

PRE-APPLICATION WORKSHEET

HLF Heritage Conservation Application

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

Imogen Goldie, Heritage Planner
igoldie@heritagebc.ca
604-417-7243 ext.102

1. Heritage Conservation Project Summary

PROJECT NUMBER	_____
PROJECT TITLE	_____
AMOUNT REQUESTED	_____
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

- 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 NOT-FOR-PROFITS

REGISTRATION NUMBER _____

DATE OF REGISTRATION _____

FOR NOT-FOR-PROFITS, LOCAL GOVERNMENTS, SCHOOL BOARDS

RECONCILIATION Briefly describe how your organization is engaging with or advancing reconciliation (e.g., land acknowledgement, organizational statement, incorporation of Indigenous place names, MOU). If this information is on a website, please provide a link. Please provide all acknowledgements, statements and documents, either here or in the supporting documentation section below. (250 words)

SUPPORTING DOCUMENTATION*

- Board of Directors List
- Recent Financial Statement

*refer to the [Program Guidelines](#) for information on formatting and downloading files.

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? What is the pre-Colonial history and the Indigenous relationship to the land and place? Has it been conserved? Is the Heritage Resource listed on a Heritage Register and/or legally protected; if so, where and when? If the Built Heritage Resource is not currently listed or protected, please describe why not and if you intend to have it registered (500 words)

STATEMENT OF SIGNIFICANCE - A properly written *Statement of Significance* which provides a description of the Heritage Resource, the heritage value including the character-defining elements of the Heritage Resource. When and by whom was the *Statement of Significance* prepared? If there is no existing *Statement of Significance* for the Heritage Resource explain why the heritage resource is important. (150 words)

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

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 the owner)
- Statement of Significance
- Location Map
- Site Plan
- Historic Photographs
- Current Photographs (**required**)
- 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 – sensitive adaptation of a heritage resource for continuing or new use
- Restoration – returning a heritage resource to its 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)

ENVIRONMENTAL SUSTAINABILITY - Tell us about any plans to minimize construction waste so that your contribution to landfill is reduced. Have you developed an environmental sustainability plan or action items? Will you be re-using and/or recycling materials? Will you be giving/selling materials that you no longer need to other organizations or sites?

4. Scope: Eligible Work & Quotes

SCOPE OF ELIGIBLE WORK - Describe the eligible work you are requesting funding for. See *Program Guidelines & Policies* for a 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). Upload any drawings, specifications, or additional documents used in the tendering process and selection of quotes for the work.

EXAMPLE 1: ELIGIBLE WORK

DESCRIPTION/TASK

RESPONSIBILITY

QUOTE 1

QUOTE 2

Masonry Repointing

Brick exterior approx. 2000 sq ft

Our Heritage Society

S&S Brickwork \$5000.00

ABC Masonry \$4700.00

EXAMPLE 2: ELIGIBLE WORK

DESCRIPTION/TASK

RESPONSIBILITY

QUOTE 1

QUOTE 2

Delivery

Donated Labour: Supply delivery 12 hrs@\$30/hr

Our Heritage Society

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.

EXPENDITURES

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 elements necessary to successfully complete the project. These can include organizational 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, if applicable, the Heritage Resource? Is there a *Heritage Management Plan*? (150 words)

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

AUTHORIZATION - Please include letters of approval for the use of any copyrighted materials, archive materials, photographs, drawings, etc. Attach documents in the supporting documentation area.

ONGOING COSTS - Will there be any ongoing operating and maintenance costs for the completed project? If yes, explain what the costs are and who is responsible 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 and its benefits? 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 issue that may have wider application or consequences for heritage conservation in your local 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. They 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.

NAME _____

TITLE _____

ORGANIZATION _____

NAME _____

TITLE _____

ORGANIZATION _____