, and compares favourably to the efforts of other major cities. Several key challenges are apparent in Vancouver's situation:

- Vancouver does not have the strong and supportive federal and provincial/state programs available to other cities. There is no significant financial assistance from the senior levels of government.
- Vancouver faces unique challenges due to high land values.

Despite these challenges, Vancouver's Program has been successful in many ways and continues to protect numerous significant heritage sites. The 2015 designation of First Shaughnessy as a Heritage Conservation Area sent a strong message of civic support for heritage. However, like any program that has grown over time through separate initiatives there are slippages, misalignments and missed linkages that can be addressed to improve efficiency. Notably, the provision of incentives has not kept pace with the costs of land and construction. Global best practice now strongly recognizes the importance of cultural landscapes and intangible cultural heritage, as well as providing a much broader definition of heritage value than has been traditionally defined. Despite the Program's long-term development and operation, an overarching guiding Vision

has never been clearly articulated.. As part of this program review, the following Vision, Goals, Strategic Directions and Guiding Principles were developed through consultation with City of Vancouver Staff and the Public Advisory Committee, recognizing the strengths of the current program, current challenges, and opportunities offered by global best practices. The Vision, Goals, Strategic Directions and Guiding Principles can form the basis of a new, comprehensive Heritage Strategy (discussed on page 32), which would align heritage conservation with other City priorities, such as the Greenest City Action Plan and the Housing Vancouver Strategy.

### 3.1 Guiding Principles

Through further analysis of the various components of the Heritage Conservation Program, three guiding principles were developed that will assist in reinvigorating and strengthening the program, and will better support heritage conservation.

#### A. Remove Disincentives to Heritage Conservation

There are a number of current disincentives to heritage conservation/retention projects. These include:

- Longer permit processing times than outright development projects (additional heritage review times including Statement of Significance review)
- Requirements for additional documentation (Statements of Significance, Heritage Register Evaluation, etc.)
- Lack of clarity regarding what documentation needs to accompany each application (*pro forma*, Heritage Revitalization Agreement, Conservation Plan, etc.)
- Additional permitting charges for Alternative Solutions (which heritage projects can utilize) for the VBBL
  - The greatest expense in this process is the consulting time to prepare and the cost of liability attached to the alternate or relaxation which has been transferred to the registered professional who prepares, submits, signs, and seals these documents; fees relating to the above can easily be in the tens of thousands of dollars on a typical project
- The Transfer of Density program, one of the city's most powerful conservation tools, has remained frozen for a decade.

These disincentives limit the appeal of pursuing heritage projects, especially when compared to new-build/outright projects that can be processed more quickly under current procedures.

#### B. Improve and Increase Incentives for Heritage Conservation

There are a number of existing incentive programs available for heritage conservation/retention projects, including:

- Heritage Revitalization Agreements
- Transfer of Density program (currently frozen)
- Heritage Façade Rehabilitation Program (limited to Downtown Eastside neighbourhoods)
- Heritage Building Rehabilitation Program (limited to Downtown Eastside neighbourhoods)
  - Expired in 2015, but the future of the program is currently under review
- Overall, citywide heritage incentives including zoning and development relaxations and variances.
- Alternate compliance methods for Heritage Register sites that can be accessed under the VBBL; under the 2014 changes to the VBBL, the CBO can consider a building as a heritage building even though it may not be listed on the Heritage Register, in order to conserve it.

These incentives help encourage owners and developers to proceed with heritage projects, however there is an opportunity for enhancement, improvement and augmentation, especially within the context of escalating real estate costs.

#### C. Accept Non-conformance while ensuring life safety

Heritage and character buildings inherently do not conform to existing standards and codes. They were often built at a time prior to zoning and building codes and reflect a use of technology, design and materials that is not always consistent with current standards. In many ways, these differences have inherent strengths, and the actual performance of an historic structure should be accepted as a baseline, rather than trying to force conformance to existing standards, except where life-safety could be compromised. The City already accepts this principle in the acceptance of alternate compliance under interpretation of the Vancouver Building Bylaw (VBBL):

*If the conservation work does not create an unsafe condition, or reduce the level of performance of a building, and it is required to maintain the existing character, then it meets the intent of Part 11 of the VBBL.*

City of Vancouver Bulletin 2014-007-BU

In practice, the City still has policies and procedures that interfere with accepting non-conformance and understanding the inherent performance of existing buildings.

# CITY OF VANCOUVER HERITAGE CONSERVATION PROGRAM

## VISION

The City of Vancouver's Heritage Conservation Program encourages and fosters the retention and conservation of historic places across the city, while supporting the ongoing sustainable development of its neighbourhoods.



### **GOAL #1 (UNDERSTANDING): RECOGNIZE A DIVERSITY OF HERITAGE VALUES**

Identify, celebrate and protect a broad range of historic places, including those with social and cultural heritage values, which illustrate Vancouver's history, rich diversity, and development over time.

#### **STRATEGIC DIRECTIONS:**

- Update the Vancouver Heritage Register to better reflect a values-based understanding of historic places
- Identify and understand heritage values and historic places as an integral part of all planning-related activities
- Work with interdepartmental and community partners in the identification and recognition of heritage values and historic places

#### **PROGRAM COMPONENTS:**

- Vancouver Heritage Register (VHR)
  - Historic Context Statements and Thematic Frameworks
  - Heritage Assessments (first step in evaluation for VHR)
  - Statements of Significance



### **GOAL #2 (PLANNING & MANAGING): ENHANCE HERITAGE MANAGEMENT TOOLS**

Provide leadership through clear and consistent heritage policies, effective heritage management tools, and meaningful heritage conservation incentives.

#### **STRATEGIC DIRECTIONS:**

- Ensure effective heritage conservation incentives
- Create supportive regulations and policies
- Streamline processing of heritage applications

#### **PROGRAM COMPONENTS:**

- Planning and regulatory tools
  - Community and land use plans and policies
  - Zoning and Development Bylaw
  - Heritage Property Standards of Maintenance Bylaw
  - Heritage Procedure By-law
  - Heritage policies and guidelines
  - Other bylaws (VBBL, Parking)
- Support tools
  - Zoning incentives
  - Transfer of Density
  - Property Tax Exemption
  - Grants
  - Dedicated Heritage staff (Planning, Urban Design & Sustainability Division)
- Protection tools
  - Heritage Designation
  - Heritage Revitalization Agreement
  - Temporary Protection
  - Heritage Conservation Covenants
  - Heritage Alteration Permits
  - HA zones and design guidelines
  - Heritage Conservation Areas





### **GOAL #3 (STEWARDSHIP): LINK HERITAGE TO OTHER CITY GOALS**

Acknowledge the environmental, social and cultural benefits of heritage conservation. Leverage heritage conservation to meet other City goals and strive for outcomes that balance multiple objectives.

#### **STRATEGIC DIRECTIONS:**

- Apply a heritage conservation lens and instill heritage values while developing City plans, programs and policies
- Support sustainable heritage conservation and integrated design processes
- Steward the conservation of City-owned heritage resources

#### **PROGRAM COMPONENTS:**

- All other City strategies (i.e. *Greenest City Strategy*, *Housing Vancouver Strategy*, etc.)
- Statements of Significance and heritage conservation plans for City-owned heritage resources



### **GOAL #4 (SHARING): PROMOTE PUBLIC AWARENESS, ENGAGEMENT AND SUPPORT**

Promote and support the celebration and protection of the city's heritage values and historic places. Provide opportunities for a broad spectrum of public education and awareness.

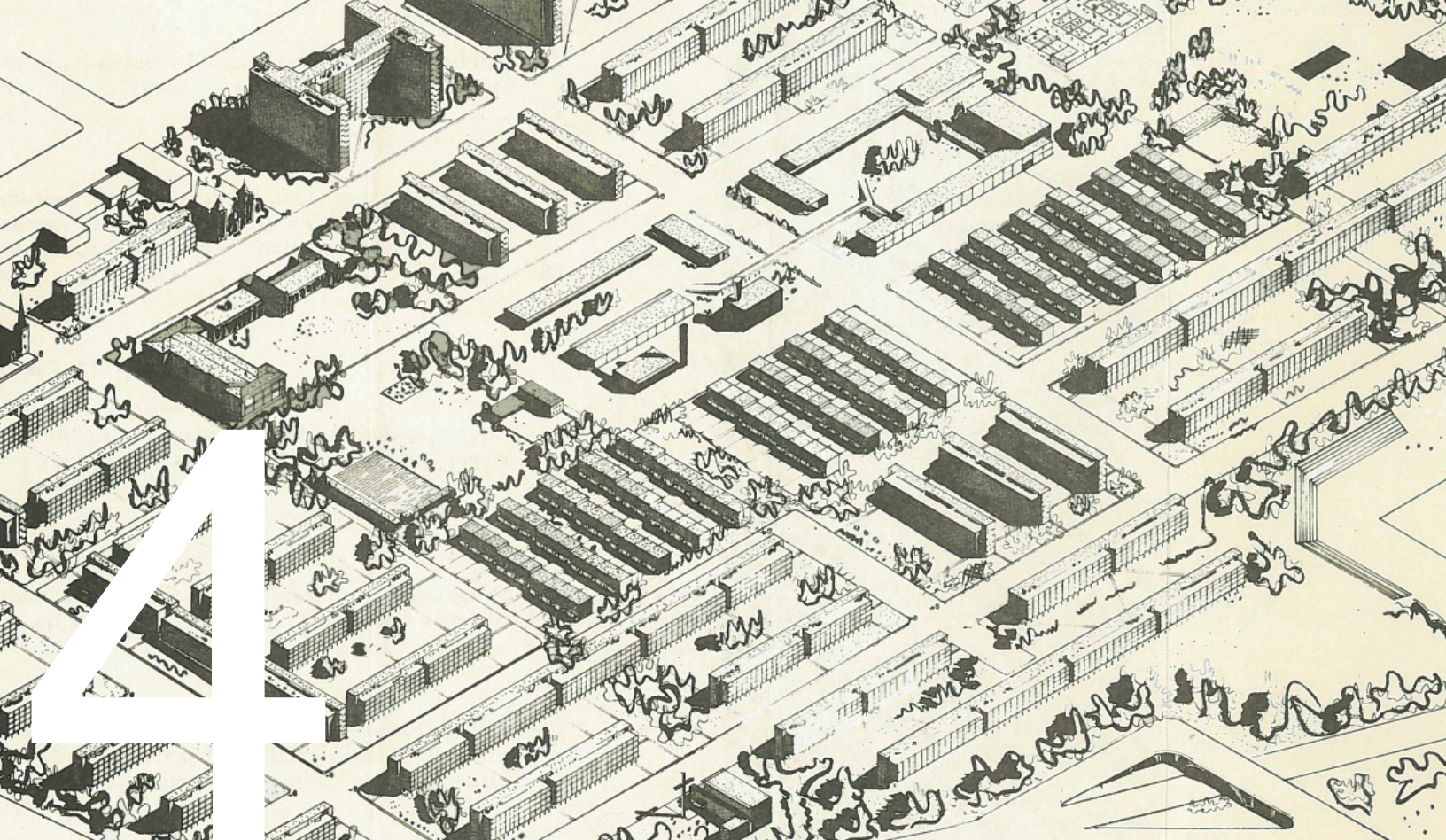
#### **STRATEGIC DIRECTIONS:**

- Improve heritage awareness and engagement programs, tools, and resources
- Work with interdepartmental and community partners in the celebration of heritage values and historic places
- Maximize strategic partnerships to build greater public awareness, engagement and support for heritage

#### **PROGRAM COMPONENTS:**

- Heritage information on City website
- Heritage plaques
- Heritage awards
- Heritage public advisory committees





# PROGRAM REVIEW

The City's Heritage Conservation Program is a collection of policy initiatives, but has never been developed as its own strategic plan, similar to what has been developed for other program modules. In the absence of a community plan, the development of an overarching Heritage Strategy will outline a clear Vision and Goals, set Strategic Directions, and determine objectives and policies. This will assist in a clear understanding and administration of heritage policies.

Based on the work undertaken in the Heritage Action Plan, the City should develop a **Heritage Strategy** that will act as the guiding document for the City's heritage initiatives. The following technical review of the Heritage Conservation Program is organized into three parts: (1) permit processing and fees; (2) regulations; and (3) policies, tools and incentives. Within each part, there are separate aspects of the program that have been analyzed with a SWOT chart. A number of recommendations have been proposed, along with anticipated outcomes for the program. The scope of the proposed recommendations includes both regulatory changes and process improvements. The intention is to strengthen the regulations, policies, tools and incentives available to Staff, the Director of Planning, and Council, in order to better protect historic places across the City.

## 4.1 Permit Processing and Fees

### 4.1.1 Permit Requirements

#### Existing Situation

Currently, the permit process is viewed as overly complicated, creating a disincentive to proceed with character or heritage projects, which are seen as more cumbersome than outright applications. There is an opportunity to simplify/streamline the requirements for certain conditional projects (heritage/character retention) that should be eligible for priority processing.

Once a property is legally protected, substantial changes or any alteration to the identified heritage characteristics of the property requires a specialized permit: the Heritage Alteration Permit (HAP). HAPs are required in addition to development permits or a development-building permit, however they are processed concurrently and there is no separate application/fee required. HAPs may also be required when the property is in a Heritage Conservation Area, subject to a Conservation Covenant or under Temporary Protection. HAPs will be used as a primary regulatory tool in the new First Shaughnessy Heritage Conservation Area.

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Permit Requirements	<ul style="list-style-type: none"><li>Permitting process for heritage properties ensures compliance with applicable zoning and compliance with heritage conservation practices</li></ul>	<ul style="list-style-type: none"><li>Unclear in what circumstances and at what stage Heritage Evaluation/SOS/CP/HRA are required</li><li>Density (FSR) increase triggers (for <i>pro forma</i>, etc.) unclear</li><li><i>Pro formas</i> may be completed at different times and for different Staff members through the enquiry stage</li></ul>	<ul style="list-style-type: none"><li>Streamline and clarify permit processes for heritage/character retention projects</li></ul>	<ul style="list-style-type: none"><li>Limited Staff resources</li></ul>

#### Recommendations

- Introduce 'threshold' checklist early in enquiry process to provide clarity of what documentation (Evaluation/Statement of Significance/Conservation Plan/Heritage Revitalization Agreement) is required and at what density increase (threshold) level.
- Pro formas* should only be accepted at one point in the permitting process.
- Clarify density increase thresholds (consider raising interim, [ $<10\%$  density increase] *pro forma* exemption to apply to projects increasing density by less than 12-15%; or at least consider making the interim exemption permanent).
- Ensure that the application process is clearly defined and is explained on the City's website.

#### Outcomes

- A streamlined and more efficient permit system where requirements are clearly outlined for every stage of a project, so that they can be easily understood from the start.
- Improved communication regarding city expectations and process for heritage projects.



#### 4.1.2 Development and Building Permit Fee Schedules

##### Existing Situation

See *Planning & Development and Community Services Schedule of Fees For Permits* for the breakdown of current fees. There are no additional fees for Heritage Revitalization Agreement (HRA) processing, as these applications are processed as Development Permits. There are only nominal fees required for maintenance or minor repairs of designated heritage properties or those properties located within heritage zoning areas (Chinatown, Gastown, Yaletown, First Shaughnessy). Conversely, there is only a nominal fee for the demolition of buildings on the Heritage Register or a home in an RS zone.

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Development and Building Permit Fee Schedules	<ul style="list-style-type: none"><li>• No additional fees for HRAs</li><li>• Nominal fees for maintenance or minor repairs</li></ul>	<ul style="list-style-type: none"><li>• Demolition fee (currently \$321.00 plus \$345.00 if pre-1940 house) not high enough to discourage the demolition of Heritage Register sites/RS-zone homes</li></ul>	<ul style="list-style-type: none"><li>• Consider fee discounts for heritage retention projects</li></ul>	<ul style="list-style-type: none"><li>• Civic budget implications</li></ul>

##### Recommendations

- Consider offering permit fee discounts to help incentivize heritage retention projects.

##### Outcomes

- Increased fees may provide a disincentive to demolishing a Heritage Register site/RS-zone home.
- Improved heritage retention.

### 4.1.3 Processing Times

#### Existing Situation

The number of recent permit applications has dramatically increased at the City of Vancouver, thanks to a growing economy and population, as well as a very active real estate market. There are limited Staff resources available to keep up with this increased demand and, as a result, the City is experiencing a backlog in permit applications.

Throughout the Heritage Action Plan consultation, it was clear that frustration exists for anyone involved in applying for a permit, for any proposed level of intervention. There was general agreement that the process is opaque, takes too long and can appear completely arbitrary in terms of process and outcome. The attenuation of the process can be a serious disincentive for heritage projects, which are perceived to be more complicated and time-consuming, as compared to outright development.

Permit processing times can be unnecessarily extended for heritage projects due to an inadequate level of Staff awareness regarding the special circumstances and exemptions for these projects. The City has undertaken a separate, overall review of permit processing times; recommendations for the expedited, priority processing of heritage permits should be tied to this larger review.

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Processing Times		<ul style="list-style-type: none"><li>Heritage projects are not given any processing priority</li><li>Extensive Staff time spent on pre-application advice</li><li>Inadequate Staff to expedite permit processing</li><li>Lack of Staff awareness of heritage procedures and exemptions</li></ul>	<ul style="list-style-type: none"><li>Streamline and clarify processes by processing conditional projects (heritage/character retention) on a priority basis; processing times should be competitive with outright projects</li><li>Major maintenance/repair permit approvals could be outsourced</li></ul>	<ul style="list-style-type: none"><li>Limited Staff resources</li></ul>

#### Recommendations

- Accelerate processing times for heritage/character retention projects by prioritizing them and ensuring their processing times are competitive with outright projects.
- Hire additional Staff to help process permits; consider dedicated Heritage Staff that deal directly with heritage permits, including plan checkers, project facilitators and inspectors.
- Provide heritage training for staff involved in heritage permit processing and increase industry (architects, builders, etc.) literacy regarding the process.
- Move to a *certified professional system* for sign-off on major maintenance/repair permits, recognizing there could be an additional cost to applicants. There is a need to clarify and build professional expertise over time, as Certified Professionals may not have specific heritage experience.

#### Outcomes

- A system in which heritage/character retention permits are expedited, thereby relieving pressure on Staff resources.
- Improved conservation outcomes.
- Increased heritage retention.

# 4.2 Regulations

## 4.2.1 Zoning and Development Bylaw

### Existing Situation

This bylaw regulates the development of property in Vancouver by encouraging land use and building according to community goals and visions for the future of the city and its neighbourhoods. Section 3.2.5 relates to heritage conservation. Provisions under the Zoning and Development Bylaw may be relaxed where literal enforcement would result in unnecessary hardship in carrying out any restoration or renovation of a heritage property. In addition, Council could determine that a proposed development would make a contribution to conserving a building or site designated as protected heritage property or a building or site on the Heritage Register, in which case they may relax the provisions of this bylaw as an incentive to heritage retention.

There are Demolition Delay ordinances built into section 10.12, which allow demolition permits for heritage buildings to be delayed until the satisfaction of the Director of Planning, in order to ensure alternatives to demolition are adequately considered.

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Zoning and Development Bylaw	<ul style="list-style-type: none"><li>Demolition Delay ordinances help ensure alternatives to demolition of heritage buildings are considered</li></ul>	<ul style="list-style-type: none"><li>Current density allocations in conditional areas may be too high for retention to be a viable option</li></ul>	<ul style="list-style-type: none"><li>Conditional zoning areas have the potential to offer incentives for retention</li></ul>	<ul style="list-style-type: none"><li>Current zoning incentives may not be effective within an extremely active real estate market</li></ul>

### Recommendations

- Consider zoning updates to certain single-family areas (RS-3/3A/5) to better encourage retention of pre-1940 heritage and character homes (see separate Zoning Review report).
- Maintain certain non-conforming uses of heritage buildings (such as corner stores) by introducing more flexibility around the creative use/reuse of heritage buildings in certain areas; this can be addressed through HRAs.

### Outcomes

- Additional zoning incentives and demolition disincentives that together promote increased retention of heritage and character buildings.

#### 4.2.2 Vancouver Building Bylaw

##### Existing Situation

In September 2013, Council approved in principle a new 2014 City of Vancouver Building Bylaw (VBBL). This took effect on January 1, 2015 and includes unique-to-Vancouver bylaw provisions regulating the design and construction of buildings. The VBBL Part 11 (Previously Part 10) was updated to facilitate heritage conservation work. Part 11 of the 2014 VBBL has alternate compliance methods for existing buildings, including heritage buildings and buildings considered to have heritage character merit. The intent is to provide flexibility, and to maintain a balance between VBBL requirements and the heritage and/or character elements of a building. The definition of 'heritage' has been expanded to include buildings not listed on the Heritage Register, subject to the discretion of the Director of Planning.

In November 2014, the *City of Vancouver Bulletin 2014-007-BU* was issued to address heritage compliance issues. Since that time, there has been uneven application and interpretation of the Bulletin, as there is no dedicated processing stream. The following specific issues have been noted:

- Staff do not appear to be able to identify projects where the Heritage tables apply unless the site is listed on the Vancouver Heritage Register.
- The concept of replacing heritage elements is not being applied if the replacement is new construction.
  - Whether an existing wall is replaced or a new wall is created, the response is 'new construction must comply with the current VBBL'.
  - Even when elements are removed, rehabilitated and replaced, some Staff interpret this as 'new' construction.
- City policy to classify all buildings under the edition of the VBBL at the time of permit submission creates problems similar to the one described above.
  - There exists an unworkable concept of constructing elements in a building which must meet a standard lacking in all other structural elements (e.g. 2-hour non-combustible fire separation supported by a 45-minute combustible floor).
  - Another specific concern is interpretation of grade:
    - Definition of grade to establish the first storey has changed over the decades; it would be appropriate to realize that it is impractical to lower existing buildings.
    - A building that is constructed in 1905 as a 3-storey plus basement house should be assessed as 3-storey plus basement, even if the basement would be considered a first storey under the current bylaw.
    - The result is a building that conforms as a 3-storey building is pushed into significant non-conformance.
    - The obvious exception would be if the building was being raised.
- When a Code Consultant becomes involved in such projects, they often manage to develop a more workable solution based on the inherent principles described in the bulletin; however, this is done at significant cost to the owner (additional consultant fees) and often the building department will only accept these principles when documented in a report signed and sealed by a registered professional, resulting in fees relating to Alternative Solutions and Minor Relaxations, as described above; all of these fees are typically not anticipated in the project budget.
- The Building Department should be involved during initial conversations with the Heritage and Planning Departments to eliminate being 'blind-sided' at the permit stage: there is discontinuity when owners may be encouraged to pursue a particular direction towards maintaining 'character merit' elements of a building, only to find that the Building Department insists they be removed or covered.
- The plan checking process needs to be reversed – the overall level of upgrading should be negotiated between senior Staff able to make judgment in concept, and then 'confirmed' by junior Staff; currently, the first code review is completed by junior Staff, often leading to immense lists of non-conforming issues.
- Staff should recognize that the Bylaw Part 11 provides only prescribed solutions, it does not prevent the use of other solutions.

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Vancouver Building Bylaw	<ul style="list-style-type: none"> <li>Recent (2014) update which better facilitates heritage conservation through Part 11 for Existing Buildings</li> </ul>	<ul style="list-style-type: none"> <li>Weak coordination among Staff groups</li> <li>Lack of Staff education</li> <li>Charge for Alternate Solutions review</li> <li>Charge for Minor Relaxation review</li> </ul>	<ul style="list-style-type: none"> <li>Increased education and awareness of changes</li> <li>Specialized Codes could enhance substantially the ability to upgrade both heritage and existing buildings, and provide additional incentives for heritage conservation</li> <li>Potential for separate fire and life safety review for heritage (and possibly character) buildings</li> </ul>	<ul style="list-style-type: none"> <li>Site level implementation – lack of understanding of heritage goals of a project</li> </ul>

### Recommendations

- Eliminate (or at least reduce) extra permit fees (currently starting at \$732.00 each) for evaluation/review of an Alternate Solution/Minor Relaxation for retention projects, recognizing this has civic budget implications.
- Ensure expectations regarding the level of upgrading that can be achieved, regarding life safety, seismic and energy-efficiency, are understood before heritage character is compromised. Building staff, including Inspectors, should be involved at the enquiry stage to ensure a consensus on these expectations.
- Consider, in consultation with Building staff, new fire and life safety review process for heritage (and potentially character) buildings that could potentially include:
  - o Any building constructed prior to ~1970 could be offered the opportunity of having a Certified Professional provide a comprehensive fire and life safety upgrade report;
  - o If this is limited to buildings that are constructed pre-1970 it does not run the risk of setting precedents or overwhelming Staff;
  - o This report would be a global approach and would not incur additional fees for Minor Relaxations or Alternative Solutions;
  - o The report may be accepted as presented, or may be reviewed in conjunction with the Certified Professional so that issues of disagreement on 'appropriate upgrading' can be discussed;
  - o The City may wish to provide a checklist of issues to be discussed in the report;
  - o Administratively this could be accomplished with a single Minor Relaxation form on file referencing the report.
- Appoint dedicated staff to heritage applications, recognizing this has civic budget implications. Ensure adequate staff training in heritage issues.

### Recommendations (continued)

- In addition, the City should consider the development of a Rehabilitation Subcode, which can apply to historic or existing buildings, or both; this would be even more streamlined than Part 11 of the VBBL. Relevant models include:
  - ***The State of New Jersey Rehabilitation Subcode:*** Common sense rules for the restoration and re-use of existing buildings in New Jersey. Adopted in 1998, the New Jersey Rehabilitation Subcode was the first comprehensive set of code requirements for existing buildings. It is a stand-alone subchapter and, therefore, it contains all the technical requirements that apply to a rehabilitation project. The Department of Community Affairs developed the Rehabilitation Subcode with guidance from a 30-member committee under the coordination of the Center for Urban Policy Research at Rutgers University. The Committee was composed of code officials, fire officials, architects, historic preservationists, advocates for people with disabilities, and government representatives. Subsequent studies indicated that the application of the Subcode clarified and streamlined the rehabilitation process for all existing buildings, resulting in a 19% saving in overall project costs. This represented a huge incentive for the rehabilitation of historic buildings as well as the general building stock, promoting investment and significant amounts of building upgrading that would not otherwise have been financially viable. These cost savings, when added to the U.S. Preservation Tax Credits and other incentives, presented significant advantages to heritage projects in New Jersey.
  - ***The California Historical Building Code:*** This Code is unique among state regulations, and required state agencies promulgating regulations for building construction to work in harmony with representatives of other design and construction disciplines. The result was a totally new approach to building codes for historical structures, which maintains currently acceptable life-safety standards. These regulations are also unique in that they are performance oriented rather than prescriptive. The background of the Code can be traced to 1973, with a proposal by the California Landmarks Advisory Committee that expressed a need for a new building code to meet the intent of protecting the public health and safety and also retain “enough flexibility to allow restoration of a Historic feature while still retaining its Historic integrity.” After years of comprehensive study, the Code was first adopted in 1979, and has been updated on a periodic basis.

### Outcomes

- A VBBL that effectively facilitates heritage conservation, ensures appropriate life safety and is implemented by well-informed and efficiently coordinated Staff.
- Streamlined procedures and an enhanced ability to retain existing building stock in an efficient and sustainable manner.



#### 4.2.3 Subdivision Bylaw

##### Existing Situation

The intent of Subdivision Bylaw No. 5208 is to control the subdivision of land. Section 9 of the subdivision bylaw specifies minimum standards for subdivision. A Heritage Revitalization Agreement may vary or supplement the provisions of the Subdivision Bylaw. Under current circumstances, a subdivision application may be approved for a property with a heritage or character building prior to a heritage/character review, which could result in the demolition of the building.

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Subdivision Bylaw		<ul style="list-style-type: none"><li>• ‘Panhandle’ subdivisions as a result of HRAs are discouraged</li><li>• Heritage/character review takes place only after subdivision occurs</li></ul>	<ul style="list-style-type: none"><li>• Review heritage/character merit before subdivision considered</li></ul>	

##### Recommendations

- Heritage/character reviews should occur before a subdivision is approved.
- Amend the Subdivision bylaw to instruct the Approving Officer to not approve subdivision applications that would result in the loss of heritage or character buildings.

##### Outcomes

- Potential subdivisions no longer in conflict with heritage conservation.

#### 4.2.4 Heritage Procedure Bylaw

##### Existing Situation

The Heritage Procedure Bylaw was passed in 2015. The bylaw delegates certain authorities to the Director of Planning and Chief Building Official to enable a faster response to heritage concerns and provides details on procedures for Heritage Alteration Permits. The Heritage Procedure By-law will provide greater clarity to the public and owners of designated heritage properties across the city regarding the procedures the City uses to manage heritage property, as provided for in Part XXVIII – Heritage Conservation of the *Vancouver Charter*.

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Heritage Procedure Bylaw	<ul style="list-style-type: none"><li>Clarifies heritage procedures both internally and for the public</li></ul>	<ul style="list-style-type: none"><li><i>Standards and Guidelines for the Conservation of Historic Places in Canada</i> (Parks Canada) formally adopted for Chinatown and Gastown, but not citywide, even though they are used in practice</li></ul>	<ul style="list-style-type: none"><li>Provides a renewed foundation for the <i>Heritage Policies and Guidelines</i> document</li><li><i>Standards and Guidelines</i> could formally apply citywide</li></ul>	

##### Recommendations

- Update the *Heritage Policies and Guidelines* document to include all heritage policies, including reference to applicable bylaws, such as Heritage Procedure Bylaw (or feed into a new *Heritage Strategy*)
- Standards and Guidelines for the Conservation of Historic Places in Canada* (Parks Canada, 2010) should be formally adopted by Council for citywide application.

##### Outcomes

- Clarified and streamlined heritage procedures for both Staff and the public.

#### 4.2.5 Heritage Property Standards of Maintenance Bylaw

##### Existing Situation

The Heritage Property Standards of Maintenance Bylaw was passed in 2015 and is currently applied in the First Shaughnessy Heritage Conservation Area. The bylaw outlines minimum requirements for maintenance of property to ensure the objectives of the First Shaughnessy area are upheld, and to prevent “demolition through neglect” of pre-1940 homes in the neighbourhood.

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Heritage Property Standards of Maintenance Bylaw	<ul style="list-style-type: none"><li>Encourages First Shaughnessy owners to maintain their properties and helps avoid demolitions of heritage homes due to their neglect</li></ul>	<ul style="list-style-type: none"><li>Only applies to First Shaughnessy HCA, enabling protected heritage sites in the remainder of the city to fall into disrepair</li></ul>	<ul style="list-style-type: none"><li>There is a potential to extend the reach of the bylaw to apply to all protected heritage properties across the city</li></ul>	<ul style="list-style-type: none"><li>Enforcement may pose challenges to existing staff, and may require additional resourcing</li></ul>

##### Recommendations

- Extend the application of the Heritage Property Standards of Maintenance Bylaw to all designated heritage properties across the city.

##### Outcomes

- Clear expectations regarding the maintenance of heritage sites.
- Reduced demolition by neglect.
- Higher level of maintenance across designated/protected heritage resources throughout the city.



#### 4.2.6 Heritage Conservation Area Official Development Plan

##### Existing Situation

In 2015, First Shaughnessy became the city's first Heritage Conservation Area (HCA). This required the enactment of a Heritage Conservation Area Official Development Plan, that now enables the establishment of other HCAs across the city. Further recommendations regarding concentrations of heritage resources and potential HCAs are included in a separate report, the **Vancouver Heritage Register System Plan**.

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Heritage Conservation Area Official Development Plan	<ul style="list-style-type: none"> <li>Potential to place heritage conservation at the forefront of neighbourhood development</li> </ul>	<ul style="list-style-type: none"> <li>Additional study time/funding required to determine future HCAs</li> <li>Lengthy notification and consultation process required when future areas considered</li> </ul>	<ul style="list-style-type: none"> <li>Other areas in the city may benefit from the application of an HCA, including: Gastown, Chinatown, Japantown/Railtown, Yaletown, Mole Hill, Delamont Park, Granville Island, the 800-1200 block of Granville Street, the South Granville apartment district, Commercial Drive, etc.</li> </ul>	<ul style="list-style-type: none"> <li>Lack of neighbourhood support</li> <li>Legal challenges (similar to First Shaughnessy process to adopt HCA)</li> </ul>

##### Recommendations

- Study the potential cost/benefit for other areas in the city to adopt an HCA, including: Gastown, Chinatown, Japantown/Railtown, Yaletown, Mole Hill, Delamont Park, Granville Island, the 800-1200 block of Granville Street, the South Granville apartment district, Commercial Drive, etc.
  - Areas with concentrations of similar building ages/types/styles may be easier to fit into the HCA model as guidelines developed would need to be somewhat prescriptive in the type of heritage character that is to be preserved; Gastown, Chinatown and Yaletown, which already have HA-zoning in place, may be the most likely starting point.

##### Outcomes

- Future studies would determine if current zoning mechanisms are sufficient to ensure heritage conservation in identified areas of heritage concentration, or if an HCA would provide a better heritage management framework.

## 4.3 Policies, Tools and Incentives

### 4.3.1 Heritage Policies and Guidelines Document

#### Existing Situation

The City's *Heritage Policies and Guidelines* document has been amended and reaffirmed periodically since its inception in 1986. Over the years it has become a repository of a range of heritage policies adopted by Council. It was reaffirmed in 1991 and last amended in 2002.

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<i>Heritage Policies and Guidelines</i> Document	<ul style="list-style-type: none"> <li>A repository of a range of adopted heritage policies</li> </ul>	<ul style="list-style-type: none"> <li>Last amended 2002</li> <li>Relationship with other policies is unclear</li> <li>Document not readily accessible, or user-friendly</li> <li>Heritage policies sometimes superseded by other civic priorities, such as sustainability and housing</li> </ul>	<ul style="list-style-type: none"> <li>Identify overarching vision and goals of heritage conservation program</li> <li>Include all policies/tools that are available for heritage conservation</li> <li>Produce a truly comprehensive document</li> <li>Heritage policies could be aligned with other civic priorities, such as the <i>Greenest City Action Plan</i> and <i>Housing Vancouver Strategy</i></li> </ul>	<ul style="list-style-type: none"> <li>Staff time and resources need to be identified to undertake work on a new strategy</li> </ul>

#### Recommendations

- Elevate heritage policies into a cohesive *Heritage Strategy* on the same plane as the *Greenest City Action Plan*, *Housing Vancouver Strategy*, etc. A new *Heritage Strategy* could either replace the Policies and Guidelines document or supplement it and should include benchmarks/targets, as well as regular reporting back to determine effectiveness. Adjustments should then be made as required.
- Adopt the new Vision, Goals and Strategic Directions for the Heritage Conservation Program (to appear either in the existing document or the new *Heritage Strategy*).
- Change to 'premium cost approach' rather than 'Encumbered/Unencumbered' incentive calculations, including transfer of density.
- For all projects where heritage incentives are offered or heritage sign-off is required as part of a heritage site application, ensure that accredited members of the Canadian Association of Heritage Professionals (CAHP), or registered architects/professional engineers with certification and/or education in building conservation field be required to provide heritage consulting services.
  - The success of a heritage conservation project also depends on the architects, contractors and craftspeople who are engaged to undertake the work. Currently, there are no professional designations within these fields to distinguish those who are qualified to undertake heritage work; this is a larger issue within the industry.
  - The Independent Contractors and Business Association of BC (ICBA) offers a series of training courses that lead to certification through "tickets" that are earned through classroom and online training. The City could work with the ICBA and other service providers to help develop a system whereby, at a minimum, site superintendents on heritage projects eligible for City incentives would require heritage qualification. The content and delivery of these courses could be provided through outside providers, such as the Vancouver Heritage Foundation, or provincially through Heritage BC.

#### Outcomes

- A strong, clear, comprehensive and up-to-date document, which identifies all the tools/policies that support heritage conservation goals.
- Heritage conservation aligned with other City priorities.

