



Alberta Historical Resources Foundation Heritage Preservation Partnership Program

Historic Resource Conservation Grant Application

Application deadlines: February 1st and September 1st

1. This application package includes:
 - Sections A to H
 - Schedules
 - Schedule A: Cash Expenses for Conservation Work
 - Schedule B: Donated Labour, Services, Materials and Equipment
 - Schedule C: Cash Expenses for Eligible Non-conservation Work (allowed as matching contribution)
 - Guidelines on Determining Historical Significance for Local Historic Resources
 - Template: Approval for Intervention to a Municipal Historic Resource
2. Read the program guidelines before completing this application. These guidelines are also available at www.culture.alberta.ca/ahrf.
3. Fill out the forms completely and attach all required supporting documents.
4. Sign the Declaration Statement.
5. Submit your application documents in the following order:
 - Sections A to H
 - Schedule A, invoices/receipts, cost estimates/quotes, Terms of Reference and other documents supporting Schedule A
 - Schedule B and documents supporting Schedule B
 - Schedule C, invoices / receipts, cost estimates/quotes, Terms of Reference and other documents supporting Schedule C
 - All other attachments
6. Drop off your application or send by mail/courier to: Alberta Historical Resources Foundation
Old St. Stephen's College Building
8820 - 112 Street
Edmonton, Alberta T6G 2P8
7. If you have any questions, contact the Program Coordinator at (780)431-2305, toll-free in Alberta by first dialing 310-0000. Office hours are from 8:15 to 4:30 pm.



Alberta Historical Resources Foundation Heritage Preservation Partnership Program

For Office Use Only

File No.: HR-
F-
C-

Heritage Conservation Adviser:

Historic Resource Conservation Grant Application

This is an application for assistance with: conservation and associated architectural/engineering services
 architectural/engineering study

A. HISTORIC RESOURCE/PLACE

Name of Historic Resource/Place _____

Location _____
Street No. City/Town Postal Code

OR _____
Legal Description Municipality

Designation Status Provincial Historic Resource Municipal Historic Resource Local Historic Resource
Listed in the Alberta Register?
 Yes No

Legal owner of this historic resource _____

Have you applied previously for funding to the Alberta Historical Resources Foundation, for this historic resource? Yes No

If so, when was your last application? _____
Month and Year of Application

B. APPLICANT INFORMATION

Applicant (if applying as an individual)

Name(s) Mr./Mrs./Ms. _____

Address _____
Street / P.O. Box No. City / Town Postal Code

Bus. Ph. () _____ Res. Ph. () _____ Cell Ph. () _____

Fax No. () _____ E-mail _____

Applicant (if applying as an organization, corporation, municipality)

Name of Organization _____

Registered Mailing Address _____
Street / P.O. Box No. City / Town Postal Code

Bus. Ph. () _____ Fax () _____

Contact Person Mr./Mrs./Ms. _____

Position / Title _____ E-mail _____ Website _____

Bus. Ph. () _____ Res. Ph. () _____ Cell Ph. () _____ Fax No. () _____

GST Rebate (if applying as an organization)

Are you entitled to claim a rebate to recover the GST you paid on goods and services? Yes No
If you answered yes to the above question, what percentage of the 5% GST do you recover? 50 % 100% %

For example, some non-profit organizations recover half, or 50% of the 5% GST paid.

This portion of the GST will be deducted when computing eligible cash expenses in Schedules A and C.

C. REQUIRED SUPPORTING DOCUMENTS Attach the supporting documents that apply to you.

All applicants

- Cost estimates/quotes from contractors, consultants, suppliers of services and materials
- Copy of terms of reference used to solicit architectural/engineering consultants and copy of consultant’s proposal and fees, where applicable
- If receiving a grant from another program: copy of letter and/or agreement identifying the amount awarded and what the grant is funding
- If applying for a grant from another program, include information about your funding request.
- If you are the legal owner of the property: copy of Land Title Certificate
- If you are not the legal owner of the property: letter authorizing the work and if applicable, copy of Lease Agreement
- Copy of historic photographs of property, if available

Non-profit organizations

- Incorporation document
- List of current executives or Board of Directors including name, position/title and phone number
- Current financial statement
- If applying as a committee: letter of endorsement from organization

Corporations

- Incorporation document

Municipal Historic Resources

- Copy of Municipal By-law designating the historic resource as a Municipal Historic Resource
- Municipality’s approval for intervention to a Municipal Historic Resource (see template for municipalities)

Local Historic Resources (resources that are not designated as Provincial or Municipal Historic Resource)

- Detailed description of the historical significance of your resource
Refer to the significance criteria outlined in the attached Guidelines for Determining Historical Significance.
- Supporting documentation from history books or other sources of information you used in your research.
- Letters demonstrating broad community support for the preservation of the site, from e.g. civic leaders, historical societies, community associations, service clubs, interest groups, etc.

