

2016 HERITAGE COMMUNITY INVESTMENT PROGRAM

PROJECT GRANT

CRITERIA AND GUIDELINES

PURPOSE

To provide project assistance to organizations to preserve, research, document, interpret, celebrate, and raise awareness of the history and heritage of Edmonton.

Projects may include a range of activities as noted above, including commemoration of significant anniversaries. This program is intended to result in diverse and innovative ways of presenting Edmonton's story for the benefit of all Edmontonians.

ELIGIBILITY

To be eligible for a Heritage Community Investment Program Project Grant:

- The organization must be a non-profit society that has been registered as a non-profit for at least one year.
- Though the primary activities of the organization may not be primarily heritage-focused, they must demonstrate the commitment and ability to conduct a heritage project.
- The related activities must generally take place within the corporate limits of the City of Edmonton.
- An applicant must have no outstanding evaluations or unused grant funding to be returned to the Edmonton Heritage Council.

This program excludes: Provincial facilities, such as the Royal Alberta Museum, and those owned and operated by the City of Edmonton, such as Fort Edmonton Park.

EVALUATION CRITERIA

A Peer Jury appointed by the Edmonton Heritage Council will review all applications. This Jury will make recommendations to the Board of Directors of the Edmonton Heritage Council who will then make Grant recommendations to the City of Edmonton. The Peer Jury will base their grant recommendations on their assessment of the proven or potential merit of the application.

In determining merit, the Jury will use the factors below, grouped into three areas:

1. Project & Activities (weighted 40%)

- The project's heritage and historic merit relative to its scope and to Edmonton's story
- The clarity and commitment of the organization(s) and community involved
- The capacity of the organization(s) and associated project staff to complete the project at a high standard based on past work
- The potential positive impact of the project on specific communities, organizations and the wider public
- The project demonstrates a strong commitment to preservation of the tangible and intangible heritage and history of Edmonton
- The project results in new stories being told from a diversity of residents, perspectives and themes
- The project demonstrates innovation
- The project methodology and community process is clearly outlined and reasonable

2. Community Relations & Outreach Factors (weighted 40%)

- The applicant encourages the participation of Edmonton residents
- The applicant collaborates with other non-profit and business organizations in pursuing its activities
- The applicant encourages membership in its organization and active participation of the public within the organization
- The applicant has a strong and volunteer program
- The applicant has a strategic approach to community relations and outreach

NOTE: Special consideration will be given to projects that demonstrate the inclusion of diverse communities in their planning, development, implementation and management.

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3. Financial Factors (weighted 20%)

- The applicant expends its financial resources in Edmonton
- The applicant demonstrates fiscal responsibility

ANNUAL GRANT DEADLINE

The deadline for this second run of 2016 Project Grants is **February 29th, 2016**.

ELIGIBLE EXPENSES

The Grant will invest in expenses directly associated with the development and production of projects that have a benefit to Edmontonians by increasing awareness and knowledge about Edmonton's heritage and history. This includes:

- Costs of contract or dedicated staff specifically related to the project
- Costs of research, documentation and interpretation leading to new sources of knowledge about Edmonton
- Collections-based work including documentation and conservation
- Outreach activities including community outreach and engagement or online products
- Production of a public program, including exhibit, display, publication or other form of presentation for public dissemination
- The appraisal, arrangement, and/or description of archival records
- Costs attributed to celebrating a significant anniversary

Project funding is meant to provide funding for one-off projects. This means that there is a clear beginning and end date, there is a clear and specific scope and list of activities, and the activities are part of a subset of other operations. If the project activities applied for are part of a multi-year project, only the activities that will be occurring in the eligible calendar year will be eligible.

If the project has a provincial, national or international scope, only the activities that occur within the corporate limits of Edmonton or which research Edmonton stories will be eligible. A detailed breakdown showing what percentage of activities and their costs occur in Edmonton will be required in an application for a project that occurs outside of Edmonton or has other non-Edmonton elements to it.

INELIGIBLE EXPENSES

- Expenses that have already been incurred. No expenses, including the institution's matching contributions, may be included prior to the application deadline
- Capital costs, including but not restricted to the purchase of land, equipment, fixtures or physical facilities
- Art gallery projects
- The purchase of original artifacts, documents or specimens
- Hosting an Annual General Meeting
- Travel outside of city limits
- Any expenses related to or contributing to fundraising or sponsorship

This grant is intended only for project costs specifically attributed to the project being applied for. These grants are not intended to support organizations that are primarily training or educational institutions.

PLEASE NOTE: Collections on short- or long-term loan to a museum from private individuals and private organizations are, in fact, private collections; the museum does not have legal title (a signed certificate of gift agreement / form) to these objects. Consequently, they are not held in the public trust since owners may retrieve their loaned objects at any time. Applications submitted for long-term care and management of collections and for treatment conservation projects where the collection is on short- or long-term loan are grant **ineligible** if funding the project could result in private interests benefiting from public funding.