## 4.3.2 Civic Heritage Stewardship

### Existing Situation

There is a diverse range of City-owned heritage resources included on the Heritage Register, but there is no single authority that oversees civic heritage sites. Management of these resources is not centralized, as the Board of Parks and Recreation, the Vancouver School Board (VSB), and Vancouver Fire and Rescue Services (VFRS) operate their resources according to their own mandates and goals, and are not always aware that a site is listed on the Register or is considered to have heritage value. There is also a fractured management structure for resources that are the responsibility of City Hall, as the Planning Department, Engineering Services and Cultural Services are charged with the oversight of different sites, again, each with their own mandates. Further slippage can be due to a lack of detail on the Register listings (e.g. individual character-defining elements within parks, or small but significant outbuildings on school sites). Certain heritage sites are at risk of mismanagement, as they may fall between the governance of different departments. The City may also own or control other sites that have not yet been evaluated for their heritage significance. In addition to City-owned heritage buildings, heritage infrastructure, including historic pavements and street furnishings, can be particularly challenging to manage between departments.

#### **City-Owned Historic Buildings**

The City owns a number of identified heritage buildings, some of which, like Roedde House, are operated through a management agreement. The overall management of City-owned buildings is inconsistent, and Conservation Plans have not been prepared (Roedde House is the exception). The City may also own other buildings whose heritage significance has not yet been evaluated, and are not yet identified as potential heritage sites. The lack of clear identification of sites, management policies, Conservation Plans and dedicated funding threaten the long term conservation of City-owned heritage buildings.

#### **Monuments**

Many of the monuments listed on the Heritage Register are located on public land, though there is no clear policy framework for their management. In essence, the City has inherited the responsibility for many historic monuments, but has no policies in place for their conservation. Many of these monuments are visibly deteriorating and will require future conservation interventions. A survey of the identified monuments indicates that there is no consistency between what is listed on the Heritage Register and what is listed on the Public Art Registry. There are no current City policies that relate to the maintenance of historic monuments, and no dedicated funding for conservation.

#### **Historic Pavements**

The earliest streets in Vancouver were simply graded, with wooden sidewalks in some areas. As the city grew and developed, some streets received more durable paving, first by being gravelled, then some received wooden blocks (partially visible on Alexander Street), and ultimately masonry paving, including granite blocks (still visible on the 400 block of Hamilton Street, along some stretches of Homer Street and other locations), stamped “Granitoid” concrete (visible on West 10th Avenue at Columbia Street) and hard-fired paving bricks (visible on Arbutus Street north of West 3rd Avenue). Concrete was used for sidewalks from an early date. By the 1920s, bitulithic paving was being used. Poured concrete was used for the construction of the Stanley Park causeway in 1937-38, but the City gradually adopted the North American standard of asphalt “blacktop” pavement and concrete sidewalks.

In the past, Engineering Services developed policies relating to the retention of certain types of historic paving, but these appear to no longer be available. *The City of Vancouver Street Restoration Manual* (Engineering Services, August 2008) includes the following single policy:

- 3.13.3** *At street intersections the cast year shall be stamped in the surface of the sidewalk as directed by the City Engineer. The necessary template figures will be available from the City. Old historical sidewalk stamp markings 1950 or older have special value to the City and are required to be saved and kept in place. The City must be contacted and consulted prior to the demolition and removal of the markings.*

#### **Historic Street Furnishings and Elements**

There are few historic streetscape elements that are officially identified by the City; one example is the Birks Clock at Granville Street and Hastings Street, which is listed on the Vancouver Heritage Register. Identification of significant elements in advance of any proposed street works is crucial to their conservation: the historic terrazzo apron of the Vogue Theatre National Historic Site was destroyed during the repaving of Granville Street in 2009. Some historic signs have been identified on the Vancouver Heritage Register (such as the BowMac sign) while some are attached to protected buildings; many other historic signs (both attached and painted) exist but are not clearly identified. Further identification and flagging of historic elements should be undertaken to ensure better understanding of what historic streetscape furnishings and elements exist.



### 4.3.2 Civic Heritage Stewardship (continued)

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Civic Heritage Stewardship	<ul style="list-style-type: none"> <li>The history of the city's Heritage Conservation Program and the Vancouver Heritage Register communicate to the public that heritage conservation is a civic priority</li> </ul>	<ul style="list-style-type: none"> <li>The Planning Department is unable to enforce best-practice conservation standards for parks/VFRS sites if they are in conflict with Parks Board/VFRS goals</li> <li>Heritage school buildings are managed by the VSB, which may have conflicting goals versus best-practice heritage conservation standards (seismic upgrading as an issue)</li> <li>The management of heritage infrastructure is not effectively coordinated between Engineering Services and the Planning Department</li> <li>There is a lack of knowledge about what heritage elements exist within the public realm</li> </ul>	<ul style="list-style-type: none"> <li>A higher level of coordination for heritage resources would avoid their neglect or mistreatment, according to best-practice heritage conservation standards</li> <li>Certain resources would benefit from more focussed management, including parks/park facilities, monuments, schools, heritage infrastructure and heritage elements located in the public realm</li> </ul>	<ul style="list-style-type: none"> <li>Limited Staff resources</li> <li>Lack of information about what heritage elements exist within the public realm</li> <li>Lack of best-practice heritage conservation standards across different City departments and entities</li> </ul>

### Recommendations

- The Board of Parks and Recreation, Vancouver School Board, Vancouver Fire and Rescue Services, Planning Department, Engineering Department and Cultural Services should be consulted to determine how to more effectively work together for the common goal of better civic heritage stewardship.
- City departments, agencies or boards responsible for managing heritage resources should develop a stewardship strategy/plan for heritage resources that each manages.
- Develop Statements of Significance (Step 1) for all City-owned sites on the Heritage Register and then Conservation Plans (Step 2) for City-owned heritage sites when work that requires a Development and/or Building Permit is undertaken.
- Historic features in the public realm, including monuments, pavements and street furnishings, should be surveyed/identified, inventoried and flagged within the City's internal systems to ensure they are appropriately identified for future conservation policies.
- Review the management framework of historic monuments and their relation to the Public Art Registry. Develop a consistent framework for the management and conservation of significant historic monuments on City-owned land. Provide funding to develop a management framework and for conserve as required.
- Identify budget requirements for the conservation of City-owned and managed heritage sites.

### Outcomes

- A more effective management system for city-owned and public realm heritage sites; better Civic Heritage Stewardship is a goal of the Heritage Conservation Program.
- The City would embrace a leadership role, and set the standard for other property owners and managers.

### 4.3.3 Transfer of Density

#### Existing Situation

The Transfer of Density (TOD) program was established as a mechanism to provide financial incentives for heritage rehabilitation projects. In cases where increasing the density on the heritage property is not possible or desirable, Council permits the owner to transfer the theoretical density from the 'donor' site to a 'receiver' site. If a heritage building occupies a site which is zoned for greater floor space ratio (FSR) or density, the City may allow the potential density from the heritage property to be transferred to another property elsewhere, to encourage the retention of the heritage resource. The City can also create bonus density to provide additional financial incentive.

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Transfer of Density	<ul style="list-style-type: none"><li>Helped revitalize heritage areas</li><li>City has successfully implemented measures to reduce and reinstate Heritage Amenity Bank</li><li>Provides significant incentives for larger projects</li></ul>	<ul style="list-style-type: none"><li>Heritage Amenity Bank still frozen and not available as an incentive</li><li>There are limits to how much density can be absorbed</li></ul>	<ul style="list-style-type: none"><li>Reintroduce the program in a sustainable format</li><li>Process should be competitive – additional density is not a right</li><li>Use Vision/Goals/Strategic Directions and new <i>Heritage Strategy</i> to set priorities for the reintroduction of the program</li></ul>	<ul style="list-style-type: none"><li>An imbalance of supply and demand could once again compromise the system, as it did in 2007, when the Heritage Amenity Bank had to be frozen</li></ul>

#### Recommendations

- Develop a plan/process to allocate [transfer of] density, as an incentive for heritage conservation, annually.
- When program is re-instated, ensure that creation of new density is based on the previous year's absorption [Council reports 2009 and 2013].

#### Outcomes

- A sustainable, viable TOD policy that effectively provides incentives for heritage retention, including larger-scale projects.

#### 4.3.4 Heritage Designation/Heritage Revitalization Agreement (HRA)

##### Existing Situation

*Designation* is a formal, legal protection, listed on the Land Title, which acknowledges the heritage value of a site. Heritage Bylaw No. 4837 is the original bylaw through which heritage properties can be designated. Previously, Council added properties to this bylaw through amendments. However, as of February 2003, separate bylaws for each designated property are enacted. Designation preserves a property and its physical, heritage character-defining elements through a municipal bylaw, which is crafted specifically for that site. Once a Designation bylaw has been enacted on a property, no alterations may be made to it without obtaining a Heritage Alteration Permit. The City's long-term goal is to protect, through voluntary designation, as many resources on the Vancouver Heritage Register as possible. However, if the City determines a property is of extraordinary merit and under extreme threat, Council may choose to designate without owner approval. Designations without owner approval are extremely rare in British Columbia. Since 1977, the City has not enacted a designation for any heritage site without owner agreement, and is unlikely to do so as the affected owner is entitled to apply for compensation for loss in property value.

A Heritage Revitalization Agreement (HRA) is a formal, legally binding agreement, negotiated between the City and a private property owner. These agreements are site-specific, and written to suit unique properties and projects, and can vary or supersede other development regulations. An HRA may vary the property's applicable zoning on density, siting, land use, or other previous legislation or regulation. For example, an HRA may allow a property owner a higher FSR, an infill building and/or a change in use, if the owner agrees to conserve the property's heritage value.

In practice (although not in policy), Heritage Designations and HRAs were previously coupled to ensure protection measures were fully enacted. However, when density increases are less than 10% and there are no other variances, Designations are generally used as a sufficient mechanism to protect heritage resources, but do not provide incentives. HRAs are only required when density increases are in excess of 10% and/or there are additional variances; a separate Designation is not required.

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Civic Heritage Stewardship	<ul style="list-style-type: none"><li>Strong tools for retention and protection of properties</li></ul>	<ul style="list-style-type: none"><li>Complexity</li><li>Lengthy processing times for HRAs (Legal and Real Estate Departments must be involved)</li></ul>	<ul style="list-style-type: none"><li>Simplify and expedite HRAs</li><li>Applications need to consider heritage context and neighbourhood character</li></ul>	

##### Recommendations

- Consider fully decoupling Designations and HRAs to reduce processing times and requirements as Heritage Designations and an HRA provide equivalent protection measures; however Designations within HRAs should still be considered in cases where future development potential is not fully realized or future, area-wide density increases may occur.

##### Outcomes

- A streamlined process that expedites HRAs and thereby increases retention of heritage.
- Removal of administrative redundancy and streamlining of the application process.



#### 4.3.5 Heritage Processes in Downtown Eastside (DTES)

##### Existing Situation

In July 2003, Council approved heritage incentives for Gastown, Chinatown and the Hastings Street Corridor (including Victory Square), which included the Heritage Façade Rehabilitation Program (HFRP) and the Heritage Building Rehabilitation Program (HBRP). The Heritage Building Rehabilitation Program was initially established for a five-year period (2003-2008), and was subsequently extended. The HFRP is still active, but the HBRP expired at the end of 2015. Their goal was to increase economic activity in the area as well as conserve existing heritage buildings. Many properties under the HBRP program required a Heritage Revitalization Agreement, with the City providing incentives to meet shortfall costs. The program originally provided incentives such as property tax exemption, residual and bonus density, and relief or variance to Development Cost Levies. If not all shortfall costs were covered by façade grants and property tax exemptions, the difference was awarded through transferable density bonusing. However, the density bonus has not been available since 2007. Currently, the available incentive is a façade grant. The Heritage Façade Rehabilitation Program (HFRP) provides a façade grant of up to \$50,000. To date, 41 properties have benefited from the HBRP/HFRP, though not all projects have been completed.

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Heritage Processes in DTES	<ul style="list-style-type: none"><li>• A range of tools have been introduced which facilitate heritage conservation</li><li>• 41 heritage buildings have benefited from the HBRP/HFRP</li></ul>	<ul style="list-style-type: none"><li>• Transfer of Density program has been frozen, thereby preventing the full effectiveness of the HBRP</li></ul>	<ul style="list-style-type: none"><li>• The HBRP could be reinstated</li><li>• Consider transitioning Gastown and Chinatown to Heritage Conservation Areas (HCA) if this would result in more effective management of heritage resources (versus the current HA-zoning)</li><li>• Heritage initiatives in the area could address gaps in the Heritage Register regarding First Nations and other cultural communities (Chinatown/Japantown)</li></ul>	<ul style="list-style-type: none"><li>• Building height pressures in both Gastown and Chinatown as development pressure increases</li></ul>

##### Recommendations

- Review and restructure incentive programs for heritage conservation in the DTES, focused on heritage premium costs; the program(s) should not offer full shortfall costs in the future.
- Study the potential costs/benefits of HCAs for Gastown and Chinatown (versus HA-zoning).
- Identify gaps in the Heritage Register related to cultural communities in the DTES.

##### Outcomes

- Improved management of resources in Vancouver's oldest neighbourhoods, with heritage conservation priorities aligned with other civic priorities for the DTES.

#### 4.3.6 Heritage Building Revitalization Outside Downtown Eastside (DTES)

##### Existing Situation

Many of the tools and programs that are available in the DTES, such as Heritage Designation and HRAs, also apply to areas outside the DTES. Other programs, such as the HFRP and HBRP (described on the previous page), are/were only available within the DTES.

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Heritage Building Revitalization Outside DTES	<ul style="list-style-type: none"><li>Heritage incentives are available to properties across the city</li></ul>	<ul style="list-style-type: none"><li>Certain incentives are not available for properties outside of the DTES, including the HFRP and HBRP</li></ul>	<ul style="list-style-type: none"><li>Properties outside the DTES may benefit from programs like the HFRP/HBRP</li></ul>	<ul style="list-style-type: none"><li>Enlarging the boundaries of the HFRP/HBRP would compromise the revitalization effect of the programs within the DTES</li></ul>

##### Recommendations

- Provide incentive programs to heritage properties citywide.
- Develop a citywide heritage incentive program for eligible sites, such as those of outstanding community importance where cultural, social and housing uses comprise a significant part of their heritage values (refer to section 4.3.7).

##### Outcomes

- A greater range of incentive programs would benefit a larger number of heritage resources throughout the city, which currently lack significant incentives.

#### 4.3.7 Heritage Incentive Program

##### Existing Situation

City Staff have continually monitored municipal best practices in heritage conservation throughout Canada and the United States, and tools and incentives used in Victoria, Toronto, Calgary, Winnipeg, Seattle, Portland and other cities have been analyzed for local applicability. The Best Practices review in this report has concluded that Vancouver generally utilizes a similar suite of developmental administrative tools, but lacks significant financial incentives.

The key model for development of a new Vision for Vancouver's Heritage Conservation Program is UNESCO's **Historic Urban Landscape** protocol, which suggests four key categories of tools:

- Civic engagement tools
- Knowledge and planning tools
- Regulatory systems
- Financial tools

The weakest pillar of Vancouver's Heritage Conservation Program is the lack of significant financial incentives; notably, Vancouver suffers from a lack of senior government assistance for heritage projects. Comparison to American models is particularly striking, where robust tax credits are offered by the federal government as well as by many state and municipal jurisdictions. Nova Scotia is the only Canadian jurisdiction that has access to a similar incentive. Tax relief systems are offered in several Canadian municipalities with four main approaches currently in use: property tax abatements, property tax credits, property tax relief and sales tax grants and rebates. Victoria applies a directed incentive model where property tax incentives are provided to projects that include seismic upgrading as well as housing in vacant upper storeys of heritage buildings.

Incentives generally fall into three categories: Financial, Developmental and Administrative. Developmental (density bonuses, etc.) and administrative (building code exemptions, etc.) incentive programs have been discussed in previous sections of this report. Current City of Vancouver financial incentive programs for conservation are focused on specific areas and building types in the DTES, and there is no effective Transfer of Density program. Grants for cultural infrastructure projects are a key resource, but only for certain qualifying categories of resources. Provincial and Federal funding has been largely withdrawn or reduced and has not been extended to private owners. Therefore, the modest grants provided by the Vancouver Heritage Foundation are the only direct financial incentive available for many sites. These grants include:

- True Colours Grant
- Restore It Grant
- House Call Grant
- Get on the Register Grant
- Heritage Energy Retrofit Grant

Related incentive programs are designed for a certain subset of historic resources, such as the *Chinese Society Buildings Matching Grant Program*, which was launched in July 2014 as a 3-year initiative with a total budget of \$2.5 million. Its primary objective is to support critical capital upgrades to buildings owned by Chinese Family Clan and Benevolent Societies. This will assist in the rehabilitation of Society buildings located in the DTES/Chinatown. In December 2015, Council approved a supplemental building rehabilitation program (*Chinese Society Legacy Program*) to protect and conserve 12 society heritage buildings in Chinatown, and committed \$3.6 million towards the total program budget of \$36 million. These heritage buildings are over 100 years old and are in urgent need of rehabilitation. The program aims to upgrade these important heritage assets and create a lasting cultural legacy for generations to come.

In general, a key missing component of the City of Vancouver's Heritage Conservation Program is the ability to offer significant financial incentives.



#### 4.3.7 Heritage Incentive Program (continued)

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Heritage Incentive Program	<ul style="list-style-type: none"> <li>Has successfully contributed to the maintenance of many heritage buildings</li> </ul>	<ul style="list-style-type: none"> <li>Low uptake on façade grants and tax incentives</li> <li>Grant administration can be a strain on City and Council resources</li> <li>There are tools/incentives available in DTES which are not available elsewhere in the City</li> <li>Lack of policy for seismic upgrading of unreinforced masonry buildings</li> </ul>	<ul style="list-style-type: none"> <li>Consider moving grant administration to a reliable external fund administrator for greater efficiency</li> <li>Implement incentives to better encourage heritage retention and to seismically upgrade unreinforced masonry buildings</li> </ul>	<ul style="list-style-type: none"> <li>Limited City and Council resources</li> </ul>

#### Recommendations\*

- Develop a heritage incentive program that provides financial assistance, which is predictable and manageable in its output.
- Establish a heritage incentive/grant fund with a minimum of \$500,000 available per year, recognizing this requires a significant civic budget allocation.
- Establish annual budget for each program component (e.g. capital budget for façade grants, annual property tax exemption capacity and transferable density not to exceed previous year's absorption level).
- Appoint the Vancouver Heritage Foundation as the external grant administrator.
- Tie incentives (beyond HFRP/HBRP) for unreinforced, heritage masonry buildings to seismic upgrade requirement.
- Define eligibility criteria involving a competitive selection process.
- Define eligible work to ensure high level of retention and heritage conservation, as well as a focus on seismic upgrades to heritage unreinforced masonry buildings.

#### Outcomes

- Improved conservation outcomes for many heritage sites.
- A program that offers greater levels of heritage incentives in order to encourage retention and promote maintenance.
- An effective program that is administered efficiently and places less strain on City and Council resources.
- Safer masonry buildings.

*\*See Appendix C for Vancouver Heritage Foundation report on Financial Incentives.*









# CONCLUSIONS

Components of the Heritage Conservation Program have been in place for a number of decades. Although the Program has many strengths and functions very well in a challenging context, it requires renewal to ensure that it remains effective into the future.

The strengthening of the regulations, policies, tools and incentives of the Program will build upon its success and help conserve heritage resources across the city. The following summary table categorizes the recommendations in this report by their applicable Strategic Direction (see pages 17-18) and their timeline for implementation.

A separate report has been submitted that addresses the ***Character Home Zoning Review***. An additional report, the ***Vancouver Heritage Register System Plan***, provides recommendations for a comprehensive update of the Vancouver Heritage Register.



## 5.1 Summary of Recommendations

	Recommendation	Related Heritage Conservation Program Strategic Direction	Recommended Timeline for Implementation
1.1	Introduce 'threshold' checklist early in enquiry process to provide clarity of what documentation (Evaluation/SOS/CP/HRA) is required, based upon building condition, and at what density increase (threshold) level.	Streamlined processing	Short-term
1.2	<i>Pro formas</i> should only be accepted at one point in the permitting process.	Streamlined processing	Short-term
1.3	Clarify density increase thresholds (consider raising interim, [ $<10\%$ density increase] <i>pro forma</i> exemption to apply to projects increasing density by less than 12-15%; or at least consider making the interim exemption permanent on a <i>Short-term priority</i> basis).	Streamlined processing	Short-term
1.4	Ensure that the application process is clearly defined and is explained on the City's website, noting that each project has its own peculiarities.	Streamlined processing	Short-term
2.1	Consider offering permit fee discounts to help incentivize heritage retention projects, recognizing civic budget implications.	Sustainable heritage conservation	Short-term
3.1	Accelerate processing times for heritage/character retention projects by prioritizing them and ensuring their processing times are competitive with outright projects.	Streamlined processing	Medium-term
3.2	Hire additional Staff to help process permits; consider dedicated Heritage Staff that deal directly with heritage permits, including plan checkers, project facilitators and inspectors, recognizing this has civic budget implications.	Streamlined processing	Long-term
3.3	Provide heritage training for staff involved in heritage permit processing and increase industry (architects, builders, etc.) literacy regarding the process.	Streamlined processing	Medium-term
3.4	Move to a <i>certified professional system</i> for sign-off on major maintenance/repair permits, recognizing there could be an additional cost to applicants.	Streamlined processing	Medium-term
4.1	Consider zoning updates to certain single-family areas to better encourage retention of pre-1940 heritage and character homes.	Sustainable heritage conservation	Short-term
4.2	Maintain certain non-conforming uses of heritage buildings (such as corner stores) by introducing more flexibility around the creative use/reuse of heritage buildings in certain areas; this can be addressed through HRAs.	Supportive regulations and policies	Medium-term
5.1	Eliminate (or at least reduce) extra permit fees (currently starting at \$732.00 each) for evaluation/review of an Alternate Solution/Minor Relaxation for retention projects, recognizing this has civic budget implications.	Supportive regulations and policies	Short-term
5.2	Ensure realistic expectations as to the level of upgrading that can be achieved before heritage character is completely compromised, including life safety, seismic and energy-efficiency upgrades. Building staff, including Inspectors, should be involved at the enquiry stage to ensure a consensus on these expectations.	Supportive regulations and policies	Medium-term
5.3	Consider, in consultation with Building staff, a new fire and life safety review process for heritage (and potentially character) buildings.	Apply heritage conservation lens on city priorities, initiatives and policies	Medium-term
5.4	Appoint dedicated staff to heritage applications, recognizing this has civic budget implications. Ensure adequate staff training in heritage issues.	Supportive regulations and policies	Medium-term
5.5	Consider the development of a Rehabilitation Subcode that is even more streamlined than Part 11 of the VBBL, and can apply to historic or existing buildings, or both.	Apply heritage conservation lens on city priorities, initiatives and policies	Medium-term

## 5.1 Summary of Recommendations (continued)

	Recommendation	Related Heritage Conservation Program Strategic Direction	Recommended Timeline for Implementation
6.1	Heritage/character reviews should occur before a subdivision is approved.	Supportive regulations and policies	Short-term
6.2	Amend the Subdivision bylaw to instruct the Approving Officer to not approve subdivision applications that would result in the loss of heritage or character buildings.	Supportive regulations and policies	Short-term
7.1	Update the <i>Heritage Policies and Guidelines</i> document to include all heritage policies, including reference to applicable bylaws, such as Heritage Procedures Bylaw (or feed into a new <i>Heritage Strategy</i> ).	Supportive regulations and policies	Medium-term
7.2	<i>Standards and Guidelines for the Conservation of Historic Places in Canada</i> (Parks Canada, 2010) should be formally adopted by Council for citywide application.	Supportive regulations and policies	Short-term
8.1	Extend the application of the Heritage Property Standards of Maintenance Bylaw to all protected heritage properties across the city.	Supportive regulations and policies	Short-term
9.1	Study the potential cost/benefit for other areas in the city to adopt an HCA, including: Gastown, Chinatown, Japantown/Railtown, Yaletown, Mole Hill, Delamont Park, Granville Island, the 800-1200 block of Granville Street, the South Granville apartment district and Commercial Drive, etc.	Integrate heritage conservation into neighbourhood planning	Medium-term
10.1	Elevate heritage policies into a cohesive <i>Heritage Strategy</i> on the same plane as the <i>Greenest City Action Plan</i> , <i>Housing Vancouver Strategy</i> , etc. A new <i>Heritage Strategy</i> should include benchmarks/targets, as well as regular reporting back to determine effectiveness.	Supportive regulations and policies	Medium-term
10.2	Adopt the new Vision, Goals and Strategic Directions for the Heritage Conservation Program (to appear either in the existing document or the new <i>Heritage Strategy</i> ).	Supportive regulations and policies	Short-term
10.3	Change to 'premium cost approach' rather than 'Encumbered/Unencumbered' incentive calculations, including transfer of density.	Effective incentives	Short-term
10.4	For all projects where heritage incentives are offered or heritage sign-off is required as part of a heritage site application, ensure that accredited/certified professionals be required to provide heritage consulting services.	Strategic partnerships with non-government organizations	Short-term
11.1	The Board of Parks and Recreation, Vancouver School Board, Vancouver Fire and Rescue Services, Planning Department, Engineering Department and Cultural Services should be consulted to determine how to more effectively work together for the common goal of better civic heritage stewardship.	Enhance city stewardship	Medium-term
11.2	City departments, agencies or boards responsible for managing heritage resources should develop a stewardship strategy/plan for heritage resources that each manages.	Enhance city stewardship	Medium-term
11.3	Develop Statements of Significance (Step 1) for all City-owned sites on the Heritage Register and then Conservation Plans (Step 2) for City-owned heritage sites when work that requires a Development and/or Building Permit is undertaken.	Enhance city stewardship	Medium-term
11.4	Historic features in the public realm, including monuments, pavements and street furnishings, should be surveyed/identified, inventoried and flagged within the City's internal systems to ensure they are appropriately identified for future conservation.	Enhance city stewardship	Medium-term
11.5	Identify budget requirements for the conservation of City-owned and managed heritage sites.	Enhance city stewardship	Medium-term

## 5.1 Summary of Recommendations (continued)

	Recommendation	Related Heritage Conservation Program Strategic Direction	Recommended Timeline for Implementation
12.1	Develop a plan/process to allocate [transfer of] density, as an incentive for heritage conservation, annually.	Effective incentives	Medium-term
12.2	When Transfer of Density program is re-instated, ensure that creation of new density is based on the previous year's absorption [Council reports 2009 and 2013].	Effective incentives	Medium-term
13.1	Consider fully decoupling Designations and HRAs to reduce processing times and requirements; a Heritage Designation and an HRA provide equivalent heritage protection measures; however Designations within HRAs should still be considered in cases where future development potential is not fully realized or future, area-wide density increases may occur.	Streamlined processing	Short-term
14.1	Review and restructure incentive programs for heritage conservation in the DTES, focused on heritage premium costs; the program(s) should not offer full shortfall costs in the future. Refer also to Recommendation 10.3.	Effective incentives	Short-term
14.2	Study the potential costs/benefits of HCAs for Gastown and Chinatown (versus HA-zoning).	Apply heritage conservation lens on city priorities, initiatives and policies	Medium-term
15.1	Provide incentive programs to heritage properties citywide.	Integrate heritage conservation into neighbourhood planning	Medium-term
16.1	Establish a heritage incentive/grant fund with a minimum of \$500,000 available per year, recognizing this requires a significant budget allocation.	Effective incentives	Medium-term
16.2	Appoint the Vancouver Heritage Foundation as the external grant administrator.	Strategic partnerships with non-government organizations	Short-term
16.3	Tie incentives (beyond HFRP/HBRP) for unreinforced, heritage masonry buildings to seismic upgrade requirement.	Supportive regulations and policies	Medium-term

# ACKNOWLEDGEMENTS

The ***City of Vancouver Heritage Conservation Program Review*** was undertaken as part of a larger project, the Vancouver ***Heritage Action Plan***. The Heritage Conservation Program Review was a core aspect of the Heritage Action Plan, which has provided an integrated and comprehensive framework for updating the City's heritage planning framework.

The project team for the City of Vancouver Heritage Conservation Program Review consisted of Donald Luxton, Megan Faulkner and R.J. McCulloch, of Donald Luxton & Associates Inc. Additional assistance on the project was provided by the following subconsultants.

- Andrew Hiscox, CitySpaces Consulting Ltd.
- Brent Elliott, CitySpaces Consulting Ltd.
- Jada Basi, CitySpaces Consulting Ltd.
- Asrai Ord, CitySpaces Consulting Ltd.
- Jay Wollenberg, Coriolis Consulting Corp.
- Nicole Olenick, Coriolis Consulting Corp.
- Michael Musacchio, Coriolis Consulting Corp.
- Andrew Harmsworth, GHJ Consultants Ltd.
- Wendy Morrison, GHJ Consultants Ltd.
- Bill Buholzer, Young Anderson Barristers & Solicitors
- Dr. Harold Kalman

Significant assistance was also provided by Judith Mosley, Executive Director of the Vancouver Heritage Foundation, who generously shared the Foundation's ongoing work on financial incentives.

We would like to extend our special thanks to the City of Vancouver staff who provided assistance during the course of the project: Tanis Knowles Yarnell, Planner, project liaison; Marco D'Agostini, Senior Heritage Planner; Tami Gill, Planner; James Boldt, Heritage Planner; Zlatan Jankovic, Heritage Planner; Hugh McLean, Heritage Planning Analyst; Maxine Schleger, Heritage Planning Assistant, and members of the Staff Technical Committee.

We would also like to acknowledge the contribution of Jim Stiven (Vintage Woodworks Inc.), as well as members of the Heritage Action Plan Public Advisory Committee.

Thoughtful and progressive heritage planning work has been underway in the City of Vancouver since the 1960s. The Heritage Conservation Program has developed over time into a mature and stable framework of policies and programs that continue to protect significant aspects of our shared historical legacy. This program has been developed by many individuals whose diligent contributions laid the foundations for this current project, and we acknowledge the important work that built the Program over time.





# APPENDIX A GLOBAL BEST PRACTICE REVIEW

## EDMONTON



**Population:** 877,926

**Heritage Conservation Program Establishment:** 1980

**Approximate number of Municipally Designated Sites:** 94

**Approximate number of sites on Register:** 692 + an additional 71 resources listed as either 'Fort Edmonton'; 'Landscape'; 'Cemeteries/Monuments'; 'Street Furnishings'; 'Architectural Fragments'

**Overall Program Description:** Council gave Planning and Development the responsibility to create a *Historic Management Plan* for the City of Edmonton in 1980. The City created the Register of Historic Resources in Edmonton in 1984, which listed only buildings in the City's downtown, expanded in 1988 to include significant buildings across the entire city. The citywide inventory and subsequent Register was officially reviewed and adopted in 1993.

The Register is comprised of registered and designated buildings and includes appendices listing significant architectural fragments, landscapes, Fort Edmonton Park buildings, cemeteries and monuments.

The City also passed a policy in 1988 to offer financial incentives through tax incentives or grants thereby encouraging owners to designate their properties. In 1995, an Historic Resources Review Fund Account was created to ensure a secure source of funding would be available. In 2001, this fund was increased and another Heritage Officer was hired.



In 2005 the *Historic Management Plan* was updated for several reasons:

- To align with the Standards and Guidelines for the Conservation of Historic Places in Canada (2003), which had been adopted by the Province of Alberta in 2003;
- To reformat the Register due to the increase of designated and registered buildings since the Plan's creation thirteen years before;
- To recognize additional resources that had been identified during a three year study of Modern Heritage (1930-1960); and
- The evaluation and documentation standards for historic resources in Edmonton were changed from a numerical system to a qualitative, values-based, approach.

*The Way We Grow* (2008), a municipal development plan that received first reading in late 2008, provides for much stronger protection of historic and cultural resources in Edmonton. The policies to achieve the plans stated objective include:

- Integrate heritage conservation into the broader context of planning and decision making;
- Ensure new development adjacent to properties on the Register and Inventory of Historic Resources in Edmonton respects the scale, massing, proportions and character of existing buildings;
- Support conservation and adaptive reuse of historic resources through creative design solutions and incentives;
- Ensure all City owned historic resources are conserved and maintained in a good state of repair;
- Support policies and actions outlined in the Historic Resource Management Plan;
- Develop an archaeological plan or overlay that identifies significant sites and serves as a reference during the development application process;
- Create an inventory of significant cultural landscapes and develop a method of protecting them;
- Develop regulations to identify, guide and protect the character of historic areas or districts; and
- Seek innovative design approaches to reflect and embrace the culture of Edmonton's new and emerging minority groups.

Each site considered for addition to the Register must be evaluated for its significance, regardless of age. The *Historical Resources Act* empowers municipalities to designate and regulate historic resources or areas. Section 28 of the Act requires municipalities to compensate owners of designated Municipal Historic Resources.

**Program Components:** The City of Edmonton has a Historic Resource Management Plan (2009), which outlines the mission for the City's heritage program:

*To identify, facilitate, protect, manage and promote the preservation and reuse of historic resources to enhance the quality of Edmonton's environment for the benefit of present and future generations.*

Historic sites on Edmonton's Register are afforded some protection by being flagged in the City's management system when any development issues arise. This enables the Heritage Officer to seek ways to save the buildings or ensure appropriate redevelopment occurs. All resources on the Register and Inventory are also eligible for a variety of incentives that will enable them to be restored or rehabilitated. After sites are legally designated, City Council has the authority to review any development matters and to intervene should it feel inappropriate work is being conducted on the Municipal Historic Resource.

Using the *Historic Resource Management Plan* the City merged the 'A' list with the 'B' list to ensure all sites on the Register are treated equally.

Edmonton's Register is organized by neighbourhood and includes tombstone research on each site including address, historic name, date of construction, and architect/builder.

**Tools:** Heritage Register; Heritage Inventory; Historical Resources Management Plan; City Policy C-450B: A Policy to Encourage the Designation and Rehabilitation of Historic Resources in Edmonton; The Standards and Guidelines for the Conservation of Historic Places in Canada; The Art of Living: A Plan for securing the future of arts and heritage in the City of Edmonton

**Grants:** In 1995, Edmonton City Council approved the creation of a fund to provide financial compensation for the designation of Municipal Historic Resources. Funds are withdrawn annually from the operating budget of the Planning and Development Department into a reserve account. Monies unspent in a calendar year are retained in the reserve fund for future years. These funds are used to provide an incentive to designate, rehabilitate, preserve and promote Municipal Historic Resources. The incentives given include direct grants, property tax rebates and non-monetary incentives.

These grants given to owners of Municipal Historic Resources will pay for themselves through long-term tax benefits. On average, most of the grants that have been provided have been recovered over a 5 to 10-year period. The creation of vibrant buildings also stimulates new growth and investment in the surrounding areas over time, which in turn generates greater economic activity and subsequently, taxable revenues.

**Specifics:** The City of Edmonton receives \$877,000 from Council each year for the heritage conservation grant program; unused funds are carried over. Grants are awarded according to the following procedure and guidelines:

- Buildings that are already designated are eligible for ongoing maintenance incentives from the City and Province.
- Upon receipt of the application the amount of work to restore the building is determined and an agreement between the owner and City is made. This agreement outlines the incentive level agreed upon and what portions of the building are to be protected by caveat.
- Financial Incentives are awarded according to the following for eligible work:

Residential Buildings		Commercial Buildings	
Rehabilitation Incentive	50% of project costs, to a max of \$75,000	Rehabilitation Incentive	50% of project costs (determined on case by case basis)
Maintenance Incentive	30% of project costs, to a max of \$10,000, renewable every 5 years	Maintenance Incentive	30% of project costs, to a maximum of \$50,000, renewable every 5 years

Further information:

- The City receives roughly between 5 and 10 applications for designation per year
- The maintenance incentives have proven to be the most attractive, especially for single-family home owners
- Designated buildings also qualify for up to \$100,000 in maintenance incentives from the Province of Alberta



Other than direct investment into the property, there are trade and construction spin offs as well as other long-term benefits to the character and economic well being of the city.

