

PART TWO: APPLICANT INFORMATION

1. Name of Property Owner: _____ Phone No.: _____
 Address: _____ Fax No.: _____
 _____ Postal Code: _____
 E-mail: _____

2. Name of Applicant (if not property owner): _____ Phone No.: _____
 Address: _____ Fax No.: _____
 _____ Postal Code: _____
 E-mail: _____

3. Name of Agent: _____ Phone No.: _____
 Address: _____ Fax No.: _____
 _____ Postal Code: _____
 E-mail: _____

PLEASE NOTE:

If the applicant is not the property owner, please ensure that the required authorization is completed and signed by the property owner as provided in Part Eleven of this application form.

4. Please specify to whom all communication be sent:
 Property Owner Applicant Agent

5. If known, provide the names and addresses of any holders of any mortgages, charges or other encumbrances on the subject land:

PART THREE: GENERAL INFORMATION AND APPLICATION INSTRUCTIONS

1. Before completing the Financial Incentive Program application form, the applicant should contact the Economic Development and Tourism division, to conduct a pre-consultation meeting. The proposed project will be discussed in relation to the Downtown Financial Incentive programs. In this meeting we can discuss and confirm application requirements, program eligibility, proposed scope of work, project timing, supporting documentation requirements, etc.

Contact:
Zach Gable, MAES, EcD Research Technician
 Ph: 905-318-5932 ext. 6352
 Fax: 905-772-3542
 Email: zgable@haldimandcounty.on.ca

2. A complete Financial Incentive Program application must be submitted to and approved by the County prior to commencing any community improvement work.

3. A complete Financial Incentive Program Application must be submitted to and approved by the County, through the entering into of the agreement referenced in Item 4 below, prior to commencing any community improvement works.
4. Successful applicants will be required to sign a Financial Incentive Program Acknowledgement and Agreement Form upon approval of an application by County Council. No community improvement works shall commence prior to the entering of this agreement.
5. The County is not responsible for the costs associated with this application, costs related to the anticipation of an incentive program, or any other costs incurred in relation to any of the programs, including pro-forma financial information, a third party financial review (contracted by the County), audits, etc.
6. Please ensure that the application form is complete and that all required signatures are provided.
7. In order for a Financial Incentive Program application to be considered complete by the Downtown Areas Review Panel, the applicant must submit a completed application form, in addition to any supporting documentation, required by the Review Panel (as determined in the pre-application consultation meeting, or through the Review Panel's Preliminary Screening of the application).
8. If there is insufficient space on this form to provide the required information, please provide additional information on a separate page(s) and attach the information to this application form.
9. Please print (black or blue ink) or type the information requested on the application form.
10. Applicants must deliver this application in person to:

Haldimand County
Planning & Economic Development Department
P.O. Box 400, 45 Munsee St. North
Cayuga, ON N0A 1E0

Please contact the appropriate Economic Development and Tourism division staff to arrange a time to meet and submit this application:

Contact:

Zach Gable, MAES, EcD Research Technician

Ph: 905-318-5932 ext. 6352

Fax: 905-772-3542

Email: zgable@haldimandcounty.on.ca

11. All Financial Incentive Program applications will be considered by the CIP Review Panel on a 'first-come-first-served' basis.

12. Successful applicants will be required to sign the appropriate Financial Incentive Program Acknowledgement and Agreement Form at the time that the application is approved by County Council.

PART FOUR: LOCATION/LEGAL DESCRIPTION OF SUBJECT PROPERTY

1. Is the subject property located within one of the Community Improvement Project Areas (CIPA) designated by the Downtown Areas Community Improvement Plan?

Yes___ No: ___ (we can not consider requests outside of the CIP area based on provincial legislative restrictions, so please do not submit an application if you are outside of the area.)

If yes, which CIPA:

Caledonia Cayuga Dunnville Hagersville Jarvis Selkirk

2. Property Address: _____

3. Legal Description of Property: _____

4. Roll #: _____

- 5.. Are there any easements or restrictive covenants affecting the subject property?

Yes___ No___

If yes, describe the easement or covenants and its effect:

PART FIVE: ADDITIONAL PROPERTY INFORMATION

1. Describe the present use(s) of the subject land:

2. Is the subject property designated under Part IV of the Ontario Heritage Act, or listed or otherwise identified by the County's Heritage and Culture Division or Heritage Committee as historically significant?

