

HALIFAX

Community Museums Grants Program

Administrative Order 2018-010-ADM

A Guide to Eligibility and
How To Apply





1. Cole Harbour Heritage Farm Museum—Cole Harbour Rural Heritage Society

The museum preserves Cole Harbour's historical role in market gardening and dairy farming that served Halifax in the 1800's. This interpretive site includes a collection of registered heritage buildings and agricultural artefacts, image and manuscript archives, livestock, floral and market gardens, and innovative community programming. (Image courtesy of Cole Harbour Heritage Farm Museum).



2. Fultz House Museum—Fultz Corner Restoration Society—Lower Sackville

The *Bennett Daniel Fultz House* is a registered heritage property (c.1860) owned and operated by the Society. Located at the intersection of major travel routes to Truro and Windsor, the original *Twelve Mile House* inn served military personnel stationed at Fort Sackville and stagecoaches from Halifax. (Image courtesy of Joanne Boudreau).



3. Memory Lane Heritage Village—Lake Charlotte Area Heritage Society

Memory Lane Heritage Village is an award-winning living history museum depicting coastal rural life in the 1940's. The site includes the *Eastern Shore Archives* serving small coastal villages with a special focus on the preservation of lighthouses and the families whose livelihood depended upon these endangered buildings. (Image courtesy of Lake Charlotte Heritage Society).

Cover: Africville Museum—Africville Heritage Trust Society—Halifax

Located in the Africville National Historic Site of Canada, the *Africville Museum* is housed in a replica of the original *Seaview United Baptist Church* (c.1860) destroyed in the 1960's. The Trust preserves the memory of the mass dislocation and relocation of an entire community and fosters an appreciation and understanding of Black history and the African Diaspora. (Image provided by Halifax Regional Municipality).

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Note: The application Form for Operating and Project Grants is included in the centre of this guide. Reporting forms are available online at: www.halifax.ca/community-museums-grants.

Introduction

The *Interim Community Museums Grant Program* is a new grants program for registered non-profit and charitable organizations that operate a community museum as defined in Administrative Order 2018-010-ADM. A copy Administrative Order 2018-010-ADM Interim Grants to Community Museums is posted on the HRM website at: www.halifax.ca/city-hall/legislation-by-laws.

The purpose of this program is to provide interim financial assistance to eligible community museums located within the geographic boundary of the Halifax Regional Municipality to support core museum operations and build organizational capacity. Special Project grants may also be awarded for museum-related non-recurring initiatives. The program will be reviewed after three (3) years¹ to consider continuation, amendments, or repeal in relation to the HRM Culture & Heritage Priorities Plan currently in development.

As reflected in the evaluation criteria, the *Interim Community Museums Grant Program* is not an economic development initiative. Rather, the program acknowledges the role of volunteers and non-profit organizations in the preservation and presentation of the region's social development and promotes adoption of standards of practice for museums.

The *Interim Community Museums Grant Program* has one application intake per year that will be advertised in a newspaper circulating throughout the region and on HRM's website at: <https://www.halifax.ca/community-museums-grants>. The web page also has the applicable reporting forms for recipients of a grant under this program.

For general inquiries or assistance with completing an application please contact Grants & Contributions office (HRM Finance & Asset Management) or email: nonprofitgrants@halifax.ca

¹ In fiscal year 2021. However, Council may, by resolution, extend the term of the program.

Eligibility of an Organization

Applicants must be a registered non-profit community, cultural, educational or recreational organization, or a registered charitable organization. A non-profit organization includes the following forms:

- a society registered incorporated under the *Societies Act* (1989);
- a non-profit association incorporated under the *Co-Operative Associations Act* (1989);
- a not-for-profit corporation under the *Canada Not-for-profit Corporations Act* (2009);
- a non-profit incorporated under an Act of the Nova Scotia Legislature; or
- a registered charity incorporated under the *Income Tax Act* (Canada).