Incentives recommended in 2009 include:

- Explore other funding sources to ensure additional incentives are available to assist with restoration costs;
- Develop a program to provide for ongoing maintenance to Municipal Historic Resources;
- Provide funding to remove graffiti from historic resources, with a priority given to designated buildings;
- Explore the feasibility of developing storage facilities for significant architectural remnants that may be salvaged from demolitions, so that they may be incorporated into new development in the future;
- The City should identify resources to enable the purchase, restoration and sale of historic resources for the specific purpose of saving the building; and
- Explore how the City could facilitate training in restoration techniques for owners of historic resources as part of incentives or broader initiatives.

**Heritage Awareness:**

- This Old Edmonton House seminars help owners of historic properties of public seminars with advice about owning, maintaining and restoring an historic home.
- Founded in 2009, the Edmonton Heritage Council's mandate is to:
  - provide a forum for analyzing, discussing and sharing heritage issues in Edmonton
  - advocate for a vibrant heritage community and heritage programs that benefit all Edmontonians
  - unify Edmonton's heritage community and give it a voice
  - promote the awareness and development of effective, informed and recognized heritage principles and practices.

# VICTORIA



**Population:** 80,017

**Approximate number of sites on Register:** ~1,100

**Heritage Conservation Area(s):** 13

**Heritage Register:** Established in 1982

**Advisory Body:** Heritage Advisory Panel

**Overall Program Description:** Victoria recognizes the significance of built heritage at the citywide and neighbourhood level in community planning. The Official Community Plan and neighbourhood plans have identified historic resources as a community issue in policies for heritage conservation areas, building types and uses, landmarks and features. There are 13 heritage conservation areas (HCA) in Victoria's Official Community Plan.

## **Incentive Tools:**

- Heritage Register
- Heritage Inventory
- Heritage Alteration Permits
- Heritage Designation Application
- Heritage Tax Incentive Program (residential and non-residential)
- Heritage Strategic Plan For The City of Victoria
- Official Community Plan containing *Standards and Guidelines for the Conservation of Historic Places in Canada* as well as the 13 heritage conservation areas (HCA)

**Financial Incentives:** The City of Victoria has grant programs for improvements to designated heritage houses and designated commercial, industrial, and institutional properties. In 2012, the City of Victoria gave out over 130 grants that totalled more than \$2.3 million.

**The House Grants Program:**

*The House Grants Program of the Victoria Heritage Foundation (VHF) promotes the preservation of heritage-designated residences in Victoria by assisting their owners with the costs of restoration and repair of their buildings.*

*Each year, the VHF receives funds from, the City of Victoria and allocates them to homeowner applicants. Owners are restricted to one application per fiscal year per property, but a grant application may contain more than one project. If a grant is approved, the work must be completed within the calendar year.*

*The House Grants Program may cover a portion of project costs, subject to VHF priorities and the availability of funds. Applications for up to \$500 for emergency repairs are reviewed on an individual basis.*

In 2013:

- 53 projects totalling \$182,242 in grants were funded
- homeowners invested a minimum of \$520,691
- maximum eligible project costs was \$20,500
- grants were 35% of project costs
- the average grant was \$3,438
- for every \$1,000 grant, leverage to the community was \$2,860

**The Building Incentive Program (BIP):**

*The Building Incentive Program (BIP) (administered by the Victoria Civic Heritage Trust) provides financial assistance to owners of commercial or institutional heritage designated buildings to assist with façade restoration; structural improvements, upgrading required by building codes, and other rehabilitation costs. Grants may cover up to 50% of the cost of eligible heritage work, up to a maximum of \$50,000 per project. Grants are subject to the availability of funds and the number of applicants.*

**Tax Incentive Program for Downtown Heritage Buildings:**

*Tax exemptions up to 10 years are available to eligible owners of Downtown Heritage Designated buildings. The Tax Incentive Program (TIP) is available to offset eligible seismic upgrading costs specific to the conversion of existing space to residential uses or for the rehabilitation of existing Heritage-Designated buildings for uses other than residential, for example:*

- Professional design and engineering reports, drawings, cost estimates, and specifications as required for the project.
- Seismic upgrading of building components, including Code upgrading, bracing of walls, floors, and roof systems, masonry reinforcement, affixing of cornices or other exterior architectural features to the building structure, etc.

Projects eligible for the City of Victoria Tax Incentive Program will be subject to the following calculation:

$$\begin{array}{lcl} \text{Term of tax exemption} & = & \text{Cost of seismic upgrading} \\ (\text{\# of years}) & & \text{current taxes} \end{array}$$

Following project completion, the project will be exempt from property taxes for the specified number of years. The actual value of the exemption will be determined by the revised assessment determined by the B.C. Assessment Authority and the current year's tax rate for each year.

*Example:*

A building being proposed for rehabilitation needs \$200,000 worth of seismic upgrading. It currently pays \$20,000 per year in property taxes. The maximum eligible term of exemption, which City Council may approve, is therefore:

Seismic Upgrade Cost \$200,000 = 10 Years  
Current Annual Taxes = \$20,000

The B.C. Assessment Authority provides an estimate of the increased property assessment resulting from the rehabilitation that results in a potential increase in annual taxes to \$42,000 per year. The actual value of the exemption may amount to (estimate) \$42,000 x 10 years = \$420,000.

The Downtown Victoria Business Association also offers a lighting grant to downtown property and business owners known as the '**Illuminate Downtown Grant**'. Grants of up to \$5,000, to a maximum of 25% of the cost of approved work, are available for the installation of lighting, which enhances the appearance of a building and/or better illuminates a property to improve security. The overall objective of this incentive program is to create a more appealing downtown, with an enhanced comfort level for all who visit, work, and live in Victoria.

**Heritage Awareness:** Victoria Heritage Foundation, Victoria Civic Heritage Trust, *This Old House: Victoria's Heritage Neighbourhoods Publications*, The Hallmark Society, the Victoria Historical Society, the Old Cemeteries Society. Victoria also offers a number of educational programs and material available to the public including: DIY Brochures; Walking Tours; Heritage Promotional material; Conferences; University of Victoria Cultural Resource Management Program.



# TORONTO



**Population:** 2,800,000

**Approximate number of sites on Inventory:** 9,000

**Approximate number of designated sites:** 4,500

**Heritage Conservation Districts:** 16

**Heritage Inventory:** Established in 1973

**Advisory Body:** Toronto Preservation Board

**Overall Program Description:** The Heritage Preservation Services section of the City Planning Division is responsible for advising and assisting City Council, the Toronto Preservation Board, the community and property owners on the conservation of the City's heritage resources. This involves advising on matters relating to the Ontario Heritage Act, reviewing and advising on development proposals that may affect heritage resources, monitoring and the maintenance of heritage sites, developing heritage policies, administering financial assistance programs and providing educational services.

Heritage Preservation Services assists City Council by:

- Conducting research on the historical and architectural significance of properties and districts;
- Recommending the inclusion of properties worthy of designation in the City's Inventory of Heritage Properties;
- Recommending designation under the Ontario Heritage Act that provides a measure of protection for heritage properties;
- Recommending that the City enter into Heritage Easement Agreements with property owners to ensure long term preservation;
- Advising owners and their consultants on proposed alterations to listed and designated properties;
- Making recommendations on those alterations to ensure they maintain the architectural integrity of the building, and on potential demolitions to attempt to prevent the loss of heritage buildings;
- Advising on archaeological assessments; and
- Defending Council's position before judicial tribunals such as the Ontario Municipal Board and the Conservation Review Board.

### Incentives:

- **Heritage Conservation Districts:** Heritage Conservation Districts (HCDs) are an important and powerful part of the heritage planning framework in Ontario and the City of Toronto. They serve to ensure that historically significant neighbourhoods and areas are protected and reflect Toronto's cultural heritage values and characteristics. HCDs are maintained so that every Torontonians, present and future, can appreciate and take pride in the City's rich cultural heritage. The Ontario Heritage Act enables a municipality to designate the whole or any part of an area as a heritage conservation district. This allows City Council to administer guidelines designed to protect and enhance the special character of groups of properties in an area as redevelopment proceeds. The character is established by the overall heritage quality of buildings, streets and open spaces as seen together. Toronto has sixteen Heritage Conservation Districts including: Rosedale, Cabbagetown, Harbord Village and the Union Station Area.
- **Heritage Easement Agreements:** A Heritage Easement Agreement is another tool used to ensure a building's preservation. It is an agreement between the property owner and the City and is registered on title. A Heritage Easement Agreement identifies elements of a building which are to be retained in perpetuity and may also set out permitted alterations and development.
- **Toronto Heritage Grant Program:** The Toronto Heritage Grant Program encourages the conservation of properties designated under Part IV or V of the Ontario Heritage Act in the City of Toronto through matching grant funding of up to 50% of the estimated cost of eligible heritage conservation work.
- **Heritage Property Tax Rebate Program:** The City of Toronto's Heritage Property Tax Rebate Program provides eligible heritage property owners with a 40% rebate on their municipal and educational property taxes for the eligible heritage portions of their property. To be eligible for this program, properties must be designated under Part IV or V of the Ontario Heritage Act and subject to a Heritage Easement Agreement (as of September 30, 2006).

# MONTREAL



**Population:** 1,680,000

**Heritage Databases** (not available in English): The Montréal heritage databases comprise hundreds of records, illustrated with period or contemporary documents, on the history and architectural or urban features of the city's buildings, heritage districts, place names and much more.

**There are four databases:** one on built heritage, one on municipal properties of heritage significance, one on the heritage of Old Montréal in detail, and one on the history of Montréal place names.

**Overall Program Description:** In Montreal, heritage means any asset or group of assets, natural or cultural, tangible or intangible, that a community recognizes for its value as a witness to history and memory, while emphasizing the need to safeguard, to protect, to adopt, to promote and to disseminate such heritage.

In May 2005, City Council adopted the *Heritage Policy*, responding to a need expressed through the decades by Montrealers and reaffirmed during the *Sommet de Montréal*.

The objective of the policy is to organize and orient the actions of the city and its partners in order to encourage the development of a collective vision and a shared responsibility for Montréal's heritage and to make heritage a lever of cultural, social and economic development. The policy envisions municipal activities in the following areas:

- Establishment of a system of organization for heritage-related actions.
- Implementation of this organization by ensuring that the city serves as a model owner and administrator.

## **Definitions of Heritage:**

Héritage Montreal - protects sites of interest beyond purely built heritage such as landscape, ecological, archaeological and commemorative value.

### **The notion of heritage:**

The city endorsed the general definition of heritage that was produced by the *Conseil du patrimoine de Montréal* and that appears in the *Énoncé d'orientation pour une politique du patrimoine* (heritage policy directional statement).

*Heritage means any asset or group of assets, natural or cultural, tangible or intangible, that a community recognizes for its value as a witness to history and memory, while emphasizing the need to safeguard, to protect, to adopt, to promote and to disseminate such heritage.*

Montréal's *Heritage Policy* takes into account natural, tangible and intangible cultural heritage, or in other words, all aspects of heritage as defined by UNESCO. The Policy thus subscribes to the major international principles employed in classifying heritage. These principles have been tailored to Montréal's particular situation, as well as to the context of the municipality's jurisdiction in order to ensure a practical implementation of the Policy, which covers the following kinds of heritage:

### **Natural heritage**

Primarily consists of natural systems and sites, eco-territories, and riparian and aquatic environments. It includes Montreal's major physical, biological and hydrographical formations, as well as natural environments, thereby ensuring a balance for the plants and animals living in an urban setting.

### **Tangible Cultural Heritage**

- **Public art**

Includes all works of artwork located in urban settings, such as public squares and parks, as well as work integrated into street furniture, buildings and landscaping. Such works consist primarily of sculptures, monuments, murals and landscape features

- **Archaeological heritage**

Includes layers of soil, remnants, unearthed artifacts and all other traces of human existence from sites in which human activities have been conducted. Such sites include structures, constructions, groups of buildings and developed areas, along with their surroundings and any artifacts associated with them.

- **Archival heritage**

Includes plans, photographs, films, sound and computer recordings and written documents attesting to creations by a large number of people and institutions that have been active in Montreal. It comprises the documents produced or received by individuals or organizations for meeting their needs and for carrying out their activities, that were preserved for the general information such documents provide.

- **Built heritage**

Includes different urban structures and components of these structures that are typical of Montreal, such as the network of roads, infrastructure and other components that contribute to structure the public domain, buildings and building complexes, and the distinguishing features of these sites and the various ways in which they fit into the landscape. Built heritage also includes different kinds of properties that relate to lifestyles or to specific uses within a given socio-historical context.

- **Movable heritage**

Includes municipal collections that are artistic, archaeological, documentary, ethno-historical and scientific in nature. The category includes creative works, along with archaeological artifacts, plant and animal specimens and corporate, industrial and street furniture.

- **Landscaped heritage**

Includes developed sites and complexes such as parks, squares and public or private gardens, prominent trees and shorelines. Such features, along with those contained in Montreal's natural, built and archaeological heritages, define the city's landscapes. These productions are the result of the combined works of nature, human beings and the achievements of certain renowned designers, and are based on a concept of landscape that comprises notions of nature and of culture, as well as the manner in which a community perceives, characterizes and identifies itself with its living space.



### ***Intangible Cultural Heritage***

Includes a body of creations, knowledge, know-how, practices, arts and extant popular traditions that pertain to any aspect of our social lives, as well as to the tools, objects or artifacts associated with them. Intangible heritage is borne in the collective memory and is handed down primarily from generation to generation through the processes of learning, observation and imitation. This form of heritage serves as a source of cultural endeavours, marks the city's identity, is preserved and is shared by a range of communities and socio-economic groups and is often referred to as "living heritage."

### **Incentives:**

#### ***Renovation à la carte***

The program encourages owners to restore components with heritage value instead of replacing them as one aspect of the program. Any individual or legal entity with a right of ownership over a building that meets the following requirements is eligible (provided all other program conditions are met):

- The building was constructed or converted into a residential or mixed-use building (a building that is both residential and commercial) at least 20 years ago.
- The average property value per unit (land and building) does not exceed the maximum amounts listed in the chart "Building Eligibility".

### **Major Residential Renovation**

Owners are granted a percentage of the cost of work as established by the Ville de Montréal, up to the maximum eligible amount per unit, which varies according to the type of dwelling. The financial assistance can reach 75% of the maximum eligible cost of work but the rate of financial assistance is adjusted so the owner meets at least 33% of the total cost of the project. It is also possible to renovate buildings without rental units if it is a single-unit building (single-family home). The percentage of financial assistance is then 50%.

#### **Eligibility:**

- The building was constructed or converted into a residential building at least 20 years ago.
- The building is rundown, i.e. it includes at least one important component requiring substantial renovation.
- The cost of the work required on the building exceeds the amounts fixed by the program.
- The average property value per unit—land and building—does not exceed the amounts fixed by the program (see chart "Building Eligibility")

### **Disincentive:**

#### **Minimum Maintenance**

Though legislated at the provincial level as opposed to the municipal level, the province of Quebec mandates that owners of designated historic properties adequately maintain them, as per the Quebec *Cultural Property Act*, which "says that a person is guilty of an offence if (s)he 'fails to keep classified [protected] cultural property in good condition.'"

### **Tools:**

#### **Urban Heritage Interactive Publications**

These interactive publications provide tools, tips, and strategies to help owners take care of Montreal's Urban Heritage.

**Heritage Awareness:** Montréal's Architectural Heritage Campaign, created in 1991, is an initiative of the city with the collaboration of the Héritage Montréal foundation. This annual event was designed to educate Montrealers about the importance of protecting our heritage and to recognize property owners' efforts to maintain their property.

# SAN FRANCISCO



**Population:** 837,442

**Approximate number of sites on the Register:** 230 landmark sites; over 3,300 parcels are listed in or determined eligible for listing on the California Register

**Historic Districts:** 11

**Heritage Department Employees:** 14

**Heritage Program:** Established in 1967

**Overall Program Description:** Historic preservation is used as a strategy to conserve significant elements of the built, urban environment. Integrated into City Planning, historic preservation plays an important economic, environmental, and cultural role in the ongoing development of San Francisco. Historic Preservation program staff are responsible for a variety of tasks, including project review, environmental review, Historic Preservation Commission support, and historic and cultural resource surveys.

**Window Replacement Standards:** The Planning Department recently developed a comprehensive guide to help property owners choose the appropriate window treatments, for both new and historic buildings, and to efficiently apply for a permit.

**SF Heritage** (a non-profit society):

Charged to preserve and enhance San Francisco's unique architectural and cultural identity, SF Heritage aims to help manage change over time, advocating for smart growth through the protection and reuse of historic structures and landscapes. SF Heritage collaborates with local, state and national partners on education, neighbourhood outreach and public testimony to help preserve the built environment that defines San Francisco. Founded in 1971, SF Heritage is a nonprofit membership organization that has dedicated itself to citywide advocacy and education. Soon after its incorporation, SF Heritage entered into negotiations with the City of San Francisco Redevelopment Agency in cooperation with the Landmark Board to identify the best examples of remaining buildings scheduled for demolition, and to find a way to preserve them. By December 1977, twelve homes were relocated in what may have been the largest house-moving project in San Francisco's history. The focus of SF Heritage includes special programs, regularly scheduled tours, and rental of the Haas-Lilienthal House and grounds (property donated to Heritage in 1973).

## Incentives:

- **Mills Act**

The Mills Act is an important economic incentive program available in California for use by private property owners of qualified historic buildings. Enacted by the State of California in 1976 and amended in the San Francisco Administrative Code in 1996, the Mills Act provides for a potential 50 percent reduction in property taxes on qualified historical properties in exchange for the owner's agreement to maintain and preserve the resource in accordance with standards established by the Secretary of the Interior's *Standards for the Treatment of Historic Properties*.

- **Federal Tax Credits**

A 20% Rehabilitation Tax Credit is available for the rehabilitation of income-producing properties listed individually in the National Register or as contributors to a National Register Historic District. This significant tax savings is applied only to buildings rehabilitated according to the U.S. Secretary of the Interior's Standards for Rehabilitation.

- **Preservation Easements**

Property owners can gain significant tax savings by adding a preservation easement to their historic building. This easement ensures the preservation of a property's significant architectural features while allowing the owner to still occupy and use the building. Easements also limit the future owners of a building from demolishing the building or altering it in a way that negatively impacts its architectural features. In this way, Preservation Easements provide for the permanent protection of historic buildings.

- **California Historical Building Code (CHBC)**

The CHBC provides an alternative building code for the preservation or rehabilitation of buildings designated as "historic." These regulations are intended to facilitate repair or accommodate a change of occupancy so as to preserve a historic resource's original or restored architectural features. Issues addressed by the CHBC include: use and occupancy; means of egress; archaic materials and methods of construction; fire protection; alternative accessibility provisions; mechanical, plumbing, and electrical requirements; and alternative structural regulations.

- **Preservation Loan Program (PLP)/Preservation Loan and Technical Assistance Program (PLTAP)**

Joint contract with the City of San Francisco to assist low and moderate income property owners in the restoration and rehabilitation of architecturally significant houses. Funding through the Mayor's Office of Housing and Economic Development helped set up the Preservation Loan Program (PLP) by the end of 1977. In just four years, PLP made possible the rehabilitation of nineteen significant houses in districts all over the city. Minorities and/or women heads-of-household made up 90 percent of the loan recipients.

By 1982, with the original loan pool nearly depleted, PLP shifted its focus and took a new name to reflect its new emphasis. The renamed Preservation Loan and Technical Assistance Program (PLTAP) worked increasingly with nonprofit housing development corporations on multi-unit residential rehab projects for low-to-moderate income people.

## Tools:

### Heritage FAQ Page:

- ***Do I need a permit to replace the windows of my building?***

Yes. A building permit to replace windows is required for every building in San Francisco, even non-historic buildings. Building permits are required for windows located on the front, rear, and sides of the building. Additional review by the Planning Department is required for all replacement windows that are visible from the street or other public right-of-way. The 2003 revised *Residential Design Guidelines* require that some property owners use historically appropriate window replacements, such as wood-sash, rather than vinyl or aluminum. The Planning Department has recently developed a comprehensive guide to help building owners choose the appropriate window treatments and to efficiently apply for a permit. For detailed information, please consult the *Window Replacement Standards*. A reminder: Please do not purchase replacement windows before confirming with the Planning Department that the windows can be approved. The Planning Department will not approve inappropriate replacement windows, even if they have already been purchased or installed. The Planning Department also strongly suggests repairing, rather than replacing windows.

- ***Can I add a garage to my building?***

Inserting a new garage opening can have a major impact on a historic resource and its surrounding neighborhood. Due to this potential impact, the Planning Department reviews proposals for new garages on a case-by-case basis. In some instances garages are not approved for historic resources, particularly if the addition would negatively impact the building's character-defining features such as front yard set-back, bay windows, front porches, or historic fences. More information on the procedures and criteria for adding garages are found in *Guidelines for Adding Garages and Curb Cuts*.

- ***Can I add an addition to my house?***

A vertical or horizontal addition to any building, regardless of historic status, must conform to the Residential Design Guidelines. Additions to known historic resources must also meet the Secretary of the Interior's Standards and Guidelines for the Treatment of Historic Properties and any applicable requirements outlined in Article 10 of the Planning Code. Generally, if an addition does not alter, change, obscure, damage, or destroy any character-defining features of a historic resource or building located within a historic district then it will be deemed in conformance. The Planning Department strongly urges project applicants to engage with a Historic Preservation Technical Specialist early in the design process, in order to identify potential limitations.

- ***Can I raise my house to add an extra story?***

Enlarging buildings by raising them and adding a new first floor was common at one time. Many cottages throughout San Francisco were originally one to 1.5 stories in height. These modest cottages were set on wood pilings instead of solid foundations. Buildings that must be raised for seismic retrofitting or to install a foundation will be approved. However, despite historic precedents, raising buildings designated as historic resources may not be considered appropriate and all proposals will be reviewed on a case-by-case basis.

### Heritage Awareness:

- San Francisco Architectural Heritage
- The Friends of 1800
- Victorian Alliance
- San Francisco Historical Society
- San Francisco Public Library History Center
- San Francisco Planning & Urban Research (SPUR)
- Docomomo US, Northern California chapter



# CHICAGO



**Population:** 2,718,782

**Chicago Historic Resources Survey:** 17,000+ properties in the database

**Designated Sites:** 370; 53 landmark districts and 7 district extensions

**Overall Program Description:** The Department of Planning and Development's Historic Preservation Division works with property owners, city departments, sister agencies, and the general public to promote the preservation of Chicago's historic resources. The division researches and prepares landmark designation reports and reviews permit applications for work on proposed and designated landmarks. It also administers the Demolition-Delay Ordinance, maintains the Chicago Historic Resources Survey, and promotes the preservation of historic buildings through incentives, preservation planning, public outreach, and technical assistance. The division staffs the Commission on Chicago Landmarks, which is responsible for recommending potential landmark designations to the City Council.

## **Policy/Strategies/Guidelines/Planning and By-Law Tools**

- **Demolition Delay Ordinance (90 days to explore alternative options):**

The Demolition-Delay Ordinance, adopted by City Council in 2003, establishes a hold of up to 90 days in the issuance of any demolition permit for certain historic buildings so that the Department of Planning and Development can explore options, as appropriate, to preserve the building, including but not limited to landmark designation.

The ordinance applies to buildings rated "red" and "orange" in the Chicago Historic Resources Survey (CHRS). These buildings are designated on the city's zoning map. The delay period starts at the time the permit application is presented to the department's Historic Preservation Division offices and can be extended beyond the original 90 days by mutual agreement with the applicant. The purpose of the ordinance is to ensure that no important historic resource can be demolished without consideration as to whether it should and can be preserved.

- **Landmarks Ordinance** (and the Rules and Regulations of the Commission on Chicago Landmarks)  
The Commission on Chicago Historical and Architectural Landmarks was created in 1957 by the City Council. It served primarily as an advisory board, whose principal purpose was to compile a list of significant buildings. In 1968, the City Council adopted a landmarks ordinance that gave the Commission the responsibility of recommending to the Council which specific landmarks should be protected by law. The ordinance also gave the Commission the authority to review building permits for landmarks, to ensure that any proposed alterations would not negatively affect the character of the landmark.

In 1987, the ordinance was revised to more clearly articulate the processes for landmark designation and permit review and to add an economic hardship provision for owners. The Commission also was renamed the Commission on Chicago Landmarks at that time.

In 1997 and 1999, other revisions were made to the ordinance, including regarding the status of “pending” landmarks, the waiving of permit fees for owners of landmark properties, and requiring review by the City Council of any demolitions approved by the Commission. In 2009, the Commission membership was expanded from 9 to 10 members (to add an additional ex-officio member as part of a city department reorganization).

- **Chicago Zoning Ordinance**  
Floor area bonuses for “adopting” an historic landmark

#### **Municipal Preservation Incentives/Financing**

- **Permit Fee Waive for Chicago Landmark Properties**  
Provides a tax incentive for permit issued on historic landmarks. This incentive is available for all individually landmarked buildings as well as all buildings and new construction in landmark districts. Only fees for permits for which Commission approval is required can be waived.
- **Class-L Property Tax Incentive**  
Reduces the property tax rate for 12 years for rehabilitating a landmark building in a commercial or industrial use. Must provide a minimum investment of 50% of the building’s assessed value to be eligible for the incentive. The Class L property tax incentive was established to encourage the preservation and rehabilitation of landmark commercial, industrial, and income-producing non-profit buildings.

Under the Class L incentive, the assessment levels for the improvement or building portion of the assessment are reduced to 10 percent for the first 10 years, 15 percent in year 11, 20 percent in year 12, and back to the regular assessment level in year 13. The other portion of the assessment, the land portion, is also eligible for the incentive if the building has been vacant or unused continuously for the prior two years.

- **Façade Rebate Program**  
For certain qualifying industrial and commercial buildings, a 30% or 50% rebate (depending on the use and type of project) of approved costs for façade renovations of up to \$5,000 per storefront or \$10,000 per industrial unit.
- **Property Tax Freeze for Historic Residences (owner-occupied only)**  
In 1983, the State of Illinois passed a statute enabling homeowners who rehabilitate their landmark property to receive a freeze on their property tax assessment for eleven years.

*Eligible buildings include:*

- A building individually listed on the National Register of Historic Places
- A Contributing building in a National Register Historic District
- A building locally designated as a Landmark
- Contributing buildings in a locally designated Historic District

The incentive freezes property taxes over an eleven-year period for rehabilitation of an owner-occupied single-family home, condo, coop unit, or multi-family building of up to 6 units, where one unit is owner-occupied.



# MELBOURNE



**Population:** 116,431 within City administrative boundary; 4.35 million in metro area

**Heritage Conservation Program Establishment:** 1982

**Approximate number of sites on Register:** 8,000 properties listed on i-Heritage Database; >1,500 registered properties on Heritage Inventory

**Overall Program Description:** The City of Melbourne's heritage planning policies and initiatives date back to the early 1980s, when it commissioned the first heritage studies in the city. The Register of Historic Places, established in 1974, was already in place and the City moved quickly through the 1980s to activate a robust heritage planning and conservation program. In 1988, the Melbourne Heritage Restoration Fund was launched as a non-profit partnership between the City and State of Victoria. As an integral part of the city's planning scheme, Melbourne's heritage conservation program seeks to manage and protect identified historic places by implementing a variety of planning controls, offering financial incentives and promoting awareness through the city's i-Heritage Database. The City has recently adopted a 15-year Heritage Strategy and has also developed an Indigenous Heritage Study and Strategy (Part 1) to ensure that Indigenous sites, stories and events are together identified, managed and celebrated.

## **Program Components:**

- **Melbourne Heritage Restoration Fund:**

- Financial incentives to help conserve and restore the heritage of the City of Melbourne for the enjoyment of the wider community
- Managed through Victoria's Heritage Restoration Fund

**Program Components (continued):**

- **i-Heritage Database** on city's website, which contains the following information (when available) on more than 8,000 properties, as well as **streets** and **laneways**:
  - building grading
  - architectural style
  - heritage status
  - notable features
  - statements of significance
  - historical information
  - builder
  - photograph of current building
- **Heritage Overlay** – planning controls that require permits for work undertaken on historic buildings on specific properties and in specific areas,
- **Heritage Precincts:**
  - Statements of Significance developed for each precinct, along with key attributes
  - All buildings within precinct are governed by requirements of Heritage Overlay
  - 11 Precincts developed within Capital City Zone
- **Heritage Strategy:**
  - Endorsed in 2013
  - Outlines the direction of the program over the next 15 years
  - The City has also generated a separate **Indigenous Heritage Study and Strategy** (Part 1)



# PERTH



**Population:** 21,860 within City administrative boundary; 1.97 million in metro area

**Approximate number of sites on Register:** 260 (some sites include more than one building)

**Overall Program Description:** The award-winning heritage conservation program operated by the City of Perth is notable for its strong incentive framework for property owners, where all listed (on City register) properties are eligible for grants. The grants can also be used to initiate Conservation Plans, which help to ensure that properties are preserved/rehabilitated/restored to a high calibre. There is also a Heritage Rate Concession program that helps property owners maintain their heritage buildings, as well as loan subsidies. Transfer and Bonus density programs provide further incentives for the conservation of historic buildings. Three Heritage Conservation Areas have been established in the centre of the city.

## Program Components:

- **Heritage Grants:**
  - All rateable, heritage listed properties (on register of heritage places attached to City Planning Scheme) are eligible.
  - Grants are awarded to help assist in the conservation, understanding or use of a heritage building.
  - **Conservation Plans** are strongly encouraged before any work is undertaken, these are also **eligible for grants**; Conservation Plans are a requirement to be eligible for grants from the State (Western Australia) Heritage Council.
- **Heritage Rate Concession** – the aim of the rate concession program is to support heritage property owners in the maintenance of their buildings. The City appreciates that the discount will not cover all the costs of maintenance, but the intention is to develop this scheme to provide more practical assistance. Meanwhile, it offers owners an **incentive to conduct regular maintenance**, which will also help to secure their investment in the property and limit the chances of major expenses for future repairs
- **Heritage Loan Subsidies** (State Government of Western Australia):
  - The City of Perth is a participating Local Government Authority in the Heritage Loan Subsidy Scheme
  - The scheme offers loans at a reduced rate to successful applicants in order to **help owners of heritage properties undertake conservation works**.
  - A property must be listed on the City's register in order to be eligible.

**Program Components (continued):**

- **Heritage Agreements** – define the commitments and the responsibilities of the owner and the incentives that they will receive in return; required for major incentives, such as transfer of density.
- **Transfer of Density** - the City of Perth offers an incentive to conserve cultural heritage places and conservation areas by transferring a portion of unused plot ratio from a place (donor site) to a receiving site (recipient site) where the transfer will not adversely impact on the cultural heritage and general amenity of the city.
- **Bonus Density** - allows Council to award additional plot ratio (density) to what is prescribed in the Planning Scheme for a development, in return for the protection of the cultural heritage significance of a heritage listed place.
- **Heritage Conservation Areas:**
  - Three conservation areas in the centre city.
  - King Street and William Street Conservation Areas classify properties as either 'Considerable Cultural Heritage Significance'; 'Some/Moderate Cultural Heritage Significance'; or 'Non-heritage properties'.
  - The Barrack Street Conservation Area classifies properties as either 'Heritage' or 'Non-heritage'.

# SYDNEY



**Population:** 187,561 within City administrative boundary; 4.76 million in metro area

**Approximate number of sites on Register:** 2,360

**Overall Program Description:** The City of Sydney's heritage conservation program is supported by the comprehensive Heritage Development Control Plan. Some of the major program components include: a transfer of density program (Heritage Floor Space Scheme); Heritage works without [development] consent policies; and Heritage Conservation Areas, which are spread throughout the city. The transfer of density program is designed to make heritage conservation programs financially feasible by transforming unused development potential into a transferable commodity. Providing heritage property owners with the opportunity to carry out certain works without development consent helps encourage the continued maintenance of historic buildings. Buildings within the Heritage Conservation Areas are evaluated and grouped into three categories, including Contributory, Neutral and Detracting. Buildings deemed to be Contributory can be the focus of conservation efforts within the neighbourhood.

## **Program Components:**

- **Heritage Development Control Plan** – provides objectives and provisions for the conservation of buildings with heritage significance, either individually or as part of their street or area. The aims, in relation to heritage are to:
  - Establish the framework for detailed heritage and conservation planning; and
  - Ensure that development applications for heritage items and works within heritage conservation areas and heritage streetscapes are assessed on the basis of heritage significance and desired heritage outcomes.



**Program Components (continued):**

- **Heritage Floor Space Scheme** - provides an incentive for the conservation and ongoing maintenance of heritage items in central Sydney by allowing owners of heritage buildings to sell unused development potential from their site, known as heritage floor space (HFS):
  - When a heritage item owner completes conservation works they may be awarded HFS by the City of Sydney.
  - The awarded HFS can then be sold to a site that requires it as part of an approved development application.
  - The money raised offsets the cost of conserving the heritage item.
  - Depending on quantum and market conditions, the current purchase price is approximately \$400 per square metre.
  - Conservation Management Plan required.
  - Covenant registered on title of heritage property.
- **Heritage works without consent** - to make it easier for owners to maintain and repair their properties, the Sydney Local Environmental Plan specifies certain development that may be carried out to heritage items or within heritage conservation areas without the need for development consent. These works may include re-painting a building in an original or appropriate colour scheme, replacing rusty gutters and down pipes to match original details or restoring a front verandah to its original detail.
- **Heritage Conservation Areas** – established throughout City; buildings within each Area are determined to be either:
  - *Contributory*: make an important and significant contribution to the character of a heritage conservation area of heritage streetscape and have a reasonable to high degree of integrity and date from a key development period of significance. Contributory buildings are defined as buildings that are from a significant historical period layer, highly or substantially intact or significant historical period layer, altered yet recognisable and reversible.
  - *Neutral*: do not contribute or detract from the significant character of the heritage conservation area or heritage streetscape. Buildings that do not belong to a key period of significance, good contemporary infill, and development from a key period of significance, which has been irreversibly altered, are identified as neutral.
  - *Detracting*: intrusive to a heritage conservation area or heritage streetscape because of inappropriate scale, bulk, setbacks, setting or materials. They do not represent a key period of significance and detract from the character of a heritage conservation area or heritage streetscape.



# HONG KONG



**Population:** 7,300,000

**Approximate number of recorded historic buildings:** 8,800

**Approximate number of graded historic buildings:** 1,444

**Approximate number of declared monuments:** 114

**Heritage programs established:** 1976, 2008

**Advisory bodies:** Antiquities Advisory Board (AAB), Advisory Committee on Built Heritage Conservation

**Overall Program Description:** Heritage issues and heritage programs in Hong Kong and the City of Vancouver have many parallels. Both cities are densely inhabited, with growing populations occupying small land bases that are constrained by oceans and mountains. Both are thought of as ‘developers’ cities’ and both attempt to address development-heritage conflicts in a pragmatic manner with heritage conservation programs that rely, to a large extent, on incentives. The review of Vancouver’s heritage program may benefit from lessons learned from Hong Kong.

Hong Kong maintains several parallel heritage programs:

1. The first heritage program was initiated in 1976 and is administered by the **Antiquities and Monuments Office** (AMO) within the Leisure and Cultural Services Department (LCSD). It focuses on identification and protection;
2. An expanded heritage program was initiated in 2008 and is administered by the **Commissioner for Heritage’s Office** (CHO) within the Development Bureau. It responds to pragmatic issues of development.
3. The Development Bureau’s **Planning and Lands Branch** is responsible for land-use planning, which includes zoning and the preservation of historic buildings.
4. The **Urban Renewal Authority** (URA), also within the Development Bureau, is mandated undertake urban renewal. This includes constructing new buildings and rehabilitating historic buildings.

