

Manitoba Sport, Culture, Heritage and Tourism Heritage Resources Conservation Grant

PROGRAM GUIDELINES

1. Objective

The Heritage Resources Conservation Grant program will support projects that demonstrate a commitment towards the conservation and long-term sustainability of heritage properties legally protected under *The Heritage Resources Act* or the *City of Winnipeg Bylaw 55/2014*.

The program prioritizes conservation activities that are in accordance with *The Standards and Guidelines for the Conservation of Historic Places in Canada* [herein referred to as the *Standards & Guidelines*], which establishes a consistent set of conservation principles and guidelines adopted by federal-provincial-territorial heritage agencies.

The *Standards & Guidelines* is available through the Historic Resources Branch or online at:

<https://www.historicplaces.ca/en/pages/standards-normes.aspx>.

2. Application Deadline

The annual deadline for submission of applications is **January 15**. The Historic Resources Branch will only consider fully completed applications. Please consult the Branch well in advance of your submission (four to six weeks before deadline is recommended) by calling 204-945-2118 (toll free 1-800-282-8069 ext. 2118) or emailing hrb@gov.mb.ca.

3. Eligibility – Who can apply?

In order to receive grant assistance, an applicant must meet **at least one** of the following criteria:

1. Applicant owns, or is a long-term lessee* of, a heritage property legally protected, or 'designated', under The Heritage Resources Act.
2. Applicant owns, or is a long-term lessee* of, a heritage property legally protected, or 'listed', under the City of Winnipeg Bylaw 55/2014, prior to April 1, 2019.
3. Applicant is a Municipal government, a professional association or a non-profit organization with charitable status responsible for the management of legally protected heritage properties.

Note: An exception is that Municipal governments or owners of *potential* heritage sites may apply for Research grants leading to new designations – see Grant Program Categories).

* An applicant who is a lessee with a long-term lease must have written permission from the owner to undertake the proposed conservation project.

4. Grant Program Categories

The Heritage Resources Conservation Grant program consists of five interdependent sub-programs, or grant program categories (percentage of available annual funding for each category is indicated):

- A. RESEARCH (5%)
- B. CONSERVATION PLANNING (10%)
- C. CAPITAL PROJECTS (75%)
- D. ENDOWMENTS / LONG-TERM MAINTENANCE (5%)
- E. EDUCATION / TRAINING (5%)

The first three of these grant program categories progress from (A) research, or *understanding* the heritage resource, to (B) *planning* for its conservation to (C) *intervening* through capital projects. These three activities – *understanding, planning and intervening* – are the key components of the *Conservation Decision-Making Process*, as described in the *Standards & Guidelines*.

Although these three ‘steps’ are presented sequentially, conservation is an ongoing and cyclical process and the conservation planning process needs to be flexible to allow for discoveries and for an increased understanding along the way.

The two remaining grant program categories support conservation, with (D) enabling endowments for a heritage resource’s long-term sustainability, or financial stability, and (E) supporting educational efforts to develop a capacity to carry out conservation activities.

A. RESEARCH

(5% of available annual funds)

Research exclusively focused on understanding of the heritage value of a place or places.

For potential new designations, research is an essential step in establishing whether a municipality should consider resources for designation.

For places already designated, research can help recover the original integrity of a place, distinguishing its original features from later additions or alterations.

“Understanding an historic place is an essential first step to good conservation practice. ... It is important to know where the heritage value of the historic place lies, along with its condition, evolution over time, and past.” [Standards & Guidelines, Chapter 1]

Eligible Research projects:

- a) **Research to develop municipal heritage inventories:** taking inventories and prioritizing community physical heritage assets for future planning or designations. The Heritage Resources Act enables municipalities to designate properties as Municipal Heritage Sites. Collectively, designated structures contribute to the cultural infrastructure of a community.
- b) **Research leading to a new designation:** preparing *Statements of Significance* for heritage resources by independent qualified researchers. A *Statement of Significance* describes the place’s heritage value and identifies those features (of the *site*, *exterior* and *interior*) that give the place its unique character and that its caretakers will need to protect.

Example: The *Statement of Significance* for a rural Ukrainian church includes, under *site* characteristics, its location on the highest point in the surrounding farmland at the end of a long lane; *exterior* features identified include its complex roof form with banyas (domes) and round-arched windows; *interior* features include its hand-painted religious icons. Making changes to any of these features would diminish this church’s heritage value.

- c) **Research to re-establish a designated place's original features:** undertaking archival research to locate early drawings or photographs or physical investigations by a heritage conservation architect or engineer. The owner can use these research findings to uncover or replicate those original features that modifications over time have removed or obscured.

Ineligible Research projects:

General awareness initiatives: Province may consider such projects for support under other grant programs.

B. CONSERVATION PLANNING

(10% of available annual funds)

A conservation plan, prepared by a design professional (architect, engineer) or specialized heritage conservation consultant, identifies the present condition of the resource and presents a prioritized sequence of required work items, which will serve to preserve, rehabilitate and/or restore the resource to meet the needs of the owner.