G. PROJECT FINANCING

EXPENSES Complete Schedules A, B and C before filling in this table.

Historic resource conservation projects

Total of lines 4 & 9 not to exceed Line 1	1	Eligible cash expenses for conservation work and related architectural / engineering services in Schedule A	\$	
	2	Total in-kind donations for conservation work in Schedule B	\$	
	3	1/3 of eligible cash expenses in line 1	\$	
	4	Eligible value of in-kind donations: lesser of lines 2 and 3		\$
	5	Total cash expenses for eligible non-conservation work in Schedule C	\$	
	6	Eligible cash expenses from line 1	\$	
	7	Eligible in-kind donations from line 4	\$	
	8	Line 6 minus Line 7	\$	
	9	Eligible portion of cash expenses for non-conservation work: lesser of lines 5 and 8		\$
	10	Total eligible costs: add lines 1, 4, 9		\$
11	Architectural/Engineering studies: Cost of preparing study, report, plans			\$

REVENUE Identify the funds budgeted to pay for the total eligible costs calculated above. If applying or receiving other grants, identify only the portion that will be used to pay for these costs.

			Confirmed	Pending
In general, this is a matching grant program. Applicant's contribution is at least 50% of total eligible costs	Applicant cash <i>Includes applicant's own cash, cash from donations & fundraising</i>	\$	<input type="checkbox"/>	<input type="checkbox"/>
	Eligible in-kind donations <i>section G, line 4 above</i>	\$	<input type="checkbox"/>	<input type="checkbox"/>
	Eligible portion of cash expenses for non-conservation work <i>section G, line 9 above</i>	\$	<input type="checkbox"/>	<input type="checkbox"/>
	Municipal grants <i>Indicate program name</i>	\$	<input type="checkbox"/>	<input type="checkbox"/>
	Federal grants <i>Indicate program name</i>	\$	<input type="checkbox"/>	<input type="checkbox"/>
	Other source(s) <i>Identify source(s)</i>	\$	<input type="checkbox"/>	<input type="checkbox"/>
Lottery-funded grants, maximum is 50% of total eligible costs Grants from other provincial lottery funded agencies can not be used as matching funds.	Other provincial lottery-funded grants			
	Community Facility Enhancement Program	\$	<input type="checkbox"/>	<input type="checkbox"/>
	Community Initiatives Program	\$	<input type="checkbox"/>	<input type="checkbox"/>
	Community Spirit Program	\$	<input type="checkbox"/>	<input type="checkbox"/>
	Other programs <i>Indicate program name</i>	\$	<input type="checkbox"/>	<input type="checkbox"/>
	Grant requested from AHRF <i>For conservation, up to 50% of total eligible costs in line 10 above, maximum of \$100,000 for Provincial Historic Resources, \$50,000 for Municipal Historic Resources and \$5,000 for Local Historic Resources. For architectural or engineering studies/reports/plans, up to 50% of line 11 above, maximum of \$25,000.</i>	\$		
	Total revenue	\$		

**SCHEDULE A
CASH EXPENSES FOR CONSERVATION WORK**

Enter your information on this form or use as a template.

- Itemize the conservation work and related architectural/engineering services, and the associated costs. Use additional sheets when necessary.
- For complex projects with many items, list related items in groups.
- Where applicable, indicate level of priority.
- Attach cost quotes/estimates for labour, services, materials and equipment from suppliers and contractors.
- If the work is completed, attach invoices/receipts. Work completed up to a year prior to an application deadline will be considered if it meets the conditions of retroactive funding.
- Enter the total eligible cash expenses in section G line 1.