Yes___ No___ Unknown___

If yes, please provide any available documentation to support the designation, or listing, including Historical photographs and/or drawings.

3. If the subject property is designated under Part IV of the Ontario Heritage Act, or listed or otherwise identified by the County's Heritage and Culture Division or Heritage Committee, please indicate whether or not a consultation meeting with the County's Heritage and Culture Division has been undertaken in order to identify and obtain guidance on community improvement works that will protect, restore, or enhance the heritage features of a property.

Yes____ No____

PART SIX: APPLICATION TYPE

Please indicate the Financial Incentive Program for which you are applying.

Check all that apply.

Tax Increase-based Equivalent Rebate Program (Large Scale Project)

Specify:

- Application for rebate equal to 50% of the County's portion of the property tax increase; or
- Application for rebate equal to or greater than 50%, up to a maximum of 90%, of the County's portion of the property tax increase (value to be negotiated by applicant and Review Panel). If checked, applicants must also adequately demonstrate as an attachment to this application that one or more of the following criteria can be met:
 - Check this box if application is for rebate equal to or greater than 50%, up to a maximum of 90%, of the County's portion of the property tax increase, and the applicant can demonstrate that the incentive is integral to the financial success of the initiative; or
 - Check this box if application is for rebate equal to or greater than 50%, up to a maximum of 90%, of the County's portion of the property tax increase, and the applicant can demonstrate that the development incorporates exemplary design standards and contributes to maintaining the heritage character of the Community Improvement Project Area.

PLEASE NOTE:

An application for the Tax Increase-based Equivalent Rebate will not be considered in combination with an application for any other additional incentive programs offered through the Downtown Areas CIP.

In order to determine the suitability of the Tax Increase-based Equivalent Rebate Program, prior to submitting an application for the program, eligible applicants should attempt to estimate the total potential value of the rebate, based on current assessment values and anticipated investment. Upon completing the approved community improvement works, to the satisfaction of the County, and upon reassessment of the property, should the total value of the rebate be significantly less than the applicant's estimated value, the applicant may then have the opportunity to withdraw application for the Tax Increase-based Equivalent Rebate Program, and submit an application for one or more of the additional incentive programs offered through the Downtown Areas CIP.

Application and Permit Fees Refund Program

Downtown Housing Grant Program

Heritage Improvement Grant Program

PLEASE NOTE:

In order to determine the suitability of the Heritage Improvement Grant Program, prior to submitting an application and approval by the County, applicants will be required to participate in a consultation meeting with the County's Heritage and Culture Division. The purpose of the consultation meeting will be to identify and obtain guidance on community improvement works that will protect, restore, or enhance the heritage features of a property.

An application for an incentive that is offered by the Heritage Improvement Grant Program will not be considered in combination with an application for an incentive that is offered by the Façade Improvement Grant Program.

Façade Improvement Grant Program

PLEASE NOTE:

Prior to approval by the County, applications for the Façade Improvement Grant Program will be subject to review by the County's Heritage and Culture Division. Should the property be listed or otherwise identified by the County's Heritage and Culture Division, or if heritage features are identified by the County's Heritage and Culture Division, the application may be refused and the applicant may alternatively be required to apply for the Heritage Improvement Grant Program.

An application for the same community work that is offered by the Façade Improvement Grant Program will not be considered in combination with an application for an incentive that is offered by the Heritage Improvement Grant Program. For example, for a project to use both the heritage improvement and façade improvement, two different pieces of work would have to be done – the bricks could be resurfaced using an alternative to sandblasting (sandblasting brick projects will not be considered because of their danger to brick structure), and then the property owner could apply to also have the signage changed in front of the building to gain access to both of these options.

Building Renovation, Restoration and Improvement Grant

PLEASE NOTE:

Program eligibility is limited to: the conversion of vacant, residential, or underutilized space to use as: a restaurant, market or Place of Assembly related to arts, culture, and/or recreation

OR

Rehabilitation of existing, or conversion of space for Commercial Roofed Accommodations within the Downtown Areas Community Improvement Project Areas.

PART SEVEN: PROPOSED COMMUNITY IMPROVEMENT

Scale of Community Improvement:

1. Does the proposed community improvement work involve 25% or more of the existing gross floor area?

Yes____ No____

PLEASE NOTE:

Infrastructure work including the improvement or reconstruction of existing on-site public infrastructure (water services, sanitary and storm sewers) will be considered eligible.