### Program Components:

- The **Antiquities and Monuments Office (AMO)**, a division of LCSD, administers a heritage program that is defined by the Antiquities and Monuments Ordinance (Cap. 53) of 1976. The objective is 'to preserve the archaeological and built heritage of Hong Kong and to promote the awareness and appreciation of ... such cultural legacy.' Individual historic places may be assigned one of three grades. Graded buildings are not subject to statutory protection.
  - Grade 1: Buildings of outstanding merit, which every effort should be made to preserve if possible.
  - Grade 2: Buildings of special merit; efforts should be made to selectively preserve.
  - Grade 3: Buildings of some merit; preservation in some form would be desirable and alternative means could be considered if preservation is not practicable.

Historic places that are considered by the AMO and the AAB to 'need proper preservation' may be declared a 'monument' under the Antiquities and Monuments Ordinance and thereby legally protected. Declaration as a monument requires approval by the Chief Executive, Hong Kong's premier Government official. A property may be declared a 'proposed monument', which provides 12 months' protection, without the approval of the Chief Executive. The property owner or legal occupier has the right to object to declaration; the final decision is made by the Chief Executive.

To date only publicly-owned buildings have been successfully declared as monuments. Owners of privately-owned properties, even those who favoured preservation, have objected. In an important precedent (in 2013), a privately-owned property, Hotung Gardens, was proposed as a monument. The owner, the granddaughter of the original owner and builder, objected strongly to the proposal and demolished the principal house. The proposed declaration was subsequently withdrawn by Government. Another privately-owned property, 27 Lugard Road, was voluntarily preserved by its owner. The Government proposed its declaration as well, but once again the owner objected and that proposal was also withdrawn.

The program supports the conservation of graded buildings with financial assistance by means of compensation and grants.

- The **Commissioner for Heritage's Office (CHO)** was set up under the Development Bureau (which is separate from LCSD) in order to implement a more pragmatic and action-oriented heritage program. It was initiated in 2008 in support of the Chief Executive's Policy Statement on Heritage Conservation (2007). The objective of the program is 'to protect, conserve and revitalise as appropriate historical and heritage sites and buildings through relevant and sustainable approaches. ... Due regard should be given to development needs in the public interest [and] respect for private property rights.'

Two incentive programs have been initiated by the Development Bureau to assist properties that are publicly-owned, owned by an NGO, or owned privately, although privately-owned property must be used for a non-profit-making enterprise. The programs are:

- 'Revitalising Historic Buildings Through Partnership Scheme,' which assists the conservation and revitalization of Government-owned historic properties. It strives 'to strike a balance between sustainable development and heritage conservation.' Work is overseen by the Works Branch of the Development Bureau.
  - More than 20 buildings have been assisted by the scheme. One example is Lui Seng Chung, a triangular shophouse in Kowloon.
- 'Financial Assistance for Maintenance Scheme,' which provides funds for maintenance for privately-owned graded historic buildings or non-profit-making Government buildings. The limit of assistance has recently been raised from HK\$1 million to HK\$2 million (about CAD\$350,000) per property.

CHO and the Development Bureau also take forward schemes apart from these incentives programs. The largest project underway is the conservation and revitalization of the Central Police Station Compound. It contains three clusters of buildings, declared as monuments in 1995 under the Antiquities and Monuments Ordinance. They will be re-used for cultural purposes. A new infill building in the courtyard will provide additional floor space. The project is a partnership between the Hong Kong Jockey Club and the Development Bureau.

- The **Planning and Lands Branch** of the Development Bureau, under the provisions of the Town Planning Ordinance, is responsible for land-use planning policy and strategy. Its enabling legislation This includes a number of activities that may have a direct impact on historic places:
  - The Branch drafts statutory zoning plans, which determine land use. As in British Columbia, a more intensive use will lead to development pressure to demolish and rebuild, whereas a less intensive use will create few pressures. Zoning can also be used to protect natural conservation areas.
  - Zoning plans may use a classification called 'other specified use (OSU)'. Heritage Properties may be classified as 'OU (heritage building)', subject to approval from the Town Planning Board.
- The **Urban Renewal Authority (URA)**, a division of the Development Bureau, is mandated to acquire land so that it may carry out urban renewal. Its mission addresses both new building and the improvement of old buildings. Two elements in the mission statement are:
  - To enable and encourage the rehabilitation of dilapidated buildings to prevent urban decay.
  - To preserve by maintaining and restoring buildings of historical and architectural value, and to sustain local characteristics.

As a consequence of this mandate, the URA has been responsible for the conservation of a number of graded historic buildings. These include the shophouses at 60-66 Johnston Road, Wan Chai, which form part of a larger development that includes a high-rise residential tower.

**Conclusions:** Hong Kong maintains an extensive heritage conservation program, which was developed in support of formal heritage policy initiated in 1976 and expanded in 2007. The program is reasonably effective as a pragmatic response to Hong Kong's strong culture of development. Generally the program is not unlike Vancouver's. The main difference is one of governance. In Hong Kong the Government exerts far more control than it does in Vancouver and British Columbia, and so people look more to Government for solutions and funding.

It remains generally assumed – although it is not legally required – that Government will pay the cost of the conservation of historic buildings, whether they are publicly or privately owned. The only conservation tools used widely in Hong Kong are grants and compensation, both financial measures. Both require direct Government expenditures, for which there is some fiscal and political resistance. Some non-financial conservation tools have been used on occasion for graded buildings, including land swaps, land-use variances, and plot-ratio (what we call floor-space ratio, or FSR) bonuses and transfers, but none is officially enabled by legislation.

Government launched a broad review of heritage conservation policy in 2013. An important consultation paper, *Respecting Our Heritage While Looking Ahead*, proposed using another conservation tool, exemptions from the Building Ordinance (the equivalent of our building code) for historic properties. Those who administer the conservation program have been made aware of the broader range of tools and incentives that are available, but as yet no others tools have been implemented.

# APPENDIX B

## UNESCO HISTORIC URBAN LANDSCAPE

### Preamble

*The General Conference,*

*Considering* that historic urban areas are among the most abundant and diverse manifestations of our common cultural heritage, shaped by generations and constituting a key testimony to humankind's endeavours and aspirations through space and time,

*Also considering* that urban heritage is for humanity a social, cultural and economic asset, defined by an historic layering of values that have been produced by successive and existing cultures and an accumulation of traditions and experiences, recognized as such in their diversity,

*Further considering* that urbanization is proceeding on an unprecedented scale in the history of humankind, and that throughout the world this is driving socio-economic change and growth, which should be harnessed at the local, national, regional and international levels,

*Recognizing*, the dynamic nature of living cities,

*Noting*, however, that rapid and frequently uncontrolled development is transforming urban areas and their settings, which may cause fragmentation and deterioration to urban heritage with deep impacts on community values, throughout the world,

*Considering*, therefore, that in order to support the protection of natural and cultural heritage, emphasis needs to be put on the integration of historic urban area conservation, management and planning strategies into local development processes and urban planning, such as, contemporary architecture and infrastructure development, for which the application of a landscape approach would help maintain urban identity,

*Also considering* that the principle of sustainable development provides for the preservation of existing resources, the active protection of urban heritage and its sustainable management is a condition sine qua non of development,

*Recalling* that a corpus of UNESCO standard-setting documents, including conventions, recommendations and charters (1) exists on the subject of the conservation of historic areas, all of which remain valid,

*Also noting*, however, that under processes of demographic shifts, global market liberalization and decentralization, as well as mass tourism, market exploitation of heritage, and climate change, conditions have changed and cities are subject to development pressures and challenges not present at the time of adoption of the most recent UNESCO recommendation on historic areas in 1976 (Recommendation concerning the Safeguarding and Contemporary Role of Historic Areas),

*Further noting* the evolution of the concepts of culture and heritage and of the approaches to their management, through the combined action of local initiatives and international meetings (2), which have been useful in guiding policies and practices worldwide,

*Desiring* to supplement and extend the application of the standards and principles laid down in existing international instruments,



*Having before it proposals concerning the historic urban landscape as an approach to urban heritage conservation, which appear on the agenda of the 36th session of the General Conference as item 8.1,*

*Having decided at its 35th session that this issue should be addressed by means of a recommendation to Member States,*

1. *Adopts*, this 10th day of November 2011, the present Recommendation on the Historic Urban Landscape;
2. *Recommends* that Member States adopt the appropriate legislative institutional framework and measures, with a view to applying the principles and norms set out in this Recommendation in the territories under their jurisdiction;
3. *Also recommends* that Member States bring this Recommendation to the attention of the local, national and regional authorities, and of institutions, services or bodies and associations concerned with the safeguarding, conservation and management of historic urban areas and their wider geographical settings.

## **Introduction**

1. Our time is witness to the largest human migration in history. More than half of the world's population now lives in urban areas. Urban areas are increasingly important as engines of growth and as centres of innovation and creativity; they provide opportunities for employment and education and respond to people's evolving needs and aspirations.
2. Rapid and uncontrolled urbanization, however, may frequently result in social and spatial fragmentation and in a drastic deterioration of the quality of the urban environment and of the surrounding rural areas. Notably, this may be due to excessive building density, standardized and monotonous buildings, loss of public space and amenities, inadequate infrastructure, debilitating poverty, social isolation, and an increasing risk of climate-related disasters.
3. Urban heritage, including its tangible and intangible components, constitutes a key resource in enhancing the liveability of urban areas, and fosters economic development and social cohesion in a changing global environment. As the future of humanity hinges on the effective planning and management of resources, conservation has become a strategy to achieve a balance between urban growth and quality of life on a sustainable basis.
4. In the course of the past half century, urban heritage conservation has emerged as an important sector of public policy worldwide. It is a response to the need to preserve shared values and to benefit from the legacy of history. However, the shift from an emphasis on architectural monuments primarily towards a broader recognition of the importance of the social, cultural and economic processes in the conservation of urban values, should be matched by a drive to adapt the existing policies and to create new tools to address this vision.
5. This Recommendation addresses the need to better integrate and frame urban heritage conservation strategies within the larger goals of overall sustainable development, in order to support public and private actions aimed at preserving and enhancing the quality of the human environment. It suggests a landscape approach for identifying, conserving and managing historic areas within their broader urban contexts, by considering the interrelationships of their physical forms, their spatial organization and connection, their natural features and settings, and their social, cultural and economic values.
6. This approach addresses the policy, governance and management concerns involving a variety of stakeholders, including local, national, regional, international, public and private actors in the urban development process.
7. This Recommendation builds upon the four previous UNESCO recommendations concerning heritage preservation, and recognizes the importance and the validity of their concepts and principles in the history and practice of conservation. In addition, modern conservation conventions and charters address the many dimensions of cultural and natural heritage, and constitute the foundations of this Recommendation.

## **I. Definition**

8. The historic urban landscape is the urban area understood as the result of a historic layering of cultural and natural values and attributes, extending beyond the notion of “historic centre” or “ensemble” to include the broader urban context and its geographical setting.
9. This wider context includes notably the site’s topography, geomorphology, hydrology and natural features, its built environment, both historic and contemporary, its infrastructures above and below ground, its open spaces and gardens, its land use patterns and spatial organization, perceptions and visual relationships, as well as all other elements of the urban structure. It also includes social and cultural practices and values, economic processes and the intangible dimensions of heritage as related to diversity and identity.
10. This definition provides the basis for a comprehensive and integrated approach for the identification, assessment, conservation and management of historic urban landscapes within an overall sustainable development framework.
11. The historic urban landscape approach is aimed at preserving the quality of the human environment, enhancing the productive and sustainable use of urban spaces, while recognizing their dynamic character, and promoting social and functional diversity. It integrates the goals of urban heritage conservation and those of social and economic development. It is rooted in a balanced and sustainable relationship between the urban and natural environment, between the needs of present and future generations and the legacy from the past.
12. The historic urban landscape approach considers cultural diversity and creativity as key assets for human, social and economic development, and provides tools to manage physical and social transformations and to ensure that contemporary interventions are harmoniously integrated with heritage in a historic setting and take into account regional contexts.
13. The historic urban landscape approach learns from the traditions and perceptions of local communities, while respecting the values of the national and international communities.

## **II. Challenges and opportunities for the historic urban landscape**

14. The existing UNESCO recommendations recognize the important role of historic areas in modern societies. These recommendations also identify a number of specific threats to the conservation of historic urban areas, and provide general principles, policies and guidelines to meet such challenges.
15. The historic urban landscape approach reflects the fact that both the discipline and practice of urban heritage conservation have evolved significantly in recent decades, enabling policy-makers and managers to deal more effectively with new challenges and opportunities. The historic urban landscape approach supports communities in their quest for development and adaptation, while retaining the characteristics and values linked to their history and collective memory, and to the environment.
16. In the past decades, owing to the sharp increase in the world’s urban population, the scale and speed of development, and the changing economy, urban settlements and their historic areas have become centres and drivers of economic growth in many regions of the world, and have taken on a new role in cultural and social life. As a result, they have also come under a large array of new pressures, including:

### **Urbanization and globalization**

17. Urban growth is transforming the essence of many historic urban areas. Global processes have a deep impact on the values attributed by communities to urban areas and their settings, and on the perceptions and realities of their inhabitants and users. On the one hand, urbanization provides economic, social and cultural opportunities that can enhance the quality of life and traditional character of urban areas; on the other hand, the unmanaged changes in urban density and growth can undermine the sense of place, the integrity of the urban fabric, and the identity of communities. Some historic urban areas are losing their functionality, traditional role and populations. The historic urban landscape approach may assist in managing and mitigating such impacts.

## Development

18. Many economic processes offer ways and means to alleviate urban poverty and to promote social and human development. The greater availability of innovations, such as information technology and sustainable planning, design and building practices, can improve urban areas, thus enhancing the quality of life. When properly managed through the historic urban landscape approach, new functions, such as services and tourism, are important economic initiatives that can contribute to the well-being of the communities and to the conservation of historic urban areas and their cultural heritage while ensuring economic and social diversity and the residential function. Failing to capture these opportunities leads to unsustainable and unviable cities, just as implementing them in an inadequate and inappropriate manner results in the destruction of heritage assets and irreplaceable losses for future generations.

## Environment

19. Human settlements have constantly adapted to climatic and environmental changes, including those resulting from disasters. However, the intensity and speed of present changes are challenging our complex urban environments. Concern for the environment, in particular for water and energy consumption, calls for approaches and new models for urban living, based on ecologically sensitive policies and practices aimed at strengthening sustainability and the quality of urban life. Many of these initiatives, however, should integrate natural and cultural heritage as resources for sustainable development.
20. Changes to historic urban areas can also result from sudden disasters and armed conflicts. These may be short lived but can have lasting effects. The historic urban landscape approach may assist in managing and mitigating such impacts.

## III. Policies

21. Modern urban conservation policies, as reflected in existing international recommendations and charters, have set the stage for the preservation of historic urban areas. However, present and future challenges require the definition and implementation of a new generation of public policies identifying and protecting the historic layering and balance of cultural and natural values in urban environments.
22. Conservation of the urban heritage should be integrated into general policy planning and practices and those related to the broader urban context. Policies should provide mechanisms for balancing conservation and sustainability in the short and long terms. Special emphasis should be placed on the harmonious integration of contemporary interventions into the historic urban fabric. In particular, the responsibilities of the different stakeholders are the following:
  - (a) Member States should integrate urban heritage conservation strategies into national development policies and agendas according to the historic urban landscape approach. Within this framework, local authorities should prepare urban development plans taking into account the area's values, including the landscape and other heritage values, and features associated therewith;
  - (b) Public and private stakeholders should cooperate, inter alia, through partnerships to ensure the successful application of the historic urban landscape approach;
  - (c) International organizations dealing with sustainable development processes should integrate the historic urban landscape approach into their strategies, plans and operations;
  - (d) National and international non-governmental organizations should participate in developing and disseminating tools and best practices for the implementation of the historic urban landscape approach.
23. All levels of government – local, regional, national/federal, – aware of their responsibility – should contribute to the definition, elaboration, implementation and assessment of urban heritage conservation policies. These policies should be based on a participatory approach by all stakeholders and coordinated from both the institutional and sectorial viewpoints.

#### **IV. Tools**

24. The approach based on the historic urban landscape implies the application of a range of traditional and innovative tools adapted to local contexts. Some of these tools, which need to be developed as part of the process involving the different stakeholders, might include:
- (a) Civic engagement tools should involve a diverse cross-section of stakeholders, and empower them to identify key values in their urban areas, develop visions that reflect their diversity, set goals, and agree on actions to safeguard their heritage and promote sustainable development. These tools, which constitute an integral part of urban governance dynamics, should facilitate intercultural dialogue by learning from communities about their histories, traditions, values, needs and aspirations, and by facilitating mediation and negotiation between groups with conflicting interests.
  - (b) Knowledge and planning tools should help protect the integrity and authenticity of the attributes of urban heritage. They should also allow for the recognition of cultural significance and diversity, and provide for the monitoring and management of change to improve the quality of life and of urban space. These tools would include documentation and mapping of cultural and natural characteristics. Heritage, social and environmental impact assessments should be used to support and facilitate decision-making processes within a framework of sustainable development.
  - (c) Regulatory systems should reflect local conditions, and may include legislative and regulatory measures aimed at the conservation and management of the tangible and intangible attributes of the urban heritage, including their social, environmental and cultural values. Traditional and customary systems should be recognized and reinforced as necessary.
  - (d) Financial tools should be aimed at building capacities and supporting innovative income-generating development, rooted in tradition. In addition to government and global funds from international agencies, financial tools should be effectively employed to foster private investment at the local level. Micro-credit and other flexible financing to support local enterprise, as well as a variety of models of partnerships, are also central to making the historic urban landscape approach financially sustainable.

#### **V. Capacity-building, research, information and communication**

25. Capacity-building should involve the main stakeholders: communities, decision-makers, and professionals and managers, in order to foster understanding of the historic urban landscape approach and its implementation. Effective capacity-building hinges on an active collaboration of these main stakeholders, aimed at adapting the implementation of this Recommendation to regional contexts in order to define and refine the local strategies and objectives, action frameworks and resource mobilization schemes.
26. Research should target the complex layering of urban settlements, in order to identify values, understand their meaning for the communities, and present them to visitors in a comprehensive manner. Academic and university institutions and other centres of research should be encouraged to develop scientific research on aspects of the historic urban landscape approach, and cooperate at the local, national, regional and international level. It is essential to document the state of urban areas and their evolution, to facilitate the evaluation of proposals for change, and to improve protective and managerial skills and procedures.
27. Encourage the use of information and communication technology to document, understand and present the complex layering of urban areas and their constituent components. The collection and analysis of this data is an essential part of the knowledge of urban areas. To communicate with all sectors of society, it is particularly important to reach out to youth and all under-represented groups in order to encourage their participation.

#### **VI. International cooperation**

28. Member States and international governmental and non-governmental organizations should facilitate public understanding and involvement in the implementation of the historic urban landscape approach, by disseminating best practices and lessons learned from different parts of the world, in order to strengthen the network of knowledge-sharing and capacity-building.



29. Member States should promote multinational cooperation between local authorities.
30. International development and cooperation agencies of Member States, non-governmental organizations and foundations should be encouraged to develop methodologies which take into account the historic urban landscape approach and to harmonize them with their assistance programmes and projects pertaining to urban areas.

## GLOSSARY OF DEFINITIONS

### **Historic area/city** (from the 1976 Recommendation)

- “Historic and architectural (including vernacular) areas” shall be taken to mean any groups of buildings, structures and open spaces including archaeological and palaeontological sites, constituting human settlements in an urban or rural environment, the cohesion and value of which, from the archaeological, architectural, prehistoric, historic, aesthetic or sociocultural point of view are recognized. Among these “areas”, which are very varied in nature, it is possible to distinguish the following “in particular: prehistoric sites, historic towns, old urban quarters, villages and hamlets as well as homogeneous monumental groups, it being understood that the latter should as a rule be carefully preserved unchanged.

### **Historic urban area** (from the ICOMOS Washington Charter)

- Historic urban areas, large and small, include cities, towns and historic centres or quarters, together with their natural and man-made environments. Beyond their role as historical documents, these areas embody the values of traditional urban cultures.

### **Urban heritage** (from European Union research report N° 16 (2004), Sustainable development of Urban historical areas through and active Integration within Towns – SUIIT)

- Urban heritage comprises three main categories:
  - Monumental heritage of exceptional cultural value;
  - Non-exceptional heritage elements but present in a coherent way with a relative abundance;
  - New urban elements to be considered (for instance):
    - The urban built form;
    - The open space: streets, public open spaces;
    - Urban infrastructures: material networks and equipments.

### **Urban conservation**

- Urban conservation is not limited to the preservation of single buildings. It views architecture as but one element of the overall urban setting, making it a complex and multifaceted discipline. By definition, then, urban conservation lies at the very heart of urban planning.

### **Built environment**

- The built environment refers to human-made (versus natural) resources and infrastructure designed to support human activity, such as buildings, roads, parks, and other amenities.

### **Landscape approach** (from the International Union for Conservation of Nature – IUCN, and the World Wildlife Fund – WWF)

- The landscape approach is a framework for making landscape-level conservation decisions. The landscape approach helps to reach decisions about the advisability of particular interventions (such as a new road or plantation), and to facilitate the planning, negotiation and implementation of activities across a whole landscape.

### **Setting** (from the ICOMOS Xi'an Declaration)

- The setting of a heritage structure, site or area is defined as the immediate and extended environment that is part of, or contributes to, its significance and distinctive character.

### **Cultural significance** (from the ICOMOS Australia Burra Charter)

- Cultural significance means aesthetic, historic, scientific, social or spiritual value for past, present or future generations. Cultural significance is embodied in the place itself, its fabric, setting, use, associations, meanings, records, related places and related objects. Places may have a range of values for different individuals or groups.

# APPENDIX C

## FINANCIAL INCENTIVES FOR HERITAGE IN VANCOUVER

WRITTEN BY  
VANCOUVER HERITAGE FOUNDATION







VANCOUVER  
**HERITAGE**  
FOUNDATION

## FINANCIAL INCENTIVES FOR HERITAGE IN VANCOUVER

---



Vancouver Heritage Foundation

November 30<sup>th</sup> 2015

## CONTENTS

	Page
EXECUTIVE SUMMARY .....	3
INTRODUCTION .....	5
FINANCIAL INCENTIVES FOR HERITAGE .....	6
- The Goal of Incentives .....	7
- Valuing Vancouver's Heritage .....	8
- The Finances of Heritage .....	9
INCENTIVES AVAILABLE IN VANCOUVER .....	15
- City of Vancouver Programs .....	16
- Vancouver Heritage Foundation Grants .....	19
- The Provincial and Federal Context .....	23
- Incentives Available – program details .....	25
FINANCIAL INCENTIVES OPTIONS .....	31
BEST PRACTICE EXAMPLES .....	39
CONCLUSIONS .....	43
BIBLIOGRAPHY .....	46
Acknowledgements .....	49
Appendices	
I. City of Vancouver Cultural Infrastructure Grants to Heritage Register buildings 2009-2014 .....	51
II. Catalogue of Vancouver Heritage Foundation Grants 1999-2014 .....	55
III. Figures 5 and 6 in larger scale .....	69

## List of Illustrations

Figure 1: Geographical distribution of heritage resources on the Vancouver Heritage Register.	9
Figure 2: Ownership of Vancouver Heritage Register resources.	10
Figure 3: The Heritage Register includes a wide range of buildings, structures and sites.	10
Figure 4: Stages of heritage conservation for an individual site.	11
Figure 5: Summary of available programs for stages of heritage conservation, Vancouver2015.	15
Figure 6: Heritage Façade Rehabilitation Program funded buildings.	16
Figure 7: Eligible areas: City of Vancouver financial incentive programs 2015.	18
Figure 8: Geographical distribution of VHF grants 1999-2014.	19
Figure 9: VHF Restore It grants 2004-2014.	21
Figure 10: VHF True Colours grants 2004-2014.	21
Figure 11: Summary of the principal options for financial incentives in Canada.	33
Box 1: A closer look at heritage granting: Colbourne House	12
Box 2: A closer look at heritage granting: Evangelistic Tabernacle	12
Box 3: A closer look at heritage granting: Percy House	22
Box 4: A closer look at heritage granting: Atlantic Street	22



## EXECUTIVE SUMMARY

Vancouver Heritage Foundation (VHF) has provided grants to houses and other buildings in Vancouver for fifteen years. Drawing on this experience and our many interactions with building owners over the years, and based in our role to promote and support heritage conservation, this study reviews financial incentives in Vancouver to provide input to the Heritage Action Plan process. It focuses on the approximately 2,200 resources listed on the Vancouver Heritage Register as the core of Vancouver's built heritage, and what is available to assist and motivate heritage conservation.

The City of Vancouver launched the Heritage Action Plan in December 2013 to update and strengthen the City's Heritage Conservation Program, aiming to further enable the protection of Vancouver's heritage. Financial incentives are already part of the program but a more substantial, city-wide incentives program could be a strong contributor to achieving the Action Plan goals.

Around the globe, governments at all levels and other organizations offer financial support to encourage the protection and long-term care of heritage buildings and sites. In a variety of ways, public investment is made in often privately-owned assets in recognition of the wide-reaching public benefits of heritage. Such investments aim to achieve more and better conservation, addressing the particular demands and costs of doing it well and leveraging investment by others.

Vancouver cares about its built heritage. Recent public surveys by VHF and the City of Vancouver show strong public support for heritage retention. The City's Heritage Conservation Program has provided substantial investment in heritage over three decades and the Heritage Action Plan was launched to reassess what is needed now.

### The Finances of Conservation

Vancouver's built heritage is largely in private ownership – by individuals, commercial entities or non-profit groups. It is varied and includes many private houses as well as commercial buildings, mixed use and non-commercial, institutional and religious buildings along with monuments and structures. The costs can be substantial and conservation work is ongoing, from planning to major intervention and maintenance. Many owners lack the resources for major projects and many sites do not offer the prospect of profitable returns.

### Current Situation

Vancouver lacks a long-term reliable and well-funded program that could allow owners to purchase and plan with confidence. VHF's grants are the only city-wide support and the only funding available for many sites. The need is much larger than what VHF has been able to offer from an annual grant budget that ranges from \$12,000 to \$15,000. Current City programs for conservation are focused on specific areas and building types in the Downtown Eastside and currently lack the effective transfer of density tool. Grants for cultural infrastructure projects are a key resource for those that qualify.

In 2015, municipalities have the lead role in supporting heritage conservation. Provincial and Federal funding has been largely withdrawn or reduced over the past decade and has not extended to private homes or many other types of properties in private ownership.

### Incentive Options

A summary of the key options for financial incentives for heritage indicates that Vancouver already uses, or has used, the most common and effective ones available at the municipal level in some form. Different

incentives address different types of sites or ownership so several can be used to provide support to different needs.

In examining best practice models, two Western Canada examples demonstrate how the available incentives have been tailored and offered at the municipal level to meet local needs and goals in Victoria and Edmonton. Both highlight the value of long-term reliable programs, committed to leveraging investment and results.

### **The Opportunity**

Proven programs in Vancouver can be reinvigorated to further achieve results for targeted areas and building types, for major interventions and large-scale projects. However, many heritage buildings and sites are not served by existing programs.

VHF could provide the vehicle to offer a much-expanded grants program to motivate and support conservation activity by owners. VHF could build on its experience to manage a City-funded program for a wide range of built heritage across the city and stimulate significant investment in Vancouver's most valued and vulnerable places.

An annual heritage fund of at least \$500,000 along with an administrative budget of \$75,000 would enable meaningful support to houses as well as several larger-scale projects each year, with the flexibility to support all stages of conservation activities. With greater investment comes the opportunity to more rigorously seek high quality work that meets established heritage conservation standards.

In revitalizing financial incentives for Vancouver's built heritage, a commitment to provision of funding and programs in the long term will be key to achieving the most successful outcomes. Heritage conservation is a long-term commitment to planning, restoring, adapting and maintaining. In taking these tasks on, owners need confidence that their own commitment will be supported.

### **Vancouver Heritage Foundation**

Vancouver Heritage Foundation is a registered charity supporting the conservation of heritage buildings and structures in recognition of their contribution to the city's economy, sustainability and culture.

VHF does this by:

- Developing practical tools, information and incentives to help in the successful conservation of heritage buildings and structures.
- Creating opportunities to access and learn about Vancouver's heritage buildings.
- Fundraising in the public and private sectors to build an endowment that will protect our built heritage into the future.
- Promoting relationships that support heritage conservation.

For more information about Vancouver Heritage Foundation, visit [www.vancouverheritagefoundation.org](http://www.vancouverheritagefoundation.org)  
402 – 510 West Hastings Street, Vancouver BC V6B 1L8    Tel: 604 264 9642

## INTRODUCTION

As the City of Vancouver reviews its Heritage Conservation Program in 2015, Vancouver Heritage Foundation (VHF) has taken the opportunity to review the range of potential financial incentives as tools for the City to consider during the Heritage Action Plan. This work is intended to complement that being prepared by the consultant team. This study explores the value of financial incentives for heritage conservation, details what is currently offered in Vancouver and takes a survey of the incentives that could be used. The study focuses on the many buildings, structures and sites on the Vancouver Heritage Register – the core of Vancouver’s heritage resources. Their owners are responsible for the care of much of Vancouver’s built heritage.

For fifteen years, VHF has provided grants to heritage houses and buildings for heritage conservation. As a city-wide program, for many heritage building owners, modest VHF grants are often the only available financial assistance in conservation work. This study draws on VHF’s granting experience as well as interactions with building owners through other VHF programs and projects. The study team is grateful to all those who have shared their experience and knowledge to inform this report.

Financial incentives, monetary and non-monetary, are an important partner to heritage legislation. Alongside protection of heritage places, incentives can motivate and make feasible restoration and rehabilitation but also ongoing maintenance and proper care of structures for long-term benefits. They can include property tax exemptions, income tax credits and loans as well as grants. The City of Vancouver has put several programs in place over the decades to encourage protection and rehabilitation of buildings and sites on the Heritage Register. The Heritage Action Plan process offers an opportunity to review how best to meet the needs for conservation in the city today.

Vancouver has the opportunity to draw substantial benefits from a stock of heritage assets that are retained, restored and well-cared-for. The Heritage Inventory was established in 1986, later adopted as the Heritage Register, and remains a central part of the City of Vancouver’s Heritage Conservation Program with approximately 2,200 resources listed and around 25% of them protected. At a time of ongoing pressure for redevelopment, with heritage buildings of all types under threat, tools that can motivate retention and protection, and help realize the potential of older buildings are crucial. Financial incentives are a key component of the heritage conservation tool kit and deserve consideration for a more wide-reaching role in Vancouver.

## FINANCIAL INCENTIVES FOR HERITAGE

In many places, financial assistance in a variety of forms to the owners of heritage buildings and sites is offered by governments at all levels as well as non-government organizations. This investment of public resources is based on recognition of the substantial benefits to the wider public of heritage conservation, and the particular effort and costs of doing it well. This approach has been widely-adopted policy internationally since the 1970s to encourage conservation and secure protection of heritage assets.<sup>1</sup> Locally, from 1977, the Province of British Columbia provided substantial grants for heritage conservation, enabling many projects that otherwise would not have been feasible.

The case for financial support to owners has been made by economists, urban planners, heritage consultants and others who have pointed to the need to secure protection of buildings and encourage good conservation practices for the long-term benefits. The premise is that the value of heritage buildings and sites is much greater than the private value they have for their current owners. The cultural, historic and social values are not accounted for by the market and therefore something more is needed to motivate the long-term approach required to secure the public benefit.

Donovan Rypkema, American real estate and economic development consultant, has written and lectured extensively on heritage conservation and argues that for the economic benefits alone, it is well worth the investment. He has outlined heritage conservation as economic development, downtown revitalization, tourism strategy and more.<sup>2</sup> He has highlighted the relationship between versatile economies, sustainable development and support for heritage resources.<sup>3</sup> He has noted the long-term economic value in the differentiation that retaining built heritage brings:

*If in the long run we want to attract capital, to attract investment in our communities to have community rebirth, we must differentiate them from anywhere else. It is our built environment that expresses, perhaps better than anything else, our diversity, our identity, our individuality, our differentiation.*<sup>4</sup>

Australian economist Norman Thomson put the case for investment by the public sector three decades ago with arguments still relevant today.<sup>5</sup> He explored the implications of private ownership of heritage assets and why financial incentives are useful to see heritage assets retained and maintained. With the majority of heritage properties in private ownership, either individual or corporate, he pointed out that "Designated heritage assets are, in the case of the built environment, part of the property market".<sup>6</sup> But he argued that the market is unable to account for the benefit of heritage to the wider public. He sets out the case for incentives that motivate private spending on heritage properties, whether through grants, loans or tax incentives.

---

<sup>1</sup> Kalman (2014), pp.261-62. Kalman points to programs from the 1940s onwards.

<sup>2</sup> Rypkema (1994).

<sup>3</sup> Rypkema (2007).

<sup>4</sup> Rypkema (2012).

<sup>5</sup> Thomson (1985).

<sup>6</sup> Thomson (1985), p.256.



Gianfranco Mossetto, an experienced advisor and academic in economics and finance, has agreed with Thomson on the inadequacy of the market alone to conserve heritage.<sup>7</sup> He proposes that current market value does not reflect the social value of heritage now or in the future, and notes the difficulty of expecting current owners to invest in maintenance and restoration for the benefit of others and future generations:

*The current decision-maker, therefore, has to be either an altruist (and maybe even a masochist) or a future potential consumer willing to pay now in order to be able to consume in the future...*

Heritage specialist and architectural historian, Harold Kalman concurs on the difficulty for the market in valuing heritage assets beyond the usual real estate considerations and suggests that,

*therefore one often cannot depend on normal market forces to support cultural assets fully.*<sup>8</sup>

This is of particular note in considering the variety of resources on the Vancouver Heritage Register that hold value for different groups within the community that is not reflected in any real estate appraisal.

The arguments for incentives are not that the public sector should pay for private owners to benefit, but rather to find a good balance that stimulates activity in the right direction. Thomson described the goal:

*The aim is to design fiscal incentives which will generate private expenditure on the conservation of heritage assets judged to be of significance.*<sup>9</sup>

He noted that while this might result in increasing the value of the heritage property, it still achieves the “desired result of reducing the chance of deterioration and ultimate demolition”.<sup>10</sup> In conjunction with regulation that prevents or discourages demolition and insists on upkeep, investment by both the private and public sectors provides the framework for heritage conservation to deliver the benefits for the wider community.

## The Goal of Incentives

The primary purpose of offering financial incentives is to achieve a greater level of heritage conservation than would otherwise be achieved – more of it and of a better quality. Securing protection of heritage resources is often part of that, ensuring a longer-term benefit. Key goals include:

- Investment in the public benefits of heritage resources – cultural, economic and environmental.
- Sharing the cost and motivating investment by others.
- Quality control, encouraging good practice in conservation work, such as following the *Standards and Guidelines for the Conservation of Historic Places in Canada*.

Some programs have specific objectives beyond these, such as retaining existing accommodation units or community spaces. The successful Building Incentive Program in Victoria has targeted bringing vacant or

---

<sup>7</sup> Mossetto (in “The Economic Dilemma of Heritage Conservation” (1994))

<sup>8</sup> Kalman (2014), p.249. Kalman refers to the concept of cultural capital (discussed Kalman (2014), pp.18-19) developed by economist David Throsby notably in *Economics and Culture* (2001) and with Ilde Rizzo in “Cultural Heritage: Economic Analysis and Public Policy” (2006), described as a way to take account of the value of heritage beyond its immediate market price. Rizzo & Throsby (2006), p.987.

<sup>9</sup> Thomson (1985), p.257.

