

PRE-APPLICATION WORKSHEET

**HLF Heritage Conservation Application**

Please contact the Program Manager before beginning the application process to confirm if your organization and project are eligible for funding, and to get a Project Number/Password.

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**Log In**

PASSWORD \_\_\_\_\_

**1. Heritage Conservation Project Summary**

PROJECT TITLE \_\_\_\_\_

AMOUNT REQUESTED FROM HERITAGE LEGACY FUND \_\_\_\_\_

PROJECT SUMMARY AND SCOPE OF WORK (150 words) \_\_\_\_\_

DATES (START – COMPLETION) \_\_\_\_\_

**APPLICANT CONTACT INFORMATION**

CONTACT NAME \_\_\_\_\_

TITLE \_\_\_\_\_

ORGANIZATION \_\_\_\_\_

MAILING ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_

PROVINCE \_\_\_\_\_

POSTAL CODE \_\_\_\_\_

WEBSITE \_\_\_\_\_

EMAIL \_\_\_\_\_

ARE YOU A HERITAGE BC MEMBER? Check one

- Individual
- Student
- Corporate
- Government (including Educational Institutions)
- Group (Non Profits and Charities)

## ORGANIZATION INFORMATION

ORGANIZATION (Legal Name) \_\_\_\_\_

TYPE OF INCORPORATION

- Registered Not-for-Profit (BC Society Act)
- Federally Registered Charity
- Local Government (Community Charter)
- First Nation
- School Board

## FOR NOT-FOR-PROFITS AND REGISTERED CHARITIES

REGISTRATION NUMBER \_\_\_\_\_

DATE OF REGISTRATION \_\_\_\_\_

## SUPPORTING DOCUMENTATION\*

- Board of Directors List
- Recent Financial Statement

\*Refer to the [Heritage Legacy Fund Program Guidelines and Policies 2017](#) for information about file formats and sizes for uploading documents to the application.

## 2. The Heritage Resource

NAME OF HERITAGE RESOURCE \_\_\_\_\_

ADDRESS OF HERITAGE RESOURCE \_\_\_\_\_

OWNER OF HERITAGE RESOURCE \_\_\_\_\_

MANAGER OF HERITAGE RESOURCE \_\_\_\_\_

**OVERVIEW** A brief physical description of the Heritage Resource and its location (150 words)

**BRIEF HISTORICAL BACKGROUND** When was it designed and built, and by whom? What is the period, descriptive characteristics, theme? What were its historic uses or functions? Has it been conserved? Is the Heritage Resource listed on a Heritage Register (local government, BC Register of Historic Places, Canadian Register of Historic Places); if so, where and when? If the Built Heritage Resource is not currently listed, please describe why not and if you intend to have it registered (400 words)

**LEGAL PROTECTION** Is the Heritage Resource legally protect, when and by what means (Heritage Designation, Conservation Covenant, Heritage Revitalization Agreement, Scheduled Property within a Heritage Conservation Area)? If the Heritage Resource is not currently legally protected, indicate why not and if you intend to seek formal designation and protection (150 words)

**STATEMENT OF SIGNIFICANCE** A properly written Statement of Significance which provides a description of the Heritage Resource, the heritage values of the Heritage Resource, and the character-defining elements of the Heritage Resource, is a requirement for the Heritage Conservation application. When and by whom was the Statement of Significance prepared? (50 words)

Attach the Statement of Significance in the supporting documentation area below.

**COMMUNITY CONTEXT** What is the significance of the Heritage Resource in your community? How does the proposed project fit with any plans local government may have for heritage conservation? (300 words)

**CURRENT CONDITION** What is the current condition of the Heritage Resource? What are its current uses (300 words)

### SUPPORTING DOCUMENTATION

- Heritage Resource Owner Authorization (required if applicant is not owner of the Heritage Resource)
- Statement of Significance (required)
- Location Map
- Site Plan
- Historic Photographs
- Current Photographs
- Other

### 3. Heritage Conservation Project

**CONSERVATION PLANNING** Is there a conservation plan, conservation statement or conservation survey prepared for the Heritage Resource? When was it prepared and by who? If these documents are not prepared, why not? (300 words)

**CONSERVATION PRIORITIES** What conservation work is needed? Please list in order of priority (300 words)

#### FORM OF CONSERVATION

- Preservation – protecting, maintaining, stabilizing the existing form, material and integrity
- Rehabilitation – for the sensitive adaptation of a heritage resource for continuing use or for a compatible new use
- Restoration – returning a part or all of a heritage resource to its condition or appearance at an earlier period

**PHASING** Is the proposed work part of a larger or phased project? If so, describe how the proposal fits within the scope of the larger project (300 words)

**CONSERVATION STANDARDS** The [\*Standards and Guidelines for the Conservation of Historic Places in Canada\*](#) is the benchmark for heritage conservation. How is this project consistent with these guidelines? List the applicable sections of the guidelines and how the conservation work for this project fits into these guidelines (300 words)

## 4. Scope: Eligible Work & Quotes

**SCOPE OF ELIGIBLE WORK** Describe the eligible work you are requesting funding for. See the *Program Guidelines & Policies* for definition and examples of eligible work (300 words)

**SPECIFY ELIGIBLE COSTS & QUOTES** Provide an itemized list of the eligible work; a description of tasks, products and/or quantities; who will be responsible for managing the work; and a minimum of two quotes (excluding GST) with copies provided on supplier letterhead. Upload any drawing, specifications, or additional documents used in the tendering process and selection of quotes for the work

