Heritage Legacy Fund Program
Guidelines & Policies
2018

HeritageBC

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CONTENTS

Introduction
The Heritage Legacy Fund of British Columbia Society
Contact Information

Part 1: General Guidelines
Eligible Applicants
Funding Programs
Application Process
Contribution Agreement
Funding Acknowledgment

Part 2: Heritage Conservation Program
What Work is Eligible?
What Work is Not Eligible?

Part 3: Heritage Awareness Program
What Work is Eligible?
What Work is Not Eligible?

Part 4: Heritage Planning Program
What Work is Eligible?
What Work is Not Eligible?

Part 5: Indigenous Partnership Program
What Work is Eligible?
What Work is Not Eligible?

Part 6: Application Procedures
Before You Start…
How to Submit an Application
Submission Requirements
Project Costing
Eligible Heritage Costs
Minimum of Two Contractor Quotes
Project Financial Budget
Heritage Terms and Definitions

INTRODUCTION

Heritage BC is a charitable non-profit organization and is independent of government. Heritage BC administers and manages the Heritage Legacy Fund (HLF).

The Heritage Legacy Fund was established as an endowment from the Province of British Columbia in 2003 and is held by the Vancouver Foundation. It is a self-sustaining private endowment fund that relies on the donations and bequests of donors. The goals of the Foundation are to:

- Support the conservation of heritage resources in British Columbia
- Promote and increase public awareness, understanding, and appreciation of British Columbia's heritage resources
- Encourage high standards of heritage conservation and the continuing maintenance and protection of heritage resources
- Support community-based heritage projects
- Increase the Heritage Legacy Fund

The Heritage Legacy Fund supports a financial assistance program for Heritage Awareness and Heritage Conservation. Program funds are used for community initiatives that conserve and increase the understanding and appreciation of heritage resources. Heritage resources may include existing heritage buildings, structures, sites, cemeteries, districts, (built) cultural landscapes or large artifacts.

When funds are available, the Heritage Legacy Fund supports a financial assistance program for Heritage Planning. This program supports organisations and communities in planning for heritage conservation and awareness.

Starting in 2018, the Heritage Legacy Fund will also support Indigenous Partnership. Program funds will be used to support communities and heritage organisations in working towards reconciliation with Indigenous peoples through collaboration.

Program staff at Heritage BC are available to answer inquiries and to administer applications:

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Part 1: General Program Guidelines

Eligible Applicants

Registered non-profit societies, registered federal charities, local governments, self-governing First Nations, and School Boards may apply for funding. Financial contributions are not made to individuals, unregistered organizations, private businesses or BC Government Agencies. Applicants must be an up to date paid member (corporate, government, group, student or individual) of Heritage BC to submit an application.

Funding Programs

- **Heritage Conservation Program** for the preservation, rehabilitation, and restoration of heritage resources
- **Heritage Awareness Program** for the research, documentation, presentation, and publication of information about specific community heritage resources
- **Heritage Planning Program** for the creation of planning documents to assist with heritage conservation and awareness
- **Indigenous Partnership Program** for initiatives to further reconciliation with Indigenous peoples through collaboration.

Projects that meet program criteria may qualify for up to half the project cost (excluding GST) on a cost-sharing basis. Project costs must be based on a minimum of two quotes, when applicable. Project costs incurred prior to notification of funding are not eligible.
Projects must be completed within one year of the date of the award.

All funds provided by the Heritage Legacy Fund must be used for the purposes identified in the approved application.

In no case will a project receive funding in excess of half of eligible project expenses, regardless of the original approved funding commitment.

Funding is limited. Some eligible projects may not be supported. The Society reserves the right not to fund any application.

Application Process

All applications for 2017 are due on Friday, May 18th, 2018 by 5:00 pm PST.

Potential applicants **MUST** contact the program staff at Heritage BC to verify the eligibility of the applicant and the proposed project at least one week before the application deadline, by Friday, May 11th, 2018 at 5:00 pm, PST.

If you have a question regarding the eligibility of any work, please consult the program staff BEFORE submitting the application.

