

# HERITAGE PRESERVATION PARTNERSHIP PROGRAM GUIDELINES

## Historic Resource Conservation Grants

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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, Ministry of Culture 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](mailto:carina.naranjilla@gov.ab.ca) or 780-431-2305 (toll-free by first dialing 310-0000). Office hours are Monday to Friday, 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](mailto:cmsw.hppp@gov.ab.ca).

# HISTORIC RESOURCE CONSERVATION GRANTS

funding for studies/professional services and conservation work on historic places

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## Grants for 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.

Only Provincial Historic Resources, Municipal Historic Resources and Indigenous Historic Places are eligible to apply for grants for conservation work.

### Provincial and Municipal 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, visit the [historic resource designation](#) page or contact the Provincial Designation Program at 780-431-2309. For information on municipal designation, visit the [Municipal Historic Resources](#) page and contact the 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*.

## Grants for 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 plans, preservation plans and architectural drawings and designs associated with the conservation of the historic place.

The maximum matching grant is \$25,000.

Provincial Historic Resources, Municipal Historic Resources and Indigenous Historic Places are eligible to apply for study/professional services grants. Other undesignated historic resources may also be eligible. Please consult with the Program Coordinator or the Heritage Conservation Adviser in your region.

*Note: A historic place refers to all the buildings / structures and site features included in the designation order and Statement of Significance.*

## Funding for Proposed or Completed Work

Funding will be considered for conservation work and 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 at the time of application, 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;
- conservation work on Indigenous Historic Places is supported/approved by a Band Council Resolution; and
- conservation work complied with the *Standards and Guidelines for the Conservation of Historic Places in Canada*.

Conservation 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*
- total reconstruction of a historic place
- replacement of repairable historic building materials, features or character-defining elements
- inaccurate or inappropriate imitation of character-defining elements
- purchasing or moving a resource from its historic context
- ongoing operation or routine maintenance
- tenant improvements except those that preserve or restore character-defining elements
- energy retrofitting or upgrading
- installation or maintenance of utility 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, grant application preparation 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 shortfalls on completed projects
- work/projects that have already been funded by the grant program (work/project included in a signed Grant Funding Agreement)

## 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 the 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 delayed funding decision.

### ***Provincial Historic Resources***

For proposed work on Provincial Historic Resources, a project approval must be requested from the Historic Resources Management Branch, Ministry of Culture and Status of Women. Contact the [Heritage Conservation Adviser](#) in your region.

### ***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 designated historic resources. It includes Provincial Historic Resources and 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, visit the [Municipal Historic Resources](#) page and 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.

Properties designated as both Provincial and Municipal Historic Resources and/or Municipal Historic Resources owned by municipalities are required to submit municipal approvals.

Municipal 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 the total eligible project cost and may request funding of up to 50% of the total eligible project cost, subject to the maximum amounts (see page 2).

Eligible project costs for conservation work consist of the following:

- cash costs for materials and services, excluding GST
- in-kind costs (donated labour, services, materials or equipment) capped at 1/3 of cash costs

The applicant's contributions may be in the form of cash and the eligible portion of in-kind contributions.

Total provincial government funding can be up to 50% of the total eligible project cost. Funds received from other provincial government funding agencies are not considered part of the applicant's contribution.

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

Grants of more than 50% of total eligible project costs 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, Ministry of Culture 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 in a year, status of previous projects/grants and the grant program's budget.

### **Funding Decisions**

The Minister will make the funding decisions.

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

Applicants will generally be notified in May or June.

### **Grant Conditions and Grant Payments**

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

*Note: Funding Agreements will not be issued for completed projects receiving retroactive funding (as described on page 2). Grant payments will be initiated once the Minister has approved the grant.*

Successful applicants will receive half of their grant upon initiation of their project. To request the final payment and account for the grant, grant recipients will submit the *Record of Project Expenses* form along with supporting invoices/receipts of cash expenditures and statement of donated labour, materials, services, equipment. The form should account for the cash expenses and donated materials/services for the entire project.

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

Grant recipients have until February 28 of the following year to complete the project, access the grant and complete reporting requirements.

Unclaimed grants 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.