2. Applicants may be required to submit the following at the time of the submission of this application. Submission requirements will be confirmed with the applicant by the CIP Review Panel at the time of the pre-submission consultation meeting.
- a) A site plan and/or professional design study/architectural drawings; and/or
 - b) Specification of the proposed works, including a work plan for the improvements and construction drawings.
3. Has an application for planning approval and/or building permit, and any additional required permits, related to the community improvement works, as described above, been submitted to date?
- Yes____ No____
4. Describe the total anticipated costs associated with the proposed community improvement works. **These costs must be supported by at least two cost estimates for eligible work provided by licensed contractors, and attached to this application.**

Community Improvement Item	Cost
Total	

Please note that we require at least two quotes for each community improvement item proposed.

If you are a property owner who is considering improvements and you are contemplating doing non-electrical/mechanical work yourself (i.e. Sanding, painting), costs related to supplies are eligible under the heritage and façade improvement programs.

PART EIGHT: SUPPORTING MATERIAL

In order for an application to be considered complete, the application must be accompanied by all of the supporting material required by the County's Downtown Areas Community Improvement Plan Review Panel, which may include but is not limited to:

- Photographs of the existing building condition;
- Historical photographs and/or drawings;
- A site plan and/or professional design study/architectural drawings;
- Specification of the proposed works, including a work plan for the improvements and construction drawings; and
- Two cost estimates for eligible work provided by licensed contractors or material costs.

Submission requirements will be confirmed with the applicant by the CIP Review Panel at the time of the pre-submission consultation meeting.

If additional supporting material or documentation is required, or becomes necessary during the processing of this application, the applicant will be contacted and informed prior to this application proceeding.

PART NINE: FREEDOM OF INFORMATION

For the purposes of the *Freedom of Information and Protection of Privacy Act*, I authorize and consent to the use by or the disclosure to any person or public body any information that is collected under the authority of the *Planning Act* for the purposes of processing this application.

 Applicant/Owner/Agent Signature

 Date

PART TEN: DECLARATION

I, _____, of _____

solemnly declare that :

All of the above statements and the statements contained in all of the exhibits transmitted herewith are true and I make this solemn declaration conscientiously believing it to be true and knowing that it is of the same force and effect as if made under oath. I have read and understand all of the rules set out in this application form. All of the above statements and statements contained in all of the exhibits transmitted herewith are true.

Declared before me in

In _____
 This _____ day of _____
 _____ A.D., 20

 Applicant/Owner/Agent Signature

 A Commissioner, etc.

PART ELEVEN: AUTHORIZATION OF OWNER

If the applicant is not the owner of the land that is the subject of this application, the authorization set out below must be completed by the owner.

I/we _____ am/are the owner(s) of the land that is the subject of this application for participation within a Financial Incentive Program under the Haldimand County Downtown Areas Community Improvement Plan. I/we authorize _____ make this application on my/our behalf and to provide any of my/our personal information necessary for the processing of this application.

Signature

Date

FOR OFFICE USE ONLY BY THE CIP REVIEW PANEL

PRELIMINARY APPLICATION SCREENING CHECKLIST:

Check all that Apply:

Application is Complete (included completed form and all required supporting materials).

Application is Incomplete.

Specify:

Additional Supporting Materials/Consultation Required.

Specify:

Proposed Community Improvement Work Meets Program Requirements.

Proposed Community Improvement Work Does Not Meet Program Requirements.

Specify:

Application Accepted.

Application Refused.

Initial Site Visit and Inspection of the Building/Property Required.

Reviewed by: _____

Date: _____

FOR OFFICE USE ONLY BY THE CIP REVIEW PANEL

APPLICATION REVIEW & EVALUATION CHECKLIST:

Check all that Apply:

Application Meets All General Eligibility Requirements.

Application Does Not Meet All General Eligibility Requirements.

Specify:

Application Meets All Program Specific Eligibility Requirements.

Application Does Not Meet All Program Specific Eligibility Requirements.

Specify:

Application cannot be approved because there are outstanding property taxes owing or violations under all County/Provincial/Federal legislation or by-laws.

Specify:

Application Recommended for Approval. Financial Incentive Agreement to be Prepared and Sent to Applicant for Signature.