Contribution Agreement

Successful applicants are required to sign a contribution agreement outlining the respective responsibilities of the Heritage Legacy Fund and the recipient. It also required that successful applicants have sufficient insurance coverage and provide a certificate of insurance naming the Dogwood Heritage Society of BC as additional insured. In some instances, certificates of insurance naming the Dogwood Heritage Society of BC as additional insured will also be required from the contractors working on the project.

Upon signing the contribution agreement and providing a certificate of insurance, the recipient will be eligible to receive half of the amount of the award at the start of the project.

The balance of funding will be disbursed on completion of the project upon submission of the required documentation, including a letter certifying completion, final report with full statement of project expenses, photographs, etc.

Funding Acknowledgement

Financial support from the Heritage Legacy Fund must be acknowledged, typically by:

- Displaying a supplied banner or sign
- Recognizing Heritage BC and the Heritage Legacy Fund in project signage, media releases, promotional materials, public events, and publicity
- Using the Heritage BC logo where possible or appropriate in signs, visual materials, and publications. Successful applicants will be provided logos and a media release template for promoting their project.

Part 2: Heritage Conservation Program

The HLF Heritage Conservation Program provides financial contributions of no more than 50% of project costs, up to $25,000, for projects involving the preservation, rehabilitation, and/or restoration of a built community heritage resource, as defined by the Standards and Guidelines for the Conservation of Historic Places in Canada.

Preservation – protecting, maintaining, and stabilizing the existing form, material, and integrity of a heritage resource

Rehabilitation – the sensitive adaptation of a heritage resource for continuing use, or a compatible new use

Restoration – returning a part or all of a heritage resource to its condition or appearance at an earlier period

Work must directly relate to the conservation of the physical fabric of the built heritage resource, which tangibly represents its heritage values.

Preference may be given to projects that are formally recognized or legally protected community heritage resources.

Applications must clearly establish the heritage values of the built resource for the community, preferably related to the character defining elements of the resource, and demonstrate how the proposal will make a significant contribution toward the conservation of those values.

Applications should also outline a plan for continuing maintenance and conservation.

Applications must include an acceptable Statement of Significance for the heritage resource.

Conservation work on heritage resources should meet acceptable conservation standards, as identified in the *Standards and Guidelines*. Applications must demonstrate an understanding of the *Standards and Guidelines* and how the heritage conservation work conforms to these standards.

Applications must include photographs that clearly show the current state of the heritage resource.

What Work is Eligible?

The Heritage Conservation Program may provide financial contributions to a broad range of heritage conservation work:

- Exterior building conservation work, such as repair of foundations, roofs, parapets, cornices, masonry, original wall claddings, windows, doors, columns, towers, porches, architectural features, etc.
- Conservation of historic structures may be considered, such as outbuildings, garages, sheds, barns, bridges, trestles, railway turntables and platforms, etc.

- Building Code upgrading and fire safety improvements that make a heritage structure safer or more usable, or increase its lifespan, including structural, mechanical, electrical, fire exiting, emergency lighting, sprinklers, accessibility for persons with disabilities, etc., IF directly related to the conservation of the resource
- Seismic upgrading to strengthen a heritage structure, to improve life safety and to help ensure its preservation in a seismic event, IF directly related to the conservation of the resource
- Conservation of some original interior features or materials of a heritage building may be eligible only if they are legally protected or are formally recognized as special or essential character defining features, such as staircases, stained glass, fixed furnishings, historic finishes, special floor designs, etc.
- Conservation work for historic sites, cemeteries, or cultural landscapes is limited to the direct conservation of the existing built historic resource, such as original memorials, grave markers or tombstones, fences, gates, trellises, rock walls, railings, decorative paving, light standards, and large artifacts (e.g. vehicles, boats, locomotives and rolling stock, aircraft, industrial, agricultural and other large machinery) with a clear connection to British Columbia history, etc.

What Work is Not Eligible?