<sup>10</sup> Thomson (1985), p.261.

underused upper floors in downtown buildings into residential use. The Main Street Program, led and promoted by Heritage Canada in communities across Canada, has emphasized the economic and socially regenerative power of heritage projects. Similarly, the Heritage Building Rehabilitation Program in Vancouver was designed to stimulate economic regeneration in a specific neighbourhood. Such programs, when combined, can yield multiple public benefits.

## Valuing Vancouver's Heritage

Heritage buildings and sites bring substantial benefits to Vancouver that have been broadly recognized and provide the rationale for the City of Vancouver's current programs that support heritage. The benefits for the economy, culture and sustainability of the city are wide-reaching and were cited at the launch of the Heritage Action Plan in 2013.<sup>11</sup> The City's annual operating grant to Vancouver Heritage Foundation assists VHF's mission to support the conservation of heritage buildings and structures in recognition of these benefits.

Recent surveys have emphasized consistently how much Vancouverites value built heritage:

97% agree we need to preserve heritage buildings in Vancouver."  
*City of Vancouver survey 2015*<sup>12</sup>

96.6% believe we need to preserve heritage buildings in Vancouver.  
*Vancouver Heritage Foundation survey 2012*<sup>13</sup>

Of course, not all heritage buildings and sites are valued equally by everyone for conservation and some need more help than others to be retained and conserved. The Vancouver Heritage Register, established in 1986 and undergoing a review and update as part of the Heritage Action Plan, provides an essential tool, identifying a wide variety of resources of significance across the city [Fig. 1]. Already included in the 2,200 sites are major downtown buildings, but also private homes of all sizes and many different eras, neighbourhood commercial buildings, religious buildings, community buildings, schools and monuments.<sup>14</sup> These buildings and structures have individual significance and also contribute greatly to the streetscapes and characteristics of distinctive neighbourhoods and sense of place. This core stock of heritage resources is a particular focus for conservation, with the goal to see them retained, maintained, restored, used and enjoyed in the long term. Currently, 525 sites on the Register are protected, often achieved through the offer of incentives.<sup>15</sup>

Vancouver's heritage buildings and sites are a major asset for the city. They can act as exemplars, encouraging retention and reuse of more of the city's older buildings, a strategy that also aligns with the City's Greenest City 2020 goals.<sup>16</sup> This in turn has economic benefits, with the potential to boost heritage and cultural tourism, and in generating and sustaining skilled jobs in a wide variety of employment. Projects on

---

<sup>11</sup> City of Vancouver (2013), p.4.

<sup>12</sup> City of Vancouver (2015) "Administrative Report: Heritage Action Plan Update", p.18.

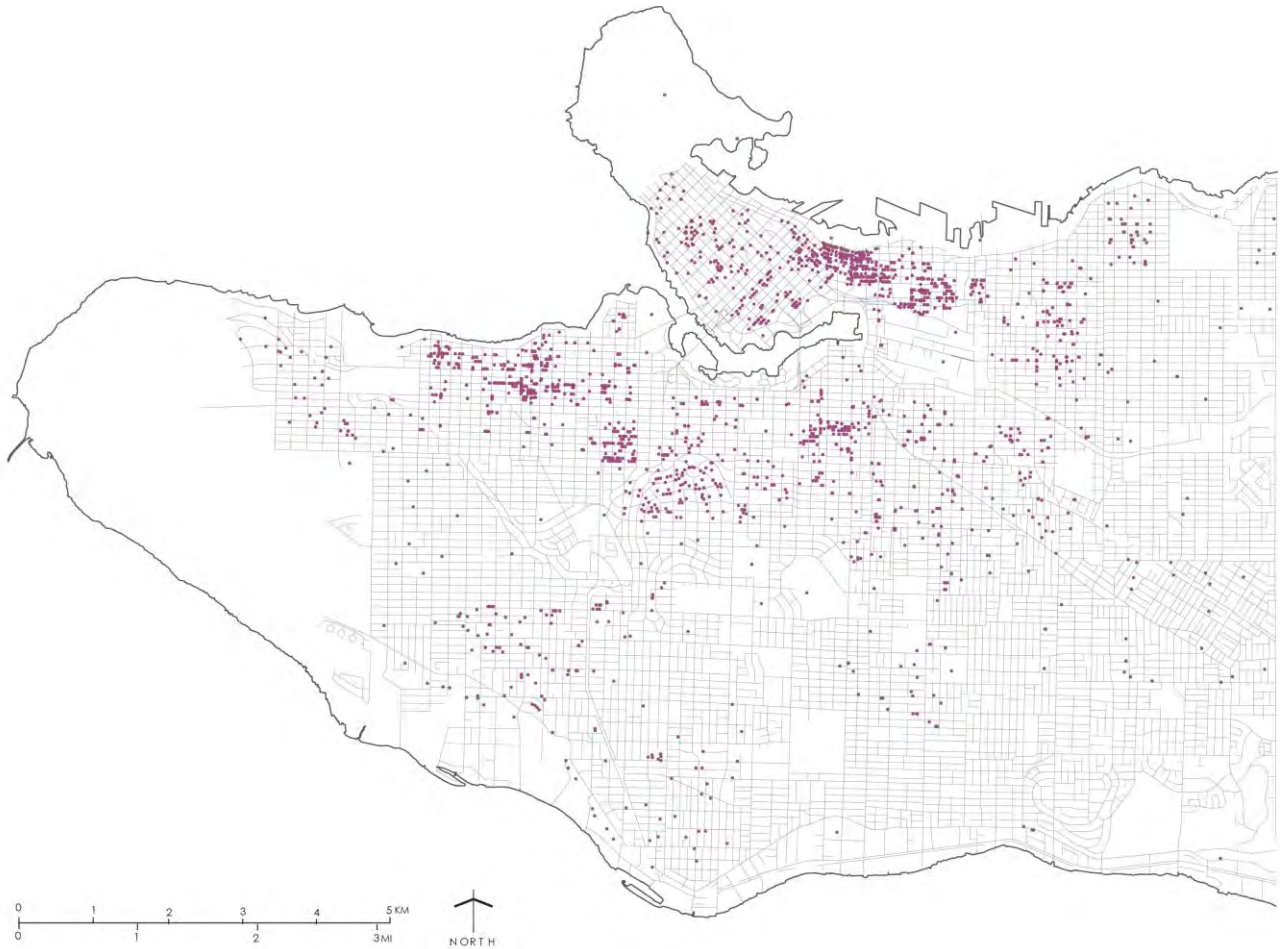
<sup>13</sup> Vancouver Heritage Foundation (2012).

<sup>14</sup> VHF's Heritage Site Finder provides a visual online tool to explore the Vancouver Heritage Register.  
<http://www.vancouverheritagefoundation.org/map/>

<sup>15</sup> City of Vancouver (2013), Appendix A, p.3.

<sup>16</sup> Studies have shown that reuse of older buildings is more sustainable than building new, more energy-efficient buildings which can take 10 to 80 years to overcome the negative environmental impacts created during construction. National Trust for Historic Preservation (2011).

older buildings put more money into local jobs compared to new construction where materials (often from distant markets) take the lion's share.<sup>17</sup>



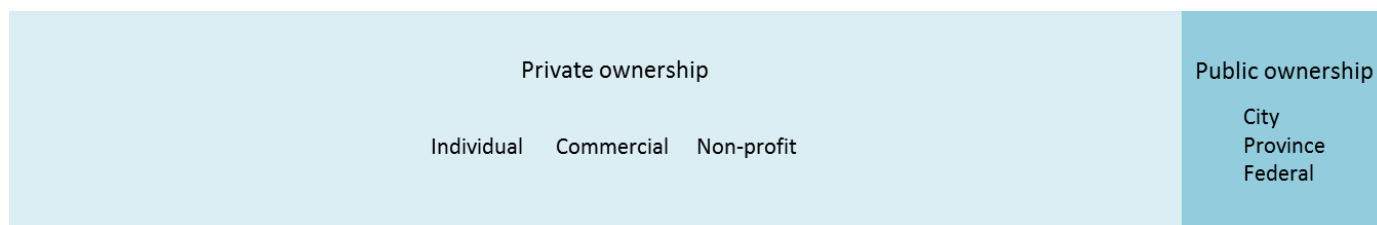
**Figure 1:** Geographical distribution of heritage resources on the Vancouver Heritage Register.

### The Finances of Heritage

Vancouver's heritage buildings are largely in private ownership, by individuals as freehold, condominiums or housing co-ops, by non-profit groups or by commercial entities [Fig. 2]. The City of Vancouver owns 127 properties that are considered to be heritage, either included on the Heritage Register or with legal protection or agreements in place.<sup>18</sup> The Vancouver School Board owns over forty Heritage Register buildings and a number of other buildings are owned by the provincial or federal governments.

<sup>17</sup> Heritage Resource Centre (2006).

<sup>18</sup> Information from the Urban Design Division, Planning & Development Services, City of Vancouver.



**Figure 2:** Ownership of Vancouver Heritage Register resources – illustrative only.

Among the wide variety of different types of buildings and structures on the Heritage Register, the most numerous are detached houses and commercial buildings, but it also includes institutional and religious buildings, mixed use buildings and monuments [Fig. 3]. Residential buildings, primarily houses, make up over 60% of the Register.<sup>19</sup>



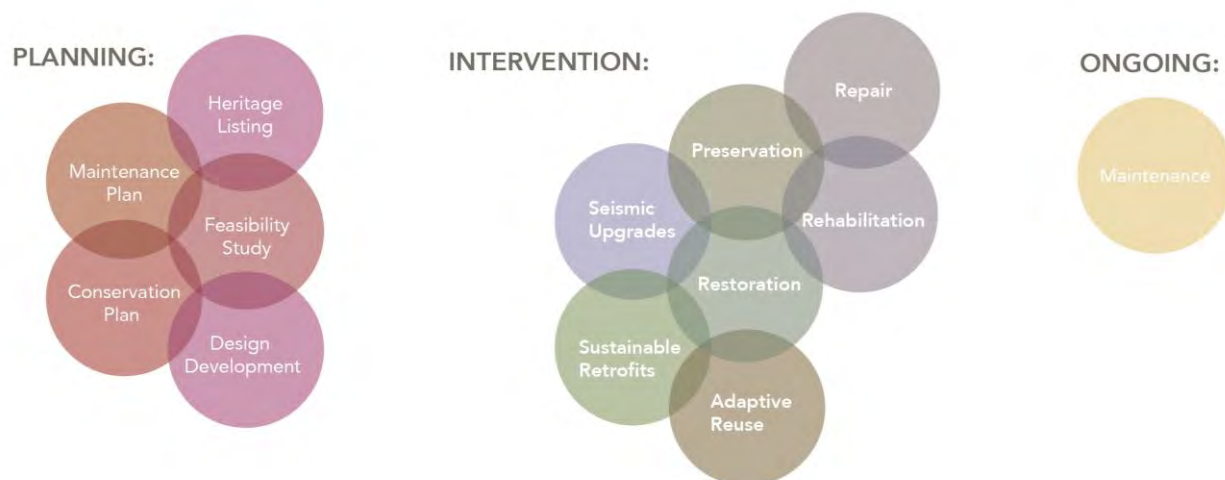
**Figure 3:** The Heritage Register includes a wide range of buildings, structures and sites.

The costs of sustaining any building or structure can be significant. For heritage sites, this can be added to by the specific materials, skills, detail and quality required to ensure the long-term protection of heritage value. Larger buildings often require retrofits for seismic stability. Proper planning for conservation work, both short-term intervention and over the long term is important to achieving the goal. The process of finding experienced professionals and trades for projects and obtaining approvals also often requires additional time and attention in comparison to non-heritage projects. In many cases, preserving the building or structure means foregoing further development opportunity on the site which has a very real value in the real estate market. Finally, the additional enhancement of some sites through the provision of interpretation to enable greater public understanding or appreciation is a unique cost. What is required for different sites will depend on the stage they are at in their conservation [Fig. 4].

The often specific requirements of such work on heritage buildings and the need to ensure an appropriate quality of materials and work often leads to higher costs even on relatively small scale projects. True Colours grant applicants often comment on the higher quotes received from painters who plan to follow the approved practices for exterior painting, including hand-scraping, sanding and preparation. A VHF Restore It grantee noted that repairs to the chimneys or roof of their house were complicated by the steepness of the roof, requiring special safety measures for workers. On a larger building, the costs scale up accordingly. The renewal of the cedar shingle roof for one VHF grantee cost over \$150,000. The roof is a key heritage feature of the home and this type of roofing can cost two or three times the cost of installing modern asphalt shingles.

<sup>19</sup> Data from VHF's Heritage Site Finder.





**Figure 4:** Stages of Heritage Conservation for an individual site.

Financial incentives in a variety of forms, whether monetary or non-monetary, are often offered to owners to affect action. Grants, tax relief, density transactions or cheap loans have all been used to make projects more feasible and economically viable. In some cases in Vancouver, owners have drawn on multiple sources. Colbourne House, a VHF True Colours Grant recipient in 2013, is maintained and operated by the Marpole Museum & Historical Society. They accessed five different federal and provincial grant programs in the late 1990s and early 2000s to fund the restoration of the house, along with fundraising from the community and individual donors to meet the project cost of over \$175,000.<sup>20</sup> Now the Society continues to raise funds to maintain the site, leading them to access a VHF grant in 2013 and to carry out ongoing fundraising (see Box 1).

Ongoing maintenance is an important aspect of sustaining a site and avoiding the need for major restoration work. Incentives that support maintenance can be very helpful in acknowledging the additional requirements of a historic building and guiding owners in doing appropriate work and doing it well.

Several buildings have turned to VHF grants for repairs and maintenance after the initial conversion or restoration of the building. The Evangelistic Tabernacle was converted to residential strata in 1994 and has received VHF Restore It grants to assist with a new roof in 2008 and window restoration in 2013 and 2014 (see Box 2). The House Grants program in Victoria and the City of Edmonton grants program both accommodate this ongoing need for maintenance and repair, as well as a steady approach to restoring a house over time.

A study of the projects that have received grants from VHF or the Victoria Heritage Foundation reveals common projects:

- Exterior painting, re-roofing, porch repairs or restoration, gutters, window repairs, restoration and storm window installation, chimney and foundation repairs.

This type of work is also consistent with inquiries to Heritage BC from across the province.

<sup>20</sup> Three of the programs they benefited from, all provincial and federal, provided 70% of the budget. They are no longer available.

### A closer look at heritage granting: Colbourne House



**Name: Colbourne House**

Neighbourhood: Marpole

Category - Ownership: Institution (museum) / Non-profit society

Built: 1912 Heritage Register: B

Vancouver Heritage Foundation Grants:

**True Colours**

**\$1,000** 2013

16% of Project Cost \$6,247 (excluding paint)

**Other Funding** utilized by Colbourne House:

1997 BC Heritage Trust (\$15,000)

2003 BC Gaming Lottery Commission (\$9000)

1999 John Hardie Mitchell Family Foundation (\$10,000)

2002 BC 2000 Community Spirit Grant (\$70,000)

2002 Federal Millennium Fund Program (\$44,222)

Donations and in-kind donations have provided approximately \$30,000

Colbourne House is operated by the Marpole Museum and Historical Society. The home was one of the first built in the community, as well as being one of few heritage buildings remaining in the area.

When the society began working with the house in the 1990s the property was derelict and set to be demolished by the City. The society began a long-term restoration process, accessing funding from several levels of government.

The interior and exterior are restored to the 1930's colour scheme and decor. The society aims to keep the house in good repair and hosts several community events in the building every year. Other restoration projects undertaken include raising the house to build a basement, restoring the interior and landscaping the exterior. Future projects include building a replica garage and a community garden for the house.

**Box 1: Colbourne House**

### A closer look at heritage granting: Evangelistic Tabernacle



**Name: Evangelistic Tabernacle**

Neighbourhood: Mount Pleasant

Category - Ownership: Residential / Strata

Built: 1909 Heritage Register: A(M)

Vancouver Heritage Foundation Grants:

**Restore It \$5,000** new roof, 2008

**0.7%** of Project Cost \$674,031

**Restore It \$1,000** window restoration, 2013

**5%** of Project Cost \$21,728

**Restore It \$1,000** window restoration, 2014

**6%** of Project Cost \$17,516

Originally built as a church, 2525 Quebec St. was converted to 38 strata apartments in 1999. The current ownership strives to keep the property in good shape and as current as possible while maintaining the historic character of the building.

Since becoming a strata apartment complex, other projects for the building include replacing the heat and hot water boiler and several painting projects.

The close adjacency of the building to the sidewalk makes any exterior restoration and maintenance work more costly and complicated. In order to do any maintenance and repair work on the six-storey building, scaffolding must be used which contributes significantly to the cost.

The Strata complex has received three grants from Vancouver Heritage Foundation. The grants have covered up to 6% of the total project costs.

**Box 2: Evangelistic Tabernacle**

## Achieving protection

A key heritage goal is to secure protection of a building or site. In British Columbia, when a property is designated by a municipality, providing legal protection from demolition, compensation is required to the owner if not done with their consent. The compensation addresses the notion that the legal protection of the property may reduce its market value by limiting future re-development on the site.<sup>21</sup> Designation therefore usually occurs with the owner's consent and negotiation of non-monetary incentives in place of financial compensation. In Vancouver, a Heritage Revitalization Agreement is a primary tool to secure protection of a heritage building. On average, eight were negotiated each year by City staff from 2010 to 2014, providing one-time non-monetary benefits to owners in exchange for protection and restoration.<sup>22</sup> Designation, rezoning and the Heritage Building Rehabilitation Program have also achieved protection in a similar way. VHF grants required designation for eligibility until 2009, causing some owners to add this protection on their homes in order to receive a grant. However, with a modest level of funding for the program and a desire to support a wide range of sites this requirement was removed.

The availability of ongoing financial incentives to designated properties can make designation more attractive to owners. An established successful program in Edmonton, has targeted protection of buildings, growing the number of designated properties from 22 in 2001 to 117 in 2015 through offering generous grants, including maintenance grants that can be accessed periodically on an ongoing basis.<sup>23</sup> In Victoria, sizeable grants for a wide variety of projects have been offered to designated houses since 1983; that city has also seen an increase in the number of houses protected by designation.

## Non-commercial projects

For large commercial developments that include heritage resources, a variety of incentives can help provide a profitable project once completed, bringing a building back into use and achieving heritage conservation goals.<sup>24</sup> For some sites, the equation is more difficult, particularly where conservation of the heritage resource precludes additional development on the site and the goal is not a profitable project but a building or structure retained and restored, perhaps significantly updated but continuing in use for its original purpose or a compatible one. Historic neighbourhood theatres, churches and even schools can be in this situation.

Strathcona Church, a prominent neighbourhood landmark, offers an example. Recently purchased by a private charitable foundation with the goal to bring it back into use as a community church, immediate work at significant cost was needed to rehabilitate the masonry and roof which had fallen into disrepair. VHF assisted with a True Colours grant for the exterior ground-level paintwork to complete this phase of stabilization. The private foundation's intention is "to maintain the church as close as possible to its original form and function for decades to come."<sup>25</sup>

---

<sup>21</sup> Several studies have disputed this including Shipley (2000).

<sup>22</sup> Information from Urban Design Division, Planning & Development Services, City of Vancouver.

<sup>23</sup> Detailed information on the Edmonton program is provided in pp.41-42, and for Victoria in pp.39-41.

<sup>24</sup> National Trust for Canada (2014) study outlined factors that discourage heritage development for developers and identified five areas that financial measures typically aim to address: Reduce risk, reduce financing costs, improve owner's financial situation, provide direct financial assistance to make projects more attractive to private investors, and compensate for foregone development potential.

<sup>25</sup> VHF True Colours grant application, Strathcona Church, 2014.

In Vancouver, Chinese Society buildings present a current example of this difficulty. The City of Vancouver Chinese Society Building Matching Grant program started in 2014, has committed \$2,087,500 as of May 2015, to twenty-five non-profit societies and associations to assist in the work needed to keep these buildings part of the historic fabric and cultural heart of Chinatown and the surrounding area.<sup>26</sup> Yet William Ma, President of the Mah Society of Canada highlighted the magnitude of the challenge, noting that “Our total project is over \$2 million, and the matching grant is \$100,000”.<sup>27</sup> Clearly other sources will have to be sought to bring the project to fruition. As this program is a matching grant, societies who cannot generate the necessary capital will not receive any funding. The grant stipulates that the funding be for major projects not “standard building repairs and maintenance.”<sup>28</sup> Many of those accepted into the program are dealing with significant deterioration and deferred maintenance. Societies who generate limited income from social housing and have largely elderly membership must therefore commit to large projects and raise significant capital, a task which many have been unable to accomplish.

Churches, small commercial buildings and apartment blocks, schools, private homes and monuments across the city face similar challenges, albeit on a variety of scales. With high land values, heritage resources not protected by designation or some other mechanism are more vulnerable to being lost when the cost of proper care of the site is left entirely to private owners or financially restricted non-profit societies. Support for all stages of heritage conservation, including maintenance, not just one-time major restorations or rehabilitations can make protection more attractive and long-term survival more likely.

---

<sup>26</sup> Chui (2015) / City of Vancouver, Reports to Council December 17 2014 and May 13 2015.

<sup>27</sup> Quoted in Chui (2015).

<sup>28</sup> City of Vancouver (2015) “Chinese Society Buildings Matching Grant”, p.2.

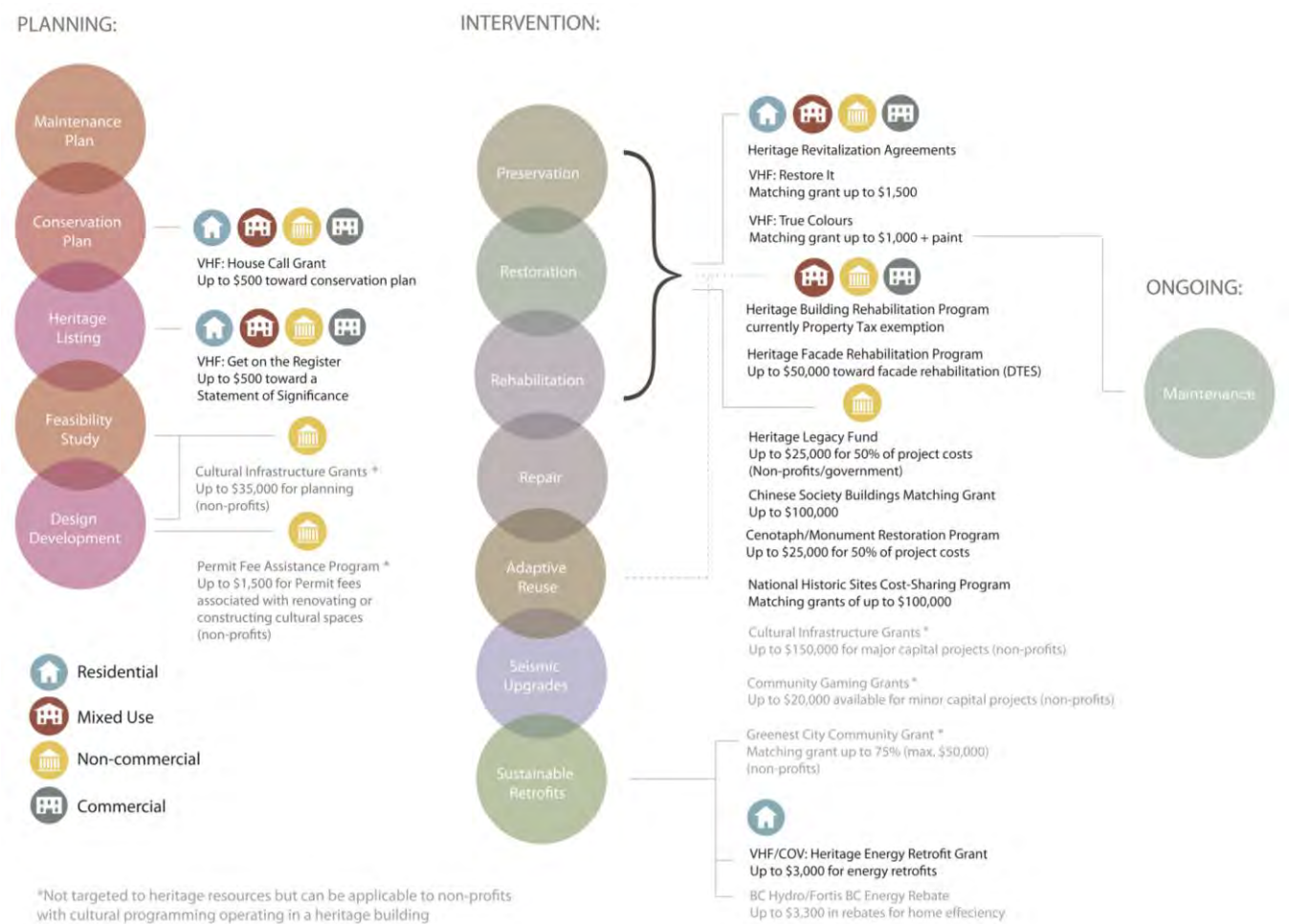


INCENTIVES AVAILABLE IN VANCOUVER

For a heritage property located in the City of Vancouver, there are existing financial incentives that can be available to support protection and conservation. A summary is provided in Figure 5 and details of each program can be found in pages 25-30. However, over the past eight years, incentives available to heritage sites have reduced significantly. With the withdrawal or reduction of programs and funding by the federal and provincial governments, municipalities have the lead role in conservation. Additionally, a key City of Vancouver component, the Transfer of Density program, is currently on hold.

Specific to Vancouver, programs are offered by the City of Vancouver and by Vancouver Heritage Foundation. Programs offered by the City of Vancouver for heritage have prioritized particular areas, building types and project types. Heritage BC has a province-wide grants program. At the Federal level, grants are occasionally offered for specific commemorations. Some heritage properties are also able to seek funding from programs offered for cultural spaces at the City and Federal level. Such funding has supported a number of Heritage Register buildings, though not often for heritage conservation specifically. Other programs that support energy-efficiency upgrades can also be applicable to heritage properties. Ownership by a non-profit society currently opens more opportunities for grant access than individual or commercial private ownership.

Figure 5: Summary of available programs for stages of heritage conservation, Vancouver 2015.



## City of Vancouver Programs

The focus for program funding, including grants, offered by the City of Vancouver for heritage conservation has been the historic districts of the Downtown Eastside. Since 2003, two programs, the Heritage Facade Rehabilitation Program and the Heritage Building Rehabilitation Program (HBRP), have offered significant financial incentives to Heritage Register properties in Gastown, Chinatown, the Hastings Street corridor and Victory Square. The high concentration of heritage resources in these districts and the economic environment of the neighbourhood made the need very apparent to support heritage conservation directly and at the same time to stimulate economic improvement. The programs led to significant activity, supporting 41 sites as of September 2015 [Fig. 6].<sup>29</sup> A major component of the HBRP, the transfer of density, has been on hold since 2009, rendering this program greatly less effective. The main incentive is now a property tax exemption. Facade grants have continued to be awarded with 8 sites proceeding since 2010 but the momentum of the program has slowed considerably without the full HBRP available. The HBRP program was designed to “meet the “shortfall cost””.<sup>30</sup> A review of the program in 2008 noted that “The principal effect has been to make feasible a number of projects which would not otherwise be economic.”<sup>31</sup> For large buildings in need of major rehabilitation work, such a program can address the complex and often costly requirements of seismic upgrading, building code compliance, restoration and adaptive reuse. The protection of participating buildings included requirements for ongoing maintenance, an important element to protect the public investment.<sup>32</sup>



**Figure 6:** Heritage Facade Rehabilitation Program funded buildings, funding approved by September 2015.

<sup>29</sup> Information from the Urban Design Division, Planning & Development Services, City of Vancouver.

<sup>30</sup> City of Vancouver (2005) “Heritage Building Rehabilitation Program Policies and Procedures”, p.2.

<sup>31</sup> Altus Group Limited (2008), p.47.

<sup>32</sup> City of Vancouver (2003), p.3.

Additional programs have been available to Chinese Society buildings to try to secure their future and the cultural heritage they anchor. The Chinatown Vision in 2002 identified the need to protect the area's heritage and culture, and the Societies are seen as key partners in the revitalization of the area.<sup>33</sup> In 2008, the Chinatown Society Buildings Planning Grant Program provided funding to Societies to prepare feasibility studies for heritage building rehabilitation, a key step in the process to achieving a successful long-term outcome. Since late 2014, the Chinese Society Building Matching Grant program has made up to \$2.5 million available over a three year period for critical capital upgrades, with a focus on heritage buildings and those offering affordable housing. This program has the potential to grant to 54 buildings, 18 of them currently on the Heritage Register but others also have potential to be included on the Register. Interest has been significant, with 30 matching grants approved to date but it is apparent that substantial further resources will be needed for projects to proceed.

The eligible areas for these current City programs is shown in Figure 7.

Before 2003 and the launch of the HBRP, the Transfer of Density program was already available, first put in place in 1983. This mechanism was first used in the city in the 1970s when the density from the Christ Church Cathedral site was transferred to the adjacent Park Place development, securing the future of the cathedral. The program allowed for the provision of bonus density and the transfer of this and residual density from a site to secure preservation of a heritage resource. Initially set up to enable the direct transfer of density to an adjacent site, the program was later expanded. It was made available for heritage sites in the downtown peninsula, the West Broadway corridor from Main Street to Burrard Street, and in South Granville, taking in the Stanley Theatre site which sold its density to the Wall Centre in the early 1990s. While still a current program, the moratorium on the creation of new density for transfer has made it generally unavailable as an option for projects.

Outside of the areas covered by these programs, incentives are more limited for heritage conservation activities, particularly those in private ownership. An important option offered by the City of Vancouver is a Heritage Revitalization Agreement (HRA). For a wide variety of sites, it can be an effective way to achieve heritage goals for a site when a one-time major intervention is planned such as an addition or infill dwelling. It enables a customized agreement of usually non-monetary incentives to a home or building owner in exchange for protection and restoration or rehabilitation of the historic property. Incentives are usually delivered on the site and can include allowing additional density or variations from the zoning requirements for setbacks or other aspects which can assist in achieving conservation. A successful HRA in 2009 secured the protection and rehabilitation of the 1911 Gow Block on Commercial Street, with the development of townhouses in the rear, a good fit for the space on the site and the usage of the original building.<sup>34</sup> The Gow Block was also able to take advantage of a grant from Vancouver Heritage Foundation to assist with repainting the restored building in a historically-appropriate colour scheme. Drawbacks of an HRA can be a lengthy involved process to achieve, and it does not address sites where additional density or similar incentives are not an option or would be inappropriate to the site. Requirements for ongoing maintenance and restoration are built into the agreement.

Beyond these programs, the City of Vancouver Cultural Infrastructure Grants program is a key resource available to non-profit societies. With up to \$1 million in funding each year since its inception in 2009, it has provided substantial sums to four or five Heritage Register sites each year related to their use for cultural activities. In 2014, the program provided \$294,000 to four societies housed in heritage buildings. A full list of

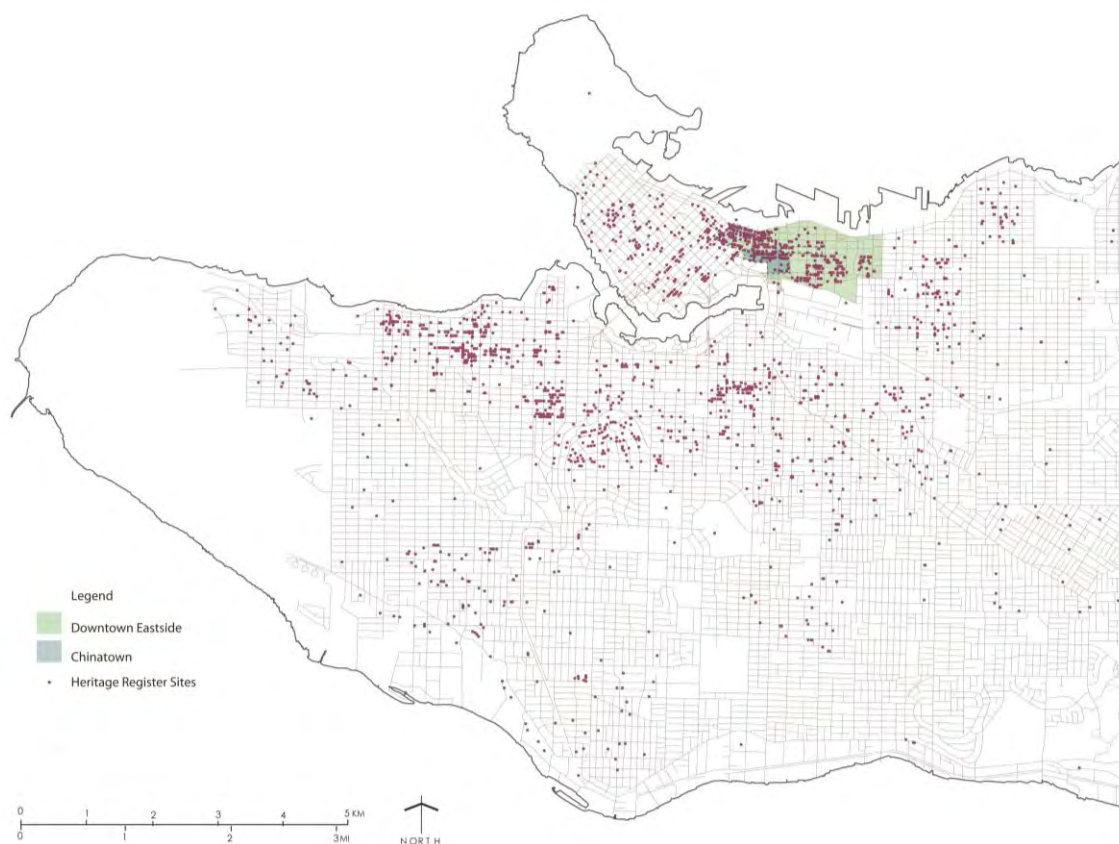
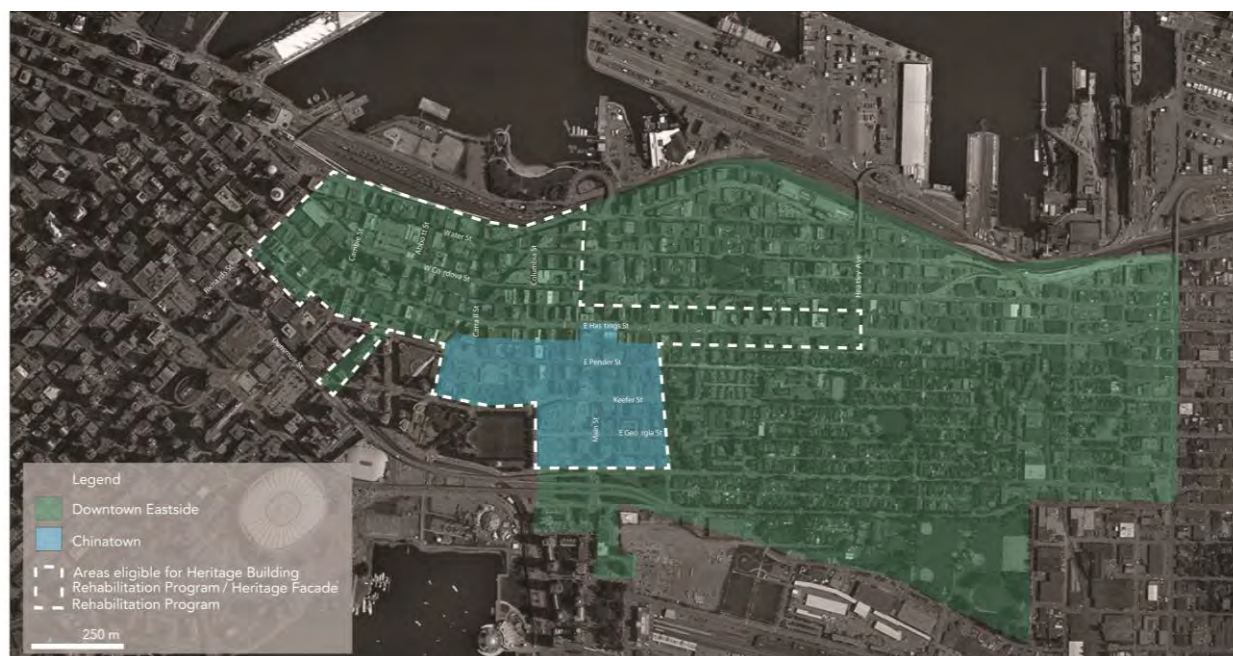
---

<sup>33</sup> Information on the programs from Planning & Development Services, City of Vancouver, October and November 2015.

