

HERITAGE PRESERVATION PARTNERSHIP PROGRAM GUIDELINES

Historic Resource Conservation Grants

The Heritage Preservation Partnership Program is the principal heritage funding program of the Government of Alberta. The program provides matching grants and scholarship funds to support initiatives that preserve and interpret Alberta's rich heritage. It is administered by the Historic Resources Management Branch of Alberta Culture, Multiculturalism and Status of Women.

The annual application deadline is the first working day of February.

For more information on these guidelines, contact the Program Coordinator at carina.naranjilla@gov.ab.ca or 780-431-2305 (toll-free by first dialing 310-0000). Office hours are from 8:15 a.m. to 12:00 and 1:00 to 4:30 pm.

Submit applications to the Heritage Preservation Partnership Program, Old St. Stephen's College Building, 8820-112 Street, Edmonton, AB T6G 2P8; or to cmsw.hppp@gov.ab.ca.

HISTORIC RESOURCE CONSERVATION GRANTS

funding for the conservation of historic places

Conservation Work

Conservation consists of actions or processes aimed at safeguarding the character-defining elements of a historic place in order to retain its heritage value and extend its physical life. This may involve one or a combination of these conservation treatments: preservation, rehabilitation, restoration.

Designated Historic Resources

The maximum matching grant is \$100,000 for Provincial Historic Resources and \$50,000 for Municipal Historic Resources.

The maximum grant for Provincial Historic Resources that are also designated as Municipal Historic Resources is \$100,000.

Provincial and Municipal Historic Resources are historic places that are formally recognized and legally protected through the process of designation. Provincial Historic Resources (PHRs) are designated by the province through a ministerial order. Municipal Historic Resources (MHRs) are designated by municipalities through a by-law passed by council.

For more information on provincial designation, contact the Provincial Designation Program at 780-431-231-2309. For information on municipal designation, contact your municipality.

Indigenous Historic Places

Indigenous historic places located on reserve land cannot be designated as Provincial or Municipal Historic Resources. However, with the submission of a Band Council Resolution, such historic places are eligible for a grant of up to \$50,000.

The Band Council Resolution must commit to the preservation of the historic place in accordance with the *Standards and Guidelines for the Conservation of Historic Places in Canada*.

Studies and Professional Services

A separate grant is also available for conservation studies and fees for architects, engineers and other professional consultants for services undertaken prior to the tendering and construction phase of the conservation project. These include preparation of feasibility studies, architectural and engineering assessments, historic structure reports, concept plan, preservation plans, architectural drawings and design associated with the conservation of the historic place.

The maximum matching grant for studies and professional services for Provincial Historic Resources, Municipal Historic Resources and Indigenous Historic Places is \$25,000.

One historic place refers to all the buildings included in the designation order.

Funding for Proposed or Completed Work

Funding will be considered for work (conservation or studies/professional services) that can be completed by Feb 28 of the following year (see Grant Conditions and Grant Payments).

Retroactive funding will be considered for work in-progress or already completed provided that:

- expenses were incurred up to a year prior to the application deadline;
- the work was carried out in consultation with a Heritage Conservation Adviser;

- conservation work on Provincial and Municipal Historic Resources has written approval from the province/municipality; and
- conservation work complied with the *Standards and Guidelines for the Conservation of Historic Places in Canada*.

Work completed on Provincial or Municipal Historic Resources prior to attaining designation, is not eligible for retroactive funding.

Ineligible Work / Expenses

- work that did not comply with the *Standards and Guidelines for the Conservation of Historic Places in Canada*
- new construction or total reconstruction of a historic place except where the reconstruction is an accurate restoration of a significant missing character-defining element
- replacement of repairable historic building materials, features or character-defining elements
- poor, weak, inaccurate or inappropriate imitation of character-defining elements
- purchase of historic place or moving from historic location
- ongoing operation or regular routine maintenance
- tenant improvements unless those that preserve or restore character-defining elements
- energy retrofitting or upgrading
- installation or maintenance of utilities services
- installation of new services or amenities such as handicap access, elevators, washrooms
- equipment such as cameras, computers and related hardware, tools, machinery
- construction insurance and permits
- wall insulation
- administration, financial reporting, fundraising, preparing the grant application and similar activities
- expenses incurred more than a year prior to the grant application deadline
- projects seeking debt reduction, such as repayment of loans or shortfall on completed projects

- projects that have already been funded by the grant program

Applicant Eligibility

Owners of historic places or their authorized representatives are eligible to apply. Applicants include individuals and organizations. These include registered non-profit organizations, corporations, municipalities, churches, schools and other educational institutions, First Nations and Metis Settlements.

Ineligible applicants include provincial government departments, and Friends organizations associated with government owned and operated historic sites and interpretive centres.

Application Deadline

The application deadline is the first working day of February.

