

Are you interested in participating in the BWG Heritage Property Tax Program? Please read about the eligibility criteria and read about how the program works.

Eligibility Criteria

To be eligible for the Heritage Tax Rebate Program the following criteria would need to be satisfied:

1. The subject property must be designated under Part IV of the *Ontario Heritage Act* and/or part of a Heritage Conservation District designated under Part V of the *Ontario Heritage Act*;
 - To gain 'heritage designation' a designation by-law must be passed by Council. For reference, to be designated means the property has formally been recognized by the municipality as culturally important, has heritage value and is worthy of on-going care. Within the by-law heritage attributes and other character defining elements are itemized and described.
 - Within the by-law attributes fall within the categories of design/physical (i.e., architectural elements, aesthetics, visuals, decoration), contextual/natural heritage (i.e., contributing to streetscapes, farms, cemeteries, and historic landscape features like mature trees, hedgerows, barns, etc.) and historical/associative (i.e., important person, event, historic or symbolic value, etc.).
 - These 'specifically' identified attributes are protected from un-sympathetic alteration and demolition. Heritage designation is not intended to prevent the alteration or expansion of a building or site. It simply introduces a mechanism to review the proposed changes beforehand to evaluate if there would be any impacts on the identified heritage attributes to ensure the attributes and the heritage character of the property is preserved in a reasonable and balanced manner.
2. The property owner would be required to enter into Heritage Conservation Agreement with the Town;
 - A Heritage Conservation Agreement is a legal agreement between the Town and property owner to protect and maintain the heritage features of a property, and to encourage good stewardship of the property. By signing the Agreement, the owner of a designated property would agree to maintaining the state of the identified heritage attributes beginning in the first year in which the owner applies for a tax rebate and the obligation to maintain would continue thereafter. This agreement would be binding upon the Owner, its successors in title, heirs and assigns and the provisions there of would run with the land.
 - The agreements may have site specific requirements, however the typical agreement would require the owner to (1) maintain the property in good condition, (2) seek approval for

alterations that may affect its heritage attributes or features, and (3) provisions for the municipality to monitor the condition of the property periodically;

3. Any residential building(s) *must* be habitable and *should* be occupied;
4. The Owner must provide an insurance certificate from an insurance company/agent/broker that states that the Owner has a valid insurance policy which insures the building(s) against normal perils that are coverable by all risk property insurance in an amount equal to the replacement cost of a similar scaled new building(s) with an exterior design complementary to the existing structure(s);
5. The property must not be subject of any Town by-law contraventions, work orders, penalties, fees, and arrears of taxes, fines or other outstanding municipal requirements as of the date of application;
6. Submission of a 'complete application' on annual basis.

Application Process and Program Cycle

Step 1: Passing Designation By-law

The subject property must be individually designated and/or part of a heritage conservation district (if one is established). Existing designated properties already have designation by-laws and meet this criteria. Owners' of properties currently not designated, but would like to become designated should contact staff. With Staff, the owner would investigate if the property is worthy of designation and work with Staff to draft a designation by-law for Council consideration.

Step 2: Entering into a Heritage Conservation Agreement with the Town

The Owner will work with Staff to complete and sign off on a Heritage Conservation Agreement for the subject property.

Step 3: Submit 'Heritage Property Tax Rebate Program: Entrance and Renewal Application' for entrance into the program (Year One)

The owner must submit a completed Heritage Property Tax Rebate Program: Entrance and Renewal Application for initial entrance into the program.

- The deadline for a complete application for a rebate for the current year is December 31st (i.e., to receive a tax rebate for 2020 the applicant must submit a deemed complete application no later than December 31st, 2020);
- The fee for the first year is proposed to be \$250.00.

Once received Staff will review the applications for accuracy and completeness. Applications deemed complete will be processed. Incomplete applications will be returned to the applicant with notes for resubmission.

Step 4. Application Review

Staff will complete internal due diligence to ensure application remains accurate and that no outstanding contraventions (as described above) exist. In year following application submission, once

weather is accommodating, Planning Staff (with supporting Staff as required) will visit the properties for which applications have been submitted and will undertake a general inspection of the physical state of the property to ensure any described works are undertaken appropriately, that the property has been maintained and that the attributes have been maintained to meet a minimum level of care as identified in the Designation By-law and Heritage Conservation Agreement.

Staff anticipate that most reviews could be completed from the sidewalk/public street. However, if that does not suffice, appointments would be arranged with the property owner should Staff need to enter private property to complete their review.

Following site visits Staff will provide a follow up letter that will inform the owner that (1) they passed the inspection, (2) that they passed the inspection but give advice certain attributes appear to be in need of maintenance in the near future, or (3) that they failed the inspection, identify reasons, and that they are not eligible for the rebate.

Step 5. Transfer of Rebate

Following inspection and application approval, Planning Staff will inform the Finance Department of which properties have been approved. When the Finance Department is informed, rebates will be applied to any billed tax amounts currently showing on the property tax account. If a credit shows on the account as result of the rebate, the owner will instead be issued a refund cheque. Concurrently to this process, the Finance Department will send a letter informing the owner that the rebate was either applied to their tax bill or that their tax bills are paid and attached is a credit cheque. This anticipated to occur in April of the year following application submission, but may vary based on inspection timing and weather).

Step 6. Submit 'Heritage Property Tax Rebate Program: Entrance and Renewal Application' for entrance in the program (After Year 1)

In subsequent years after original application approval, owners interested in continuing in the program would be required to submit a Renewal application on a yearly basis. The review and approval process as summarized above would then be re-initiated. The deadline for a complete application would be the same as that for new applications (December 31st of the current year). The fee for renewal application is proposed to be \$50.00.

Still have questions?

If you have questions not answered in the material or would like to participate in the program, please contact:

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