The Heritage Conservation Program does not financially support:

- Renovations, additions, or new construction
- Inappropriate conservation, repair, replacement, or maintenance of original historic materials or features with new materials or construction, such as replacing original wood windows with metal or vinyl windows
- General interior work or construction, drywall, interior finishing, kitchen and bathroom cabinets, fixtures or equipment, unless proven to be directly related to building code upgrading for conservation purposes
- New construction of decks, patios, site infrastructure, or site improvements such as sidewalks, parking lots, driveways, roads, lighting, fences, gates, trellises, etc.
- Statues
- New monuments, memorials, grave markers, sculptures, public art, murals, etc.
- Public amenities such as benches, picnic tables, bicycle racks, garbage cans, etc.
- Garden beds, plants, trees, seeds, or living organisms
- The management, care, or conservation of museum collections, such as research, archiving, storage, climate control, or adapting buildings for the care of collections
- Project planning activities such as condition assessments, emergency stabilization, feasibility studies, and cost estimates
- Other work deemed to be inappropriate at the discretion of program staff and Board

Part 3: Heritage Awareness Program

The HLF Heritage Awareness Program provides financial contributions of no more than 50% of project costs, up to $10,000, for projects involving the research, documentation, presentation, interpretation, and publication of information that will increase public understanding, appreciation, and education of specific existing built community heritage resources, such as a heritage building, structure, site or grouping of sites, route, conservation area or district. Applications will be evaluated on how they demonstrate innovation, sustainability, creativity, and ability to reach a wide audience.

What Work is Eligible?

Eligible projects must have a tangible product or outcome, with a clear purpose and plan to raise public awareness of the specific built heritage resources. For Indigenous applicants, awareness projects can include cultural landscapes and intangible heritage such as oral histories, language and cultural practices. Products can include publications and productions in various media, including websites.

Typical projects could include the research, design, and production of:

- Signs, historic markers or interpretive panels
- Brochures, maps or guides
- Permanent exhibits or displays
- Walking or driving tours
- “How-to” guides

What Work is Not Eligible?

The Heritage Awareness Program does not financially support:

- Books or the publication of general histories or biographies
- Conferences, workshops, festivals, or other special events
- Education or travel expenses
- Grant programs
- Archaeological research or oral histories
- Archives or museum administration, programs, collections, images, records, or database management
- Erection of statues, monuments, memorials, cairns, sculptures, public art, etc.
- Construction of facilities or other capital projects or programs
- Local government heritage management initiatives, such as creating and updating registers or strategic plans
- Other work deemed to be inappropriate at the discretion of program staff and Board

Part 4: Heritage Planning

The HLF Heritage Planning Program provides financial contributions of no more than 50% of project costs, up to $750, for projects involving the production of documents to assist with heritage conservation and awareness initiatives.

What Work is Eligible?

The commissioning, researching and generating of planning documents related to heritage conservation and awareness including, but not limited to:

- Conservation assessments or plans
- Structural evaluations, assessments or surveys
- Statements of Significance
- Heritage assessments
- Interpretation plans or strategies
- Accessibility audits, plans or strategies
- Maintenance plans.

What Work is Not Eligible?

The Heritage Planning Program does not financially support:

- Conservation work such as the repair of features
- Creation of interpretation materials such as signs or pamphlets
- Financial planning
- Grant writing
- Other work deemed to be inappropriate at the discretion of program staff and Board

Part 5: Indigenous Partnership Program

The HLF Indigenous Partnership Program provides financial contributions of no more than 50% of project costs, up to $7,500, for collaborative projects that contribute to the reconciliation process. The goals of this program include, but are not limited to, listening, acknowledging and welcoming different viewpoints, integrating Indigenous histories, heritage values and memory practices, and developing knowledge and understanding that includes Indigenous voices.

Applications will be evaluated on how they demonstrate relationship building, innovation, positive impact for the Indigenous community, and support the goals and vision of the Truth and Reconciliation Calls to Action.

All applicants must demonstrate active collaboration and partnership with Indigenous peoples.

