

PRE-APPLICATION WORKSHEET

This pre-application worksheet provides a step-by-step overview of the online application form questions and instructions on how to apply. Please review the Application Guidelines before beginning.

ONLINE APPLICATION LOG IN

USER [EMAIL ADDRESS]

PASSWORD

ONLINE APPLICATION FORM QUESTIONS

1. HERITAGE, MUSEUM AND ARCHIVE PROJECT SUMMARY

PROJECT TITLE

AMOUNT REQUESTED FROM COLUMBIA BASIN TRUST

PROJECT SUMMARY AND SCOPE OF WORK (150 words)

DATES (Estimated Start and End Date)

APPLICANT CONTACT INFORMATION

CONTACT NAME

MAILING ADDRESS

CITY

PROVINCE

POSTAL CODE

WEBSITE

EMAIL

CONTACT TELEPHONE

ORGANIZATION NAME

ORGANIZATION LOCATION

ORGANIZATION INFORMATION

TYPE OF ORGANIZATION

- Registered Not-for-Profit (BC Societies Act)
- Federally Registered Charity
- Local Government (Community Charter)
- First Nation

FOR NON-PROFITS AND REGISTERED CHARITIES

REGISTRATION NUMBER

DATE OF REGISTRATION

ORGANIZATION MANDATE (150 words)

Briefly describe your organization's purpose and mandate. Indicate the types of projects, programs, and services you deliver, and to which locations in the Basin.

SUPPORTING DOCUMENTATION

- Board of Directors List including occupations
- Recent Financial Statement

2. PROJECT DETAILS

TYPE OF PROJECT*

Choose one:

- Project that supports the development of heritage-based planning documents
 - o Conservation plan, Condition Assessment, Statement of Significance for physical heritage asset
 - o Heritage Management Plan for communities or Heritage Conservation Areas
 - o Feasibility plan, business plan, strategic plan
- Project that supports heritage conservation
 - o Minor capital request for conservation of structural or architectural detail
 - o Significant artifact requiring extensive conservation
- Project that supports exhibition development
 - o Planning, production, and presentation of heritage exhibit
 - o Documentation, presentation and publication of information about specific community heritage resources
- Project that supports collections management
- Project that increases and broadens community participation and/or creates new opportunities for heritage tourism

* Refer to Application Guidelines for examples of eligible projects

DESCRIBE YOUR PROJECT: WHAT WILL THE PROJECT DO? (200 words)

Provide a description of your project, your goals and how you plan on achieving those goals.

WHY IS THE PROJECT NEEDED? (200 words)

Describe the issues or opportunities the project will address. How were they identified and who was involved in that identification?

Questions?

1.800.505.8998

1.250.551.7821

jdunkerson@heritagebc.ca

IF YOUR PROJECT INVOLVES PLANNING FOR CONSERVATION OF A BUILT HERITAGE ASSET, PLEASE COMPLETE THE FOLLOWING:

OVERVIEW

A brief physical description of the Built Heritage Asset and its location. Indicate who owns and/or manages the property. (150 words)

BRIEF HISTORICAL BACKGROUND

When was it designed and built, and by whom? What is the period, descriptive characteristics, and theme? What were its historical uses or functions? Has it been conserved? (300 words)

REGISTER AND LEGAL PROTECTION Indicate which of the following are in place for the Built Heritage Asset (check all that apply)

- Listed on a Heritage Register (local government, BC Register of Historic Places, Canadian Register of Historic Places)
- Heritage Designation
- Conservation Covenant
- Scheduled Property in a Heritage Conservation Area
- Heritage Revitalization Agreement

FOR ALL APPLICANTS:

WHO WILL BE INVOLVED IN IMPLEMENTING THE PROJECT? (200 words)

Describe the organization, staff, or consultants, partners, or individuals, and their relevant experience and expertise that they are bringing to the project. Explain how your organization has the necessary ingredients to successfully complete the project; which may include organization skills, track record, experience, matching funds and resources, other partners, and/or local government support.

WORKPLAN

Indicate how you plan to organize and carry out your project. List activities in order of completion and specify who will be responsible for overseeing each activity. Activities may include project coordination, consultation, volunteer management, training, purchasing, installation, drafting, editing, surveying, promotion, administration, implementation, and evaluation. Identify the estimated date to start and complete each activity. Any activities that occur before receiving project approval will not be eligible for funding.

METHODOLOGY (200 words)

Identify the applicable and/or appropriate standards or guidelines (i.e. *The Standards and Guidelines for Historic Place Conservation in Canada*; *Canadian Register of Historic Places-Writing Statements of Significance*; *Canadian Conservation Institute (CCI) Notes*; *Canadian Heritage Information Network (CHIN) Guide to Museum Standards*; etc.) and how these will be used to ensure the project conforms to best practice.

HOW DO YOU PLAN ON EVALUATING YOUR PROJECT UPON COMPLETION? (150 words)

Describe how you will measure your success at the end of the project based on the project goals?

3. PROJECT BUDGET

Complete and upload the project budget indicating project expenditures and revenue. Budgets should be reasonable and appropriate to the scale of your project. Only include revenues and expenses which relate to the specific project as described in your application. See the Application Guide for definitions and examples of eligible costs. Total project revenue must equal total project costs.

ADMINISTRATION

Examples would include overhead costs to deliver the project such as office expenses and supplies and administrative wages. Total administration fees should not be more than 15 per cent of your cash budget.

CAPITAL PURCHASES, CONTRACTOR/PROFESSIONAL FEES

All purchases and fees must be justified to be eligible for funding and supported with quotes.

OTHER PROJECT COSTS

If the proposed work is part of a larger project, this may include additional ineligible costs or costs not considered part of this specific project. However, the budget for this specific project must be clearly indicated.

