

# HERITAGE COMMUNITY INVESTMENT PROGRAM

## STREAM 2 - NEW OR RETURNING APPLICANT (FUNDING INCREASE)

### 2022 OPERATIONAL GRANT GUIDELINES

These guidelines are meant for:

- New applicants to the HCIP Operational Grant or,
- Returning applicants to the HCIP Operational Grant whose eligible expenses are greater than the previous fiscal year.

If you are a returning applicant and your eligible expenses are the same or less than the previous fiscal year, please review the grant guidelines for **Stream 1 - Returning Applicant (Funding Renewal)** available on our [Operational Grants Page](#).

If you have questions about which stream is the best fit for your organization, please contact EHC Grants Staff at [grants@edmontonheritage.ca](mailto:grants@edmontonheritage.ca) or 780-429-0166 ext. 288.

## Our Commitment

The Edmonton Heritage Council (EHC) is committed to connecting people with the stories of our city. The HCIP Operational Grant provides support to museums, archives, and other heritage organizations to increase their capacity to research, preserve, interpret, and advocate for Edmonton's heritage.

Through HCIP, EHC is committed to achieving the ambitions and aims of [Connections and Exchanges: A 10-Year Plan to Transform Arts and Heritage in Edmonton](#) (Connections & Exchanges). EHC's mandate is to help advance this work in the community and with partners the City of Edmonton, Edmonton Arts Council, and ArtsHabitat Edmonton. A key aim of the plan is to build heritage sector organizational capacity and resilience, which is a core value of the HCIP Operational Grant.

The EHC is committed to reconciliation with Indigenous peoples and mutually respectful relationships between Indigenous and non-Indigenous peoples. EHC is also committed to the principle of Indigenous cultural independence and agency. We ask those applying to this program to join us in these essential commitments in their work.

The EHC is committed to equitable processes when making granting decisions.

## Your Commitment

As a grant applicant, you bring expertise and creativity to connect people and enhance heritage in Edmonton.

In receiving a grant, you commit to:

- Keeping the EHC apprised of substantial organizational updates and key dates, including special events, launches, and press or media opportunities
- Acknowledging the EHC in all promotional materials.

To be eligible for an Operational Grant:

- 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 Edmonton Metropolitan Region.
- The applicant must be up to date with final reports for other HCIP-funded work, including returning any unused grant funds.
- The organization must encourage public engagement in Edmonton's heritage by:
  - a) operating a heritage facility that is open to the public for a minimum of 200 hours per year\* and/or



- b) providing regular heritage programming to Edmontonians for a minimum of three years.
- The organization must demonstrate sound board and governance practices. Examples of unsound governance practices could include having a board member also in a paid staff role in the organization or a lack of financial controls or review.
- The organization must have year-end financial statements that follow generally accepted accounting principles for not-for-profit organizations.

*\*EHC recognizes that many organizations have not maintained regular opening hours over the past year. There will be an opportunity in the application to provide detail on your organization's standard opening hours, changes that were made in response to the COVID-19 pandemic, and future plans. Organizations will not be penalized for reduced opening hours during the past year.*

This program excludes educational institutions, recreation centres, community leagues, health facilities, religious institutions, and government-owned and/or operated facilities. Organizations that receive other Operational funding through the City of Edmonton are also not eligible to apply.

## Application Requirements

Applications must be submitted through EHC's grants application form. The following information is required to complete the application:

- Operational Grant Application Questions available on our [Operational Grants Page](#).
- Operational Budget Form (or required budget information in the format used by your organization's accounting system)
- Organizational Documents:
  - Current list of Board of Directors, including names and addresses
  - Current list of paid staff members and their positions (if applicable)
  - Most recent Annual Report or minutes from the most recent AGM

- Current Annual Return filing with the Province of Alberta Corporate Registry, demonstrating that the organization is in good standing.
- Society's bylaws (if a new applicant) or any new amendments
- Financial Documents:
  - For grant requests of less than \$30,000, comparative financial statements must be independently reviewed and/or signed by two 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.

## 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
- Utilities
- Financial management costs
- Staff salary and wages
- Professional development costs for board and staff
- Liability and property insurance
- Property maintenance, security, and cleaning
- Office supplies
- Ongoing public programming costs
- Digital systems maintenance costs including websites, databases, and other core digital assets

The Operational Grant does not cover costs related to fundraising or general marketing and promotion initiatives. It also does not cover capital costs, including, but not limited to, the purchase of property, equipment, artifacts, or digital assets, as well as major construction, renovation, or restoration work.



## Application Evaluation

The EHC reviews all applications for completeness and eligibility. A community peer jury, appointed by the EHC, then evaluates all eligible applications.

The jury makes funding recommendations to the EHC 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 and each project's alignment with *Connections & Exchanges*. The following Aims and Actions will be prioritized in making funding decisions for the Operational Grant:

**Aim:** Edmonton's neighbourhoods come alive with meaningful and relevant opportunities for participation and engagement.

- **Action:** Nurture cultural curiosity through planned and spontaneous heritage encounters that are personal and experiential.
- **Action:** Develop new heritage interpretive experiences (digital and analog) to increase visibility, improve access, and broaden engagement.

**Aim:** Edmontonians feel a sense of belonging and connectedness to people, places, and stories.

- **Action:** Create and support opportunities for cultural connection and documentation that increases understanding between people, communities, and places.
- **Action:** Adopt inclusive practices in museums, archives, and historical research and programming.
- **Action:** Contribute actively to placemaking that includes cultural landscape, natural history, built history, object, language, and story.

**Aim:** Dynamic exchanges of ideas and expertise occur between Edmonton's heritage sector and the world

- **Action:** Partner with public agencies, private citizens, and private sector organizations to celebrate and raise the profile of Edmonton's historic urban landscapes and sites of conscience.

## Application Timeline

The application process from the application deadline to the notification of funding can take up to five months.



## Application Submission

Complete applications must be submitted through EHC's application form by **Friday, September 24, 2021, at 4:00 PM**. If you are experiencing any difficulty with the application, please contact EHC Grants Staff at [grants@edmontonheritage.ca](mailto:grants@edmontonheritage.ca).

**PLEASE NOTE:** the application form does not save submissions part way through so please prepare your answers on the Stream 2 worksheet available on our [Operational Grants Page](#).

The EHC 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.