Reconciliation

Collective efforts from all peoples are necessary to revitalize the relationship between Aboriginal peoples and Canadian society - reconciliation is the goal. It is a goal that will take the commitment of multiple generations but, when it is achieved, when we have reconciliation - it will make for a better, stronger Canada. (Truth and Reconciliation Commission of Canada)

Reconciliation is about taking an honest and open-minded view of our history in BC to work towards inclusion and equality for all, and to establish respectful relationships among Indigenous and non-Indigenous peoples.

Reconciliation involves a humble recognition of the impacts of the colonial past, and the deep history and relationships that Indigenous people have on their lands. With that awareness and a spirit of cooperation, reconciliation offers the opportunity to change behaviour and bring healing.

Reconciliation is acknowledging, learning, listening and acting. It is doing the work required to bring equality and restitution.

Heritage BC recognizes reconciliation will not be achieved through a single process, but through an ongoing commitment to make things better through a range of actions that are carefully developed according to the needs and circumstances of each situation. Heritage BC believes we have a significant role to play in reconciliation: we aspire to create new partnerships to tell new, more inclusive stories.

What Work is Eligible?

Eligible projects must have a tangible product or outcome, with a clear purpose and plan to further reconciliation work. This can include programs, exhibits, and events. Projects can reflect any type of heritage, including built heritage, cultural landscapes and intangible heritage. All projects must clearly collaborate with and take direction from Indigenous people and/or communities.

Typical projects could include:

- Repatriation
- Deaccession
- Exhibitions, either new or updated
- Apprenticeship, skills training or capacity building
- Signs or pamphlets, either new or updated
- Education programs
- Community programs or events
- Online platforms or resources
- Interpretation programs
- Indigenous advisor programs

What Work is Not Eligible?

The Reconciliation Program does not financially support:

- Books or the publication of general histories or biographies
- Grant writing
- Construction of new facilities or other capital projects or programs
- Other work deemed to be inappropriate at the discretion of program staff and Board

Part 6: Application Procedures

Before You Start…

1. All potential applicants MUST contact the program staff at Heritage BC to confirm the eligibility of the applicant and the proposed project at least one week prior to the application deadline, by Friday, May 11th, 2018 by 5:00 pm PST.

2. After reviewing the program materials, please contact program staff if you would like further clarification or wish to check that all of your proposed project details are eligible for funding.

3. Please make sure you collect all the necessary information BEFORE submitting an application following the Pre-Application Worksheet (described below) as a guide.

4. Applications must provide a minimum of one or two current quotes, depending on funding stream – see Project Budgets.

5. All applications for the Heritage Conservation program must include an acceptable written Statement of Significance (SOS) for the heritage resource – ask program staff for more information.

6. All necessary building permits must be in place before disbursement of any funds.

How to Apply

It is critical to the potential success of your application that you follow instructions carefully.

The Application Form is designed to provide Heritage BC with the exact information in a consistent format that is needed to facilitate an efficient and streamlined review process.

Your cooperation will help to minimize wasted effort and incomplete applications.

1. Program Guidelines & Policies

Please review the *Program Guidelines & Policies*, including what work is eligible under the Heritage Conservation and Heritage Awareness Programs, before beginning the application process.

2. Pre-Application Worksheet

Please download the Worksheet for a step-by-step overview of the online Application Form. The Worksheet describes and explains the scope of information required, including the maximum word count. It also acts as a Checklist for all the types of support materials that are required (Statement of Significance, quotes, financial statements, current and historic images, etc.). It includes important instructions about uploading documents and photographs, accepted file formats and sizes, etc.

It is strongly suggested that the applicant write and edit their submission, and organize all support materials BEFORE attempting to fill in the form online.

3. Online Application Form

Applicants must log in to the online application using a password provided by the Program Manager. This will allow the applicant to re-enter the form to edit and revise their information.

Please complete ALL sections of the online application form. Do not skip over questions even if you feel they are already answered. Answers should be concise yet sufficiently complete to facilitate effective review and adjudication.

Submission Requirements

All support materials including documentation and images must be uploaded in accepted formats.