The applicant organization:

- shall be incorporated and have operated a community museum for a minimum of three (3) consecutive years;
- is the operator of a community museum as defined under Section 2 of Administrative Order 2018-010-ADM;
- shall be located within the geographic boundary of HRM;
- has legal title to the collection it houses in its museum on a permanent basis; and
- shall own, lease or license the property that the museum occupies, with a minimum of three (3) years remaining in any lease or license agreement as of the date of application.

Further, the museum shall:

- be open to the public a minimum of three (3) months per year, and publicize its hours of operation to the general public;
- maintain separate financial records covering museum operations, as distinct from any other activity of the applicant (See: Guidelines for Presentation of Financial Information on page 14); and
- maintain accurate records of museum use.

Operational Definition: Community Museum

The *Interim Community Museums Grant Program* defines a museum as “a permanent facility, open to the public, that acquires, conserves, researches, communicates and exhibits the tangible and intangible heritage of humanity and its environment for the purpose of education, study and enjoyment”. A community museum is defined as “a museum that reflects either the community where the museum is located or a specialized theme”.

The following are **ineligible** for consideration:

- federal, provincial, municipal, institutional², corporate and private museums;
- virtual museums;
- linguistic or heritage societies that do not own a collection;
- broad-based cultural or membership-based advocacy organizations;
- stand-alone archives;

² For the purpose of this grant program, an institutional museum or archival repository primarily documents the history of the institution itself or the purpose for which the organization was founded to further a particular cause or program (eg. government, educational, religious, charitable, fraternal).

- libraries;
- art galleries;
- interpretive centres that do not meet the criteria of a museum in terms of the depth or significance of the collection, exhibit development, engagement in research and related educational programming; or
- organizations who are currently subject to a funding agreement with HRM.

Final approval of an award is a decision of Regional Council.

Type of Grant

There are two types of grant available under the *Interim Community Museums Grant Program*: organizations may apply for an Operating Grant towards recurring core operating expenses and/or a Project Grant towards a non-recurring initiative. Organizations may make application to both the Operating and Project funding categories in the same fiscal year.

Due to budget constraints, eligibility criteria and evaluation priorities, not all applicants may receive funding.

Operating Grant

Operating grants are available at three levels:

Tier I. Up to a maximum of \$20,000 per fiscal year to a community museum whose annual museum operating expenditures average over \$10,000 for the three (3) years preceding application to the program and accredited³ under the provincial *Museum Evaluation Program* with a minimum score of 50/100.

Tier II. Up to a maximum of \$15,000 per fiscal year to a non-accredited community museum whose annual museum operating expenditures average over \$10,000 for the three (3) years preceding application to the program.

Tier III. Up to a maximum of \$5,000 per fiscal year to a non-accredited community museum whose annual museum operating expenditures average under \$10,000 for the three (3) years preceding application to the program.

Combined municipal, provincial and federal *operating* funding, including funding received from this program, shall not exceed 80% of total operating revenues for annual administrative and core museum program costs. Eligible applicants that exceed this government funding threshold remain eligible to apply for a Project Grant.

An Operating Grant may be awarded for up to three (3) years⁴, subject to the program's annual budget approved by Regional Council.

Grants may vary in dollar value to recognize indirect government assistance, scale of operations, property ownership, the significance of the collection, and the scope of educational programming.

Multi-Year Funding

To assist in building organizational capacity, the program includes the *option* of 3-year funding, subject to the program's budget capacity. A multi-year Operating Grant helps organizations plan and enter into commitments such as exhibit development, completion of the provincial museum accreditation process as applicable, or strategic planning. Multi-year funding cannot exceed the 3-year term of the interim funding program (ending March 31, 2021).

³ Within the context of this program the term "accredited" refers to organizations recognized as meeting standards of museum management under an established and objective evaluation program.

⁴ Fiscal year 2018-19, 2019-20, and 2020-21. The municipal fiscal year is April 1 to March 31. Hence, the term of this interim program ends March 31, 2021, unless otherwise amended.

