

HTG-23-59

Heritage Oshawa Budget and Work Plan Submission

Rationale

The 2024 Heritage Oshawa Committee work plan is generally an amendment of the 2023 work plan with a few additions and some respect to the upcoming Oshawa 2024 Centennial Anniversary. The additions focus on the Committee assisting staff and Council with the planning and implementation of policy pursuant to the Ontario Heritage Act.

In review of the Committee's 2023 targets and spending, then rationalized against our 2024 anticipated goals and needs, the total budget ask is for **\$70,200**. The Committee reviewed the last few years of spending to try and reconcile the ask. With the upcoming Oshawa 2024 Centennial, the Committee does not see the increase as ambitious but as reasonable for the goals we have set.

Listed below is a breakdown of the proposed spend, by account within the Committee's budget.

11653 – Civic Awards and Mementos - **\$3,900**

- The Committee anticipates the need for tokens of good-will promoting Oshawa's heritage as part of the 2024 anniversary celebrations, these may include buttons/pins, pens, coasters, hand flags, etc. as the current stock is close to being satiated or non-existent. The language and design to be complete with the assistance of corporate services. **The ask is for \$2,500.**
 - 2024 100year Heritage Pens
 - 2024 100year Heritage Pins/Buttons
 - 2024 100year Heritage Hand Flags
 - Heritage Oshawa Pens
 - Heritage Oshawa Buttons
 - Heritage Oshawa Coasters
- Designation Plaques to maintain working stock of 10 – 7x \$200 - \$1,400,
- **The ask is for \$1,400.**

20000 – Office Materials - **\$1,000**

- A number of committee members have voiced concern in volunteering their personal office stock, paper, printer ink, etc.
- **The ask is for \$1,000**

21000 – Printing and Reproduction - **\$4,500**

- In anticipation of the 2024 Centennial Anniversary the Committee is looking to have the work (brochures and/or centennial documents) by the 2023 Centennial Working Group and as designed in 2023 printed early in the year and readily available through 2024
- **The ask is for \$4,500**

24000 – Food - **\$200**

- For reimbursement for food purchased and consumed during official events

40000 – Advertising - **\$2,000**

- For outreach and community programs

43000 – Professional and Technical - \$42,500

- The committee intends on requesting staff to procure 5 heritage research reports in 2024
 - It is understood that research reports in 2023 typically costs around \$7,500.
 - Property owners to be consulted prior to the procurement of research reports in accordance with Council direction.
 - Research reports, procured by the City, will only be ordered when the property owner has provided consent to the city to the research being done (or if the property is City-owned).
 - **The ask is for 5 x \$7,500 - \$37,500**
- The committee is looking to retain a professional firm to assemble and format any missing and/or required information from the Heritage Oshawa Inventory (AB list) in addition to the Register of Properties. Both documents are incomplete and the committee does not have the membership depth or time to assemble a WG to supplement the need in having sufficient information per property to either support a research report argument and or have uniform formats and information in the register. This is anticipated to be a multiyear expenditure.
 - As a pilot this work to include a WG started in January to provide a scope of service by May
 - Staff to solicit the services through the Summer
 - Engage the services in the fall for either an end of year provision, or to organize for known cost to be included in the following year budget for the work and a recurring program
 - **The ask is \$5,000** for the 1st year

46000 – Gas Mileage - \$300

- The Committee has reviewed the need for mileage and has also discussed the process in which this is recovered as an expense. It has become apparent that the policy is unclear to the Committee and thereof the members have refrained or internalized the cost out of ignorance of the process when reimbursement could have been recovered. The Committee will be actively utilizing the cities expense policy and forms to track and recover said costs when on Heritage Oshawa's business moving forward.
- There are 9 members in the Committee, a tank of gas in a typical car is \$100, with travel around the city and potential excursions to other districts. **The ask is for \$300.**

47000 – Seminars and Training - \$15,200

- The committee sent two delegates to the Ontario Heritage Conference in London this year and it became very apparent that these conferences are a wealth of information and a place where new policies, procedures and best practices can be explored and then leveraged to make Heritage Oshawa a better, more effective tool for our city.
- The Committee is looking to send at least two members to at least two events in 2024, particularly given that it is common for these conferences to include multiple sessions running concurrently. Multiple attendees would result in additional information being brought back to the Committee.
- **The ask is for \$8,200** broken down as such;
 - 3 days 3 nights stay at a reasonable hotel - 3 x \$350 (conference hotels) - \$1050
 - x 2 members x 2 events \$4200
 - 3 days of quality meals at \$200 per day – 3 x \$200 - \$600

- x 2 members x 2 events \$1,200
- Travel to and from (train/car/bus/tolls) at \$200 each way - \$400
 - x 2 members x 2 events \$800
- Conference and seminar fees - \$500
 - x 2 members x 2 events \$2000
- The Committee is looking to be trained on the Bill 23/Amended Heritage Act. In 2023 we were looking for staff to provide some guidance but timing and budgets did not reconcile with the need. We are looking to have staff retain an expert facility to attend a special scheduled committee meeting to review the act and how it applies and impacts the committee's work. **The ask is \$3,500**
- The Committee is looking to be trained to undertake and complete title searches through "Onlands" and Ontario Land Registry, this training is to be provide by Staff or an expert facility in exchange for consideration. **The ask is \$3,500**

48000 – Memberships and dues - \$600

- Membership and dues- **\$200**
- Subscriptions and upgrades for online and cloud tools required to facilitate committee work - \$400

Heritage Oshawa 2024 Work Plan

Mandate: to advise and assist Council on all matters relating to the preservation and promotion of cultural heritage resources within the City of Oshawa.