Specify any in-kind costs and refer to the Application Guide for rates for in-kind labour. In-kind costs must be matched by equal in-kind revenues.

APPLICANT CONTRIBUTIONS

Contributions may be cash, loans, or in-kind (at the approved rates specified in the Application Guidelines). Specify any in-kind revenue.

OTHER SOURCES OF REVENUE

Show other sources of revenue being used to match eligible costs, such as other grants. Indicate which are secured and which are requested. Also indicate here the amount requested from the Columbia Basin Trust as a requested source of revenue.

EXAMPLE

EXPENDITURES			
ELIGIBLE COSTS	ITEM	AMOUNT	
		SUBTOTAL	
OTHER PROJECT COSTS	ITEM	AMOUNT	
		SUBTOTAL	
		TOTAL PROJECT	

		COSTS	
REVENUE			
APPLICANT CONTRIBUTIONS			
		SUBTOTAL	
OTHER SOURCES OF REVENUE			
		SUBTOTAL	
		TOTAL PROJECT COSTS	

4. PROJECT MERIT

Your application will be evaluated in part on its merit compared to other projects, as well as its strategic benefit to raise awareness of heritage in your community.

PUBLIC AWARENESS

What are your plans to promote awareness of the project, its benefits and goals? If approved, what can your organization do through this project to promote the project outcomes? (150 words)

COMMUNITY SUPPORT

Explain briefly how the community supports and endorses the project and your organization. Attach letter(s) of support. (150 words)

STRATEGIC BENEFIT

Is the proposed project particularly innovative or does it address important issues that may have wider application or consequences to support heritage values in your community? (150 words)

ADDITIONAL INFORMATION

Please add any information that you feel would support your application. This is your opportunity to include historical background information, historical and/or current photographs, relevant documentation, etc. Be sure it is something that has not already been addressed in this application.

5. DECLARATION

I/We declare the following:

1. I am authorized to submit this application on behalf of the applicant organization.

2. The information I have provided in this application is true, accurate and complete in every respect.
3. Heritage BC, Columbia Basin Trust and its agents shall not be obligated in any manner to any applicant whatsoever and reserves the right to fund all or none of any application submitted.
4. If the project is selected for funding, then:
 - a. once complete, I/We will send a report outlining the results of the project to Heritage BC, as required by the Columbia Basin Trust;
 - b. the financial records for this project will be available for audit;
 - c. Permission is given for on-site inspection by any person whom Heritage BC or the Columbia Basin Trust authorizes;
 - d. All funding by the Columbia Basin Trust will be properly acknowledged in print materials and other media, publicity related to the project.
5. By submitting this application, I hereby acknowledge that Columbia Basin Trust may disclose this application, and the information contained herein—including but not limited to name, location and the amount and nature of any related funding—to the public, individuals or any other entity to the extent allowed by FOIPPA (Freedom of Information and Protection of Privacy Act). I further agree that Columbia Basin Trust may proactively disclose to the public my name and location and the amount and nature of funding granted. Any questions regarding such may be directed to: FOIPPA Inquiries, Manager, Operations, Columbia Basin Trust, 300 – 445 13 Avenue, Castlegar, BC, V1N 1G1, 1.800.505.8998.

Two authorized members of the organization must certify the application. If the application includes support for a built heritage asset, one authorization must be the property's owner. Completing the fields below constitutes certification.

Name*

First
Last
Organization
Title

Name*

First
Last
Organization
Title

HOW TO APPLY

STEP 1: Read the **2020 APPLICATION GUIDE**

STEP 2: Potential applicants **MUST** contact Heritage BC to verify the eligibility of the applicant and the proposed project at least one week before the application deadline, **by February 28, 2020 2:00 p.m. PT / 3:00 p.m. MT**. Contact Jennifer Dunkerson at 1.800.505.8998 or 1.250.551.7821 or jdunkerson@heritagebc.ca

STEP 3: If your project is eligible you will be asked for an email address and receive a

password to access the online application form.

STEP 4: Refer to this **PRE-APPLICATION WORKSHEET** for a step-by-step overview of the online application form. This worksheet:

- describes and explains the scope of information required, including the maximum word count;
- acts as a checklist for all the types of support materials that are required (Statement of Significance, support letters, financial statements, budget quotes, current and historic images, etc.);
- can be used to draft a submission, and organize all support materials **BEFORE** attempting to complete the online application form which is strongly recommended; and
- has a space to store the email address and password you need to log into the online application form.

STEP 5: After reviewing the program materials, please contact Heritage BC if you would like further clarification or wish to check that all of your proposed project details are eligible for funding. If you have a question regarding the eligibility of any work, contact us **BEFORE** submitting the application.

STEP 6: Go to the **ONLINE APPLICATION FORM** and log in. You will be able to save your work and come back to it later for submission. Please note:

- It is suggested that you collect all the necessary information **BEFORE** submitting an application. It is also recommended that the application form be filled out all at once to avoid loss of any data. If the form needs to be saved and returned to, be sure to clear your computer's cache or history so that the most recent version is saved.
- All support materials including documentation and images must be uploaded in accepted formats. In the online application form, you will be prompted to **CHOOSE A FILE** from your computer to upload.
- Preferred file format is .PDF for all documents, letters, scans and quotes. Preferred file format for all photographic images is .JPG.
- File size is limited to 5MB for each upload.
- It is recommended that you label all files clearly, consistently and with no spaces.

Examples:

- TownHall_Site_SOS.pdf
- TownHall_Exterior_west.jpg

STEP 7: Submit your application by **MARCH 6, 2020 2:00 p.m. PT / 3:00 p.m. MT.**

Questions? Contact Jennifer Dunkerson at 1.800.505.8998 or 1.250.551.7821 or jdunkerson@heritagebc.ca.