Application Requirements

Consultation with the Heritage Conservation Adviser or Program Coordinator is essential at the outset of a project to ensure eligibility and compliance with the *Standards and Guidelines for the Conservation of Historic Places in Canada*. To determine the Heritage Conservation Adviser for your area, contact the Program Coordinator.

Applicants must ensure that the most current application form is used, that the application is complete and that all required attachments are submitted by the application deadline.

Applicants must submit detailed and properly documented estimates/quotes from contractors or certified quantity surveyors. The grant program may consider paying the cost of securing estimates.

The required supporting documents are listed on the application form. Incomplete applications may be returned which could result in a delay in funding decision.

Provincial Historic Resources

For proposed work on Provincial Historic Resources, a project approval must be requested from the Historic Resources Management Branch, Alberta Culture, Multiculturalism and Status of Women. Contact the Heritage Conservation Adviser.

Municipal Historic Resources

To be eligible for funding, Municipal Historic Resources must:

- be listed or eligible for listing on the Alberta Register of Historic Places;
- have an associated Statement of Significance; and
- have a written approval from the municipality for the conservation work identified on the application.

The Alberta Register of Historic Places is an online listing of Provincial Historic Resources. It also includes Municipal Historic Resources that have provided mandatory documentation and have met the conditions for listing. For information on the process for listing Municipal Historic Resources on the Register, please contact your municipality.

The written approval must be signed by the Municipal Council Appointee and must clearly identify the proposed conservation work being approved.

It is the applicant's responsibility to secure this document from the municipality and to ensure that it is complete and submitted on time.

Municipal Historic Resources that are also Provincial Historic Resources; and owned by municipalities are also required to submit this written approval.

Municipality's approval is not necessary when applying for studies and professional services grants.

Applicant Contribution and Provincial Government Funding

This is a matching grant program. Applicants are required to contribute at least 50% of eligible project value and may request funding of up to 50% of eligible project value, subject to the grant maximums set on page 2.

Eligible project value consists of the following:

- cash expenses of materials and services associated with the conservation work, excluding GST
- value of in-kind contributions (donated labour, services, materials or equipment) associated with the conservation work, maximum of 1/3 of cash expenses

Applicant contributions may be in the form of cash and eligible portion of in-kind contributions.

Total provincial government funding is up to 50% of eligible project value. Funds received from other provincial government funding agencies cannot be used as applicant's contribution.

For projects funded by municipal funding programs, the grant may be limited to 33% (a third) of the eligible project value.

Grants of more than 50% of the eligible project value may be awarded to non-profit organizations that can demonstrate financial need.

Minimum funding request is \$1,000.

The Project Budget section of the application form will guide the applicant in calculating these amounts.

Application Assessment

Staff of the Historic Resources Management Branch of Alberta Culture, Multiculturalism and Status of Women will assess the applications and develop funding recommendations.

Funding recommendations are determined based on a number of factors such as the size/scale of the historic place, scope of the project, conservation priorities, ability of the proponent to conduct the work within one year and the grant program's budget.

Funding Decisions

The Minister of Alberta Culture, Multiculturalism and Status of Women will make the funding decisions.

The Minister may award grants greater than the stated maximums for each category.

Applicants will be notified of funding decisions in April or May.

Grant Conditions and Grant Payments

Grants are administered according to the terms and conditions outlined in the Grant Funding Agreement.

Work is inspected and approved by the Heritage Conservation Adviser and must comply with the *Standards and Guidelines for the Conservation of Historic Places in Canada*.

Successful applicants will receive half of their grant upon initiation of their project. To request the final payment, grant recipients will submit invoices/receipts for the entire project along with the *Record of Cash Expenditures* form and if applicable, the *Record of Donated Labour, Materials, Services, Equipment*.

Grant recipients have until February 28 of the following year to complete the project, request the final payment and submit invoices/receipts.

Unclaimed grant amounts will be decommitted. Grants received that are not accounted for are repayable to the Government of Alberta. Delinquent grant recipients may be ineligible to reapply until the delinquency is resolved.

It is the applicant's responsibility to ensure timely and proper payments to suppliers and contractors.

The grant program is authorized to review all project financial records in connection with its contribution to the project, through its appointed auditors, at no cost to the applicant.

Public Acknowledgement of Financial Support

Grant recipients are required to publicly acknowledge the Government of Alberta's financial support. This recognition provides an opportunity for public awareness of the ministry's programs and support for heritage preservation.

Public acknowledgement of financial support may be through:

- print materials such as newsletters, annual reports, brochures, feature articles, banners, posters
- online (website)
- media outlets
- event opportunities

Owners of private historic residences are encouraged to promote their historic resource and if possible, to periodically allow the public to visit the restored portion at the owner's convenience.

Acknowledgement of support will include the Government of Alberta logo with the statement of acknowledgement as follows: "This project was funded in part by the Government of Alberta." A copy of the logo will be provided upon request.