Work Item	Contractor/Supplier	Invoice / Estimate Number	Estimated Start Date (mm/year)	Completion Date (Estimated or Actual, mm/year)	Amount without GST (\$0.00)	GST (\$0.00)	Total (\$0.00)
					\$	\$	\$
					\$	\$	\$
					\$	\$	\$
					\$	\$	\$
					\$	\$	\$
					\$	\$	\$
Totals					\$	\$	\$
Minus GST rebate Multiply total GST with GST rebate rate to determine amount of GST you are entitled to recover, does not apply to individuals							(\$)
Total eligible cash expenses for conservation work and related architectural/engineering services							\$

↓
Enter in section G, line 1

**SCHEDULE B
DONATED LABOUR, SERVICES, MATERIALS AND EQUIPMENT**

Enter your information on this form or use as a template.

- Donated labour, services, materials and equipment must be for direct conservation work. In-kind donations for fundraising, project management, administration, planning, attending meetings and similar activities, are not eligible.
- Identify donated labour and services. Include estimated/actual number of volunteers, type of work, and estimated/actual number of hours, and dollar value. Valuation should be in accordance with the following: \$15/hour for unskilled labour; \$30/hour for skilled labour (for example, by qualified contractors or tradespeople); and fair market value for professional services.
- Identify donated materials and equipment used, and estimate the total value. Valuation should be in accordance with the following: \$60/hr for heavy equipment, including operator costs and fair market value for materials and services.
- Do not include GST.
- In-kind donations received up to a year prior to an application deadline will be considered if these meet the conditions for retroactive funding.
- Enter total eligible cash expenses in section G, line 2.

Item	Details (Include source of donation, number of hours x hourly rate)	Value of donation (\$0.00, excluding GST)
		\$
		\$
		\$
Total donated labour and services		\$
		\$
		\$
		\$
Total donated materials and equipment		\$
Total in-kind donations Add all donated labour, services, materials and equipment		\$

↓
Enter in section G, line 2

**SCHEDULE C
CASH EXPENSES FOR ELIGIBLE NON-CONSERVATION WORK**

Enter your information on this form or use as a template.

- Certain non-conservation work may be considered as the applicant’s contribution. This work includes the following items: installation and upgrading of modern mechanical, electrical, or plumbing services to meet code; attic insulation; and insulation stops.
- Enter total cash expenses for non-conservation work in section G, line 5.
- The eligible portion of cash expenses for non-conservation work (section G, line 9) and in-kind donations (section G, line 4), when added, must not exceed the eligible cash expenses for conservation work (section G, line 1).

Work Item	Contractor/Supplier	Invoice / Estimate Number	Estimated Start Date (mm/year)	Completion Date (Estimated or Actual, mm/year)	Amount without GST (\$0.00)	GST (\$0.00)	Total (\$0.00)
					\$	\$	\$
					\$	\$	\$
					\$	\$	\$
					\$	\$	\$
					\$	\$	\$
					\$	\$	\$
					\$	\$	\$
Totals					\$	\$	\$
Minus GST rebate Multiply total GST with GST rebate rate to determine amount of GST that you are entitled to recover (does not apply to individuals)							(\$)
Total cash expenses for non-conservation work							\$

↓
Enter in section G, line 5

GUIDELINES FOR DETERMINING HISTORICAL SIGNIFICANCE FOR LOCAL HISTORIC RESOURCES

SIGNIFICANCE CRITERIA

Forty years is a general estimate of the time needed to develop historical perspective and to evaluate significance.

Significant historic places are those that meet at least one of the following criteria:

Theme/activity/cultural practice/event - The resource is directly associated with a theme, activity, cultural practice or event that has made a significant contribution to the broad pattern of Alberta history. It may be that one or more specific events at the site affected the entire community or the province rather than just the lives of a few individuals.

Institution/person - The resource is directly associated with a significant institution or with the life of a significant person in the community/province. Explain the role of the person with whom the resource is associated in Alberta's or the community's history; or, what is the historical context of the institution associated with this resource.

Design/style/construction - The resource embodies the distinctive characteristics of a type, style, period, or method of construction; or represents the work of a master, or expresses high artistic values. Explain why the type, style, period or method of construction represents architectural features that are significant in Alberta's development.

Information potential - The resource provides or has the potential to provide important information about a particular theme, event, institution or person, or about a particular type of building, structure or object. Explain why the information the resource has, or is likely to yield is important to the knowledge of Alberta's prehistory or history.

Landmark/symbolic value - The resource is particularly prominent or conspicuous and has acquired special visual, sentimental or symbolic value that transcends its function. A landmark contributes to the distinctive character of Alberta. Provide information about how and why the resource acquired its landmark or symbolic value, and indicate its relation to any other similar resources in the province.

