

Heritage Legacy Fund Program Guidelines & Policies 2023



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INTRODUCTION

Heritage BC is a member-based 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 by 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, Heritage Conservation, and Heritage Planning. 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, cultural landscapes, or intangible heritage such as language and customs.

The Heritage Legacy Fund will also support Indigenous Partnership projects. 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:

Imogen Goldie, Heritage Planner

igoldie@heritagebc.ca

604-417-7243 ext.102

www.heritagebc.ca

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. Religious organizations that own heritage assets may be considered if they can demonstrate an active role in regular, broad-based, and inclusive community supported programs or services. Financial contributions are not made to individuals, unregistered organizations, private businesses or BC Government Agencies.

For situations in which the applicant does not own the site, the applicant must provide evidence of a long-term lease or management agreement with the site owner. While the site will receive direct benefit from the funding, the applicant must demonstrate that it and the community will also receive long-lasting benefits from the project and therefore the funding. Leases and agreements must extend at least 3 years beyond the completion of the project period to ensure the applicant and community will reasonably realize the benefits. Long-term leases and agreements do not guarantee funding.

Applicants must be an up-to-date paid member (corporate, government or group) of Heritage BC to apply.

Funding Programs

- **Heritage Conservation Program** for the preservation, rehabilitation, and restoration of heritage resources. Contributions up to **\$50,000**
- **Heritage Awareness Program** for the research, documentation, presentation, and publication of information about heritage and heritage resources. Contributions up to **\$10,000**
- **Heritage Planning Program** for the creation of planning documents to assist with heritage conservation and awareness. Contributions up to **\$5,000**
- **Indigenous Partnership Program** for initiatives to further reconciliation with Indigenous peoples through collaboration. Contributions up to **\$7,500**

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, where applicable. Project costs incurred prior to notification of funding are not eligible.

Heritage Conservation, Heritage Awareness and Heritage Planning projects must be completed within **18 months** of the date of the award. Indigenous Partnership projects must be completed within **2 years** 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 2023 are due on **Friday April 28th, 2023 by 5:00 pm pt** via the online form.

Potential applicants MUST contact the program staff at Heritage BC to verify the eligibility of the applicant and the proposed project, and to receive application instructions for the online form at least one week before the application deadline, **by Friday April 21st, 2023 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 is 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 final report with full statement of project expenses, photographs, and copies of invoices and receipts.

Funding Acknowledgement

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

- 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 upon request.

Part 2: Heritage Conservation Program

The HLF Heritage Conservation Program provides financial contributions **up to \$50,000** which can comprise **up to 50%** of the project's cost. Here, projects involve the preservation, rehabilitation, and/or restoration of a built heritage resource.

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 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 a heritage place, including archeological sites, 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 resource for the community, preferably related to the character-defining elements of the place 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 may be required to provide an **acceptable** [Statement of Significance](#) for the heritage resource. A Statement of Significance is a fundamental planning document that provides the jury with necessary information regarding the proposed project's suitability and effect on 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* (see p.22 and 23) and how the heritage conservation work conforms to these standards.

Funding applications and/or organizations that incorporate priorities such as climate action/adaptation, accessibility, reconciliation and cultural awareness, will receive additional consideration in the review process.

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

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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 historic resource, such as original memorials, grave markers or tombstones, fences, gates, trellises, rock walls, railings, decorative paving, or light standards 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

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- 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
- The conservation of large artifacts such as rolling stock or industrial equipment.
- 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 up to **\$10,000** which can comprise **up to 50%** of the project's cost. Here, projects involve the research, documentation, presentation, interpretation, and publication of information that will increase public understanding, appreciation, and education of specific existing community heritage resources, cultural landscapes and intangible heritage such as oral histories, language and cultural practices.

Applications will be evaluated on how they demonstrate innovation, sustainability, creativity, and ability to reach a wide audience.

Funding applications and/or organizations that incorporate priorities such as climate action/adaptation, accessibility, reconciliation and cultural awareness, will receive additional consideration in the review process.

What Work is Eligible?