Government Funding Threshold

A limit on the combined value of government operating funding (referred to as a “funding threshold”) is intended to:

- confirm the independence of a community museum as compared to a quasi-government relationship;
- avoid duplication or overlap in government operating assistance;
- assist smaller organizations reliant upon volunteer fundraising and earned revenues for sustainability.

The combined level of government operating assistance cannot exceed 80% of museum operating revenues. Consequently, the value of a municipal grant is moderated to avoid exceeding this threshold. Organizations that meet or exceed the government operating funding threshold may still apply for a Project Grant or may elect not to participate in this program and instead apply to HRM's annual *Community Grants Program* for a project or capital grant⁵ as applicable based on the program's eligibility criteria.

Application for Change in Funding Level

A community museum in receipt of an Operating Grant may make a *subsequent*⁶ application to change the level of Operating Grant received based on a change in status.

- To apply for a re-assignment from Tier II to Tier I the applicant must provide proof of accreditation from the Association of Nova Scotia Museums, including the date of formal evaluation and score under the provincial *Museum Evaluation Program*.
- To apply for re-assignment from Tier III to Tier II the applicant museum's annual operating expenditures average over \$10,000 over the preceding three (3) years.

A change in funding level does not presume an increase in level of funding. Any recommended increase or decrease in funding will be subject to the program's annual budget and in relation to, for example, new applicants that meet the *Interim Community Museums Grant Program* eligibility criteria, or an organization whose government operating funding has decreased such that they no longer meet or exceeds the 80% funding threshold.

For clarity, the 80% threshold applies to monetary funding. The scale, type and value of indirect or in-kind government support is typically not quantified and included in an organization's financial statement. However, this form of government assistance may factor into the evaluation of an application in terms of the recommended dollar value of an award.

Eligible Expenses: Operating Grant

Operating Grants may be used to pay the following *expenses directly associated with the operation of a community museum*:

(a) core recurring annual expenses:

- (i) insurance, including general liability, property insurance, business interruption/loss of earnings insurance, commercial vehicle insurance, Director's and Officers liability, tenant insurance, intellectual property/identity theft, and additional contents insurance;
- (ii) rent or mortgage payments;
- (iii) snow and ice control;
- (iv) real property taxes;
- (v) fire prevention and emergency measures;
- (vi) utilities; and

⁵ The *Community Grants Program* does not fund operating.

⁶ The program does not include 'appeals' from applicants; the Grants Committee or Regional Council may refer an application for further review. Typically, such referrals are addressed in a supplementary recommendation report and are reviewed in accordance with the program's eligibility requirements, evaluation criteria, and budget.

(b) any of the following additional expenses:

- (i) telecommunications, including telephone and Internet service charges, web site hosting and domain fees;
- (ii) collections management including professional conservation assessment and treatment;
- (iii) archival materials and storage equipment;
- (iv) professional fees for the preparation of an annual audited financial statement or internal audit;
- (v) remuneration to a seasonal or temporary employee, including a residency, apprenticeship or internship;
- (vi) preventive maintenance and repairs including mandatory or warranty inspections and servicing, water/septic testing;
- (vii) expenditures related to the applicant's participation in or preparation for assessment under the provincial *Museum Evaluation Program* as applicable, including re-evaluation;
- (viii) marketing;
- (ix) janitorial and sanitary supplies; or
- (x) office supplies.

Preference may be given to core recurring operating expenses in evaluating the dollar value of a proposed award.

(c) Expenses associated with on-site retail operations may be considered if:

- (i) the operation is integral to the museum visitor experience;
- (ii) the product is linked to the museum's interpretive theme(s); and
- (iii) the revenues generated are directed to support museum operations.

Expenditures not included in this section may be considered on a case-by-case basis.