<sup>34</sup> Vancouver Heritage Foundation (2013).



heritage building recipients is given in Appendix I. A Federal government funded program, Canada Cultural Spaces Fund is also available to non-profit arts and heritage organizations but cannot be used for building conservation-related work. These programs provide some valuable support to sites that fit the criteria.

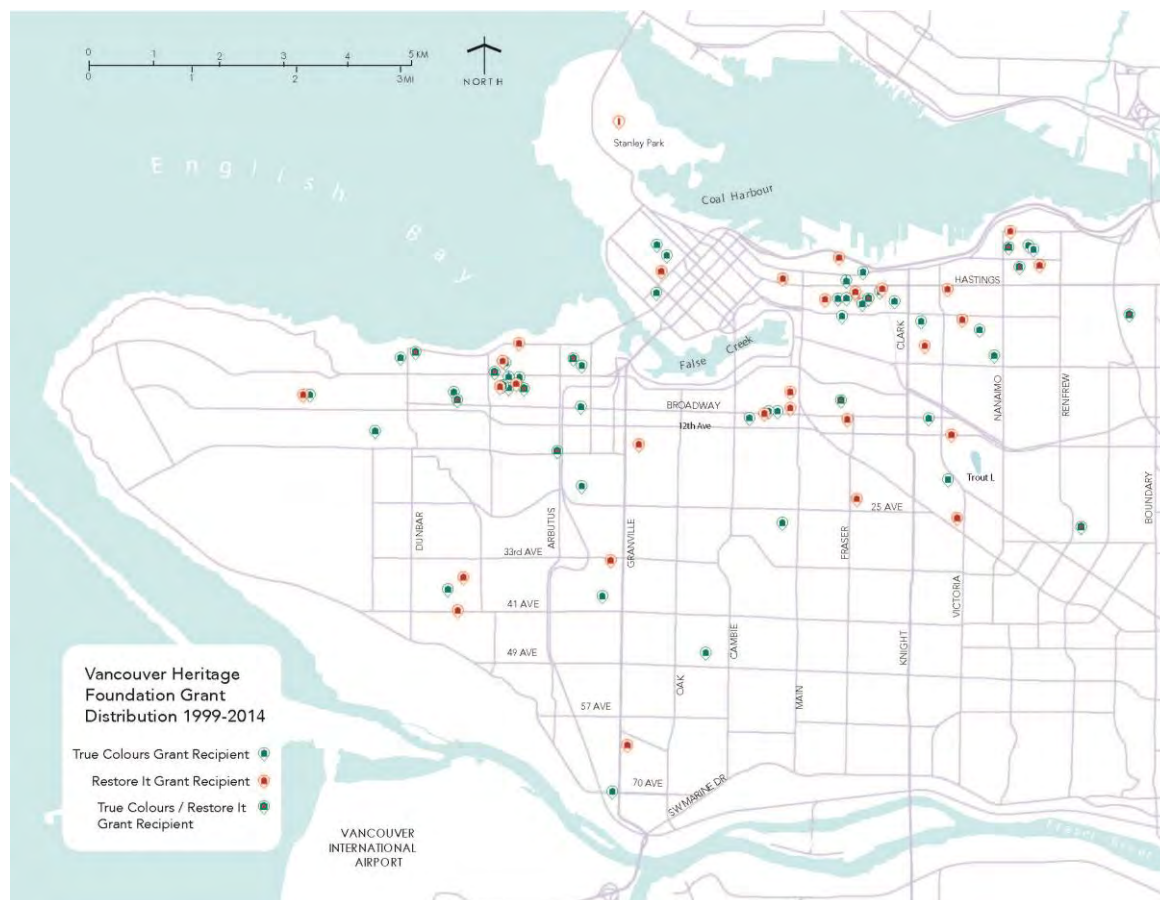


**Figure 7: Eligible Areas: City of Vancouver financial incentive programs 2015.**



## Vancouver Heritage Foundation Grants

The Vancouver Heritage Foundation grants program was launched in 1999 and is currently the only city-wide program offering direct financial incentives for heritage conservation. While the grants are typically well below 25% of overall project costs, many owners have appreciated this financial support along with the guidance and encouragement that VHF has been able to provide. The majority of the 113 grants awarded to date have been to privately-owned houses for which no other funding is available for heritage conservation activities. However, grants have also been awarded to other types of heritage buildings. Seven past recipients are owned or managed by non-profit societies including a community church and a war memorial, one is a commercial building, two are mixed use buildings, five are strata-owned buildings and three are housing co-ops. VHF grants have gone to buildings across the city, with particular clusters in the oldest neighbourhoods of Strathcona, the West End, Mount Pleasant, Kitsilano and north of East Hastings Street [Fig. 8].



**Figure 8:** Geographical distribution of VHF Grants 1999 – 2014.

Four different types of grant are available for conservation:

- True Colours
- Restore It
- House Call
- Get on the Register

Details of each are given on page 25. A fifth grant, the Heritage Energy Retrofit Grant was launched in September 2015 as a pilot program. With dedicated funding provided by the City of Vancouver, this new

grant will aim to enroll up to twenty homes from the Heritage Register or built before 1940 to undertake retrofits that reduce greenhouse gas emissions. This is an important addition to the grant funding available to privately-owned homes. Results of the pilot will be examined carefully to determine if funding can be continued or expanded.

The other four VHF grants target heritage conservation more specifically and are funded from VHF operating funding each year. Total funding for grants in recent years has ranged from \$12,000 to \$15,000. The value of the True Colours grant is greatly augmented by the ongoing partnership with Benjamin Moore who provide complimentary paint to grantees. With limited funding available, an impact has still been made. From 1999 until 2014, \$216,000 was disbursed, not including the value of free paint from Benjamin Moore which is typically valued at between \$2,500 and \$5,000 depending on the scale of the project. Eighty one different heritage properties received grants, with 33 sites receiving multiple grants. In the ten years since 2004, VHF grants of \$175,000 have been matched by over \$575,000 in private investment by building owners.

The ability to offer a wider range of grant funds more suited to the scale of different projects deserves consideration. Each year, VHF receives between 13 and 21 applications for grants<sup>35</sup> but as the grant funding is modest, VHF is aware that many heritage building owners do not apply even though the need for funding and for conservation work is clear. A review of images gathered for the VHF Heritage Site Finder of every Heritage Register property reveals a significant number in visible need of restoration and more proactive maintenance. Given few other options for assistance, some larger projects have applied to VHF and been supported with a grant. Figures 9 and 10 show the grant amount awarded and the actual project cost for projects from 2004 to 2014. These charts indicate that the grant is often limited compared to the actual cost of the project but is still a useful tool to assist property owners and encourage private investment. Projects that received a Restore It or True Colours grant from VHF saw private investment ranging from \$1,812 to over \$150,000.

Some grant recipients draw on multiple sources to make their projects feasible. Examples include Marpole Museum and Historical Society for Colbourne House, and the Japanese Canadian War Memorial Society. Others have returned for additional VHF grants in subsequent years to complete multiple projects or a project in phases, such as the strata-owned Evangelistic Tabernacle and Hycroft Manor as well as private houses such as Percy House (see Box 3). A full catalogue of VHF grant recipient sites is given in Appendix II.

There is potential to motivate more proactive care of Vancouver heritage buildings and sites and also, through greater funding, to have more input to the quality of work and approach for their long-term survival. In providing grants, VHF has been able to both provide guidance on appropriate methods and quality of work to be carried out and ensure that projects are done to an appropriate standard. The existing VHF grant programs have been able to support sites in different stages of their conservation and different magnitudes of projects. However, there is great potential to do much more across the city.

---

<sup>35</sup> For the years 2011-2014.

Figure 9: VHF Restore It grants 2004 – 2014.

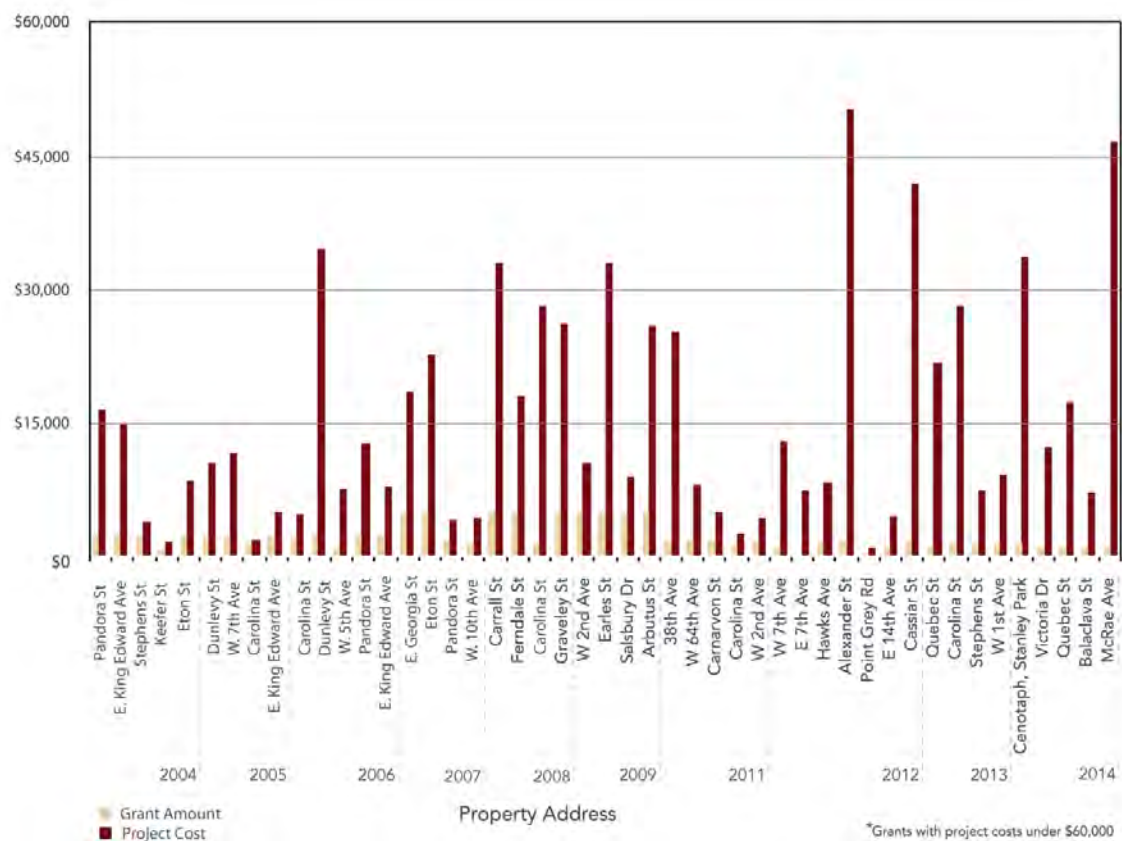
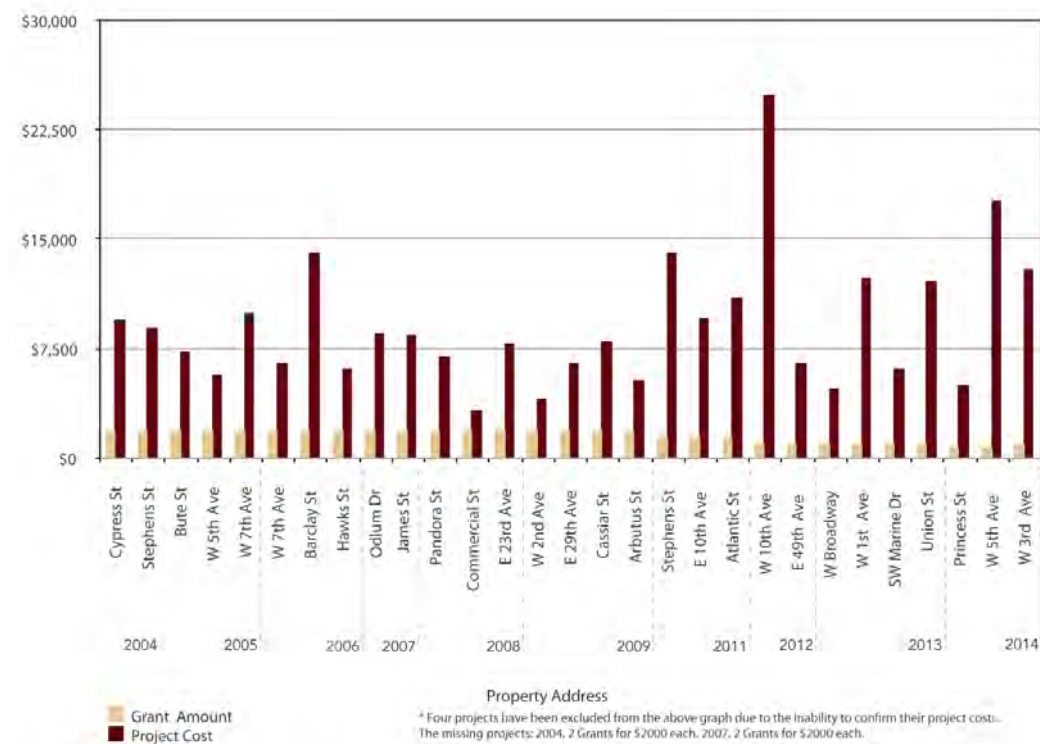


Figure 10: VHF True Colours grants 2004 – 2014. Amounts shown do not include the value of the paint.



### A closer look at heritage granting: Percy House



**Name: Percy House**

Neighbourhood: Mount Pleasant

Category - Ownership: Residential, Private

Built: 1904 Heritage Register: B(M)

Vancouver Heritage Foundation Grants:

**True Colours**

**\$2,000**, 2004 (previous owner)

**Restore It**

**\$1,290** stained glass window repair, 2005 (previous owner)

**\$2,310** wood window repairs, 2006

**50%** of Estimated Cost \$4,990 (previous owner)

**\$1,510** chimney restoration, 2008

**50%** of Estimated Cost \$3,020

**\$1,500** roof reconstruction, 2013

**5.3%** of Project Cost \$28,336

The Percy House has received four grants from Vancouver Heritage Foundation over the past 10 years. The current owners have occupied the home since 2007, utilizing two of those grants. In addition to the work supported by VHF they have also completed major renovations to bring the building up to current building code energy standards. Insulation upgrades were completed with the help of federal and provincial rebates.

Challenges encountered when maintaining and restoring the property include the steep grade of the historic roof which adds to repair costs due to safety precautions. The original wood studs and roof joists in the house were smaller than current standards making the addition of appropriate insulation more costly.

The owners have also repaired their own double-hung windows following the completion of a Vancouver Heritage Foundation workshop on historic window care.

### Box 3: Percy House

### A closer look at heritage granting: Atlantic Street



Neighborhood: Strathcona

Category-Ownership: Residential, Private

Built: 1905 Heritage Register: C

Vancouver Heritage Foundation Grants:

**True Colours \$1,500**, 2011

**14%** of Estimated Project Cost \$11,000 (excluding paint)

Having occupied the house since 1986, the current owners have completed several maintenance and restoration projects to their Victorian style home. Over the past twenty-nine years, work has been done to refinish the floors, replace windows and siding, and remodel the kitchen.

After repainting in 2011 with the assistance of Vancouver Heritage Foundation's True Colours grant, the homeowners receive frequent compliments on the colour and maintenance of the house.

The grant covered approximately 14% of the total painting project as well as providing free paint and consultation about the original colour scheme.

### Box 4: Atlantic Street



## The Provincial and Federal Context

Given the significant benefits of heritage conservation, there is an argument for financial incentives for projects to be sustained by all three levels of government. The example of the successful and long-established program in the USA of Federal tax credits, often supplemented by state and municipal programs sets a precedent that many in Canada have lobbied for. However, in the past decade, substantial federal and provincial programs have ended and not been replaced at a similar level of funding or consistency. Programs past and present have supported non-profits, local governments or commercial development projects but not privately-owned houses. In the current situation, local governments in British Columbia have the lead role in ensuring a future for their heritage buildings and sites.

### Provincial programs

For heritage conservation work, the financial incentives currently available at the provincial level in BC are through the Heritage Legacy Fund (HLF). Grants are offered each year to non-profits and local government bodies for heritage conservation and heritage awareness projects across the province, utilizing interest from a \$5 million endowment. In 2014, one Vancouver conservation project received funding, the restoration of the Japanese Canadian War Memorial. Over a decade in operation, the HLF has received requests for over \$35 million in funding support and has been able to provide \$1.8 million.<sup>36</sup>

Historically, much more has been available at the provincial level. The B.C. Heritage Trust was established in 1977 as a crown corporation and provided millions of dollars in funding to community groups, non-profits and local governments. The Trust's purpose was "to support, encourage and facilitate the conservation, maintenance and restoration of heritage property in the province" and it operated in cooperation with BC Heritage Branch.<sup>37</sup>

In 1994, the Heritage Conservation Statutes Amendment Act enabled local governments to do more to recognize and protect heritage resources, setting up key tools. Heritage Revitalization Agreements were introduced as an option and the ability was given for municipalities to offer grants. In 2001, a core review led to the B.C. Heritage Trust coming to an end and the establishment of the Heritage Legacy Fund in 2003, offering grants for the first time in 2005. Set up with an endowment, it has been managed at arms-length from the provincial government and is now fully administered by Heritage BC. With the end of the B.C. Heritage Trust, the Community Heritage Planning Program (CHPP) was also set up, run by BC Heritage Branch to offer support for local governments and non-profits to build their own capacity to implement heritage conservation. It funded context studies, community heritage register development, heritage strategic plans, heritage implementation plans and conservation plans. The CHPP ended in 2010, leaving only the Heritage Legacy Fund to provide ongoing financial support at the provincial level.

### Federal programs

The National Trust for Canada's website notes that Canada is the only G-8 country that "lacks a national system of funding policies and programs to preserve its historic infrastructure."<sup>38</sup> With the change in Federal government, there is renewed optimism that more support may be forthcoming. The National Trust and others have advocated since the 1970s for a tax program to support heritage conservation, seeing the

---

<sup>36</sup> Heritage BC (2015) *Heritage BC Quarterly: Heritage & Climate Change*. Summer 2015, p.10.

<sup>37</sup> <http://www.memorybc.ca/british-columbia-heritage-trust-fonds>

<sup>38</sup> <https://www.nationaltrustcanada.ca/issues-campaigns/financial-incentives/federal>

significant impact of such a program in the USA.<sup>39</sup> The Federal Historic Preservation Tax Incentives program there was launched in 1976 and has supported the preservation of 40,380 historic properties, leveraging over \$73 billion in private investment.<sup>40</sup> It supports commercial buildings and structures (income producing) only. It is considered to be "one of the nation's most successful and cost-effective community revitalization programs."

In Canada, a major grants project was launched in 2003 by the Liberal government as a pilot to test the responsiveness of the development industry to a program for rehabilitating historic properties for commercial use.<sup>41</sup> With a \$30 million fund offering reimbursement of up to 20% of eligible costs to a maximum of \$1 million, the Commercial Heritage Properties Incentive Fund (CHPIF) was well-received. It provided \$21.5 million to 49 projects across Canada and leveraged eight times that amount in private investment. In Vancouver, projects that received funding included the Chinese Times Building with an estimated total project cost of \$25 million.<sup>42</sup> Other Vancouver projects that received funding included the Flack Block, the Lumbermen's Building and the Alhambra Building.<sup>43</sup> The program added additional funding to that available from the City for these significant projects where seismic upgrading as well as major rehabilitation work was required to bring them back into use for the long term. The program was cancelled by the Conservative government in 2007 and has not been replaced.

Two ongoing Federal financial incentive programs in place now are the Cenotaph / Monument Restoration Program and the National Historic Sites Cost-Sharing Program. The National Historic Sites Cost-Sharing Program provides funding to other levels of government or not-for-profit organizations. There are nine National Historic Sites in Vancouver including the Former Vancouver Law Courts (currently the Art Gallery), the Vogue and Orpheum Theatres, Gastown and Chinatown. Sites within Gastown and Chinatown could apply to this program as "contributing properties". In the most recent round of funding, the Dr. Sun Yat Sen Classical Chinese Garden was approved for conservation of the Jade Water Pavilion with a \$100,000 contribution from the program.<sup>44</sup> Prior to that, the program supported condition assessment and conservation plans for five SRO Hotels in Gastown in 2011-2012. Several other applications from Vancouver properties have been unsuccessful. From 2009 to 2011, the program's \$8 million budget was over-subscribed by a factor of six with applications for \$53 million that could have leveraged \$280 million in investment.<sup>45</sup> The annual budget in recent years has been \$1 million per annum to assist sites across Canada and it continues to see demand beyond the available funding.

---

<sup>39</sup> National Trust for Canada (n.d.)

<sup>40</sup> Technical Preservation Services (n.d.)

<sup>41</sup> National Trust for Canada (n.d.)

<sup>42</sup> Parks Canada (2004)

<sup>43</sup> The Flack Block (163 West Hastings Street); Lumbermen's Building (509 Richards Street); Alhambra Building (209 Carrall Street, formerly 6 Water Street).

<sup>44</sup> Information on National Historic Sites Cost-Sharing Program is from Parks Canada (2015) and from Shelley Bruce, Parks Canada.

<sup>45</sup> National Trust for Canada (n.d.)

## Incentives Available – Program Details

The available incentives are organized here by where they apply – city-wide, location-specific, province-wide or Canada-wide, and their primary purpose – heritage conservation, cultural infrastructure or sustainability.

### City-wide Incentives for Heritage Conservation Activities:

#### **Heritage Revitalization Agreement (HRA)**

**Offered by:** City of Vancouver

**Eligibility:** All Heritage Register properties.

**For:** Protection and conservation work

**Incentive:** Varying of land use, density, set-backs and other regulations in exchange for preservation, restoration and protection of the property.

**Description:** HRAs became an option for municipalities in British Columbia in 1994. An HRA is a formal agreement between the property owner and the City. Each one involves a negotiation to establish a customized agreement, with the goal to protect the heritage property through designation and provide incentive to the owner to carry out any necessary conservation work. The HRA usually allows variation from existing zoning which can include a density bonus for greater development on the site than would otherwise be allowed.

**Per year:** On average, 8 HRAs each year were confirmed in Vancouver between 2010 and 2014.

Additionally, designation is possible without an HRA and has been used to similar effect but with less significant incentives.<sup>46</sup> Rezoning is also similar, with 5 heritage sites going that route 2010-2015.

#### **Vancouver Heritage Foundation Grants**

**Offered by:** Vancouver Heritage Foundation (VHF)

**Eligibility:** All Heritage Register properties.

**For:** Restoration, repainting in historic colours, conservation plans, addition to the Heritage Register.

**Incentive:** Matching grants; cash and in-kind (assistance and paint)

**Description:** VHF has offered grants to heritage properties for fifteen years. There are 4 different established grants:

The *True Colours Grant* provides heritage appropriate colour consultation, complimentary paint (through partner Benjamin Moore), and a grant towards the painting labour costs for repainting in an appropriate historic colour scheme. Launched: 1999. Grant: Up to \$1,000 (\$2,000 until 2009).

The *Restore It Grant* provides up to 50% of the project costs of a restoration or repair, such as a porch restoration or window repairs. Launched: 2003. Grant: Up to \$1,500 (\$5,000 until 2009).

The *House Call Grant* provides up to 50% of the cost of having a conservation plan prepared by a heritage professional. Launched: 2009. Grant: Up to \$500.

---

<sup>46</sup> Much information on HRAs and designation has been provided by Urban Design Division, Planning & Development Services, City of Vancouver.

The *Get on the Register Grant* provides up to 50% of the cost of having a Statement of Significance and accompanying research prepared by a heritage professional to assist in adding a property to the Heritage Register. Launched: 2011. Grant: Up to \$500.

True Colours, Restore It and House Call all require the building or structure to be listed on the Vancouver Heritage Register. Until 2009, designation was required in order to receive a grant but that requirement was removed in 2011 after a review of the program. The Get on the Register grant enables unlisted but worthy candidates to apply for addition to the Register and subsequently to qualify for VHF grants.

**Per year:** Each year, 10 - 14 grants are awarded, primarily for True Colours and Restore It.

**Annual funds:** \$12,000 - \$15,000.

#### **Location-specific for Heritage Conservation Activities:**

##### **Heritage Building Rehabilitation Program**

**Offered by:** City of Vancouver

**Eligibility:** Heritage Register properties in Gastown, Chinatown, Hastings Street corridor and Victory Square.

**For:** Rehabilitation, conservation work.

**Incentive:** Property tax exemptions in exchange for preservation, protection and rehabilitation of the site. In addition, bonus density can be granted and, along with residual density, be transferred from the site and sold for use elsewhere. However this significant component is currently unavailable.

**Per year:** 23 sites have been approved to participate in the Program since 2004, but only 2 since 2009.

##### **Heritage Facade Rehabilitation Program**

**Offered by:** City of Vancouver

**Eligibility:** Heritage Register properties in Gastown, Chinatown, Hastings Street corridor and Victory Square.

**For:** Facade restoration, conservation.

**Incentive:** Funding of up to 50% of facade rehabilitation costs to a maximum of \$50,000 per principal facade. Buildings have received up to \$150,000 but typically only receive funding for one or two facades.

**Per year:** \$2.9m in facade grants have been approved since 2003. Recipients usually also participated in the Heritage Building Rehabilitation Program until 2008. From 2004 to 2013, between \$50,000 and \$950,000 was approved each year in facade grants. None were approved since 2014 but one was approved in September 2015 and a further one presented for Council approval in November.

**Annual funds:** Approximately \$300,000.

##### **Chinese Society Buildings Matching Grant**

**Offered by:** City of Vancouver

**Eligibility:** Member-based Chinese Family Clan and Benevolent Societies who are registered non-profit societies and located in Chinatown or the Downtown Eastside.

**For:** Critical capital upgrades. Not intended for standard building repairs and maintenance.



***Incentive:*** Matching grant of up to \$100,000 for buildings on the Heritage Register and located in Chinatown. Matching grant of up to \$75,000 for buildings on the Heritage Register located outside of Chinatown but still within the Downtown Eastside.

***Per year:*** This program was launched in 2014. To date, 30 grants have been awarded pending work proceeding.

***Funds:*** \$2.5 million for a 3-year program.

#### **City-wide for Cultural Infrastructure:**

##### **Cultural Infrastructure Grants**

***Offered by:*** City of Vancouver

***Eligibility:*** Non-profit societies.

***For:*** Planning and completion of purchasing, building or renovating cultural space.

***Incentive:*** Grants up to \$150,000.

***Description:*** Projects receive funding up to \$150,000 for major capital projects, and up to \$35,000 for minor capital projects and planning projects. This program was launched in 2009. Heritage buildings can be eligible if they have a cultural mandate or programming. Recipients are largely galleries, theatres, museum societies and churches. Funding may be for feasibility studies for upgrades, consultations and renovations.

***Per year:*** In 2014, 27 projects were funded including 4 heritage projects. These 4 were granted a total of \$294,000, the highest amount for heritage to date from this program. From 2009 to 2014, 3 – 5 heritage buildings have received funding each year. A full list of heritage buildings that have received a grant can be found in Appendix I.

***Annual funds:*** \$800,000 - \$1,000,000.

##### **Permit Fee Assistance Program**

***Offered by:*** City of Vancouver

***Eligibility:*** Non-profits in the cultural sector.

***For:*** Permit fees associated with renovating or constructing cultural spaces for non-profits.

***Incentive:*** Up to \$1,500.

***Description:*** This grant is intended to encourage the development of safe and legal cultural space.

***Annual funds:*** \$10,000. Program to commence September 2015.

#### **City-wide for Sustainability Upgrades:**

##### **Heritage Energy Retrofit Grant**

***Offered by:*** Vancouver Heritage Foundation with City of Vancouver

***Eligibility:*** Owner-occupied private homes in Vancouver built pre-1940 or on the Vancouver Heritage Register.

***For:*** Energy retrofits that reduce greenhouse gas emissions.

***Incentive:*** Up to \$3,000 grant.

**Description:** Launching as a pilot in September 2015 until August 2016, this program offers grants for pre- and post-retrofit energy evaluations and reports, and for eligible upgrades that reduce greenhouse gas emissions. Eligible upgrades are compatible with conservation of the home's heritage features and fabric.

**Per year:** The pilot program will offer grants to up to 20 homes.

**Annual funds:** \$60,000 for the pilot program.

#### **Greenest City Community Grant**

**Offered by:** Vancouver Foundation

**Eligibility:** Registered charities and non-profit societies.

**Incentive:** Matching grant up to 75% of project costs (max. \$50,000).

**Description:** This grant could potentially be used by a charity or non-profit society operating in a heritage building to complete a sustainable retrofit of the building.

**Per year:** No examples have been identified of it being used for heritage in this way.

#### **Province-wide for Heritage Conservation Activities:**

##### **Heritage Legacy Fund**

**Offered by:** Heritage BC

**Eligibility:** Non-profit societies, registered charities, local governments and school boards.

**For:** Heritage conservation and heritage awareness projects.

**Incentive:** Matching grant up to 50% of eligible project costs (max. \$25,000).

**Description:** The Heritage Legacy Fund (HLF) was established in 2003 with a \$5 million endowment from the Government of British Columbia to support heritage conservation activities. There are two programs:

Heritage Conservation Program: Funds up to \$25,000 for half of the eligible project costs.

Heritage Awareness Program: Funds up to \$10,000 toward an educational program or campaign.

**Per year:** In 2015, 12 Heritage Conservation grants and 5 Heritage Awareness grants have been awarded, with one of each in Vancouver. Since 2005, the HLF has supported over 100 projects with \$1.8m across the province.

**Annual funds:** Variable based on income generated from a \$5 million endowment.

In 2014, 14 projects were funded with \$100,000 in Heritage Legacy Fund grants (\$87,000 for Heritage Conservation and \$13,000 for Heritage Awareness).

In 2015, 17 projects were funded with \$75,000 in Heritage Legacy Fund grants (\$64,000 for Heritage Conservation and \$11,000 for Heritage Awareness).

#### **Province-wide for Non-profit Activities:**

##### **Community Gaming Grants**

**Offered by:** BC Gaming Commission Lottery Grants

**Eligibility:** Community non-profit organizations, operating for at least 12 months before application.

**For:** Projects that benefit the larger community that are based in: Arts and Culture, Sport, Environment, Public Safety, Human and Social Services, Parent Advisory Councils and District Parent Advisory Councils.

**Incentive:** Grants up to \$100,000.

**Description:** Three tiers of organization are eligible:

- Local: Funding up to \$100,000 per year. Up to \$20,000 can be used for minor capital projects (could be used for heritage restoration or maintenance).
- Regional: Funding up to \$225,000 per year.
- Province-wide: Funding up to \$250,000 per year.

**Per year:** In 2013/2014, the Commission granted 4,999 projects contributing over \$132 million in funding across all tiers province-wide.

#### **Province-wide for Sustainability Upgrades:**

##### **Energy Rebate Offers – Residential**

**Offered by:** BC Hydro and Fortis BC

**Eligibility:** Homeowners, BC Hydro or Fortis BC customers, specific to single family dwellings.

**For:** Energy efficiency upgrades.

**Incentive:** Various rebates for homes for percentage of the cost of upgrades.

Commercial and other residential buildings may have other rebates or programs available to them.

#### **Canada-wide for Heritage Conservation Activities:**

##### **Cenotaph/Monument Restoration Program**

**Offered by:** Government of Canada

**Eligibility:** Non-profits, private sector, provinces, territories and municipalities.

**For:** The repair, restoration and expansion of statues or structures (not buildings) erected to honour Canadian veterans in conflicts after 1867.

**Incentive:** Grant of up to 50% of project costs to a maximum of \$25,000.

**Timeframe:** Reviewed quarterly.

**Funds:** Not disclosed.

##### **Canada 150 Community Infrastructure Program (closed June 2015)**

**Offered by:** Government of Canada

**Eligibility:** Provinces, territories, municipal and regional governments, Aboriginal organizations and not-for-profit organizations who own the asset.

**For:** Renovation, expansion and rehabilitation.

**Incentive:** Grant of up to 50% of total project costs to a maximum of \$500,000.

**Description:** This program was offered as a one-off opportunity, with a closing date in June 2015. It is expected to support up to 1,800 projects nationally. Funding is for the renovation, expansion and

rehabilitation of existing infrastructure that creates community, cultural and heritage benefits for the public. Projects are expected to be completed by the end of 2017.

**Total funds:** \$150,000,000.

### **National Historic Sites Cost-Sharing Program**

**Offered by:** Parks Canada

**Eligibility:** Non-federally owned National Historic Sites. Provincial, territorial, municipal and regional governments, Aboriginal and other not-for-profit organizations that own or have a long-term lease on the asset.

**For:** Technical and planning document preparation, and for conservation work.

**Incentive:** A matching grant of up to 50% of eligible project costs to a maximum of \$10,000 for Preparatory Assistance Projects and a maximum of \$100,000 for Conservation Projects.

**Description:** This program has renewed each year and supports 14 – 19 projects across Canada each year. There are two categories:

Preparatory Assistance Projects: For preparation of technical and planning documents.

Conservation Projects: For conservation of threatened components of a site to secure its physical integrity.

**Total funds:** Approximately \$1,000,000 per year.

### **Canada-wide for Cultural Spaces:**

#### **Canada Cultural Spaces Fund**

**Offered by:** Government of Canada

**Eligibility:** Non-profit arts and heritage organizations.

**For:** Upgrades and renovations to arts and heritage facilities, purchase of specialized equipment and studies related to capital projects in cultural spaces. This funding is not for restoration, it is specifically for upgrades to arts and museum spaces.

**Incentive:** Funding up to 50% of eligible project expenses. Typical funding is approximately 35% of project costs.

**Description:** The purpose of the program is to improve conditions in cultural spaces within Canada. It was launched in 2012.

**Per year:** Three Vancouver Heritage Register buildings have received funding since 2012, ranging from \$6,925 to \$79,000.

**Annual funds:** Not disclosed.



## FINANCIAL INCENTIVES OPTIONS

In assessing the programs currently available in Vancouver for heritage projects and what could be offered to achieve greater levels of heritage conservation, it is helpful to explore best practice used elsewhere and to understand the wider range of incentives in use in other contexts. A summary of the principal options is provided in Figure 11 and details of each can be found in pages 34-38.

Governments at all levels have a variety of ways to provide financial incentives to owners of heritage properties. Some are more applicable to one level of government than another, for example income tax credits. Some are suited more to a particular property type or goals of the owner. For example a property tax reduction can be valuable to a developer rehabilitating a commercial building, but not to a church which is already exempt from property tax.

The variety of incentives that have been proposed or used points to the need for a variety of options within a program to motivate and support heritage conservation. Often, not just one incentive type is offered or different programs are offered by different levels of government and by non-government agencies that complement each other. The different options are summarized here, along with what agency they can be offered by and comment on their applicability, advantages and disadvantages, and where they have been used. A summary for reference is provided in Figure 11. Many of these incentives can be offered with or without a guarantee on the property in the form of an easement or covenant, or legal protection of the property through designation, though that is often required.