SOURCES OF INFORMATION

Historical land title search – establishes the chronology of owners from the first title issued up to the current title-holder. Where? Land Titles North: 10365 - 97 Street, Edmonton T5J 3W7, phone (780) 427-2742; Land Titles South: 710 - 4 Avenue SW, Calgary T2P 0K3, phone (403) 297-6511

Tax rolls and assessments, building permits, municipal planning records – provide information about owners, land value, construction and any subsequent renovations. Where? Archives, Municipal Offices

Homestead records and Land Registers – provide information on first settlers (date, origin, age, family members, crops, livestock, buildings and land values). Where? Provincial Archives of Alberta, Edmonton; Peace River Country up to 1914 see www.lobstick.com

Telephone books, Henderson Directories – provide information about residents over time. Where? Archives, Libraries

Maps – county maps, insurance maps, township plans, Cummins Rural Directories. Where? Archives, Municipal Offices, University Map Collections

Aerial photos – Alberta Bureau of Survey and Mapping; University of Calgary Alberta Heritage Digitization Project at www.ourfutureourpast.ca

Newspapers – These provide information about significant buildings and prominent figures. Where? Archives, Libraries, University of Calgary Alberta Heritage Digitization Project at www.ourfutureourpast.ca, and www.peel.library.ualberta.ca

Local history books, historical photographs – These provide information about the original appearance of a building/site, early homesteaders and the development of the community. Where? Libraries, Archives, University of Calgary Alberta Heritage Digitization Project at www.ourfutureourpast.ca, and www.peel.library.ualberta.ca

Oral history, private collections – Where? Family members, seniors, neighbours, archives

Heritage Notes entitled "How to Research Historic Houses" and "How to Research and Evaluate Government and Commercial Buildings". Where? Available at www.culture.alberta.ca

Municipal Logo Here

*******TEMPLATE FOR MUNICIPAL USE*******

Approval for Intervention to a Municipal Historic Resource

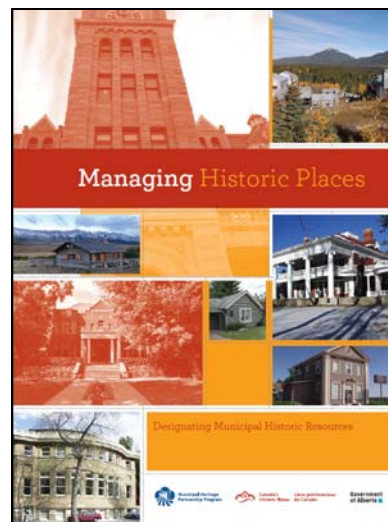
This document provides a guide for municipalities reviewing proposed interventions to designated Municipal Historic Resources, and is intended for information purposes only. Historic places designated in Alberta through a bylaw of a municipal council as Municipal Historic Resources are legally protected.

Municipalities may use this document to create their own approval documents, which are required for approving changes to designated Municipal Historic Resources.

Municipal governments are responsible for safeguarding the heritage values of these properties. Section 26(6) of Alberta's *Historical Resources Act* requires that "no person shall destroy, disturb, alter, restore, or repair an historic resource that has been designated... without the written approval of the council or a person appointed by the council for the purpose."

For more information on designating and protecting Municipal Historic Resources, please see the "Designating Municipal Historic Resources" Guide available on the Municipal Heritage Partnership Program website:

www.mhpp.ab.ca



1. Common Name of the Municipal Historic Resource (e.g., "The Smith Residence")

2. Civic Address / Legal Description of the Municipal Historic Resource

3. Name and contact information for the registered owner(s) of the evaluated property

4. Municipal Bylaw designating the Municipal Historic Resource

5. What kind of interventions / changes are being proposed to this Municipal Historic Resource? (Please provide a brief summary of the proposed work)

6. Why are these specific interventions / changes are being proposed to this Municipal Historic Resource? (Please check all that apply)

- To conserve the heritage value of the property
- To improve the functionality of the property
- To enable the adaptive re-use of the property
- Other

(Please provide a brief summary of the rationale for the proposed work)

7. What conservation documents or other resources have been reviewed in evaluating the proposed work? (Please check all that apply)

- Municipal Heritage Management Plan
- Statement of Significance
- Statement of Integrity
- Standards and Guidelines for the Conservation of Historic Places in Canada*
- Designation bylaw
- Maintenance agreement
- Proposed work plan / drawings
- Other (please describe)

8. Municipal governments are responsible for safeguarding the heritage values of these properties. What “heritage values” and/or “character-defining elements” of the Municipal Historic Resource (described in the Statement of Significance), if any, would be impacted by the proposed work? How, specifically, would they be affected?