Ineligible Expenditures: Operating Grant

Grants shall not be used for the following purposes:

- (i) expenditures unrelated to the operation of a community museum, its programs or services;
- (ii) remuneration to a member or officer of the applicant's Board of Directors;
- (iii) salaries and wages, benefits, mandatory contributions or employment-related benefits to full and part-time employees, except as outlined in sub-clause 22(1)(b)(v) of Administrative Order 2018-010-ADM;
- (iv) consulting fees to a member of staff or member of the Board of Directors;
- (v) debt retirement other than a mortgage;
- (vi) investments or savings;
- (vii) awards or prizes, banquets, dinners, receptions, souvenirs, personal gifts, or donations;
- (viii) scholarships or bursaries;
- (ix) the purchase of goods for resale;
- (x) furnishings and interior décor, except where associated with exhibits or museum programming⁷;
- (xi) fundraising;
- (xii) lease, insurance, registration, inspection, repairs or maintenance for a private vehicle; or
- (xiii) retroactive expenditures or the pre-payment of expenditures for goods and services to be utilized in the following fiscal year.

⁷ For example, repainting an exhibit wall to accommodate a new exhibit would be acceptable.

Project Grant

Project Grants are available at two levels:

Regular Project Grant. Up to a maximum of \$5,000 per fiscal year may be awarded in support of an initiative that enhances educational programming, public access, or organizational capacity building.

Special Project Grant. Up to a maximum of \$20,000 may be awarded to support an exceptional opportunity with the potential to attract provincial or national attention and/or or significantly increase the organization's revenue or notoriety such as hosting a national or international exhibition with broad public appeal. *It is recommended that interested organizations confirm a project's eligibility and the program's financial capacity in advance of any funding submission for a Special Project Grant.*

In evaluating Project Grant applications, preference may be given to organization ineligible for an Operating Grant.

Eligible Expenses: Project Grant

A Project Grant may be used to pay the following *expenses directly associated with the operation of a community museum*:

- (i) exhibit hosting or development;
- (ii) staff or volunteer training in museum practice;
- (iii) community-based research or self-publishing;
- (iv) independent professional services for any of the following:
 - a. design and/or fabrication fees;
 - b. legal fees;
 - c. strategic planning;
 - d. building condition and lifecycle planning;
 - e. building conservation assessment and report;
 - f. energy, safety or accessibility audit;
 - g. environmental assessment;
 - h. program evaluation;
 - i. an appraisal of an artefact or building for insurance or conservation purposes;
- (v) a defined program or service.

Expenses not included in this section may be considered on a case-by-case basis.

Capital Grants

Recipients of a grant under the *Interim Community Museums Grant Program* remain eligible to apply to the *Community Grants Program* for a project-specific Capital Grant (not a Project Grant) or to the *District Capital Fund*.

Information on these two programs is available online at:

www.halifax.ca/business/doing-business-halifax/community-grants and

www.halifax.ca/city-hall/districts-councillors/district-13/district-activity-district-capital-funds

Under the *Community Grants Program*, a Capital Grant supports the purchase of non-municipal property, major capital improvements⁸ to an existing building or site, or the purchase of large equipment costing over \$5,000 per item. However, preference may be given to applicants not in receipt of federal, provincial or municipal government funding.

⁸ A capital improvement is defined in real estate, accounting and law. While repairs maintain the property in its original condition (an operating expense) a capital improvement is a structural change or restoration that enhances the property's overall value, increases its useful life, or increases functionality by adaptation for a new use (a capital expense).

Non-profit organizations ineligible for consideration under the *Interim Community Museums Grant Program* may apply to the *Community Grants Program* for a Project or Capital Grant (not both) in accordance with the program's guidelines. Examples of the latter include non-profit interpretation centres, historical societies, heritage groups, and non-profit art galleries.