**EXAMPLE 1: ELIGIBLE WORK**

DESCRIPTION/TASK	Masonry Repointing	
RESPONSIBILITY	Brick exterior approx. 2000 sq ft	
QUOTE 1	Our Heritage Society	
QUOTE 2	S&S Brickwork	\$5000.00
	ABC Masonry	\$4700.00

**EXAMPLE 2: ELIGIBLE WORK**

DESCRIPTION/TASK	Delivery	
RESPONSIBILITY	Donated Labour: Supply delivery 12 hrs@\$30/hr	
QUOTE 1	Our Heritage Society	
QUOTE 2	Bob Jones	\$360.00
	William Smith	\$360.00

## 5. Project Budget

Complete the project budget indicating project expenditures and revenue. Project costs may include both hard costs (construction, materials, labour, equipment), as well as soft costs, including administration, management, and permits. Remember that the applicant is responsible for 50% of the project costs through applicant contributions and other sources of revenue. The requested amount from the Heritage Legacy Fund cannot exceed 50% of the total project costs and can only be used for eligible heritage conservation costs. Total project revenue must equal total project costs.

### EXPENDITURES

**ELIGIBLE COSTS** List each eligible work item/category and use ONE of the quotes (the preferred quote), submitted previously in Section 4. If you are not using the lowest quote, specify the reasons for selecting the preferred bidder quote. See the *Program Guidelines & Policies* for definitions and examples of eligible costs. GST is not an eligible cost.

**OTHER PROJECT COSTS** If the proposed work is part of a larger project, this may include additional ineligible costs or costs not considered Heritage work. However the budget for this specific project must be clearly indicated. Specify any in-kind costs and refer to the *Program*

*Guidelines & Policies* for rates for in-kind labour. In-kind costs must be matched by equal in-kind revenues.

## REVENUE

**APPLICANT CONTRIBUTIONS** The applicant must contribute at least half (50%) of the costs. Contributions may be cash, loans, or in-kind (at the approved rates specified in the *Program Guidelines & Policies*). Specify any in-kind revenue.

**OTHER SOURCES OF REVENUE** Show other sources of revenue being used to match eligible costs, such as other grants. Indicate which are secured and which are requested. Also indicate here the amount requested from the Heritage Legacy Fund as a requested source of revenue.

## EXPENDITUES

ELIGIBLE COSTS	ITEM	AMOUNT	
	_____	_____	
	_____	_____	
			SUBTOTAL _____
OTHER PROJECT COSTS			
	_____	_____	
	_____	_____	
			SUBTOTAL _____
			TOTAL PROJECT COSTS _____

## REVENUE

APPLICANT CONTRIBUTIONS			
	_____	_____	
	_____	_____	
			SUBTOTAL _____
OTHER SOURCES OF REVENUE			
	_____	_____	
	_____	_____	
			SUBTOTAL _____
			TOTAL PROJECT REVENUE _____

## 6. Project Management

**EXPERTISE** Explain how your organization has the necessary ingredients to successfully complete the project, which may include organization skills, track record, experience, matching funds and resources, other partners, and/or local government support. List all project volunteer and professional consultants and their disciplines. (300 words)

**OWNERSHIP** Who will own, use and be responsible for the management and maintenance of the completed project and Heritage Resource? Is there a Heritage Management Plan? (150 words)

**PERMITS** Provide details about any building and/or work permits required, and identify which are confirmed and which are still pending (150 words)

**ONGOING COSTS** Will there be any ongoing operating and maintenance costs for the completed project? If yes, explain what are the costs and who will pay for them. (150 words)

**LONG TERM VIABILITY** What is your realistic plan for continued use and viability of the Heritage Resource? (300 words)

## 7. Project Merit

Your application will be evaluated in part on its merit compared to other projects, as well as its strategic benefit to raise awareness in your community and in British Columbia. Explain how your application meets the goals of the Heritage Legacy Fund described in the *Program Guidelines & Policies*.

**PUBLIC AWARENESS** What are your plans to promote awareness of the project, its benefits and outcomes? If approved, what can your organization do through this project to promote the project outcomes and the Heritage Legacy Fund? (300 words)

**COMMUNITY SUPPORT** Explain briefly how the community supports and endorses the project and your organization. Attach any letter(s) of support in the Supporting Documentation area below. (150 words)

**STRATEGIC BENEFIT** Is the proposed project particularly innovative or does it address an important issues that may have wider application or consequences for heritage conservation in your community and BC? (150 words)

## 8. Certification

I/We Certify That:

- To the best of my/our knowledge all the information contained in this application is true and complete.
- When the project is complete, I/we will send a report outlining the results of the project to the Heritage Legacy Fund office.
- The financial records for this project will be available for audit.
- Permission is given for on site inspection by any person whom the Heritage Legacy Fund authorizes.
- All funding by the Heritage Legacy Fund will be properly acknowledged in print materials and other media, publicity related to the project, and at the project site by prominently displayed signage or other promotional materials supplied by the Heritage Legacy Fund.

This application and supporting materials are public documents, and may be made available to members of the public under the disclosure rules of the Freedom of Information and Protection of Privacy Act.

TWO AUTHORIZED MEMBERS OF THE ORGANIZATION MUST CERTIFY THE APPLICATION. If the Heritage Resource is leased, one authorization must be the Owner's. Completing the fields below constitutes certification.

NAME

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TITLE

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ORGANIZATION

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NAME

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TITLE

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ORGANIZATION

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