

HERITAGE COMMUNITY INVESTMENT PROGRAM

OPERATIONAL GRANT

INFORMATION

PURPOSE

To provide operating assistance to museums, archives, and other heritage organizations so they can research, preserve, and interpret Edmonton's heritage.

Edmonton is a varied and diverse community in the heart of Treaty Six territory, where people have lived for thousands of years. As treaty people, all Edmontonians share responsibility to establish and maintain mutually respectful relationships. Applications should demonstrate alignment with the Edmonton Heritage Council's [Strategic Goals](#), including reflection on how principles of truth and reconciliation impact and integrate with your work.

ELIGIBILITY

To be eligible for an Operational Grant through the Heritage Community Investment Program:

- The organization must be a non-profit society, registered in Alberta for at least one year;
- The related activities of the organization must take place within the City of Edmonton;
- The applicant must have submitted Final Reports for all previous grants and returned any unused funding to the Edmonton Heritage Council;
- Organizations with dedicated heritage facilities must be open for at least 200 hours per calendar year. Those without a dedicated facility must have ongoing public programming that promotes Edmonton's heritage.
- This program excludes educational institutions, recreation centres, community leagues, health facilities, churches, and government-owned and/or operated facilities.
- All organizations (both returning and new applicants) must participate in the Prerequisite Operational Grant Workshop.

NEW FOR 2019

The Edmonton Heritage Council is offering a Prerequisite Operational Grant Workshop to support applicants. This training is provided at no cost to organizations. Representatives from both returning and new applicant organizations are expected to attend.

In order to be eligible for a 2019 Operational Grant, at least one representative from the applicant organization must attend this session on **June 13, 2018 from 5:30pm to 8:00pm**. Please contact the EHC Grants staff if you have any questions about this new requirement.

APPLICATION REQUIREMENTS

All applications must include the following documents:

- Complete Application Checklist
- Operational Budget Form (or required budget information in the format used by your organization's accounting system);
- Organizational Narrative, maximum six pages including:
 - The organization's mandate and goals
 - A summary of the past year's activities, highlighting successes and challenges
 - A summary of current programs and activities in progress and planned for the upcoming year
- Organizational Documents
 - Current list of Board of Directors, including names and addresses
 - Most recent Annual Report or minutes from the most recent AGM
 - Current Annual Return filing with the Province of Alberta Corporate Registry demonstrating the organization is in good standing
 - **First-time applicants only:** Society's Bylaws and up-to-date amendments

Revised: June 2018

HERITAGE COMMUNITY INVESTMENT PROGRAM

OPERATIONAL GRANT

INFORMATION

- Financial Documents:
 - For grant requests of less than \$30,000, comparative financial statements must be independently reviewed and/or signed by board members other than the Treasurer, as specified in the Society Bylaws
 - For grant requests of \$30,000 or more, comparative financial statements must be independently audited and signed by a CPA with an auditor's report
- A detailed schedule of organizational, staffing, and operating expenses aligning with the most recent completed fiscal year as represented in the organization's financial statements.
- A detailed schedule of budgeted expenses for the current fiscal year.
- Explanatory notes for variances of +/- 10% between expenses from the most recent completed fiscal year and the current year's budget.

Additional information to complete your application may be requested by Edmonton Heritage Council prior to jury evaluation.

ELIGIBLE EXPENSES

The Operational Grant will invest up to a maximum of 25% of expenses directly incurred by an organization's internal operations, including:

- Rent, lease, or mortgage and utility costs
 - Financial management
 - Core staff salary and wages
 - Professional development costs for board and staff
 - Liability insurance
 - Property maintenance, security, and cleaning
 - Office supplies
- Costs related to volunteer or donor retention, external communications, professional memberships, and program supplies are not eligible.
- The Operational Grant does not cover capital costs, including but not limited to the purchase of property, equipment, or artifacts.
- NOTE:** An organization can only receive one Operational Grant per year through the City of Edmonton. Community leagues, seniors centres, and arts organizations may be eligible for operational funding administered through other grants.