Community Museum Grants Program

Application Form: Operating Grant

Application Deadlines: September 10, 2018, January 31, 2019, and January 31, 2020

Name of Applicant Organization:	
Registration Number(s):	
<input type="checkbox"/> non-profit society under the <i>Societies Act</i> (1989) <input type="checkbox"/> non-profit association incorporated under the <i>Co-Operative Associations Act</i> (1989) <input type="checkbox"/> not-for-profit corporation under the <i>Canada Not-for-profit Corporations Act</i> (2009) <input type="checkbox"/> charity incorporated under the <i>Income Tax Act</i> (Canada). If incorporated under an Act of the Nova Scotia Legislature provide the name of the Act (including year or section as applicable): _____	
Official Name of Museum:	Civic Address of Museum:
<input type="checkbox"/> Seasonal (operates minimum of 3 months) <input type="checkbox"/> Year-round	
Applicant Contact: Name, mailing address, telephone number and email address.	
Operating Grant Category (check only one):	
<input type="checkbox"/> Tier I — accredited community museum. Score: ____/100. Year accredited: ____	
<input type="checkbox"/> Tier II — non-accredited community museum average 3-year museum operating expenditures over \$10,000 per annum.	
<input type="checkbox"/> Tier III — non-accredited community museum average 3-year museum operating expenditures under \$10,000 per annum.	
See: <i>Community Museum Grant Program</i> Guidebook for details.	

Amount of Grant Requested:

Mandatory Submission Information: Upon *initial application* to the program an applicant must include the following documentation:

- ☐ Itemized financial statements for the preceding three (3) years including all revenues, expenses, assets and liabilities. Clearly identify expenditures directly associated with museum operations from any other function of the organization. See: Guidelines for Presentation of Financial Information in program guidebook.
- ☐ List any indirect or in-kind assistance not identified in the organization's financial statement(s).
- ☐ Proof of property ownership (e.g. deed) or a copy of the lease or license agreement in effect as of the date of application.
- ☐ Affix a copy of organizations Articles of Incorporation and a list of current members of the Board of Directors.
- ☐ Projected Museum Revenues and Expenses. See Guidebook.

Applicants are encouraged to include a brief cover letter describing the organization's mandate and operations, the intended use of municipal funds or priority expenditures, visitation or program data as applicable, or any particular challenge that you wish to bring to the attention of the review team. The brief should be no more than 8 pages. If the review team require additional information or confirmation an applicant will be contacted.

Declaration of Collection Ownership and Authorization:

I hereby certify that all statements, both written and verbal, made on behalf of the organization's Board of Directors in relation to and affixed to this application to the Halifax Regional Municipality, including ownership of the collections permanently housed at the location identified as the community museum operated by the organization, are true and accurate and it is understood that any misrepresentation of material facts may lead to the disqualification of this application or repayment of all or a portion of any funds issued pursuant to this grant application.

Name (please print)

Signature

Date

Name (please print)

Signature

Date

In accordance with the *Municipal Government Act*, any personal information collected in this application will only be used and disclosed by municipal staff for internal purposes relating to the Community Museums Grant Program. If the application is to be disclosed to an external party the personal information (address, telephone or email) will be redacted. Inquiries re: the collection and use of information may be directed to the Access & Privacy Office at accessandprivacy@halifax.ca.

Date Received:**Staff Initial:**



Community Museum Grants Program

Application Form: Project Grant

Application Deadlines: September 10, 2018, January 31, 2019, and January 31, 2020

Name and Address of Applicant Organization(s):	
Registration Number(s):	
<input type="checkbox"/> non-profit society under the <i>Societies Act</i> (1989) <input type="checkbox"/> non-profit association incorporated under the <i>Co-Operative Associations Act</i> (1989) <input type="checkbox"/> not-for-profit corporation under the <i>Canada Not-for-profit Corporations Act</i> (2009) <input type="checkbox"/> charity incorporated under the <i>Income Tax Act</i> (Canada). If incorporated under an Act of the Nova Scotia Legislature provide the name of the Act (including year or section as applicable): _____	
Applicant Contact: Name, mailing address, telephone number and email address.	
Location of Project:	
Amount of Grant Requested:	Duration of Project:
\$	
Description of Project: Attach additional information if required (up to a maximum of 4 pages).	