Using the Online Application, you will be prompted to CHOOSE A FILE from your computer to upload. Preferred file format is .PDF for all documents, letters, scans and quotes. Preferred file format for all photographic images is .JPG. File size is limited to 5MB for each upload.

Please label all files clearly and consistently with the Project Number provided by the Program Manager and a brief description.

Examples:

HC123_Site_SOS.pdf

HC123_Exterior_west.jpg

Costing & Budget Policies

Eligible Heritage Costs

Provide an itemized list of specific eligible heritage costs for which funding is requested, excluding GST. Project costs should be summarized in the format provided – refer to the Worksheet.

Contractor Quotes

Heritage Conservation and Heritage Awareness project costs must be based on a minimum of two independent contractor quotes for every portion of eligible heritage work. Heritage Planning and Indigenous Partnership projects must be based on a minimum of one quote. Independent quotes are required to help ensure competitive and reasonable pricing and to provide a standard of comparison.

Quotes must be:

- Actual prices solicited from an independent contractor, company, firm, or person(s) doing business
- Prepared on business letterhead or other means to identify the business' name, address, and contact information
- Recent and valid, dated no more than six months prior to the application

Project Financial Budget

Applicants must provide a Project Budget showing expenditures and revenues, including a breakdown of any administrative expenses.

If the proposed heritage work is part of a larger project, clearly separate the costs for the proposed heritage work from the overall project costs.

Provide a statement of revenues, showing which funding is secured and which is requested.

Clearly show the applicant's contributions, which must cover at least half the budgeted costs.

These contributions may be in-kind (ie. donated materials, services, labour, facilities):

- General in-kind labour may be rated at $12 per hour
- Skilled in-kind labour, such as licensed trades, professionals, contractors, or consultants, may be rated at $30 per hour

Provide the total project costs, excluding GST costs.

Relevant Terms and Definitions

British Columbia Register of Historic Places (BCRHP):

Official provincial list of historic places in British Columbia that have been formally recognized for their heritage value by local governments, regional governments, and/or the Province.

Canadian Register of Historic Places (CRHP):

A listing of all historic resources formally recognized by local, provincial and national governments. Sites are documented through a Statement of Significance. The program is administered by the Government of Canada and available as a searchable database at www.historicplaces.ca

Character-defining Elements:

List of the major physical characteristics of the place which must be retained in order to conserve the heritage values of the place. CDEs fall within the following categories: style, scale, massing and composition; interior layout or exterior spatial configuration; functional features; materials and craftsmanship; the relationship between the historic place and its broader setting; the ways in which people use the historic place; customs and traditions that were or continue to be associated with a historic place.

Conservation:

All actions or processes that are aimed at safeguarding the character-defining elements of a cultural resource so as to retain its heritage value and extend its physical life. This may involve "Preservation," "Rehabilitation," "Restoration," or a combination of these actions or processes.

Preservation:

The action or process of protecting, maintaining and/or stabilizing the existing materials, form and integrity of an historic place or of an individual component, while protecting its heritage value.

Restoration:

The action or process of accurately revealing, recovering or representing the state of a historic place or of an individual component, as it appeared at a particular period in its history, while protecting its heritage value.

Rehabilitation:

The action or process of making possible a continuing or compatible contemporary use of an historic place or of an individual component, through repair, alterations, and/or additions, while protecting its heritage value.

Cultural Landscape:

Distinct geographical areas that represent the combined work of humans and nature, encompassing those landscapes deliberately shaped by people, those that have evolved organically and those that have taken on significance by cultural association. Examples of cultural landscapes include canals, planted groves of trees, gardens, agricultural landscapes, and 'abandoned sites' where structures once stood but are now being reclaimed by nature. An

example of a cultural landscape in British Columbia is Rogers Pass National Historic Site, a historic travel corridor through the Selkrik Mountains. Rogers Pass is considered a cultural landscape because of its role in the construction and development of the main line of the Canadian Pacific Railway, and the interrelationship between the natural features of the mountain pass and the surviving evidence of the former rail line.