Eligible projects must have a **tangible product** or outcome, with a clear purpose and plan to raise public awareness. 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 or online exhibits or displays
- Walking or driving tours
- "How-to" guides
- Educational websites

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
- Archives or museum administration, programs, collections, images, records, or database management
- Erection of statues, monuments, memorials, cairns, sculptures, 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 **up to \$5,000** which can comprise **up to 50%** of the project's cost. Here, projects involve the production of documents to assist with heritage conservation and awareness initiatives.

Funding applications and/or organizations that incorporate priorities such as climate action/adaptation, accessibility, reconciliation and cultural awareness, will receive additional consideration in the review process.

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 and/or seismic evaluations, assessments or surveys
- Statements of Significance
- Heritage assessments
- Interpretation plans or strategies
- Accessibility audits, plans or strategies
- Emergency and 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 up to **\$7,500** which can comprise **up to 50%** of the project's cost. This supports 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, languages, 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 how it supports the goals and vision of *the United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP)* and *Calls to Action* from the Truth and Reconciliation Commission of Canada (e.g., Language and Culture 13-17, Museums and Archives 67-70 and Commemoration 79-83)

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.

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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 and genuinely collaborate with and take direction from Indigenous people and/or communities.

Typical projects could include:

- Exhibitions, either new or updated
- Apprenticeship, skills training or capacity building
- Signs or pamphlets, either new or updated
- Education and community programs or events
- Online platforms or resources
- Indigenous advisor programs
- Interpretation programs
- Language revitalization
- Repatriation
- Deaccessioning

What Work is Not Eligible?

The Indigenous Partnership 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 jury and/or Heritage BC staff and/or 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, and to receive instructions for the online application form at least one week prior to the application deadline, **by Friday April 21st, 2023 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 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 are encouraged to 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

The online 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, Heritage Awareness, Heritage Planning, and Indigenous Partnership 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.

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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 the link and 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. **Photographs are required for Heritage Conservation applications** and encouraged for all other streams.

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.

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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. This budget must show balanced expenditures and revenues.

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 \$15 per hour
- Skilled in-kind labour, such as licensed trades, professionals, contractors, or consultants, may be rated at \$30-60 per hour

Provide the total project costs, excluding GST costs.

Relevant Terms and Definitions

British Columbia Register of Historic Places (BCRHP):

A database of historic places in British Columbia that have been formally recognized for their heritage value by local governments, regional governments and Provincial or Federal government. Maintained by the Heritage Branch of the Ministry of Tourism, Arts, Culture and Sport.

Canadian Register of Historic Places (CRHP)

A Program administered by the Government of Canada, the Canadian Register of Historic Places (CRHP) provides a listing of all historic resources formally recognized by the Federal government, and those submitted by local and Provincial governments. The resource is available as a searchable database at www.historicplaces.ca

Character-defining Elements:

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

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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 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.

Heritage Conservation Area:

Established under section 614 of the *Local Government Act*, Heritage Conservation Areas are intended to provide long-term protection for a distinct area that contains resources with special heritage value and/or heritage character. The HCA is created, and the protected properties identified through the creation of a 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; additions to existing structures; construction of a new building; alterations to a building, land or feature.

Heritage Designation:

Established under Section 611 of the *Local Government Act* and through the creation of a bylaw passed by a local or regional government, a Heritage Designation is intended to provide long-term protection to properties determined to have heritage value. A designation is the only form of regulation that can prohibit demolition, and changes to a designated property can only be done through a heritage alteration permit issued by the local or regional government. Designation on a property's title is permanent until removed by bylaw. Though a local government may designate private property without the owner's permission, it is usually done through mutual agreement.

Heritage Register:

Established under section 598 of the *Local Government Act*, a community heritage register is a list of sites and structures recognized for their heritage value by a community and through a council resolution from a 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 (start with p.22 & 23):

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 for an historic place to be registered or designated and added to municipal heritage registers or the Provincial and Canadian Registers of Historic Places.

If you have any questions, please contact Heritage BC:

Imogen Goldie - igoldie@heritagebc.ca

604-417-7243 ext. 102

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