Project Budget			
The following is a project budget — not your organization's total budget. Indicate unconfirmed funding/ revenue with an asterisk *			
Projected Project Funding		Projected Project Costs	
Funding Source	\$ Amount	Type of Project Expense	\$ Amount
Municipal Grant Requested	\$		\$
Other Municipal Assistance	\$		\$
Provincial Funding	\$		\$
Federal Funding	\$		\$
Funds from your Organization	\$		\$
Funds from Non-Profit Project Partner(s)/Collaborator	\$		\$
Charitable Foundation	\$		\$
Project Income	\$		\$
Rebate (as applicable)	\$		\$
Other	\$		\$
Other	\$		\$
Other	\$		\$
Total Estimated Funding	\$	Total Estimated Cost	\$
Project Surplus/Deficit (difference between funding and cost): \$			

Authorization:		
<p><i>I hereby certify that all statements, both written and verbal, made on behalf of the organization's Board of Directors in relation to and affixed to this application to the Halifax Regional Municipality, are true and accurate and it is understood that any misrepresentation of material facts may lead to the disqualification of this application or repayment of all or a portion of any funds issued pursuant to this grant application..</i></p>		
_____	_____	_____
Name (please print)	Signature	Date
_____	_____	_____
Name (please print)	Signature	Date
<p>In accordance with the <i>Municipal Government Act</i>, any personal information collected in this application will only be used and disclosed by municipal staff for internal purposes relating to the Community Museums Grant Program. If the application is to be disclosed to an external party the personal information (address, telephone or email) will be redacted. Inquiries re: the collection and use of information may be directed to the Access & Privacy Office at accessandprivacy@halifax.ca.</p>		
Date Received:		Staff Initial:

Mandatory Application Requirements

There will be one (1) application intake per year as advertised online and in the Municipal Notices section of a newspaper circulating in the region. Late or incomplete applications will not be reviewed.

For an initial application for a grant, the applicant must provide:

- ☐ a complete application form signed by two members of the Board of Directors;
- ☐ itemized financial statements for the previous three (3) years of operation with expenditures directly associated with museum operations clearly separated from any other function of the applicant (See: Guidelines for Presentation of Financial Information on page 14);
- ☐ proof of non-profit or charitable status in good standing as of the date of application;
- ☐ the organization's articles of incorporation, including mission statement;
- ☐ a statement identifying any other municipal, provincial or federal government funding including indirect or in-kind assistance with documentation to support the monetary value of assistance or a clear description of same;
- ☐ proof of ownership of the property, or a copy of lease or license agreement as applicable;
- ☐ a signed statement attesting to the ownership of the collection (included in the application form); and
- ☐ if applicable, documentation to verify accreditation and score under the provincial *Museum Evaluation Program*.

Application should be made using the application form provided with documentation affixed or included with the application form.

All applications must be received by mail or drop-off. **Applications will not be accepted by email.**

By mail to:

Interim Community Museums Grant Program
Finance & Asset Management
Halifax Regional Municipality
PO Box 1749
Halifax, NS B3J 3A5
Attention: Grants & Contributions Office

By courier or in-person drop-off to:

Interim Community Museums Grant Program
HRM Customer Service Centre
1st Floor Alderney Gate
40 Alderney Drive
Dartmouth, NS
Attention: Grants & Contributions Office

Applications may also be submitted by drop-off at any HRM Customer Service Centre marked to the attention of the address above. For a list of HRM Customer Services Centres see: www.halifax.ca/311/InPerson.php.

HRM will provide a letter confirming receipt of your application.

Evaluation of Submissions

Applications will be reviewed by a staff evaluation team and a recommendation report submitted to the HRM Grants Committee for a recommendation to Regional Council.