Heritage Conservation Area:

Intended to provide long-term protection for a distinctive area that contains resources with special heritage value and/or heritage character, and provide protection to all or some of the properties in the area. Properties that are to be protected must be specifically identified in the bylaw. In the HCA a property owner may not do any of the following without a Heritage Alteration Permit: subdivision of property; addition of a structure; addition to an existing structure; construction of a new building; alterations to a building, land or feature. The HCA provides overall control, including design control, which is similar in intent to development permit controls but with the specific intent of conserving heritage character.

Heritage Designation:

A form of local government land use regulation that protects private heritage property that has been determined to have heritage value, and is intended to provide long-term protection. It is the only form of regulation that can prohibit demolition. Heritage designation is an official listing established under Section 954 of the Local Government Act and is created through a bylaw passed by the municipality. Changes to a designated heritage property can only be done through a heritage alteration permit issued by the local government. The local government can create a list of activities that can occur without a heritage alteration permit as a schedule in the designation bylaw. Designation on title is permanent until removed by bylaw. A local government may designate private property without the owner's permission, but is usually done with mutual agreement.

Heritage Register:

A list of sites that have been recognized for their heritage value by Council Resolution of local government.

Heritage Value:

The historic, aesthetic, scientific, social/cultural, or spiritual value of a place to past, present, or future generations. The heritage value of a historic place is embodied in its character-defining materials, forms, location, spatial configurations, uses and cultural associations or meanings. They must be lasting and maintain ongoing appreciation, teach us about the past and the cultures that came before, help create community identity, and provide connections between the past, present, and future. Individual categories of heritage values are further defined as:

Aesthetic Values:

Refers to the sensory qualities of a historic place in the context of broader categories of design and tradition. A place may have aesthetic value because of its architectural style, materials, how it reflects a particular style or period of construction or craftsmanship.

Historic Values:

Refers to the association that a place has with past events and historic themes, as well as its capacity to evoke a way of life or a memory of the past. Historic value may lie in the association of the historic place with important events, the age of a place, activities, people or traditions, its role in the development of a community, region, province, territory or nation, or its patterns of use.

Scientific Values:

Refers to the capacity of a historic place to provide knowledge, information and evidence that can advance our understanding and appreciation of a culture. Scientific value can derive from many factors such as age, quality, completeness, complexity or rarity.

Cultural/Social Values:

Considers the meanings attached to a place by a community in the present time and how people feel about a place. Cultural/Social value may be ascribed to places that perform a key role within communities, support community activities or traditions, or bring the community together and create a sense of shared identity or belonging.

Spiritual Values:

Ascribed to places with religious or spiritual meanings for a community, or a group of people. Sacred and spiritual places could include places of mythological significance, landscape features associated with myth and legends, burial sites, fasting/vision quest sites, places representing particular belief systems or places associated with sacred traditions, ceremonial practices or rituals of a community or groups of people.

Historic Place:

A structure, building, group of buildings, district, landscape, or other place in Canada that has been formally recognized for its heritage value.

Reconciliation

Coming to terms with events of the past to overcome conflicts, and to establish respectful and healthy relationships among Aboriginal and non-Aboriginal peoples; Reconciliation is the awareness of the past and action to change behaviour. It is equality and cooperation; Reconciliation is acknowledging, learning, listening and acting.

Standards and Guidelines:

Standards and Guidelines for the Conservation of Historic Places in Canada provide sound, practical guidance to achieve good conservation practice. They establish a consistent, pan-Canadian set of conservation principles and guidelines that will be useful to anyone with an interest in conserving Canada's historic places. *Standards and Guidelines* offer results-oriented

guidance for sound decision-making when planning for, intervening on, and using historic places.

Statement of Significance:
A statement that identifies the description, heritage value, and character-defining elements of an historic place. A Statement of Significance is required in order for an historic place to be listed on the Provincial and Canadian Registers of Historic Places. The document is used at the local level as a planning tool for future conservation interventions.

If you have any questions, please contact Heritage BC:

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