	<p style="text-align: center;">Designation and Preservation By-law 54-2023 and Heritage Oshawa Advisory Committee Terms Of Reference 2.0 Goals and Objectives</p>	<p style="text-align: center;">Actions to be Taken</p>	<p style="text-align: center;">Timing and Status</p>
	A	B	C
1	<p>2.0 Goals and Objectives (By-law 54-2023) 5-B, 5-G</p> <p>5-B) Advise Council on means of conserving heritage properties, landscapes and districts;</p> <p>5-G) Provide recommendations to Council on properties, landscapes and districts considered by Heritage Oshawa to be worthy of heritage designation.</p> <p>Terms of Reference</p> <p>2.3) Advise Council on means of conserving heritage properties and districts</p> <p>2.6) Provide recommendations to Council on properties worthy of heritage designation</p>	<p>(a) Select new properties for research reports</p> <p>(b) On a regular basis, review previously prepared research reports and recommend for consideration for designation, in consultation with staff.</p> <p>(c) Make recommendations for designation to council based on the research report outcome and input from the property owner (where the property is privately owned).</p>	Ongoing
2	<p>2.0 Goals and Objectives (By-law 54-2023) 5-E</p> <p>5-E) Prepare and maintain an inventory of heritage resources including buildings, structures, and other elements which are considered by Heritage Oshawa</p>	<p>Provide to Staff and Council, Heritage Oshawa updated information from the Heritage Oshawa Inventory Data Base as it pertains to the City's online and print versions of the City of Oshawa Register of Properties of Cultural</p>	Ongoing

	<p>to be of cultural heritage value or interest;</p> <p>Terms of Reference</p> <p>2.2) Prepare and maintain a list of heritage resources including buildings, structures, and other elements which are considered to be of cultural heritage value or interest including heritage conservation districts</p>	<p>Heritage Value or Interest and in coordination with staff.</p> <p>Use all tools, means and methods available to bolster and support the information in Heritage Oshawa Data Base and the Heritage Oshawa Inventory</p>	
3	<p>2.0 Goals and Objectives (By-law 54-2023) 5-D</p> <p>5-D) Establish criteria to evaluate properties of cultural heritage value or interest.</p> <p>Terms of Reference</p> <p>2.1) Establish criterion to evaluate properties of cultural heritage value or interest</p>	<p>Evaluate properties and Heritage Conservation Districts, to be included in the Inventory using the new Property Evaluation System version April 2022.</p>	Ongoing
4	<p>2.0 Goals and Objectives (By-law 54-2023) 5-C</p> <p>5-C) Advise and assist Council on current heritage conservation programs, regulations and legislation;</p> <p>5-F) Review development applications associated with cultural heritage resources and provide recommendations to staff and/or Council, as appropriate.</p> <p>Terms of Reference</p> <p>2.4) Review development applications associated with cultural heritage resources and provide recommendations to Council</p> <p>2.5) Advise and assist Council on current heritage conservation</p>	<p>When requested by Staff and/or Council by:</p> <p>(a) Review development applications involving matters of heritage preservation and provide recommendations to staff and/or Council.</p> <p>(b) Review development applications, City Committee applications, demolition permit applications, and applications for alterations to properties on the Register and within the Inventory and document demolitions or alterations.</p> <p>(c) Support staff and Council in the implementation of policy and procedures of the Ontario Heritage Act.</p> <p>(d) Implement Committee's responsibilities pursuant to the Ontario Heritage Act.</p>	Ongoing

	programs, regulations and legislations		
5	<p>2.0 Goals and Objectives (By-law 54-2023) 5-A</p> <p>5-A) Advise and assist Council on all matters relating to cultural heritage including, but not limited to, buildings and structures, cultural heritage landscapes and archaeological sites;</p> <p>Terms of Reference</p> <p>2.8) Advise and assist Council on all matters related to cultural heritage including but not limited to, buildings and structures, cultural heritage landscapes and archaeological site</p>	Monitor cultural heritage issues by creating action plans to address the same as required.	Ongoing
	Education and promotion	Actions to be taken	Timing and Status
6	<p>2.0 Goals and Objectives (By-law 54-2023) 5-H</p> <p>5-H) Promote public awareness, stewardship in heritage conservation and knowledge of cultural heritage resources within the City and heritage conservation issues through programs and activities.</p> <p>Terms of Reference</p> <p>2.7) Increase public awareness and knowledge of cultural heritage resources with in the city and heritage conservation issues through programs and activities</p>	<p>Serve as a resource for residents, community groups and Council by,</p> <p>(a) Work with Staff to develop a Heritage Oshawa outreach program to notify property owners of the interest in the potential designation of their property, the benefits of the designation and obtain formal permission to do further research including searches and reports</p> <p>(b) Developing outreach programs which include methodology for promotion and communication.</p> <p>(c) Continue to contribute to media releases commemorating and celebrating designated properties, including a description of properties and the heritage features. Special events attended by Heritage Oshawa</p>	Ongoing