APPLICATION EVALUATION

The Edmonton Heritage Council reviews all applications for completeness and program eligibility. A community peer jury, appointed by the Edmonton Heritage Council, then evaluates all eligible applications. The jury makes funding recommendations to the Edmonton Heritage Council Board of Directors, which then makes the final funding recommendations to the City of Edmonton.

The jury members will base their recommendations on the proven and potential merit of each application. In determining the merit, the jury will consider many factors, including:

- Alignment with the Edmonton Heritage Council's [Strategic Goals](#);
- The effect of the organization's activities on improving the quality of life in Edmonton through a direct benefit for residents;
- Demonstrated partnerships and involvement of Edmonton residents, external organizations, and businesses;
- The organization's membership and volunteer base;
- The financial stability and fiscal responsibility of the organization.

Revised: June 2018

HERITAGE COMMUNITY INVESTMENT PROGRAM OPERATIONAL GRANT INFORMATION

APPLICATION SUBMISSION

Complete applications must be submitted in **unbound, single-sided, hard copy** by **Friday, September 28, 2018 at 4:00 PM** to our offices:

Edmonton Heritage Council
2nd Floor, Prince of Wales Armouries Heritage Centre
10440-108 Avenue NW
Edmonton, AB T5H 3Z9

The Edmonton Heritage Council **strongly encourages** all potential applicants to contact staff prior to submission to confirm eligibility and completeness of applications. Draft applications can be submitted for feedback **no later than two weeks before the grant deadline.**

Late or incomplete applications will not be accepted.

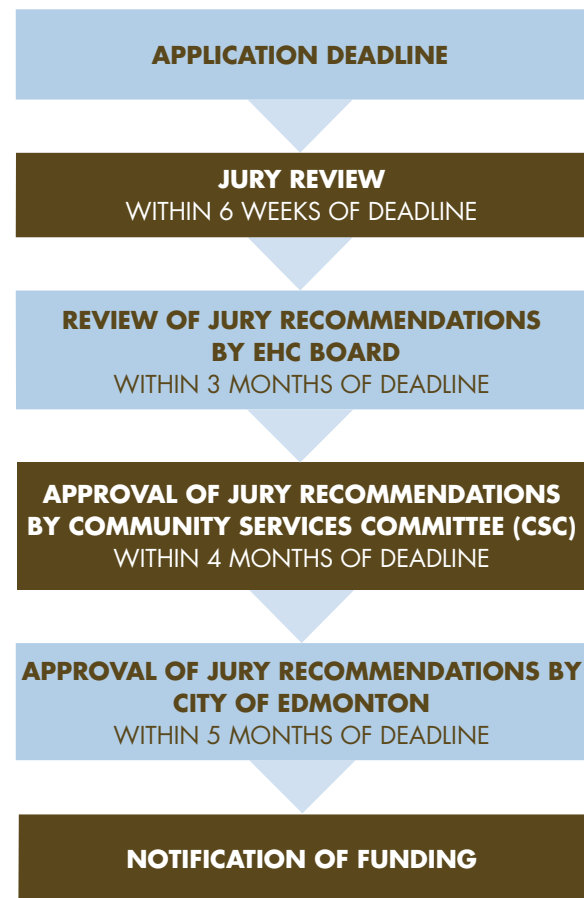
**FOR MORE INFORMATION,
PLEASE CONTACT:**

**JULIA DARBY
GRANTS COORDINATOR
(780) 429-0166 EXT. 288
GRANTS@EDMONTONHERITAGE.CA**

WWW.EDMONTONHERITAGE.CA/GRANTS

APPLICATION TIMELINE

Please note, the full application process from the application deadline to the notification of funding can take **up to five months.**



OPERATIONAL FUNDING PROVIDES ASSISTANCE TO
HERITAGE ORGANIZATIONS TO ENHANCE THEIR ABILITY TO
PRESENT EDMONTON'S HISTORY AND HERITAGE FOR THE
BENEFIT OF EDMONTONIANS

Revised: June 2018