“Planning is the mechanism that links a comprehensive understanding of an historic place with interventions that respect its heritage value. Planning should consider all factors affecting the future of an historic place, including the needs of the owners and users, community interests, the potential for environmental impacts, available resources and external constraints.” [Standards & Guidelines, Chapter 1]

Conservation, an “overarching term for protecting historic places” [Standards & Guidelines], is comprised of three distinct approaches:

Preservation – protect the resource’s existing materials to ensure continued existence.

Rehabilitation – return the resource to a usable state through repair or sensitive changes.

Restoration – return the resource to the appearance of an earlier time.

Most conservation projects will include a combination of those three activities.

Eligible Conservation Planning projects:

- a) **Comprehensive Conservation Plan:** severely neglected resources or large-scale resources with multiple conservation issues must have a *Conservation Plan* prepared in order to be eligible for capital project grants. A *Conservation Plan* will assist owners in identifying and retaining the culturally significant, or “*character-defining*”, elements of their buildings while accommodating functional needs.

An effective *Conservation Plan* will identify the appropriate conservation approach for each component or aspect of the proposed work and will include the following:

1. Architectural Assessment – determine what the building originally looked like and how it has changed over time.
2. Inspection – identify all the areas where remedial work is required (roof, flashings, walls, windows, doors, foundations, site, etc)
3. Documentation – prepare drawings and specifications of any required work in order to solicit competitive bids from contractors.
4. Prioritization / Costing – prioritize work required to address the most critical items first. Include costs to complete identified conservation work.
5. Phased Implementation – provide conservation schedule to address prioritized work items and ongoing preventative maintenance.

- b) **Design documents:** drawings/specifications prepared for heritage reviews and contractor pricing of work to conserve significant heritage features.

For designated places, the designating authority must issue a heritage permit before any work can take place. Through a collaborative process, the proponent will develop the project to a form acceptable to all parties. Heritage reviews should occur at these stages:

Conceptual Proposal – submit initial project description for review; the designating authority will provide feedback on how the project may affect the historic place and, if necessary, suggest alternative approaches.

Design Stages – as the project develops, submit drawings for review.

Contract Documents – prior to tendering, forward working drawings/specifications for final review. A heritage permit will be prepared and issued at this time if the proposed work complies with the *Standards & Guidelines*.

Ineligible Conservation Planning projects:

Contractor quotes/estimates: project descriptions whose focus is limited to one building trade or physical aspect of a place.

C. CAPITAL PROJECTS

(75% of available annual funds)

Before undertaking capital work to conserve heritage resources, applicants are encouraged to seek professional advice – see Conservation Planning. All proposed work must comply with *the Standards & Guidelines*.

“Intervening on an historic place – that is, any action or process that results in a physical change to its character-defining elements – must respect and protect its heritage value.”
[*Standards & Guidelines, Chapter 1*]

Eligible Capital Project expenses: (in descending order of priority)

- a) **Structural repairs:** building stabilization, moisture control (foundations, roofs, etc).
- b) **Exterior restoration:** conservation of original material, reconstruction of missing components (provide documentary evidence of components in your application).
- c) **Window repairs:** repair of existing original windows.
- d) **Interior restoration:** conservation of original interior features where the resource is primarily intended for public use and open to the public or, where private, the interior features are listed character-defining elements.
- e) **Window replacement:** new windows that match original windows (configuration, operation, detailing and materials), only if the original windows no longer exist or are in irreparable condition (provide documentary evidence of original window design and/or condition assessment of the deteriorated windows).
- f) **Exterior painting:** painting using an original paint colour scheme (provide documentary evidence of historic paint colours in your application).
- g) **Barrier-free access installations:** ramps, lifts, etc to meet universal accessibility requirements (demonstrate minimal impact to historically significant features).

Note: Professional fees, such as architectural, engineering and/or heritage consultant fees incurred in developing the project scope of work, may be considered as eligible expenses, provided the capital work is undertaken.

Ineligible Capital Project expenses:

Renovations: upgrades that use non-original contemporary materials (vinyl siding, asphalt shingle roofing, drywall or insulation products).

New construction: replicated buildings and building additions.

Building moving: moving buildings takes away an important aspect of their cultural heritage value. Where possible, conserve buildings on their original sites/settings.

Building services: plumbing, mechanical, electrical or other building service upgrades.

Landscaping: paving, planting or other site development work.

Commemoration: construction or maintenance of historic markers or plaques.

D. ENDOWMENTS / LONG-TERM MAINTENANCE (5% of available annual funds)

An endowment can provide stable, long-term funding to maintain an important heritage resource, following the completion of critical conservation work. Investing 2% of the heritage resource's replacement value annually towards its maintenance and repair is recommended.

Municipalities and local community groups/foundations may wish to set up an endowment for an individual building or a collection of buildings in their area of jurisdiction. Municipalities are responsible for inspections and permits to ensure that conservation of designated properties within their jurisdiction is undertaken in accordance with the Standards and Guidelines.