Application Not Recommended for Approval.

Reviewed by: _____

Date: _____

Financial Incentive Agreement Prepared by: _____

Date Financial Incentive Agreement Sent: _____

- Caledonia Cayuga Dunnville Hagersville Jarvis Selkirk
 Tax Relief Permit/Fee Rebate DTN Housing Heritage Imp Façade

GENERAL TERMS & CONDITIONS OF THE FINANCIAL INCENTIVE PROGRAMS

- 1.1 Community improvement works undertaken and completed that are associated with an approved incentive program application must be consistent with the project description contained in the application form and supporting materials, and with the program agreement. Should the undertaken or completed works not be consistent with the original project description, to the satisfaction of the County, the County may delay, reduce, or cancel the approved incentive program benefits, and may require repayment of any of the incentive program benefits, at the discretion of the County.
- 1.2 The County reserves the right to audit the costs associated with any of the works described by the approved CIP application. Audits will be undertaken at the expense of the applicant.
- 1.3 Upon approval and/or completion of community improvement works, the County reserves the right to inspect any properties/buildings that are associated with an incentive program application offered within this CIP.
- 1.4 Should the applicant fall into default of any of the General Eligibility Requirements, or fail to meet the detailed requirements of each of the incentive programs or any other requirements of the County, the County may delay, reduce, or cancel the approved incentive program benefits, and may require repayment of any of the incentive program benefits, at the discretion of the County.
- 1.5 The property owner must not have outstanding tax arrears and must be in good standing with regard to taxation at the time of application and throughout the duration of the incentive benefit period as identified within the Downtown Areas Community Improvement Plan.
- 1.6 The Property owner must be in conformity with all County/Provincial/Federal by-laws and legislation throughout the term of the program.
- 1.7 The County may discontinue any of the CIP incentive programs at any time; however, all applicants with approved incentive program benefits will continue to receive the benefits in accordance with the terms outlined in the CIP, subject to fulfilling any requirements and agreements and subject to available funding as approved by Council.
- 1.8 Any program commitments may be cancelled if work does not commence within six months of Council's approval of an application, or in accordance the anticipated time of commencement indicated within this Agreement.

2.0 SPECIFIC TERMS & CONDITIONS OF THE FINANCIAL INCENTIVE PROGRAMS

2.1 Tax Increase-based Equivalent Rebate Program

- a) When an approved project is complete, a rebate that is equal to part of the County's portion of the increase in taxation will be provided annually for the agreed upon time period following the payment of all property taxes by the owner.

- b) Rebates will not exceed the total cost of approved community improvement works invested by the applicant, or will not be paid to the applicant for a period more than ten years, whichever is the lesser amount.
- c) Annual rebates may be equal to 50% of the County's portion of the property tax increase of the subject property related to the approved downtown financial improvement.
- d) At the County's sole discretion, annual rebates of up to 90% of the County's portion of the property tax increase may be negotiated between the applicant and the County where:
 - a) it is demonstrated that the incentive is integral to the financial success of the initiative, or
 - b) the development incorporates exemplary design standards and contributes to maintaining the heritage character of the Community Improvement Project Area.
- e) Rebate requests for more than 50% shall require a financial pro-forma (at the expense of the applicant), an independent third party financial review (at the expense of the applicant as contracted by the County), and will be consistent with the terms, conditions, performance expectations, and duration of the rebate, as contained within the information provided by the applicant in the approved Financial Incentive Application Form and within this Agreement.
- f) Approval of rebate requests for more than 50% will be at the sole discretion of the County. Rebates will be provided upon successful completion of the approved work, to the satisfaction of the County, and payment of the full reassessed value of the County taxes.
- g) The County, at its sole discretion, will also have the option of providing a one-time lump sum rebate payout in the second year of the program. In this case, in the first year of the program, the eligible applicant may receive a rebate that is equal to part of the County's portion of the increase in taxation. In the second year of the program, the County may provide a final rebate that is equal to the value of all remaining annual rebates. Should the County opt to provide the applicant with the one-time lump sum rebate payout in the second year of the program, it will be indicated within this Agreement.
- h) Tax Increase-based Equivalent Rebates are provided to property owners for up to a maximum of 10 years (but will not exceed the total cost of approved community improvement works invested by the applicant).
- i) Upon completing the approved community improvement works, to the satisfaction of the County, and upon reassessment of the property, should the total value of the rebate be significantly less than the applicant's estimated value, the applicant may then have the opportunity to withdraw application for the Tax Increase-based

Equivalent Rebate Program, and submit an application for one or more of the additional incentive programs offered through the Downtown Areas CIP.