In some form, Vancouver already has available or has used the most common and effective incentives that are able to be implemented at the municipal level. They remain very applicable to the Vancouver context. The favoured route for both provincial and municipal funding across Canada is property tax programs and grants. These stand out for their applicability to different types of property and ownership, the direct assistance they provide and their relatively straight-forward, easy-to-understand format. Additionally Vancouver has been ahead of many municipalities in utilizing a transfer of density program.

A number of sources have been informative in preparing this section.

Published in 2014, Harold Kalman's book, *Heritage Planning: Principles and Process*, draws on Kalman's decades of Canadian and international experience in the heritage field, with particular reference to Canada, USA, Australia and the UK. In the "Managing Change: Tools and Incentives" section, he looks at the three elements of planning and protection tools, financial incentives and non-financial incentives.<sup>47</sup> Overall, Kalman presents an objective overview of the different options and lays out the success of several programs where incentives secured considerable commitment and investment from private owners.

In 2014, the National Trust for Canada published a Canada-wide study, *Financial Measures to Encourage Heritage Development: Final Report*. The focus of the study is commercial development and presents findings from surveys with developers across the country. Prepared for the Federal-Provincial-Territorial Ministers' Table on Culture and Heritage, it presents the case for financial measures, how they work and the impact they can have. Several success stories are noted where public funding has leveraged significant private investment from the USA, UK, Australia and Canada. It provides a

---

<sup>47</sup> Kalman (2014), pp.248-277.

summary of different measures that could potentially be used at the federal, provincial or municipal level with preferences from developers identified as property tax and income tax measures, and grants.

A specific review of Vancouver's heritage conservation program, including incentives, is underway in 2015 as part of the Heritage Action Plan. In November 2014, Donald Luxton and Associates Inc. prepared *Public Advisory Committee Backgrounder #1* including "Part II: Municipal Best Practices". This provides a summary of eight municipal programs as best practice case studies, including cities in British Columbia, other Canadian provinces, the USA and Australia. It highlights a variety of different programs, including financial incentives components, which have been effective in achieving heritage conservation goals and can be used as inspiration in examining the best approach for Vancouver.

**Figure 11:** Summary of the principal options for financial incentives in Canada.

	Tax Measures			
Incentive	Property Tax – Freeze, abatement, relief or credit	Income Tax Credits – Refundable or Non-Refundable	Capital Cost Allowance	Sales Tax Rebates
Description	Property tax can be used to compensate an owner for a percentage of rehabilitation / restoration costs	A percentage of the specific rehabilitation expenditure is refunded through income tax credit	Advantageous categorization of heritage restoration or repair costs for tax purposes	Rebate of the sales tax paid on materials for heritage projects
Provider	Provincial, Municipal governments	Federal, Provincial governments	Federal, Provincial governments	Federal, Provincial governments
Usage	Widely in Canada Vancouver	USA		Nova Scotia

	Access to Funds			Other	
Incentive	Grants	Revolving Fund	Loans and Mortgages	Density Bonus / Density Transfer	Waived Development Fees
Description	Typically offered as a matching grant up to a specified limit, paid following project completion	A pool of capital is loaned out for heritage projects at a low interest rate	A loan or mortgage is provided at a low interest rate	Greater density is permitted on site, enhancing value or revenue / Bonus or residual density development rights are transferred off-site, generating revenue	Fees for permits or other planning requirements are waived or reduced for heritage projects
Provider	Federal, Provincial, Municipal governments, Non-government agencies	Non-government agencies	Government agencies, financial institutions	Municipal governments	Municipal governments
Usage	Widely used in Canada and internationally Vancouver	UK, USA, Australia	USA	USA, Australia Vancouver	Some USA cities

## **TAX MEASURES:**

### **Property Tax – Freeze, abatement, relief or credit**

***Offered by:*** Provincial or municipal government

***Applicable to:*** Commercial, Owner-occupied residential

***Description:*** Property tax can be used to compensate an owner for a percentage of rehabilitation/restoration costs, or for increased property taxes due to the improvements to the property for a limited period of time, or for designating a heritage property. This can be in the form of phasing in an increase due to improvements, credits to offset expenditure for a period of years, or ongoing relief.

***Advantages:*** Provides a direct financial benefit, applicable to a wide range of properties and can lessen the deterrent of increased property taxes resulting from the improvement.

***Disadvantages:*** Not applicable to sites that are already exempt from property taxes including churches, buildings owned by charities and operated for charitable purpose.

***Used:*** Vancouver, Victoria, Edmonton, Winnipeg, Regina, Ontario, Quebec, New Brunswick, Nova Scotia, San Francisco, Chicago.

Both Vancouver and Victoria have included property tax relief in their programs for specific districts.

New Brunswick Property Tax Abatement program gives a 4 year tax reduction for designated heritage properties and National Historic Sites. Ontario has a Heritage Tax Relief Program in place that over 30 municipalities have adopted. Nova Scotia offers a tax rebate for non-commercial or non-profit owned property.

Illinois: Property Tax Freeze for Historic Residences, since 1983, for eleven years for owner-occupiers that rehabilitate their property.

### **Income Tax Credits – Refundable or Non-Refundable**

***Offered by:*** Federal or provincial government

***Applicable to:*** Commercial, Owner-occupied residential, Non-commercial (Refundable only)

***Description:*** A percentage of the specific rehabilitation expenditure is refunded through income tax credits. For refundable credits, any excess over taxes owing is paid out. For non-refundable, any excess would be carried forward as a credit.

***Advantages:*** Open-ended in timeframe, with no maximum amount and of value to a wide range of project size and type.

***Used:*** USA (Federal and State)



### **Capital Cost Allowance – Treatment of heritage rehabilitation expenses**

*(proposed – not enacted)*

***Offered by:*** Federal or provincial government

***Applicable to:*** Commercial

***Description:*** Allowance of heritage restoration or repairs to be considered 'maintenance' rather than 'betterment' so can be expensed in the same tax year, or the creation of a new CCA class with accelerated write-off rate.

***Advantages:*** Can provide a cash benefit to tax paying firms, improving on the current 5% depreciation per annum for buildings.

### **Sales Tax Rebates**

***Offered by:*** Federal or provincial government

***Applicable to:*** Owner-occupied residential, Non-commercial

***Description:*** Rebate of the sales tax paid on materials for heritage projects. Currently, a rebate of 36% of GST is refunded for substantial renovations.

***Advantages:*** Rewards ongoing maintenance as well as restoration and rehabilitation, rather than major projects only.

***Disadvantages:*** Able only to contribute to the material costs when labour typically represents the more significant cost.

***Used:*** Nova Scotia

The Nova Scotia Heritage Property Rebate is for owner-occupied and non-commercial properties, giving a rebate equivalent to 10% of the provincial portion of HST on materials for repair, restoration or improvement paid by various categories of non-profit organizations.

## **ACCESS TO FUNDS:**

### **Grants**

***Offered by:*** Federal, provincial or municipal government or non-government agency

***Applicable to:*** Commercial, Owner-occupied residential, Non-commercial / All

***Description:*** Typically offered as a matching grant up to a specified limit, a cash amount is given to the owner up to a percentage of their cost for a project.

***Advantages:*** Direct financial assistance to owners that can motivate a wide-variety of work towards sustaining any type of heritage property long-term.

***Disadvantages:*** Direct financial cost.

***Used:*** Canada and internationally. Vancouver, Victoria, Edmonton. BC.

A grant program is offered by nearly all the Canadian provinces and territories in some form either directly or through a non-government agency. Programs vary in eligibility and types of work supported and to what value.

Alberta: Heritage Resource Conservation Grants through the Alberta Historical Resources Foundation.

Manitoba: Designated Heritage Buildings Grant Program.

Quebec Cultural Heritage Fund.

New Brunswick: Heritage Place Conservation Grant.

Nova Scotia: Conservation Work Grant. Etc.

Melbourne, Australia: Melbourne Heritage Restoration Fund, through Victoria's Heritage Restoration Fund.

### **Revolving Fund**

***Offered by:*** Non-government agency

***Applicable to:*** Commercial, Owner-occupied residential

***Description:*** A pool of capital is loaned out for heritage projects at a low interest rate, offering financing that may be difficult to obtain elsewhere.

***Advantages:*** Provides funding for heritage work that may not be forthcoming from traditional lenders.

***Disadvantages:*** Administration of loans requires appropriate financial expertise and sizeable capital resource.

***Used:*** Ottawa, UK, San Francisco, Perth (Australia).

Architectural Heritage Fund in the UK and Historic Ottawa Development Inc. Preservation Loan and Technical Assistance Program in San Francisco – targeted to non-profit housing and multi-unit development for low-to-moderate income residents.

Perth: Municipality participates in the Heritage Loan Subsidies program from state government offering reduced rate loans.

### **Loans and Mortgages**

***Offered by:*** Federal, provincial, municipal government agencies, Financial institution

***Applicable to:*** Commercial, Owner-occupied residential

***Description:*** A loan or mortgage is provided at a lower interest rate than traditional banks. Funds can come from a fund invested in by individuals for the purpose. Guarantees for loans or mortgages from others can also be provided.

***Advantages:*** Provides funding for heritage work that may not be forthcoming from traditional lenders.

***Disadvantages:*** Less compelling when interest rates are already low. Need willingness to assume the risk of providing loans.

***Used:*** USA

Some USA banks have offered historic preservation loans in the past. US Department of Housing and Urban Development provides loans through private lenders.

Loan guarantees: Hamilton and Markham, ON

### **Tax Increment Financing**

***Offered by:*** Provincial or municipal government

***Applicable to:*** Commercial, Owner-occupied residential

***Description:*** Public sector investment is provided for projects in a particular area based on the anticipated property tax increase from the area resulting from improved property. The debt incurred is to be paid down by the property tax later collected.

***Advantages:*** Considered useful as a way to finance major regeneration of an area.

***Disadvantages:*** The municipality incurs debt in order to finance projects.

***Used:*** USA for area redevelopment. Calgary: Set up first TIF area in Canada for the East Village area.

## **OTHER:**

### **Density Bonusing**

***Offered by:*** Municipal government

***Applicable to:*** Commercial, Owner-occupied residential, Non-commercial / All

***Description:*** Bonus density development rights are provided to a heritage property in exchange for restoration or rehabilitation work, usually as part of a one-time major intervention on the site.

***Advantages:*** Offers the opportunity to increase the value or revenue of a heritage property with more square footage or rentable space.

***Disadvantages:*** Can lead to undesirable alteration of the form or setting of a heritage building. Only provides a one-time incentive. Not usually applicable to already designated property.

***Used:*** Vancouver, Perth (Australia)

In Vancouver, density bonusing is an option within a Heritage Revitalization Agreement negotiation or rezoning.

### **Density Transfer**

***Offered by:*** Municipal government

***Applicable to:*** Commercial, Owner-occupied residential, Non-commercial / All

***Description:*** Bonus and/or residual density development rights are transferred off-site into a 'density bank' or directly to a receiver site. Density units are sold to finance restoration or rehabilitation work on the site, usually as part of a one-time major intervention on the site.

***Advantages:*** Provides opportunity to generate funds to assist in restoration or rehabilitation work, and removes development opportunity from the site that otherwise would continue to threaten retention long-term.

***Disadvantages:*** Relies on there being a market/demand for the density so it can be sold and landed elsewhere. Only provides a one-time incentive. Not usually applicable to already designated property.

***Used:*** Vancouver, Perth (Australia), Sydney

Perth: The transfer of density is from the donor site directly to a recipient site.

Sydney: Owners can sell unused development potential.

### **Waived Development Fees**

***Offered by:*** Municipal government

***Applicable to:*** Commercial, Owner-occupied residential, Non-commercial / All

***Description:*** Fees for permits or other planning requirements are waived or reduced for heritage projects.

***Advantages:*** Assists with up-front costs of heritage projects.

***Used:*** Some USA cities including Chicago.

In Chicago, applies to Landmark buildings, and to buildings and new construction in landmark districts.



## BEST PRACTICE EXAMPLES

Incentive programs in two cities in Western Canada stand out for effective use of financial incentives to achieve local heritage conservation goals. In both cases, the municipality has provided substantial and sustained funding to address specific local challenges for heritage.

The City of Victoria operates their programs under the same provincial legislation as Vancouver and a similar interest in seismic upgrades. It is a much smaller city with perhaps a greater direct economic dependence on its heritage credentials but offers a well-established program for study with three distinct complimentary elements.

The City of Edmonton has a larger population than Vancouver at around 877,000. Its heritage resources date primarily from 1900 onwards. The program focuses aggressively on getting more buildings designated. It operates with the same provincial requirement as BC that compensation would be required if designation occurs without the owner's consent. With an initial focus on the downtown in the 1980s, the program expanded in the 1990s to be city-wide and now presents a long-running comprehensive city-run program for study.

### VICTORIA, BC

Three distinct programs provide financial incentives to different types of heritage properties in the city.<sup>48</sup> All three were established to address different needs and have been effective in achieving results, with Victoria's stock of heritage resources now in better shape. The three programs have been sustained over the long term and analysis has shown substantial return on investment for the City of Victoria.

Two of the programs are focused in the downtown core of the city, where heritage buildings are an important asset for Victoria's tourism industry and broader economy, as well as the quality of life of residents. A third program has a further reach to heritage homes throughout the city. All three address the need to stimulate and support upgrading and restoration of the city's heritage fabric as a key asset for Victoria.

At a municipal level, Kalman highlights the programs in Victoria as "worthwhile municipal investments", noting that analysis reveals impressive return on investment for the city.<sup>49</sup>

#### House Grants Program

This program is managed by the Victoria Heritage Foundation, a non-profit society set up by the City of Victoria in 1983. Since then, the Foundation has offered grants to support heritage conservation work on designated heritage houses. Funding is provided by the City of Victoria each year, for both the grants and an administration amount. In 2014, the Foundation gave \$176,941 in 48 grants, meeting on average 35% of project costs.<sup>50</sup> 2013 was similar with \$182,242 providing 53 grants.

---

<sup>48</sup> Information about Victoria programs has been provided by Victoria Heritage Foundation, Victoria Civic Heritage Trust, City of Victoria, Kalman (2014), pp.262-63, and Barber (2013).

<sup>49</sup> Kalman (2014), pp.262-63.

<sup>50</sup> Victoria Heritage Foundation Annual Reports 2013 and 2014.

*The grants:*

- Approximately 30% - 35% of project cost (to a maximum project cost of \$20,500).
- Maximum grants to any one house over a ten year period are limited to \$20,500.
- Homes must be designated to be eligible.

*Key results:*

- The number of homes protected by designation has grown from 142 to over 400 of the 630 houses on the Heritage Register.
- Over 1,100 grants have been awarded to 335 houses.
- By 2002, with over 200 houses granted to, the program had already generated \$1.8 million in private investment.

Victoria Heritage Foundation grants support a wide range of projects to assist in restoring, rehabilitating and maintaining heritage homes, their exterior features and designated interior features. Funded projects include roofing, painting, window repair, storm window installation, seismic retrofits and foundation repair. The Foundation has established priorities for types of work it funds and has requirements for work to meet conservation standards. They receive around 50 applications each year and are able to provide a grant to most of them.

### Building Incentive Program

Since 1990, the Building Incentive Program (BIP) has provided grants to owners of commercial or institutional designated heritage buildings. The program is managed by the non-profit Victoria Civic Heritage Trust at arm's length from the City of Victoria who provides the annual funding. The program has \$420,000 available to award as grants each year.

*The grants:*

- Up to 50% of the eligible heritage work, to a maximum of \$50,000 per project.

*Key results:*

- From 1990 to 2013, the BIP generated more than \$123 million in private investment for 196 properties.
- \$28.08 in private investment was leveraged per \$1 grant funding (1990 – 2013).

The BIP assists with façade restoration, structural work, upgrades required by building code and other rehabilitation work.

### Tax Incentive Program

Launched in 1998, the Tax Incentive Program (TIP) is designed to encourage rehabilitation of downtown heritage buildings by assisting with the cost of seismic upgrading. Also managed by the Victoria Civic Heritage Trust, it provides a property tax incentive to encourage rehabilitation of buildings and in particular, to bring upper floors of buildings back into use as residential accommodation. The program expanded in 2004 to include non-residential uses for rehabilitated buildings. The incentive assists in making such projects economically viable.

*The incentive:*

- Up to 10 years exemption from property taxes. The period of exemption is directly related to the cost of seismic upgrading required.

*Key results:*

- 34 buildings have been rehabilitated and received seismic upgrades (to 2013).
- Over 630 residential units have been created.
- Over \$205 million in private investment into the downtown core, significantly increasing buildings' value and property tax revenue once exemptions expire, more than paying back the incentive over time.

Increasing residential use in the downtown has been beneficial to the economy and experience of the area. The reuse of a large number of historic masonry buildings is recognized as sound from a sustainability point of view. In 2014, 16 buildings were in the program, with a total tax exemption for the year of \$1,035,824.<sup>51</sup> One new building was accepted to the program for \$556,642 over ten years.

## EDMONTON, AB

The history of incentive programs for heritage in Edmonton dates back to 1984 and has evolved over the years.<sup>52</sup> An initial focus on the downtown expanded city-wide with a full Inventory (1993) and the set-up of the Heritage Reserve Fund in 1995. In 2001, funding was increased. With the stated goal "to identify, manage, protect and promote the preservation and reuse of historic resources to enhance the quality of Edmonton's environment for the benefit of present and future generations"<sup>53</sup>, a key component of the policy is the provision of financial incentives for rehabilitation and maintenance.

In recent years, City funding of \$877,000 (equivalent to \$1 per person) has been set aside each year for the program and any unused amount is added to future years, allowing the fund to provide very large grants when appropriate. From 2015, the annual funding has been increased to \$1.377 million, suggesting that the City is seeing the benefit of the investment. Even with this level of funding, the program is over-subscribed and annual demand for funding continues to increase.

The program is managed directly by City staff, including monitoring of projects to ensure compliance to *The Standards and Guidelines for the Conservation of Historic Places in Canada* and other program requirements.

The program offers matching grants. Municipal property tax rebates are included as options but have not been used, with the preference from both government and owners for grants. Grants for maintenance were added in 2009 and now two separate parts of the program address rehabilitation and maintenance, for both residential and commercial buildings:

- *Residential buildings (single family detached homes)*  
Rehabilitation Incentive: Up to 50% of project costs, to a maximum of \$75,000  
Maintenance Incentive: Up to 30% of project costs, to a maximum of \$10,000, renewable every 5 years. First application can be 5 years after Rehabilitation Incentive.

---

<sup>51</sup> City of Victoria, October 2015.

<sup>52</sup> Information on Edmonton programs was provided by David Johnston, Principal Heritage Planner, City of Edmonton.

<sup>53</sup> City of Edmonton (2008), City Policy C450B, p.1.

- *Commercial buildings (all other buildings, including other non-residential building types and multi-family residential)*

Rehabilitation Incentive: Up to 50% of project costs (no cap)

Maintenance Incentive: Up to 30% of project costs, to a maximum of \$50,000, renewable every 5 years.

For commercial rehabilitation projects, there is no upper limit. The largest grant given so far was \$1.7 million. Churches and other community buildings frequently apply, with \$500,000 often given. Phasing over a number of years can allow for fundraising to maximize funding. Residential Rehabilitation grants usually range from \$50,000 - \$75,000. Commercial Rehabilitation grants are typically \$300,000 - \$500,000. City-owned buildings can participate in the program, but provincially-owned buildings cannot as the City is not able to designate them.

Requirements include designation of the property, an agreement with the City and repayment of incentives if the site is subsequently removed from designation, demolished or altered inappropriately.

*Key results:*

- Between 5 and 10 applications to designate are now made each year.
- 117 fully designated buildings now on the Heritage Register, increased from 22 in 2001. There are approximately 850 further sites on the Inventory (non-designated) of which about 815 are buildings and structures.
- The majority of designated buildings have received a grant.
- From 1998 to June 2015, \$9.4 million had been provided as Rehabilitation grants.
- Since 2009, \$317,000 has been disbursed in Maintenance grants.
- Additionally, the same fund has provided \$1.6 million to book projects, lamp rehabilitation projects, the neon museum, and local research projects (1998-2015).

This municipal program is also supplemented by a provincial program that provides maintenance grants to designated buildings.

Real estate market values have increased substantially in recent years. The generous grant program has aggressively and successfully targeted designation of properties to protect them and supported their long-term rehabilitation and maintenance. However, with rising land values, there are signs that it is becoming harder to have the same impact and the City's commitment to the program remains key.



## CONCLUSIONS

Vancouver has the opportunity to draw substantial benefits towards City goals from a stock of heritage assets that are retained, restored and well-cared-for. Appropriate financial incentives can have a significant impact, and should be considered a shared investment, in the places the City has identified as of particular value, those on the Vancouver Heritage Register.

Programs offered by the City of Vancouver have been effective in achieving objectives in specific neighbourhoods and for key sites and types of property. Vancouver Heritage Foundation grants have provided welcome support to many other buildings and sites for heritage conservation but are often modest compared to project costs and the overall need to support and motivate action.

There are many heritage buildings and sites that could benefit from an expanded program of financial incentives in Vancouver. Greater support could be considered to a broader set of Heritage Register buildings and sites, including privately-owned homes and other building types outside the Downtown Eastside, or that cannot access cultural infrastructure funding. Support for different stages of heritage conservation, including conservation and maintenance planning, and for maintenance activities could help get more projects underway and avert some of the need for significant one-off interventions. Heritage Register properties can offer a good starting point to encourage protection through designation or covenant but a larger program could also act to draw more candidates forward.

A long-term approach to providing stable funding and programs can build momentum over time. Confidence in continuing availability of programs allows owners to plan and make decisions with confidence – from taking on ownership through restoration to maintenance. Behaviour of many VHF grantees already demonstrates it is not about a one-time fix and profit for many owners but rather a long-term commitment to restoring and maintaining. More people need to be encouraged to do this.

Three important financial incentives are already available or in use in Vancouver, all of them used elsewhere in Canada and internationally. These provide a toolkit that could be expanded to assist more sites:

- Matching grants
- Property tax relief
- Density transfer

The ability to transfer density from a site and sell it to finance major conservation work has been valuable in Vancouver over many years for larger projects and vulnerable sites. Unbuilt development opportunity will continue to threaten sites across the city while the current market demand for new development continues.

A property tax exemption program can be useful to support one-off interventions such as a major rehabilitation, seismic upgrading or significant restoration work, for owner-occupied houses as well as for commercial buildings. Expansion of where this is available could be considered.

Matching grants offer great flexibility to meet the particular conservation needs and financial situation of the recipient site for a wide variety of projects from planning to ongoing maintenance. Designation or heritage agreements can be required, gaining more protection of sites. Support also enables some owners to leverage other funding, such as from the Heritage Legacy Fund.

Vancouver Heritage Foundation's grants program is an existing vehicle that could be effectively expanded to meet the opportunity. It is an important component of what is currently offered in Vancouver to support heritage conservation. However, the modest funding available limits both the scale and number of potential projects.

A larger program offered through VHF could more adequately compliment the management of complex programs by City staff for large rehabilitation projects and HRAs. A dedicated annual granting fund could be established by the City, able to award large enough grants to provide meaningful support and the ability to assist more sites across the city, in both private and public ownership. A dedicated grants officer could manage an increased volume of small grants needing evaluation and management but which can make a big difference to outcomes, as well as assessing support to a range of larger projects.

The key features of an enhanced VHF grants program might be:

<b>Annual funding from City of Vancouver</b>	Dedicated grants officer for guidance, support, monitoring	Matching grants of 35% - 50% of project costs	Reliable, long-term sustained funding
<b>Broad eligibility</b>	For buildings and sites in all types of ownership	City-wide availability Dovetail with location specific programs	Designation or payback covenant to protect investment
<b>Range of grant levels and streams</b>	Different types of heritage resource and likely scale of projects	Houses Other residential Commercial Mixed use Non-commercial	
<b>All stages of heritage conservation</b>	Planning	Conservation Plan; Feasibility Plan; Maintenance Plan	
	Intervention	Restoration; Rehabilitation; Repair; Seismic; Energy retrofits	
	Ongoing	Maintenance; Painting	

A similar level of support as that in Victoria and Edmonton could be tailored to Vancouver's needs, with clear goals of retention, protection, restoration and maintenance. In addition to existing City programs, an annual fund of at least \$500,000 plus administration support could offer the flexibility to support different types and scale of projects for all building and site types.

- A fund of \$175,000 per year in grants for houses and small-scale heritage resources could support as many as 40 - 50 projects per year at a level that motivates action.
- A fund of \$325,000 per year for other buildings and site types could support 4 – 8 larger projects per year.
- An administration budget of \$75,000 per year could enable a full time grants officer to manage the program, provide guidance and ensure standards of conservation, as well as promote the program.

Augmenting the existing programs to provide a city-wide program that is simple to understand and access, and reliably available for the long term, could turn the tide towards more and better conservation of Vancouver's heritage. Such an investment would help unlock the full potential of heritage resources and the benefits for the city as a whole. The Heritage Action Plan report cautioned against expectations of the City to intervene to "save" heritage buildings and places.<sup>54</sup> But financial incentives are largely about leveraging other investment from private and other sources to realize a much greater overall return and have proven to be very cost-effective. Such investment in heritage can be viewed as self-financing with returns that are significant and widespread. While it is important to continue to petition the provincial and federal governments to do more, in the current climate there is an opportunity to address the gaps, including those left by discontinued or suspended programs, and provide meaningful stable support at the municipal level.

---

<sup>54</sup> City of Vancouver (2013), p.3.

## BIBLIOGRAPHY

- Altus Group Limited (2008) *Heritage Rehabilitation Incentives in the City of Vancouver: Analysis of Transfer of Density Program, Final Report*. Prepared for: City of Vancouver, June 2008.
- Donald Luxton & Associates Inc. (2014) *Heritage Action Plan: Public Advisory Committee Backgrounder #1*
- Grefe, X. (2004) "Is Heritage an Asset or a Liability?" *Journal of Cultural Heritage*, 5 (3), pp.301-309
- Hills, S. & Worthing, D. (2006) "Private Home, Public Cultural Asset: The Maintenance Behaviour of Listed Building Owner-occupiers", *Journal of Housing and the Built Environment*, 21, 203-213
- Heritage Canada The National Trust (2013) "Provincial Funding for Historic Building Conservation in Canada" (Summary table)
- Kalman, H. (2014) *Heritage Planning: Principles and Process*, New York / Abingdon: Routledge
- Mossetto, G. (1994) "The Economic Dilemma of Heritage Preservation", in Peacock, A. & Rizzo, I. (eds.) *Cultural Economics and Cultural Policies*, Boston: Kluwer Academic Publishers  
Available online: [http://link.springer.com/chapter/10.1007/978-94-011-1140-9\\_7#page-1](http://link.springer.com/chapter/10.1007/978-94-011-1140-9_7#page-1)
- Oram, M. (n.d.) "Background Study of Heritage Preservation Incentive Programs". The City of Calgary Land Use Planning & Policy.
- Rizzo, I. & Throsby, D. (2006) "Cultural Heritage: Economic Analysis and Public Policy", in Ginsburgh, V. & Throsby, D. (eds) *Handbook of the Economics of Art and Culture*, Amsterdam: Elsevier
- Rypkema, D. (1994) *The Economics of Historic Preservation: A Community Leader's Guide*. National Trust for Historic Preservation, Washington D.C.
- Rypkema, D. (2012) "Economics and Historic Preservation" in *Forum Journal*, Fall 2012.
- Schuster, M. (2006) "Tax Incentives in Cultural Policy", in Ginsburgh, V. & Throsby, D. (eds) *Handbook of the Economics of Art and Culture*, Amsterdam: Elsevier
- Shipley, R. (2000) "Heritage Designation and Property Values: Is There an Effect?" *International Journal of Heritage Studies*, 6 (1), pp. 83-100
- Thomson, N. (1985) "Fiscal Incentives for Private Heritage Conservation", *The Australian Quarterly*, 57 (3), pp.255-261
- Throsby, D. (2001) *Economics and Culture*, Cambridge: Cambridge University

## Online

- Barber, S. (2013) "Victoria's Tax Incentive Program – 14 Successful Years!" *Heritage*. Vol. XVI, No. 1 pp.18-20.  
<http://www.heritagecanada.org/sites/www.heritagecanada.org/files/UC%20%231%20only%20FINAL.pdf>
- Chiu, Vivian (2015) "Funding needs for Chinatown upgrades", May 7 2015, in *Vancouver 24 hrs*  
<http://vancouver.24hrs.ca/2015/05/07/funding-needs-for-chinatown-upgrades>
- City of Edmonton (2008) "City Policy C-450B", Planning and Development, September 3 2008, p.1  
[www.edmonton.ca/city-government/documents/PDF/C450B.pdf](http://www.edmonton.ca/city-government/documents/PDF/C450B.pdf)



- City of Vancouver (2015) "Administrative Report: Heritage Action Plan Update", June 1 2015  
<http://former.vancouver.ca/ctyclerk/cclerk/20150609/documents/a2.pdf>
- City of Vancouver (2003) "Administrative Report: Heritage Incentives Implementation for Gastown and Chinatown", June 9 2003  
<http://former.vancouver.ca/ctyclerk/cclerk/20030710/pe3.htm>
- City of Vancouver (2015) "Chinese Society Buildings Matching Grant"  
<http://vancouver.ca/files/cov/chinese-society-buildings-matching-grants-program-summary-application-guidelines.pdf>
- City of Vancouver (2012) *Greenest City 2020 Action Plan*  
<http://vancouver.ca/files/cov/Greenest-city-action-plan.pdf>
- City of Vancouver (2005) "Heritage Building Rehabilitation Program Policies and Procedures for Gastown, Chinatown, Hastings Street Corridor and Victory Square", July 10 2003, amended 2003, 2005.  
<http://former.vancouver.ca/commsvcs/guidelines/H009.pdf>
- City of Vancouver (2005) "Heritage Facade Rehabilitation Program Policies and Procedures for Gastown, Chinatown, Hastings Street Corridor and Victory Square", July 10 2003, amended 2003, 2005.  
<http://former.vancouver.ca/commsvcs/guidelines/H010.pdf>
- City of Vancouver (2013) "Policy Report: Heritage Action Plan to Update Vancouver's Heritage Conservation Program", November 26 2013.  
<http://former.vancouver.ca/ctyclerk/cclerk/20131204/documents/ptec8.pdf>
- City of Vancouver (1983/2013) "Transfer of Density Policy and Procedure", January 25 1983, amended 1984-2013  
<http://former.vancouver.ca/commsvcs/guidelines/T001.pdf>
- City of Vancouver (2014) "Vancouver Heritage Register"  
<http://former.vancouver.ca/commsvcs/guidelines/V001.pdf>
- C+S Planning Group & Sustainable Cities (2013) *Dynamic Downtowns Workbook: Using Heritage to Build Strong, Vibrant Downtowns*  
[https://www.for.gov.bc.ca/ftp/heritage/external/publish/web/DynamicDowntownsWorkbook\\_Final.pdf](https://www.for.gov.bc.ca/ftp/heritage/external/publish/web/DynamicDowntownsWorkbook_Final.pdf)
- English Heritage (2014), "The Value and Impact of Heritage"  
<http://hc.historicengland.org.uk/caring-for-the-local-historic-environment/>
- Heritage Resource Centre (2006) "Heritage Conservation Briefs: Job Creation", University of Waterloo.  
<https://uwaterloo.ca/heritage-resources-centre/resources/heritage-conservation-briefs>
- McCleary, R. (2005) *Financial Incentives for Historic Preservation: An International View*, Master's Thesis, University of Pennsylvania.  
[http://repository.upenn.edu/hp\\_theses/35/](http://repository.upenn.edu/hp_theses/35/)
- National Trust for Canada (2014) *Financial Measures to Encourage Heritage Development: Final Report*. Prepared for: The Federal-Provincial-Territorial Ministers' Table on Culture and Heritage (FPT).  
<https://www.nationaltrustcanada.ca/sites/www.heritagecanada.org/files/Final%20Report%20-Financial%20Measures-2014.pdf>
- National Trust for Canada (n.d.) "Financial Incentives"  
<https://www.nationaltrustcanada.ca/issues-campaigns/financial-incentives>

Parks Canada (2015) "Parks Canada's National Historic Sites Cost-Sharing Program"  
<http://www.pc.gc.ca/eng/progs/lhn-nhs/ppf-csp/index.aspx>

Parks Canada/Canada's Historic Places (2006) "Canadian Register of Historic Places: Writing Statements of Significance"  
<http://www.historicplaces.ca/media/5422/sosguideen.pdf>

Parks Canada/Canada's Historic Places (2010) *Standards and Guidelines for the Conservation of Historic Places in Canada*, 2<sup>nd</sup> ed.  
<http://www.historicplaces.ca/media/18072/81468-parks-s+g-eng-web2.pdf>

Parks Canada (2004)

"Minister Dion Announces New Funding To Revitalize And Restore Eight Historic Canadian Properties". Media Room, News Releases and Backgrounders  
[http://www.pc.gc.ca/APPS/CP-NR/release\\_e.asp?id=838&andor1=nr](http://www.pc.gc.ca/APPS/CP-NR/release_e.asp?id=838&andor1=nr)

"Backgrounder: Commercial Heritage Properties Incentive Fund Contributions"  
[http://www.pc.gc.ca/APPS/CP-NR/release\\_e.asp?bgid=717&andor1=bg](http://www.pc.gc.ca/APPS/CP-NR/release_e.asp?bgid=717&andor1=bg)

Preservation Green Lab (2011) *The Greenest Building: Quantifying the Environmental Value of Building Reuse*, The National Trust for Historic Preservation, 2011  
[http://www.preservationnation.org/information-center/sustainable-communities/green-lab/lca/The\\_Greenest\\_Building\\_lowres.pdf](http://www.preservationnation.org/information-center/sustainable-communities/green-lab/lca/The_Greenest_Building_lowres.pdf)

Rypkema, D. (2007) "Economic Benefits of Preservation", Preservation Action Council of San Jose.  
[www.preservation.org/rypkema.htm](http://www.preservation.org/rypkema.htm)

Technical Preservation Services (n.d.) "Tax Incentives for Preserving Historic Properties", National Park Service, US Department of the Interior  
<http://www.nps.gov/tps/tax-incentives.htm>

Vancouver Heritage Foundation (2012) *Conserving Heritage Buildings in a Green and Growing Vancouver*.  
<http://www.vancouverheritagefoundation.org/wp-content/uploads/2013/01/Conserving-Heritage-Report-FINAL.pdf>

Vancouver Heritage Foundation (2013) *Gow Block: Cedar Cottage Townhomes*  
<http://www.vancouverheritagefoundation.org/wp-content/uploads/2013/02/Final-Copy-Gow-Block.pdf>

## ACKNOWLEDGEMENTS

### Study Team:

Judith Mosley MSc, VHF Executive Director  
Roxanne Nesbitt MArch, VHF Project Research Assistant  
Neil Armitage PhD  
Karly Morgan BA, Dip Env, MSc

### Consultation:

VHF is grateful to many people who shared their knowledge, experience and information with the study team:

John Atkin  
Scott Bowden – Colliers International  
Rebecca Bishop - Vancouver Heritage Foundation  
Shelley Bruce – Parks Canada  
Brigitte Clark – Victoria Heritage Foundation  
Marco D’Agostini – City of Vancouver  
Karen Dearlove – Heritage BC  
Marta Farevaag  
Robert Fung – Salient Group  
Michael Geller  
Zlatan Jankovic – City of Vancouver  
Berdine Jonker – BC Heritage Branch  
David Johnston – City of Edmonton  
Harold Kalman  
Robert Lemon  
Donald Luxton  
Bonnie Ma – City of Vancouver  
Hugh McLean – City of Vancouver  
Murray Miller – City of Victoria  
Karen Russell  
Catherine Umland – Victoria Civic Heritage Trust  
Barbara Vanderburgh  
Chris Wiebe – The National Trust for Canada  
Andy Yan

### Property Owner / Manager Interviews:

Ric Arboit  
Ian Foreman  
Doug Meredith  
Peter Mustard  
Roy Pick  
Carol Sawyer





## Appendix I: City of Vancouver Cultural Infrastructure Grants to Heritage Register Buildings

### Cultural Infrastructure Grants 2014

#### Artspeak Gallery Society

233 Carrall St.

Bodega hotel and saloon 225-233 Carrall St.

