PRE-APPLICATION WORKSHEET

HLF Heritage Planning Application

Please contact the Heritage 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.

Laura Saretsky
lsaretsky@heritagebc.ca
Direct Line: 778.995.7243

PASSWORD _____

1. Heritage Planning Project Summary

PROJECT NUMBER _____

PROJECT TITLE _____

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)
- ☐ Local Government (Community Charter)
- ☐ First Nation
- ☐ School Board

FOR NON-PROFITS

SOCIETY NUMBER _____

DATE OF REGISTRATION _____

SUPPORTING DOCUMENTATION*

- ☐ Board of Directors List

*Refer to the *Heritage Legacy Fund Program Guidelines and Policies 2019* 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 description of the Heritage Resource, its location and history (250 words)

REGISTER AND LEGAL PROTECTION Indicate which of the following are in place for the Heritage Resource (check all that apply)

- ☐ Listed on a Heritage Register (local government, BC Register of Historic Places, Canadian Register of Historic Places)
- ☐ Heritage Designation
- ☐ Conservation Covenant
- ☐ Scheduled Property in a Heritage Conservation Area
- ☐ Heritage Revitalization Agreement

SUPPORTING DOCUMENTATION

- ☐ Historic Photographs
- ☐ Current Photographs
- ☐ Other

3. Heritage Planning Project

TYPE OF PROJECT (check all that apply)

- ☐ Statement of Significance
- ☐ Condition Assessment
- ☐ Heritage Assessment
- ☐ Conservation Plan
- ☐ Accessibility Plan
- ☐ Interpretation Plan
- ☐ Maintenance Plan
- ☐ Other

PROJECT DESCRIPTION Briefly describe the project and any resulting plans or documents to be produced. How will these plans or documents be used going forward? What are the benefits for the Heritage Resource? (300 words)
METHODOLOGY Provide a step-by-step description of the proposed project, including surveys, consultation, drafting, editing, etc. Identify the appropriate standards or guidelines (i.e. *The Standards and Guidelines for Historic Place Conservation in Canada; Canadian Register of Historic Places-Writing Statements of Significance*; etc.) and how these will be used to ensure the project conforms to best practice. (400 words)

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. (200 words)

4. Scope: Eligible Work & Quotes

SPECIFY ELIGIBLE COSTS & QUOTES Provide an itemized list of the eligible work including a description of tasks; who will be responsible for managing the work; and a minimum of one quote (excluding GST) with copies provided on supplier letterhead. Upload any additional documents used in the tendering process and selection of quotes for the work

5. Project Budget

Complete the project budget indicating project expenditures and revenue. Project costs may include both hard costs (labour, equipment), as well as soft costs, including administration or management. Total project revenue must equal total project costs.

EXPENDITURES
PROJECT COSTS List each eligible work item/category and use 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. 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
SOURCES OF REVENUE List any applicant contributions, including in-kind revenue which should be calculated according to the *Program Guidelines & Policies*. Remember that this program only funds 50% of the eligible project costs, up to a maximum based on the type of project. These maximums are listed in the *Program Guidelines & Policies.* Show other sources of

revenue. 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

_____	_____	
_____	_____	
	TOTAL PROJECT REVENUE	_____

Heritage BC

HERITAGE Legacy Fund OF BRITISH COLUMBIA

6. 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.
- Planning documents that result from the support of the Heritage Legacy Fund will be submitted to Heritage BC.
- 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 _____

TITLE _____

ORGANIZATION _____

NAME _____

TITLE _____

ORGANIZATION _____