

# HERITAGE PRESERVATION PARTNERSHIP PROGRAM GUIDELINES

## Historic Resource Conservation Grants Transportation/Industrial Artifact Conservation Grants

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The Heritage Preservation Partnership Program is the principal heritage funding program of the Government of Alberta. It 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.

Annual application deadlines: first working day of February and September

For more information on these guidelines, contact the Program Coordinator at 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.

Applications are submitted to: Old St. Stephen's College Building, 8820-112 Street, Edmonton, AB T6G 2P8.

# HISTORIC RESOURCE CONSERVATION GRANTS

funding for the conservation of Alberta's historic places

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## 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.

### Maximum Grant for 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.

Registered Historic Resources that have not received any funding from the grant program may be considered for a one-time matching grant of up to \$5,000. However, these have the least priority for funding.

### Maximum Grant for Non-designated Historic Resources

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 per year per application.

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*.

If a Band Council Resolution is not applicable, the Indigenous historic place will be eligible for a one-time matching grant of up to \$5,000.

Historic places that do not fall under the categories described above are referred to as Local Historic Resources. These are eligible for a one-time matching grant of up to \$5,000.

The historical significance of Local Historic Resources is subject to review. Local Historic Resources are the least priority for funding.

## Studies and Professional Services

A separate grant may also be provided 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 is \$25,000.

A historic place is eligible for one approved grant for conservation and one approved grant for studies/professional services per calendar year.

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

### **Non-designated Cemeteries and Burial Grounds**

Non-designated cemeteries or burial grounds may qualify for a one-time matching grant for conservation work or studies/professional services of up to \$5,000 if it meets one of the following:

- The site is associated with a significant historic event or theme. This could include cemeteries or burial grounds associated with residential schools, former settlements, or epidemic outbreaks.
- The site contains the graves of historically significant individuals.
- The site contains distinctive historic landscapes or grave architecture. Distinctive features could include spirit houses or cairns.
- The site demonstrates culturally distinctive mortuary or burial practices.

Eligible work includes the following:

- studies undertaken to confirm the presence of graves in a particular location
- site surveying, including mapping and marking
- grave architecture restoration, including features like spirit houses and cairns
- restoration of historic fencing, gates, and signage
- sympathetic modern fencing to protect historic portion of cemeteries

Ineligible work includes regular maintenance and site beautification.

### **Applying for Retroactive Funding**

Retroactive funding will be considered for conservation work and studies/professional services in-progress or already completed at the time of grant 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; 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
- utilities services and installation
- 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

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### **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 Deadlines**

The application deadlines are the first working day of February and September. February is the primary deadline.

### **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**

In order 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
- must submit with the application, a written approval from the municipality for the proposed conservation work.

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,

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.

### **Local Historic Resources and Non-designated Cemeteries and Burial Grounds**

Applicants are asked to provide information on the historical significance of their historic resource.

### **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 1.

Eligible project value consists of the following:

- cash expenses of materials and services associated with the conservation work
- value of in-kind donations (labour, services, materials or equipment) associated with the conservation work, maximum of 1/3 of cash expenses
- cash expenses for certain non-conservation work; includes work that protects the historic place such as installation and upgrading of mechanical, electrical or plumbing services to meet code; attic insulation and insulation stops

The total of in-kind donations and non-conservation work must not exceed the total cash expenses.

Applicant contributions may be in the form of cash (own cash or donations), eligible portion of in-kind donations (labour, services, materials and equipment) and eligible non-conservation work.

Total provincial government funding is limited to a maximum of 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 eligible project value.

Grants of more than 50% of 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, status of previous projects/grants and the grant program's budget.

Historic places with a grant maximum of \$5,000 are the least priority for funding.

### **Funding Decisions**

The Minister of Alberta Culture, Multiculturalism and Status of Women makes the funding decisions based on the recommendations provided by staff.

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

Applicants are notified of the funding decision in writing, in June/July for February applications, and in December/January for September applications.

### **Grant Conditions**

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*.

Grant recipients have two years from the date of grant notification, to claim their grant and complete the project.

Grants that are not claimed within this two-year period may be decommitted. When the grant is decommitted, the file is closed.

In special cases, extensions may be granted upon review of written request to the Program Coordinator. Each grant is limited to one approved extension with a maximum of one year.

### **Claiming the Grant**

Grants are paid by submitting full or partial claims. To make a claim, grant recipients are asked to submit the *Record of Cash Expenditures* form and if applicable, the *Record of Donated Labour, Materials, Services, Equipment* form along with invoices and/or receipts of expenses incurred in undertaking the work.

Grants are calculated and paid in accordance with the following:

- The amount of grant to pay is equal to 50% of the total of: cash expenses for conservation work, value of in-kind donations and cash expenses for non-conservation work.
- The value of in-kind donations is a maximum of 1/3 of eligible cash expenses for conservation work.
- The maximum allowable value of in-kind donations and non-conservation work is equal to the total cash expenses.

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." Copies of public acknowledgement should be sent to the program office. Copy of logo will be provided upon request to the program office.



# TRANSPORTATION / INDUSTRIAL ARTIFACT CONSERVATION GRANTS

funding for the preservation or restoration of transportation and industrial artifacts that have distinctive and significant connections to Alberta's history

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## Project Eligibility

The artifact must be the first artifact of its kind, the last remaining, the best example, or having a direct association with a key historic event or figure. It must have been built in Alberta or had a long period of continuous use within the province. The applicant must establish the special significance of the artifact to Alberta.

Assistance is restricted to costs associated with the restoration of artifacts and not for artifact purchase, engine maintenance or total reproduction.

Work must comply with the conservation principles described in the *Standards and Guidelines for the Conservation of Historic Places in Canada* and approved by a Heritage Conservation Adviser.

Each artifact may be considered for a one-time matching grant of up to \$25,000.

## Applicant Eligibility

Only municipalities and organizations registered in Alberta are eligible to apply.

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

## Application Deadlines

The application deadlines are the first working day in February and September. February is the primary deadline.

## Application Requirements

Consultation with the Heritage Conservation Adviser or Program Coordinator is essential at the outset of a project to ensure eligibility. To determine the

Heritage Conservation Adviser for your area, contact the Program Coordinator.

Expenses already incurred at the time of application will not be considered for funding.

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

## 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.

Eligible project value consists of the following:

- cash expenses of materials and services associated with the conservation work
- value of in-kind donations (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 (own cash or donations) and eligible portion of in-kind donations (labour, services, materials and equipment).

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

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

Minimum funding request is \$1,000.

The Project Budget 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 including the heritage significance of the artifact, ability of the proponent to conduct the work, public accessibility and the grant program's budget.

### **Funding Decisions**

The Minister of Alberta Culture, Multiculturalism and Status of Women will make the funding decisions based on the recommendations provided by department staff.

Applicants are notified of the funding decision in writing, in June/July for February applications, and in December/January for September applications.

For guidelines on the following topics for the Transportation/Industrial Artifact Conservation, refer to pages 4-5:

- Grant Conditions
- Claiming the Grant
- Public Acknowledgment of Financial Support