Significance: B (M)

**\$150,000** To purchase an additional unit within their building.

#### Roundhouse Community Arts and Recreation Society

181 Roundhouse Mews

Significance: A (P)

**\$75,000** To install a larger, longer, and higher set of bleachers in the Roundhouse Performance Centre.

**\$12,000** To fund a feasibility study for a new entrance to performance space.

#### Vancouver Dance Foundation

677 Davie St.

Significance: B (M)

**\$50,280** To upgrade the entrance to the Scotiabank Dance Centre for disability access and energy conservation.

#### Native Daughters Post #1

(Old Hastings Mill Store Museum)

1575 Alma St.

Significance: A (M)

**\$6,750** To replace the 50 year old furnace and ductwork with a high efficiency HVAC system.

### Cultural Infrastructure Grants 2013

#### Firehall Theatre Society

280 East Cordova St.

Significance: B (M)

**\$17,500** Renovations to dressing rooms, storage areas and exterior lighting.

#### Historic Joy Kogawa House Society

1450 West 64th Ave.

Significance: B

**\$34,500** To purchase the house from The Land Conservancy.

#### Unit / Pitt Gallery

236 East Pender St.

Significance: O (M)

**\$35,000** To upgrade space at 236 East Pender.

#### Vancouver Japanese Language School

475 Alexander St.

Significance: B (M)

**\$3,370** Study to make the hall a more effective performance venue.

## **Cultural Infrastructure Grants 2012**

### **St. Andrew's Wesley United Church**

1012 Nelson St.

Significance: A (M)

**\$150,000** Additional washrooms and storage space, acoustic treatment on existing spaces.

### **Carnegie Community Centre Association**

(former Carnegie Library)

401 Main St.

Significance: A (M)

**\$7,900** Improvements to the theatre and sound room.

### **Vancouver East Cultural Centre (The Cultch)**

1895 Venables St.

Significance: B (M)

**\$7,810** Refurbish seating.

### **Western Front Society**

303 East 8th Ave.

Significance: B

**\$14,740** Canopy installation over the building's front entrance.

### **Marpole Museum and Historical Society**

8743 SW Marine Dr.

Significance: B

**\$3,120** Planning for the construction of a new presentation space.

## **Cultural Infrastructure Grants 2011**

### **Artspeak Gallery Society**

233 Carrall St.

Bodega hotel and saloon 225-233 Carrall St.

Significance: B (M)

**\$20,000** Feasibility study for gallery expansion.

### **Carnegie Community Centre Association**

(former Carnegie Library)

401 Main St.

Significance: A (M)

**\$2,300** Evaluation of existing theatre spaces in order to renovate in the future.

### **Dr. Sun Yat-Sen Garden Society of Vancouver**

578 Carrall St.

Significance: O (M)

**\$9,000** Consultation for renovation.

### **Roedde House Preservation Society**

1415 Barclay St.

Significance: B (M)

**\$10,500** To write a heritage conservation plan for the Roedde House Museum.

**Western Front Society**

303 E 8th Ave.

Significance: B

**\$49,700** Technical upgrades to Grand Luxe Theatre.

**Cultural Infrastructure Grants 2010****Artspeak Gallery Society**

233 Carrall St.

Bodega hotel and saloon 225-233 Carrall St.

Significance: B (M)

**\$1,000** To hire a realtor to study the possibility of purchasing an additional space.

**Museum of Vancouver (Vancouver Museum Society)**

1100 Chestnut St.

Significance: A (M)

**\$21,500** Planning study for lobby renovations.

**Historic Joy Kogawa House Society (The Land Conservancy)**

1450 West 64th Ave.

Significance: B

**\$25,000** Renovation to front of the house.

**Vancouver Dance Foundation**

677 Davie St.

Significance: B (M)

**\$14,500** Upgrades to building HVAC and security.

**Western Front Society**

303 E 8th Ave.

Significance: B

**\$15,000** Fire safety upgrades.

**Cultural Infrastructure Grants 2009****Firehall Theatre Society**

280 East Cordova St.

Significance: B (M)

**\$25,000** Feasibility study for renovation.

**Gallery Gatchet Society**

88 East Cordova St.

Significance: C

**\$3,000** Feasibility study for co-location.

**Native Daughters Post #1**

(Old Hastings Mill Store Museum)

1575 Alma St.

Significance: A (M)

**\$11,000** Electrical and lighting upgrades.

## **Cultural Infrastructure Grants Summary 2009-2014**

The City of Vancouver's Cultural infrastructure grant supported 3-5 Heritage Register buildings per year through local non-profits. This funding includes feasibility studies for upgrades, consultations and renovations. This documentation does not include funding to non-profits housed in heritage buildings not related to the maintenance and use of the building.

### **Yearly summary**

#### **2014**

Granted **27** projects, **4** heritage projects, total funding for heritage **\$294,030**

#### **2013**

Granted **33** projects, **4** heritage projects, total funding for heritage **\$90,370**

#### **2012**

Granted **23** projects, **4** heritage projects, total funding for heritage **\$183,570**

#### **2011**

Granted **30** projects, **5** heritage projects, total funding for heritage **\$91,500**

#### **2010**

Granted **26** projects, **5** heritage projects, total funding for heritage **\$77,000**

#### **2009**

Granted **14** projects, **3** heritage projects, total funding for heritage **\$39,000**

## Appendix II: Catalogue of Vancouver Heritage Foundation Grants 1999-2014



### True Colours Grant Recipients

Amount shown does not include value of complimentary paint.

#### W 10th Ave

Mount Pleasant

**True Colours**, 1999

Built: 1910

Heritage Register: B(M)

Category/Ownership: Residential/Private



#### W 10th Ave

Mount Pleasant

**True Colours**, 1999

Built: 1914

Heritage Register: B(M)

Category/Ownership: Residential/Private



#### W 5th Ave

Kitsilano

**True Colours \$2,000**, 1999

Built: 1914

Heritage Register: B(M)

Category/Ownership: Residential/Private



#### Princess Ave

Strathcona

**True Colours \$2,000**, 2000

Built: 1907

Heritage Register: C(M)(H)

Category/Ownership: Residential/Private



#### Princess Ave

Strathcona

**True Colours \$2,500**, 2000

Built: 1907

Heritage Register: B(M)(H)

Category/Ownership: Residential/Strata





**Oxford St**  
 Hastings Sunrise  
**True Colours \$2,500, 2000**  
 Built: 1912  
 Heritage Register: B(M)  
 Category/Ownership: Residential/Private



**W 37th St**  
 Kerrisdale  
**True Colours \$2,500, 2000**  
 Built: 1912  
 Heritage Register: B(M)  
 Category/Ownership: Residential/Private



**Lakewood Drive**  
 Grandview Woodlands  
**True Colours \$2,500, 2000**  
 Built: 1908  
 Heritage Register: A(M)  
 Category/Ownership: Residential/Private



**E Cordova St**  
 Strathcona  
**True Colours \$1,500, 2001**  
 Built: 1898  
 Heritage Register: B(M)  
 Category/Ownership: Residential/Private



**Princess Ave**  
 Strathcona  
**True Colours \$1,500, 2001**  
 Built: 1903  
 Heritage Register: C(M)(H)  
 Category/Ownership: Residential/Private



**E 1st Ave**  
 Hastings Sunrise  
**True Colours \$1,500, 2001**  
 Built: 1930  
 Heritage Register: B(M)  
 Category/Ownership: Residential/Private



**W 3rd Ave**  
 Kitsilano  
**True Colours \$1,500, 2001**  
 Built: 1912  
 Heritage Register: B(M)  
 Category/Ownership: Residential/Private



**Union St**  
 Strathcona  
**True Colours \$1,500, 2002**  
 Built: 1902  
 Heritage Register: B(M)  
 Category/Ownership: Residential/Private



**Yukon St**  
 Mount Pleasant  
**True Colours \$1,500, 2002**  
 Built: 1913  
 Heritage Register: B(M)  
 Category/Ownership: Residential/Private



**Angus Drive**  
 Kerrisdale  
**True Colours \$1,500, 2002**  
 Built: 1926  
 Heritage Register: A(M)  
 Category/Ownership: Residential/Private



**Crown St**  
 West Point Grey  
**True Colours \$ 2,000, 2003**  
 Built: 1941  
 Heritage Register: C(M)  
 Category/Ownership: Residential/Private



**Dundas St**  
Hastings Sunrise  
**True Colours \$2,000, 2003**  
Built: 1922  
Heritage Register: B(M)  
Category/Ownership: Residential/Private



**Pacific St**  
West End  
**True Colours**  
Painted: 2003  
Built: 1902-1908  
Heritage Register: B  
Category/Ownership: Residential/Housing Co-op



**Cypress St**  
Kerrisdale  
**True Colours \$2,000, 2004**  
**21% Estimated Project Costs \$9,500**  
Built: 1912  
Heritage Register: A(M)(H)  
Category/Ownership: Residential/Private



**Bute St**  
**Rand House**  
West End  
**True Colours \$2,000, 2005**  
**27% of Project Cost \$7,394**  
Built: 1896  
Heritage Register: B(M)(H)  
Category/Ownership: Residential/Private



**Barclay St**  
**Roedde House**  
West End  
**True Colours \$2,000, 2006**  
**14% of Project Cost \$18,500**  
Built: 1893  
Heritage Register: A(M)  
Category/Ownership: Institution (Museum)/Non-profit/City of Vancouver



**W 7th Ave**  
Kitsilano  
**True Colours \$2,000, 2006**  
**31% of Project Cost \$6,500**  
Built: 1912  
Heritage Register: C(M)  
Category/Ownership: Residential/Private





### **Hawks Ave**

Strathcona

**True Colours \$2,000**, 2006 (painted **six row houses**)

**5%** of Project Costs: \$37,238

Built: 1898

Heritage Register: B(M)

Category/Ownership: Residential/Strata



### **Odium Drive**

Grandview Woodlands

**True Colours \$2,000**, 2007

**23%** of Project Cost \$8,600

Built: 1910

Heritage Register: B(M)

Category/Ownership: Residential/Private



### **James St**

Riley Park

**True Colours \$2,000** + Complimentary paint, 2007

**23%** of Project Cost \$8,533

Built: 1910

Heritage Register: B(M)

Category/Ownership: Residential/Private



### **Commercial St**

#### **The Gow Block**

Grandview Woodlands

**True Colours \$2,000**, 2008

**60%** of Project Cost \$3,325

Built: 1910

Heritage Register: B(M)(H)

Category/Ownership: Mixed-use/Private



### **E 23rd Ave**

#### **Pidruchny House**

Renfrew Collingwood

**True Colours \$2,000**, 2008

**25%** Project Cost : \$7,950

Built: 1930

Heritage Register: C(M)

Category/Ownership: Residential/Private



### **Atlantic St**

Strathcona

**True Colours \$1,500**, 2011

**14%** of Estimated Project Cost \$11,000

Built: 1905

Heritage Register: C

Category/Ownership: Residential/Private



### **E 10th Ave**

Grandview Woodlands

**True Colours \$1,500**, 2011

**16%** of Project Cost \$9,635

Built: 1908

Heritage Register: C

Category/Ownership: Residential/Private



### **Stephens St**

Kitsilano

**True Colours \$1,500**, 2011

**11%** of Project Cost \$14,140

Built: 1908

Heritage Register: C

Category/Ownership: Residential/Private



### **W 10th Ave**

Kitsilano

**True Colours \$1,000**, 2012

Built: 1912

Heritage Register: B

Category/Ownership: Residential/Private



### **E 49th Ave**

Sunset

**True Colours \$1,000**, 2012

**15%** of Project Cost \$6,524

Built: 1910

Heritage Register: B

Category/Ownership: Residential/Private





**W Broadway**  
**The Hollywood Theatre**

Kitsilano

**True Colours \$1,000, 2013**

**21% of Project Cost \$4,866**

Built: 1935

Heritage Register: B

Category/Ownership: Commercial/Religious Society (tenant)



**SW Marine Drive**

**Colbourne House**

Marpole

**True Colours \$1,000, 2013**

**16% of Project Cost \$6,247**

Built: 1912

Heritage Register: B

Category/Ownership: Institution (Museum)/Non-profit



**W 3rd Ave**

Kitsilano

**True Colours \$1,000, 2014**

Built: 1913

Heritage Register: C

Category/Ownership: Residential/Private



**W 5th Ave**

Kitsilano

**True Colours \$800, 2014**

**5% of Project Cost \$17,650**

Built: 1912

Heritage Register: B

Category/Ownership: Residential/Private



**Princess St**  
**Strathcona Church**

Strathcona

**True Colours \$800, 2014**

**16% of Project Cost \$5,071**

Built: 1910

Heritage Register: B

Category/Ownership: Charitable foundation



## Restore It Grant Recipients

### E Georgia St

Strathcona

**Restore It \$2,500** New roof, 2003

Heritage Register: B(M)

Built: 1901

Category/Ownership: Residential/Private



### Manitoba St

#### Ladner House

Mount Pleasant

**Restore It \$2,500** New roof, 2003

Heritage Register: B(M)

Category/Ownership: Residential/Private



### McRae Ave

#### Hycroft Manor

Shaughnessy Heights

**Restore It \$2,500**

Restore the North exterior balustrades and staircase, 2003

**Restore It \$1,000** Roof Repair, 2014

**2.2 %** of Project Cost \$45,360

Heritage Register: A(M)(L)

Built: 1911

Category/Ownership: Private Club



### Pendrell St

Mole Hill (West End)

Restoration of lost Victorian detailing on **four houses** including

Paterson House, 2003

Heritage Register: B

Category/Ownership: Residential/Housing Co-op



### Stephens St

#### Lukov House

Kitsilano

**Restore It \$2,500** Repair of wood shingles and wood windows, 2004

**64%** of Project Cost \$3,873

Heritage Register: B(M)

Built: 1917

Category/Ownership: Residential/Private



### E King Edward Ave

Riley Park-Little Mountain

#### Restore It Grant

**\$2,500** New drainage system 2004, **16%** of Project Cost \$15,000

**\$2,500** entry door and side lights restoration 2005, **50%** of Project Cost \$5,000

**\$2,500** porches & exterior stairs restoration 2006 **31%** of Project Cost \$8,000

Heritage Register: B(M)(H)

Built: 1902

Category/Ownership: Residential/Private



### **Eton St**

#### **Bergquist House**

Hastings-Sunrise

#### **Restore it Grant**

**\$2,500** New shingle roof, 2004

**29%** of Project Cost \$8,558

**\$5,000** front porch and sleeping porch restoration, 2007

**22%** of Project Cost \$22,617

Heritage Register: B(M)(H)

Built: 1911

Category/Ownership: Residential/Private



### **Keefer St**

#### **Manson's Duplex**

Strathcona

**Restore It \$906** repair of wood window, 2005

**50%** of Project Costs \$1,812

Heritage Register: B(M)

Built: 1899

Category/Ownership: Residential/Strata



### **Dunlevy Ave**

#### **Winchcombe House**

Strathcona

#### **Restore It**

**\$2,500** Wood window repairs, 2005

**23%** of Project Cost \$10,625

**\$2,500** front and back porch restorations, 2006

**7%** of Project Cost \$34,596

Heritage Register: B(M)

Built: 1895-1899

Category/Ownership: Residential/Private



### **W 10th Ave**

Point Grey

#### **Restore It**

**\$1,500** Chimney restoration, 2007

**34%** of Project Cost \$4,410

Heritage Register: B

Built: 1913

Category/Ownership: Residential/Private



### **Graveley St**

#### **Marchese House**

Grandview-Woodlands

**Restore It \$5,000** New roof, 2008

**19%** of Project Cost \$26,285

Heritage Register: B(M)

Built: 1908

Category/Ownership: Residential/Private





### Connaught Drive

#### Brooks House

3rd Shaughnessy

**Restore It \$5,000** Replacement rolled shingle roof, 2008

**3.2%** of Project Cost \$158,718

Heritage Register: A(M)(H)(L)

Built: 1921

Category/Ownership: Residential/Private



### Carrall St

#### Woods/Pennsylvania Hotel

Downtown Eastside

**Restore It \$5,000** Neon sign replication, 2008

**15%** of Project Cost \$33,117

Heritage Register: B(M)(H)

Built: 1906

Category/Ownership: Mixed-use/Non-profit Society



### Quebec St

#### Evangelistic Tabernacle

Mount Pleasant

**Restore It \$5,000** New roof, 2008 **0.7%** of Project Cost \$674,031

**Restore It \$1,000** Window restoration, 2013 **5%** of Project Cost \$21,728

**Restore It \$1,000** Window restoration, 2014 **6%** of Project Cost \$17,516

Heritage Register: A(M)

Built: 1909

Category/Ownership: Residential/Strata



### Earles St

#### Earles Road Substation

Renfrew-Collingwood

**Restore It \$5,000** Concrete siding repairs, 2009

**15%** of Project Cost \$33,019

Heritage Register: B

Category/Ownership: Residential/Strata

Built: 1911



### Salsbury Drive

#### Pilling House

Grandview-Woodlands

**Restore It \$4,900** Sleeping porch restoration, 2009

**54%** of Project Cost \$8,956

Heritage Register: C(M)

Built: 1912

Category/Ownership: Residential/Private



### **W 38th Ave**

Dunbar

**Restore It \$3,500** Rafter tail and sleeping porch repairs, 2011

**14%** of Project Cost \$25,000

Heritage Register: B

Built: 1914

Category/Ownership: Residential/Private



### **Carolina St**

Mount Pleasant

**Restore It \$1,381.60** New gutters, 2011

**50%** of Project Cost \$2,764

Heritage Register: C

Built: 1900-05

Category/Ownership: Residential/Private



### **Carnarvon St**

#### **Simpson House**

Kerrisdale

**Restore It \$2,000** Sewer line repair, 2011

**38%** of Project Costs \$5,131

Heritage Register: C(H)

Built: 1919

Category/Ownership: Residential/Private



### **W 64th Ave**

#### **Joy Kogawa House**

Marpole

**Restore It \$2,000** New roof, 2011

**25%** of Project Cost \$8,037

Heritage Register: B

Built: 1912

Category/Ownership: Institution/Non-profit Society



### **Point Grey Rd**

Kitsilano

**Restore It \$500** Soffit and porch repairs, 2012

**45%** of Project Cost \$1,120

Heritage Register: B

Built: 1914

Category/Ownership: Residential/Private



### **E 7th Ave, Quebec Manor**

Mount Pleasant

**Restore It \$309** Iron railing restoration, 2012

**4%** of Project Cost \$7,546

Heritage Register: A

Built: 1910-11

Category/Ownership: Residential/Housing Co-op



### **Hawks Ave**

#### **BC Mills Prefab Demonstration House**

Strathcona

**Restore It \$1,500** Siding repairs and porch restoration, 2012

**18%** of Project Cost \$8,298

Heritage Register: B

Built: 1903

Category/Ownership: Residential/Private





## **E 14th Ave**

### **John Tibb House**

Trout Lake

**Restore It \$1,000** New gutters, entry door restoration, 2012

**21%** of Project Cost \$4,650

Heritage Register: C(M)

Built: 1912

Category/Ownership: Residential/Private



## **Alexander St**

### **Japanese Hall**

Oppenheimer-Downtown Eastside

**Restore It \$2,000** Metal pivot window restoration, 2012

**4%** of Project Cost \$50,187

Heritage Register: B(M)

Built: 1906

Category/Ownership: Community/Non-profit Society



## **Stephens St**

Kitsilano

**Restore It \$1,500** Restore casement windows, 2013

**19%** of Project Cost \$7,524

Heritage Register: B

Built: 1913

Category/Ownership: Residential/Private



## **Victoria Drive**

Kensington - Cedar Cottage

**Restore It \$1,000** Roof replacement, 2014

**8%** of Project Cost \$12,334

Heritage Register: B

Built: 1930

Category/Ownership: Residential/Private



## **Japanese Canadian War Memorial, Stanley Park**

**Restore It \$1,500**, 2014 Stonework, masonry and plaque restoration work

**4.5%** of Project Cost \$33,776

Heritage Register: Monument

Built: 1920

Category/Ownership: Monument/ Non-profit Society

## Restore It and True Colours Grant Recipients



### **E 29th Ave**

Renfrew Collingwood

**True Colours \$2,500**, 2000

**True Colours \$2,000**, 2009

**31%** of Project Cost \$6510

**Restore It \$5,000**, porch repair 2010,

**42%** Project cost \$11,777

Built: 1912

Heritage Register: B(M)

Category/Ownership: Residential/Private



### **E Georgia St**

Strathcona

**True Colours \$1,500**, 2001

**Restore It \$2,500**, 2004

Built: 1892

Heritage Register: B(M)(H)

Category/Ownership: Residential/Private



### **Ferndale St**

Grandview-Woodlands

**True Colours \$2500**, 2003

**Restore It \$5,000** New roof, 2008

**27%** of Project Cost \$18,000

Heritage Register: C(M)

Built: 1909

Category/Ownership: Residential/Private



### **Pandora St**

Hastings-Sunrise

**Restore It \$2,500** Restoration of front stairs and porch, 2004

**15%** of Project Cost \$16,464

**\$2,050** repair of wood window, 2007

**50%** of Project Cost \$4,100

**True Colours \$2,000**, 2004

Heritage Register: C(M)

Built: 1927

Category/Ownership: Residential/Private



### **Stephens St**

Kitsilano

**Restore It \$2,500**, 2004

**64%** of Project Cost \$3,872

**True Colours \$2,000**, 2004

**22%** of Project Cost \$8,975

Built: 1917

Heritage Register: B(M)

Category/Ownership: Residential/Private



### **Carolina St, Percy House**

Mount Pleasant

**True Colours \$2,000**, 2004

**Restore It**

**\$1,480** Stained glass window repair 2005, **77%** of Estimated Cost \$1,920

**\$2,310** wood window repairs, 2006, **50%** of Estimated Cost \$4990

**\$1,510** chimney restoration, 2008, **50%** of Estimated Cost \$ 3020

**\$1,500** roof reconstruction **5.3 %** of Project Cost \$28,336

Heritage Register: B(M)

Built: 1904

Category/Ownership: Residential/Private



#### **W 7th Ave**

##### **Williams House**

Kitsilano

**Restore It Grant \$2,500** Wood shingle repair, 2005

**21%** of Project Cost \$11,750

**\$1000** Re-roofing, 2012

**8%** of Project Costs \$13,046

**True Colours \$2,000**, 2006, **20%** of Project Cost \$10,000

Heritage Register: B(M)

Built: 1912

Category/Ownership: Residential/Private



#### **W 5th Ave**

##### **Straight House**

Kitsilano

**Restore It \$850** Cedar roof shingle replacement, 2006

**11%** of Project Cost \$7,701

**True Colours \$2,000** Painted 2005,

**35%** of Project Cost \$5,727

Heritage Register: C(M)

Category/Ownership: Residential/Private



#### **Pandora St**

##### **Kendrick House**

Hastings-Sunrise

**Restore It \$2,500** New roof, 2006

**19%** of Estimated Project Cost \$12,900

**True Colours \$2,000**, 2008

**28%** of Project Costs \$7,035

Heritage Register: C(M)

Built: 1928

Category/Ownership: Residential/Private



#### **E Georgia St**

##### **Hendrix House**

Strathcona

**Restore It \$5,000** Restoration of front porch and stairs, 2007

**27%** of Estimated Project Cost \$18,500

**True Colours \$2,000**, 2007

Heritage Register: C(M)

Built: 1904

Category/Ownership: Residential/Private



#### **Arbutus St, Curry Residence**

Arbutus Ridge

**Restore It \$5,000** Wood window replication, 2009

**19%** of Project Cost \$26,106

**True Colours \$2,000** Painted 2009

**37%** of Project Cost \$5,397

Heritage Register: B(M)(H)

Built: 1930

Category/Ownership: Residential/Private





## W 2nd Ave

### Faulkner House

Kitsilano

**True Colours \$2,000** Painted 2009, **47%** of Project Cost \$4,168

**Restore It \$5,000** Wood siding repairs 2009, **47%** of Project Cost \$10,649

**Restore It \$1,000** Chimney Repair, **40%** of Project Cost \$2,520

**Restore It \$2,000** front stair restoration, 2011 **46%** of Project Cost \$4,350

Heritage Register: C

Built: 1908

Category/Ownership: Residential/Private



## Cassiar St

### Industrial Girls School

Grandview-Woodlands

**True Colours \$2,000**, 2009 **25%** of Project Cost \$8,000

**Restore It \$2,000** Terrazzo stair restoration, 2011-12

**5%** of Project Cost \$41,974

Heritage Register: A(M)

Built: 1914

Category/Ownership: Residential/Strata



## W 1st Ave

### Kitsilano

**Restore It \$1,500** Sleeping porch, soffit, siding and roofing repairs, 2013

**16%** of Project Cost \$9,226

**True Colours \$1,000**, 2013

**8%** of Project Cost \$12,370

Heritage Register: C

Built: 1917

Category/Ownership: Residential/Private



## Balaclava St

Kitsilano

**Restore It \$1,000** Roof replacement, 2014

**14%** of Project Cost \$7,192

**True Colours \$2,000**, 2007

Heritage Register: C

Built: 1912

Category/Ownership: Residential/Private



## Union St

Strathcona

**Get on the Register \$350**, 2011 **50%** of Project Cost \$700

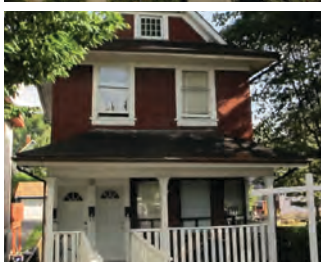
**House Call \$500**, 2011 **50%** of Project Costs \$1,000

**True Colours \$1,000**, 2013 **8%** of Estimated Project Cost \$12,158

Built: 1886

Heritage Register: C

Category/Ownership: Residential/Private



## Union St

Strathcona

**Get on the Register \$378**, 2014 **50%** of Project Cost \$756

Built: 1908

Heritage Register: Proposed as C

Category/Ownership: Residential/Private



Figure 5: Summary of available programs for stages of heritage conservation, Vancouver 2015.

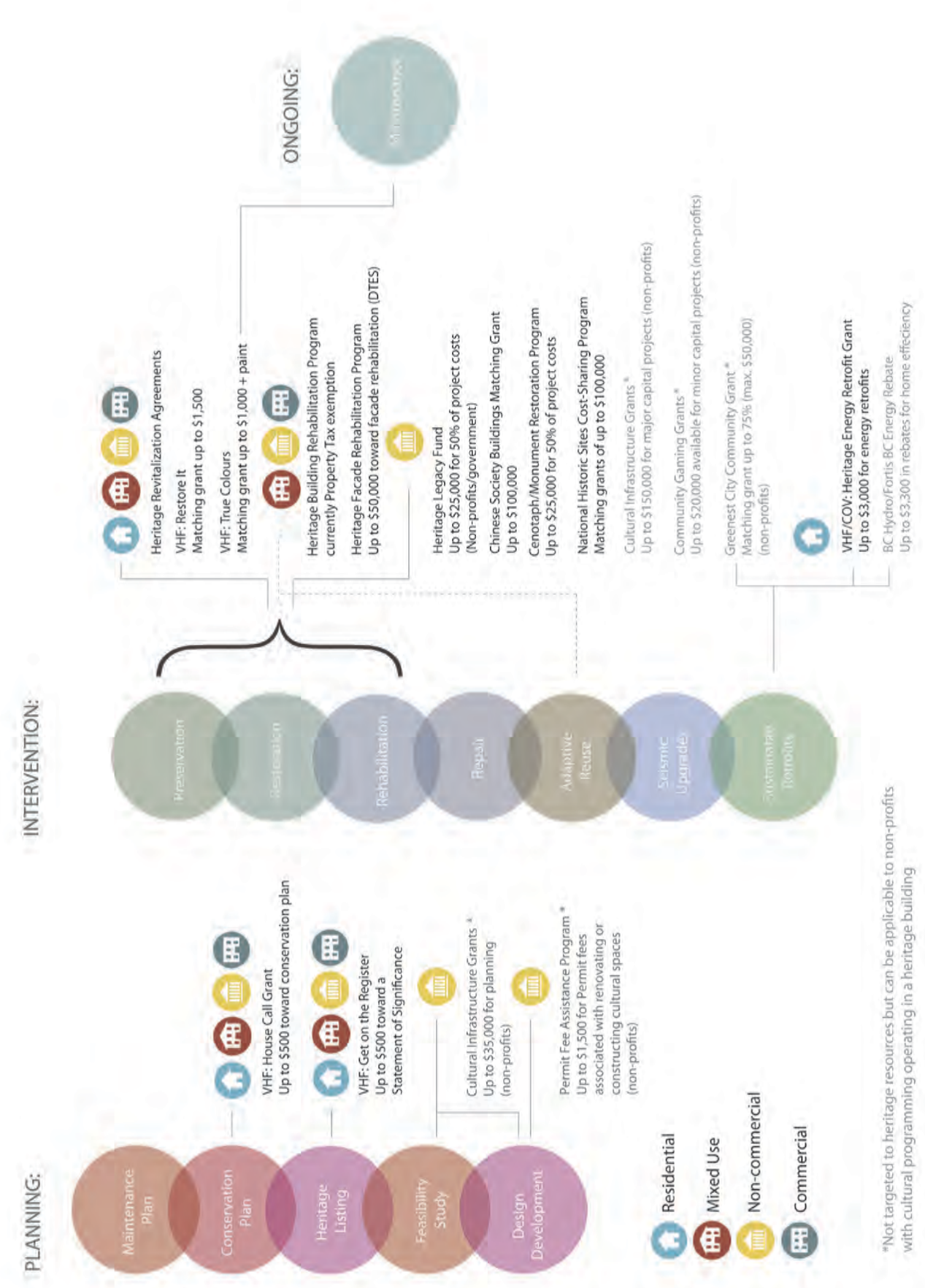
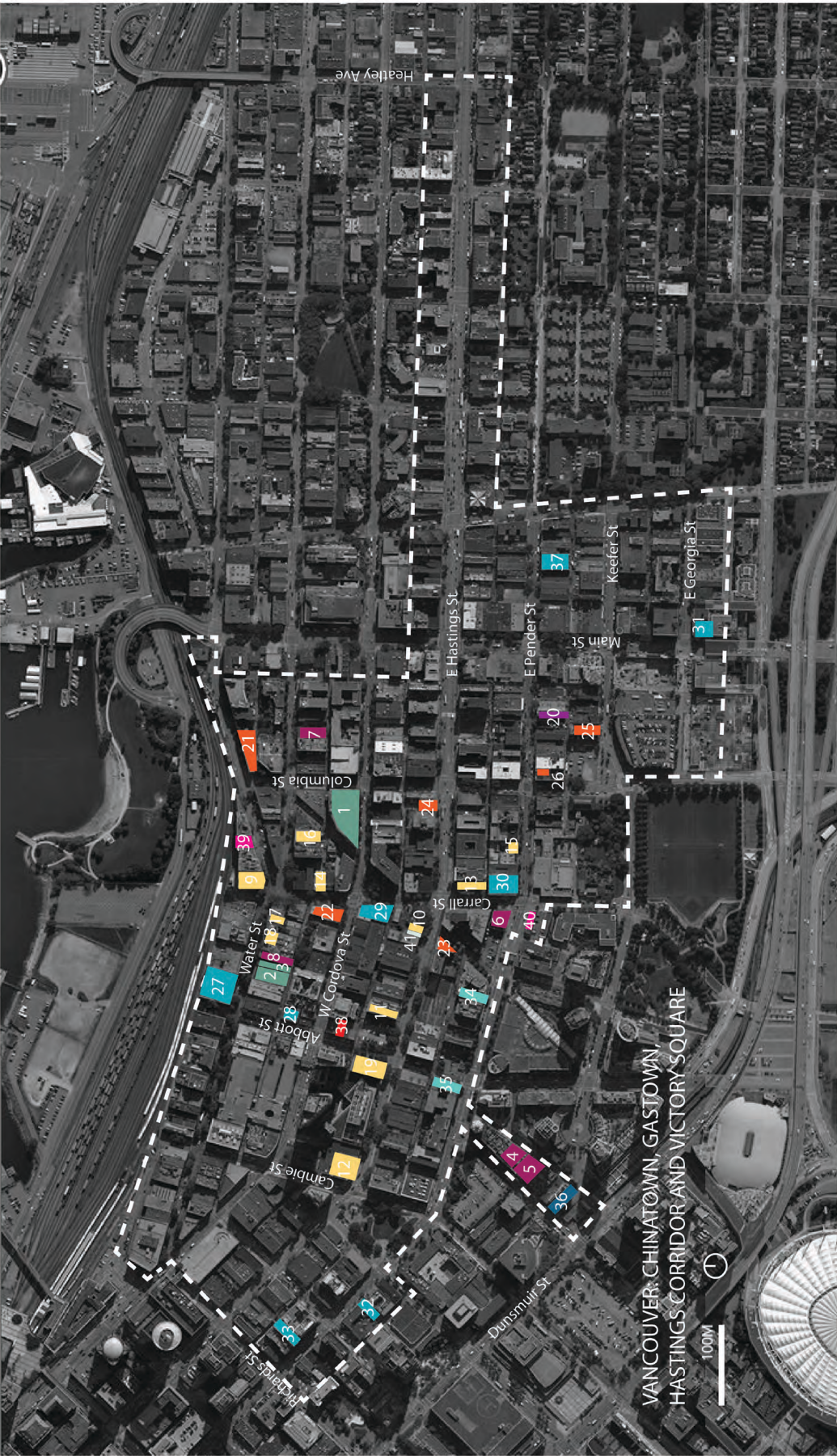




Figure 6: Heritage Facade Rehabilitation Program funded buildings, funding approved by September 2015.



2004	1	55 E Cordova St \$100,000*	2006	9	1 Alexander St \$150,000	2007	20	158 E Pender St \$50,000	2009	27	134 Abbott St \$100,000	2011	36	564 Beatty St \$150,000*
	2	44 (46) Water St \$50,000*		10	1 W Hastings St \$100,000*		21	118 Alexander St \$50,000		28	228 Abbott St \$50,000		37	258 E Pender St \$50,000
	3	50 (52) Water St \$50,000*		11	53 W Hastings St \$50,000*	2008	22	265 Carrall St \$100,000*		30	309 Carrall St \$100,000	2012		
				12	163 W Hastings St \$100,000*		23	18 W Hastings St \$50,000*		29	488 Carrall St \$50,000	2013	38	320 Abbott St \$50,000
2005	4	522 Beatty St \$50,000*		13	412 Carrall St \$50,000*		24	71 E Hastings St \$50,000*		31	208 E Georgia St \$50,000*		39	41 Alexander St \$50,000
	5	540 Beatty St \$50,000*		14	210-212 Carrall St \$100,000*		25	133 Keefer St \$50,000*		32	330 W Pender St \$50,000		40	8 W Pender St \$100,000
	6	5 W Pender St \$100,000*		15	51 E Pender St \$50,000*		26	108 E Pender St \$50,000		33	429 W Pender St \$50,000			
	7	124 Powell St \$35,000		16	40 Powell St \$50,000*					34	31 W Pender St \$50,000	2015	41	5 W Hastings St \$50,000 (pending completion)
	8	36 Water St \$100,000*		17	6 Water St \$100,000*					35	100 W Pender St \$50,000			
				18	12 Water St \$100,000*									
				19	Woodwards Building \$100,000*									

\*Also participated in the Heritage Building Rehabilitation Program. Project received a property tax exemption and/or bonus density.