2.2 Application and Permit Fees Refund Program

- a) Where an eligible applicant is undertaking an approved project in accordance with the purpose of the Downtown Areas CIP, the County may provide a refund equivalent to the applicable cost of normal planning application/building permit fees.
- b) Planning application fee refunds may be made available for Minor Variances, and/or Site Plan Applications.
- c) Building permit fee refunds may be made available for Building Permit fees and/or Demolition Permit fees.
- d) Development charge fee refunds may be made available for development charge fees for new residential units, improving buildings, or rehabilitating lands.
- e) Roads Operations Fees refunds may be made available for occupation/excavation permit used for sidewalks occupancy
- f) County Fees refunds for the administration of agreements over Haldimand County property, including the registration costs of encroachment agreements
- g) At the County's sole discretion, refunds will be equal to up to 100% of the application fees paid by the applicant.
- h) Applicants must pay for all application and permit fees prior to undertaking the approved work. A refund for the amount of the application and permit fees will be provided to the applicant once the approved work is complete, to the County's satisfaction.
- i) Refunds will be provided upon successful completion of the approved work, to the satisfaction of the County.
- j) County planning application/building permit/development charge fees will be refunded on a one-time basis.

2.3 Downtown Housing Grant Program

- a) Grants for the rehabilitation of residential space may be available to eligible applicants in order to provide improvements to existing residential units. Grants may be equal to 15% of the construction cost to a maximum of \$15,000 per unit.
- b) Grants for the conversion of non-residential space to residential units and the rehabilitation of residential space to provide additional residential units may be made available to eligible applicants. Grants may be equal to 15% of the construction cost to a maximum of \$15,000 per unit.

- c) Grants will be provided upon successful completion of the approved work, to the satisfaction of the County.
- d) Grants will be provided on a one-time basis to the eligible applicant for an approved project.

2.4 Heritage Improvement Grant Program

- a) Grants for improvements to/restoration of heritage buildings will be provided to eligible applicants for a total of 50% of the construction costs to a maximum of \$10,000.
- b) Where improvements/restoration is being made to historical buildings that have a significant public view and are located adjacent to, or are clearly visible from, the Grand River, the grant amount could increase to \$15,000.
- c) Recipients of the Heritage Improvement Grants agree to protect, restore, or enhance the heritage features of the property.
- d) Grants will be provided upon successful protection, restoration, or enhancement of the heritage features of the property, to the satisfaction of the County.
- e) Grants are provided on a one-time basis to each eligible applicant for each approved project.

2.5 Façade Improvement Grant Program

- a) Grants for front, rear, or sidewall façade improvements will be provided to eligible applicants for a total of 50% of the construction costs to a maximum of \$10,000.
- b) Where improvements are being made to waterfront façades or façades with a significant public view, the grant amount could increase to \$15,000.
- c) Grants for improvements to/restoration of building signage will be provided to eligible applicants for 50% of the construction costs to a maximum of \$5,000.
- d) Where improvements/restoration is also being made to signage on buildings that have a significant public view and are located adjacent to, or are clearly visible from, the Grand River, the grant amount could increase to \$7,500.
- e) When both eligible accessibility improvements are made to an entrance and combined with other façade improvements the grant maximum will increase to \$15,000.
- f) Grants will be provided upon successful completion of the approved work, to the satisfaction of the County.
- g) Grants are provided on a one-time basis to each eligible applicant for each approved project.

2.6 Building Restoration, Renovation and Improvement Grant

a) At the County's sole discretion, a grant may be made available for a maximum of 50% of eligible costs up to a maximum value of \$25,000 per property, whichever is less.

b) Program eligibility is limited to:

The conversion of vacant, residential, or underutilized space to use as: a restaurant, market or Place of Assembly related to arts, culture, and/or recreation

OR rehabilitation of existing, or conversion of space for Commercial Roofed Accommodations within the Downtown Areas CIPA.

c) Applicant will only receive the full value/benefit of grants upon successful completion of the approved work, to the satisfaction of the County.