For information on achieving heritage site sustainability, please see MAKE IT WORK: A Sustainability Workbook for Historic Places:

http://www.gov.mb.ca/chc/hrb/pdf/sustainability_workbook_2010.pdf.

For general information on maintaining a heritage building, please refer to the Heritage Building Maintenance Manual:

http://www.gov.mb.ca/chc/hrb/pdf/maintenace_for_heritage_bldgs.pdf.

Eligible investment:

New endowments: see criteria below.

E. EDUCATION / TRAINING (5% of available annual funds)

Independent qualified researchers and trained local heritage tradespersons are essential to undertake high quality, heritage conservation work and ensure long-term stability of a designated heritage resource.

Accredited organizations or groups may sponsor or deliver training workshops to develop skills in the various heritage trades or enhance membership or owner/caretaker knowledge of designated heritage resources and heritage conservation approaches.

Eligible Education/Training activities:

- a) **Professional development sessions:** held at conferences for Manitoba Architects Association, Association of Manitoba Municipalities, etc.
- b) **Post-secondary trades training courses:** offered by accredited institutions such as Assiniboine Community College, Red River College, University of Manitoba, Manitoba Institute of Trades and Technology, etc
- c) **Apprenticeship training:** sponsorship of on-site training in traditional heritage masonry, carpentry, metalwork, etc.

- d) **Technical information workshops:** facilitated by Municipal Heritage Advisory Committees or non-profit organizations, open to owners, managers and/or appointed representatives of designated heritage properties.

Ineligible Education/Training activities:

Private lessons: individuals interested in personal career or skills development.

5. Level of Assistance

The level of assistance varies according to grant program category.

A. RESEARCH

Research by an independent professional leading to a municipal inventory or a municipal designation or to re-establish original character features is eligible for grants up to \$5,000.00, on a matching funds basis (e.g. 50% Province: 50% applicant).

B. CONSERVATION PLANNING

Preparation of a comprehensive Conservation Plan or Design documents is eligible for grants up to \$5,000.00, on a matching funds basis (e.g. 50% Province: 50% applicant).

C. CAPITAL PROJECTS

Designated heritage sites are eligible for grants up to \$25,000, on a matching funds basis (e.g. 50% Province: 50% applicant). Typically, maximum grant amounts are approved only for special projects.

Volunteer labour, donated materials and loaned equipment valued at actual costs, may be included as part of the applicant's share. Volunteer labour rates may not exceed the minimum wage levels set by the construction sector.

The applicant's share can include grants from other federal and municipal government sources, or from other private organizations.

The Province's contribution will be limited to amounts which, when combined with other provincial funding sources, do not exceed 50% of the total project costs.

D. ENDOWMENTS / LONG-TERM MAINTENANCE

For every \$2 raised by private/municipal sources, the province will provide \$1, up to a \$25,000 maximum contribution for endowments established after June 11, 2019.

E. EDUCATION / TRAINING

Flexibility on matching ratio. More than 50% provincial funding may be considered on a case-by-case basis.

6. Funding Agreements

1. For approved projects, successful applicants will sign an agreement to comply with Heritage Resources Conservation Grant requirements as outlined in the Guidelines and the Application Form.
2. Any funds awarded pursuant to an application are to be used solely for the purposes specified in the application, unless written permission has been obtained from HRB staff.
3. Any funds not so used will be returned to the HRB within 60 days of the agreed-upon completion date of the project as a debt due and owing to the Manitoba government.
4. All Capital Projects work will comply with heritage conservation best practices (*Standards & Guidelines*), honouring the original intent of the heritage resource, its materials and details.

7. Method of Payment

1. Grant payments are claimed by submitting Financial Activity Reports to the Historic Resources Branch in Winnipeg following completion of the work (or a portion of the work).
2. Approved Research, Conservation Planning or Capital Projects grants may be paid out to project sponsors on a progress payment basis, for the portion of work completed.
3. Payments will be made by reimbursing only approved, paid project cost expenditures (proof of payment required) and the approved value of volunteer labour and donated materials that has been contributed to the project.

Due to budget limitations in a given fiscal year, the reimbursement of requests for progress payments may be delayed until the following fiscal year.

8. General Conditions

1. Manitoba Sport, Culture, Heritage and Tourism (SCHT) reserves the right to inspect your heritage resource before, during and after the work period.
2. SCHT may require reasonable public access to the restored portion of the heritage building or site after project completion.
3. Successful applicants must agree to include a mutually agreeable form of credit for SCHT in publicity and promotional material related to funding or funded activities under this program.
4. The applicant must make a commitment to complete the project by a specific date.
5. No further grant application for any heritage resource will be acceptable until completion of the project.
6. Grants obtained through this program may only be used to finance work described in the application. Grants may not be used to enable the applicant to transfer financial resources to other uses or to generate a financial surplus.
7. The applicant agrees that the SCHT Minister is not liable for any claims, demands, or causes of action that may be made against him or her because of any act, or omission, by the applicant, or the applicant's employees or agents, resulting at or from the heritage resource site.

9. Contacts

Manitoba Sport, Culture, Heritage and Tourism

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