![Heritage BC]

![Heritage Legacy Fund of British Columbia]

PRE-APPLICATION WORKSHEET
HLF Heritage Planning 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.

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1. Heritage Planning 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

*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 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 (municipal, provincial, federal)
- ☐ 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)
- ☐ Conservation assessment/plan
- ☐ Structural and/or seismic assessment
- ☐ Statement of Significance
- ☐ Heritage assessment
- ☐ Accessibility audit or strategy
- ☐ Emergency and maintenance plan
- ☐ Interpretation plan
- ☐ Other

PROJECT DESCRIPTION - Briefly describe the project and any resulting tangible product(s) including quantities to be produced. How will this project raise awareness for the Heritage Resource? What are the benefits? What is the target audience? Is there an interpretation, public

awareness, education or promotional plan in place? Is the proposed Heritage Awareness project a phase that is part of a larger project and how does it fit within the scope of that project? If not, briefly explain the context for the proposed project. (500 words)

METHODOLOGY - Provide a step-by-step description of the proposed project, including surveys, consultation, drafting, editing, etc. Identify the appropriate standards (i.e. *The Standards & Guidelines for the Conservation of Historic Places in Canada;* The 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 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)

4. Scope: Eligible Work & Quotes

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.

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
ELIGIBLE COSTS - List each eligible work item/category and use **ONE** of the quotes (the preferred quote), submitted 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.

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.

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. 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. 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. Completing the fields below constitutes certification.

NAME _____

TITLE _____

ORGANIZATION _____

NAME _____

TITLE _____

ORGANIZATION _____