<i>Heritage Values</i>	<i>Potential Impacts</i>

<i>Character-Defining Elements</i>	<i>Potential Impacts</i>

9. Applying the *Standards and Guidelines for the Conservation of Historic Places in Canada* helps to ensure that sound conservation principles are considered when reviewing potential changes to historic places. Please check whether the proposed work meets each standard.

General Standards for all projects – “Preservation”

1. Conserve the *heritage value* of a historic place. Do not remove, replace, or substantially alter its intact or repairable *character-defining elements*. Do not move a part of a *historic place* if its current location is a *character-defining element*.

Yes No

2. Conserve changes to a *historic place* which, over time, have become *character-defining elements* in their own right.

Yes No

3. Conserve *heritage value* by adopting an approach calling for *minimal intervention*.

Yes No

4. Recognize each *historic place* as a physical record of its time, place and use. Do not create a false sense of historical development by adding elements from other *historic places* or other properties or by combining features of the same property that never coexisted.

Yes No

5. Find a use for a *historic place* that requires minimal or no change to its *character-defining elements*.
- Yes No
6. Protect and, if necessary, stabilize a *historic place* until any subsequent *intervention* is under-taken. Protect and preserve archaeological resources in place. Where there is potential for disturbance of archaeological resources, take mitigation measures to limit damage and loss of information.
- Yes No
7. Evaluate the existing condition of character-defining elements to determine the appropriate intervention needed. Use the gentlest means possible for any intervention. Respect heritage value when undertaking an intervention.
- Yes No
8. Maintain *character-defining elements* on an ongoing basis. Repair *character-defining elements* by reinforcing their materials using recognized conservation methods. Replace in kind any extensively deteriorated or missing parts of *character-defining elements*, where there are surviving prototypes.
- Yes No
9. Make any *intervention* needed to preserve *character-defining elements* physically and visually compatible with the *historic place*, and identifiable upon close inspection. Document any intervention for future reference.
- Yes No

Additional Standards Relating to “Rehabilitation”

10. Repair rather than replace *character-defining elements*. Where *character-defining elements* are too severely deteriorated to repair, and where sufficient physical evidence exists, replace them with new elements that match the forms, materials and detailing of sound versions of the same elements. Where there is insufficient physical evidence, make the form, material and detailing of the new elements compatible with the character of the *historic place*.
- Yes No

11. Conserve the heritage value and *character-defining elements* when creating any new additions to a historic place or any related new construction. Make the new work physically and visually compatible with, subordinate to and distinguishable from the historic place.

Yes No

12. Create any new additions or related new construction so that the essential form and integrity of a *historic place* will not be impaired if the new work is removed in the future.

Yes No

Additional Standards Relating to “Restoration”

13. Repair rather than replace *character-defining elements* from the restoration period. Where *character-defining elements* are too severely deteriorated to repair and where sufficient physical evidence exists, replace them with new elements that match the forms, materials and detailing of sound versions of the same elements.

Yes No

14. Replace missing features from the restoration period with new features whose forms, materials and detailing are based on sufficient physical, documentary and/or oral evidence.

Yes No

10. Approval: Work Permitted or Not Permitted by the Municipal Council or its Appointee

Based upon the assessment of the work proposed, it is certified by that the proposed work meets the standards of conservation described above, and does not negatively impact the heritage values and character-defining elements of the Municipal Historic Resource.

Yes (meets the standards, work permitted)
 No (does not meet the standards, work not permitted)

11. If permitted, please list any conditions that apply to the proposed work:

12. Name and Position of Municipal Council Appointee / “Certification Officer”

Name

Position

- | | |
|---|--------------------------------------|
| <input type="checkbox"/> Chief Administrative Officer | <input type="checkbox"/> Planner |
| <input type="checkbox"/> Development Officer | <input type="checkbox"/> Other _____ |

13. Municipal contact information

Municipal governments in Alberta are responsible for safeguarding the heritage values of these properties. Section 26(6) of Alberta's *Historical Resources Act* requires that "no person shall destroy, disturb, alter, restore, or repair an historic resource that has been designated... without the written approval of the council or a person appointed by the council for the purpose."

**Signature of Municipal Council Appointee
/ "Certification Officer"**

Date