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This program excludes: educational institutions, recreation centres, community leagues, health facilities, churches, provincial facilities such as the Royal Alberta Museum, and those owned and operated by the City of Edmonton such as Fort Edmonton Park.

GUIDELINES

All applications must include the completed, signed application form and budget form along with the following required information, and applicable additional information.

REQUIRED

1. Within a maximum of five (5) pages, please provide the following, under separate headings:

- A one-sentence summary of the project
- A description of the project in relation to the eligibility and evaluation criteria
- Partners, quality of partnership and significant outcomes from them
- Objectives and anticipated outcomes
- Project approach and implementation plan, including project methodology and community process
- Process of internal and external knowledge transfer and dissemination
- Sustainability of project past completion date
- Significance and benefits of project to Edmontonians and how the project will engage Edmontonians. If applicable, please indicate whether this project has been funded in a previous year through an Edmonton Heritage Council grant, what was accomplished and whether you plan to apply to us for a future phase.

NOTE: Special consideration will be given to projects that demonstrate the inclusion of diverse communities in their planning, development, implementation and management.

2. Within a maximum of 1 page, please provide the following:

- A brief summary of the applicant's activity during the last fiscal year. Please include basic information about organizations, groups or persons who you have worked with, or who have utilized your space (if applicable), paid or otherwise.

3. The applicant's most recent audited/reviewed annual financial statement, which should include a detailed schedule of organizational and project expenses.

4. Unless EHC has them on file from previous Project Grants, you must include these formal documents with your application:

- A current list of Board of Directors including names and addresses
- The most recent annual report or minutes from the most recent Annual General Meeting
- A copy of the society's by-law's and amendments to by-laws
- Proof of Filing of most recent annual return submitted to Corporate Registry of the Province of Alberta

POTENTIALLY REQUIRED

5. If contract staff or dedicated staff time is being applied for, a CV, job description and work plan must be submitted for each person with time allocated to this project. Any other materials such as a portfolio or examples of work can be included but may not be reviewed in their entirety by the Jury.
6. If applying as a museum, proof of current Recognized Museum status in the Alberta Museums Association Recognized Museum Program.

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7. If applying as an archive, proof of current Institutional Membership with the Archives Society of Alberta.

8. Additional Information

Any materials relevant to establishing project expenses or supporting the application, up to a maximum of 5 pages long. The grants program staff reserve the right to assess the pieces that best support the application. Though this information is submitted, it may not be viewed by the Jury in its entirety. As we don't return support materials, please do not include originals.

CONSIDERATIONS

- If you are hiring a contractor for special services, the Jury would like to see at least two (2) quotes.
- Please visit the Resources section of the Edmonton Heritage Network (EHN) website to learn of some best practices. www.edmontonheritagenetwork.ca.

APPLICATION SUBMISSION

Completed applications must be received at the Edmonton Heritage Council office, 2nd Floor, 10440-108 Ave, Edmonton, AB, T5H 3Z9, by 4:00 p.m. on **February 29th, 2016**. Incomplete applications or applications received after this date will not be considered. Applications must be submitted as a hard copy in our office.

As the funding available for Project Grants is limited, funding will be distributed based on recommendations submitted by a peer review jury to EHC's Board of Directors and decided upon by the City of Edmonton. Submitting an application does not guarantee funding.

APPLICATION TIMELINE

The whole application process for this second run from deadline to notification of a successful or unsuccessful grant may last up to fifteen weeks or approximately four months. The Edmonton Heritage Council aims to process applications in a timely and efficient manner that adheres to our accountability requirements.



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LEVEL OF SUPPORT

The Project Grant may be awarded, subject to availability of funds, for 50% of total project costs, up to a maximum of \$15,000.

REPORTING AND RECOGNITION

Successful applicants must submit a Final Report within three (3) months of the project conclusion, or June 30th, 2017, whichever is earlier. The Final Report requirements are posted on our website at edmontonheritage.ca/opportunities.

Successful applicants to EHC's grant programs must provide recognition of financial support as outlined in recipients' Letter of Agreement.

FEEDBACK

The Edmonton Heritage Council is always happy to receive feedback on its programs. Please feel free to contact us at any time throughout the year to provide your feedback.

MORE INFORMATION

The Edmonton Heritage Council's Program Manager will gladly speak with you about your Grant Application. They can provide clarification, explanations, and an impartial perspective through a grant review prior to officially submitting your grant application. We strongly encourage you to contact them at least 2 weeks in advance of grant deadlines.

PROGRAM CONTACTS

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