		<p>and elected officials where appropriate.</p> <ul style="list-style-type: none">(d) Reach out to the local post-secondary institutions (University/Colleges) to understand if there is interest in partnering and aligning some of Heritage Oshawa goals with course curriculum.(e) Continue to increase public awareness and knowledge of cultural heritage resources within the city and heritage conservation issues through programs and activities.(f) Continue to provide information and promotion of heritage issues such as the Heritage Property Tax Reduction Program, designation, etc.(g) Continue to assist in authoring of language for heritage plaques.(h) Continue to participate in plaque presentations involving elected officials for designated properties and celebrate designations and historical matters(i) Continue in the participation of events such as Heritage Week (Feb.), Swing into Summer, Peony Festival (June), Canada Day (July), Doors Open (May.), Heritage Showcase (Nov.), the presentation of heritage-related talks or workshops, and others as appropriate. Commemoration of City anniversaries, promotion of Committee events.(j) Continue to perform Community Outreach by participating in community and local events.(k) Continue to engage various community groups, develop relationships and search for collaborations between stakeholders	
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	Administrative items	Actions to be taken	Timing and Status
7	Advisory Committee Policy and Procedure (Item 12.3 and 14.1)	<p>Strike working groups, engage professionals and materials through the city and as required to support the ongoing efforts of Heritage Oshawa by:</p> <ul style="list-style-type: none"> (a) Develop a Heritage Oshawa expense report that can be utilized and or affixed to the current city procedure for reimbursement of personal expenses of official and approved Heritage Oshawa expenditures (b) Support staff in the development of scopes and requirements to be used in the solicitations of 3rd party and professional firms as they pertain to Heritage Oshawa (c) Request Council to review the membership of Heritage Oshawa to understand that the committee would appreciate additional members (professional) and 2 post secondary students (d) Continue to undertake training as requested by Heritage Oshawa Committee that promotes understanding and the work of the Heritage Committee (Onlands, Bill 23/Heritage Act, etc.) (e) Continue to learn, understand and describe the various incentives and grants available through all levels of government and become a resource (Item 6) to the community at large to describe, assist and direct to those avenues available to advantage the same and as it pertains to heritage buildings, revitalizations and historic neighborhoods. 	2024

8	Advisory Committee Policy and Procedure (Item 12.3 and 14.1)	Prepare budget submission and work plan for 2025 and prepare 2023 annual report with assistance from staff.	Fall 2024
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2024 Heritage Oshawa Budget

Program: 120 - ADVISORY COMMITTEES OF COUNCIL				
Location: 403 - Heritage Oshawa Advisory				
Committee Account	Description	2023 Approved	2024 Requested	Comments on the Projected
11653	Civic Awards and Mementos	\$1,000.00	\$3,900.00	•pins, pens, small Heritage Oshawa swag - \$2,500 •Heritage Plaques 7 x \$200 - \$1,400
20000	Office Materials & Supplies	\$2,500.00	\$1,000.00	personal office stock, paper, printer ink, etc. The ask is \$1,000 to expense claim against
21000	Printing and Reproduction	\$1,500.00	\$4,500.00	In anticipation of the 2024 Anniversary Heritage Oshawa the committee is looking to have the work (brochures and or centennial documents) by the 2023 centennial working group and as designed in 2023 printed early in the year and readily available through 2024. The ask is for \$4,500
24000	Food	\$0.00	\$200.00	•For reimbursement for food purchased and consumed during official events
40000	Advertising	\$0.00	\$2,000.00	•For outreach and community programs
43000	Professional and Technical	\$25,000.00	\$42,500.00	•The ask is for 5 reports x \$7,500 - \$37,500 •The ask is for \$5,000 budget for 3rd party support for inventory continuity
46000	Gas Mileage	\$600.00	\$300.00	
47000	Seminars and Training	\$3,000.00	\$15,200.00	•The ask is for \$8,200 broken down as such; 3 days 3 nights stay at a reasonable hotel - 3x\$350 (conference hotels) - \$1050 x 2 members x 2 events \$4200 3 days of quality meals at \$200 per day – 3x\$200 - \$600 x 2 members x 2 events \$1,200 Travel to and from (train/car/bus/tolls) at \$200 each way - \$400 x 2 members x 2 events \$800 Conference and seminar fees - \$500 x 2 members x 2 events \$2000 •Bill 23/Amended Heritage Act. training. The ask is \$3,500 •“Onlands” and Ontario Land Registry training. The ask is \$3,500
48000	Membership and Dues	\$200.00	\$600.00	•Membership and dues •Subscriptions and upgrades for online and cloud tools required to facilitate committee work
Total Expenses		\$33,800.00	\$70,200.00	
Total Revenues		\$0.00	\$0.00	
Total Budget		\$33,800.00	\$70,200.00	