Applicants will be notified if their application is ineligible.

Owing to limited funds, not all eligible applicants may receive funding. For example, an application could be declined in relation to the 80% government funding threshold or an application for a Project Grant in addition to an Operating Grant may be declined.

In accordance with Section 25 of Administrative Order 2018-010-ADM the following criteria are used to evaluate submissions:

- (i) the incremental impact of municipal funding;
- (ii) the extent of public access (for example, hours of operation, access to the collection, communications, community engagement or outreach programming);
- (iii) the significance of the museum collection (for example, accession and de-accession policy; specialized, unique or comprehensive collection; scale and focus);
- (iv) the applicant's demonstrated standards of practice, including completion of the *Museum Evaluation Program* or formal application to or acceptance into the program as applicable;
- (v) confirmation of property ownership, lease or license agreement, or letter of agreement and terms attached thereto;
- (vi) all municipal, provincial and federal government funding, including any indirect or in-kind assistance to museum operations;
- (vii) the proportional cost of museum operations as distinct from unrelated or ancillary programs and services;
- (viii) reliance on volunteer labour and self-directed fundraising and/or earned revenues;
- (ix) financial stewardship as demonstrated through the submission of itemized financial statements; and
- (x) any outstanding obligations to the municipality, including overdue reporting as part of a grant program, tax or rent arrears, any other amounts owed to HRM.

Operating Grant: Evaluation and Weighted Scoring

The *Interim Community Museums Grant Program* evaluation criteria requires that the review team gauge the “**incremental impact**” of municipal funding on overall museum operations or a specific priority outcome. A measure of incremental change cannot be undertaken without a baseline from which the “before” and “after” impact can be deduced or measured⁹. Consequently, the documentation required in an initial application to the program is quite extensive (Section 20 of Administrative Order 2018-010-ADM). But, if approved for a multi-year Operating Grant, the recipient organization simply submits an annual financial statement and a brief progress report.

When applying for an Operating Grant you might consider how these funds will be used to achieve an improvement in, for example, sustainability, public access, collections management, or facilities. A self-evaluation of impact helps in the collection of feedback from grant recipients by HRM and contributes to an evaluation of the program’s effectiveness from the funder’s perspective.

The criteria used to evaluate applications set out in Section 25 of the Administrative Order 2018-010-ADM have been grouped into categories as shown below in Table 1 and “weighted” to reflect their relative priority. Individual scores are not published in reports but feedback is available upon request.

Table 1. Operating Grant: Evaluation Criteria and Weighted Scoring

Criteria	Description	Points
Funding Priority	Sustainability. Core recurring operating costs; financial stewardship and reporting; government funding; proportional cost of museum operations as distinct from unrelated programs and services; safety and associated liability; protection and significance of collection (scale, uniqueness, specialization, rarity, thematic depth, research interest).	40
Funding Impact	Direct incremental impact of municipal funding on museum operations, standards of practice and collections management.	30
Self-Sufficiency	Reliance on volunteer labour, self-directed fundraising and earned revenues; cost exposure and human resources in relation to property ownership; scale of holdings; facility state of good repair.	20
Public Benefit	Public Access. Seasonal or year-round operation; scope and quality of visitor experience; community outreach/programming; interpretation and presentation; community engagement.	10
Total		100

⁹ In the first year of application the evaluation can only gauge the *probability* to which municipal funding will contribute to an outcome that might not otherwise occur (“need”) or a change in the scale, type or quality of program or service.

Project Grant: Evaluation and Weighted Scoring

The scoring of a Project Grant application differs from that of an Operating Grant—there is less emphasis on sustainability and higher priority placed on a non-recurring initiative. These grants represent an opportunity to, for example, capitalize on a unique opportunity, address an issue in-depth, or to enhance the quality of the collection or amenities.

The criteria used to evaluate applications set out in Section 25 of the Administrative Order 2018-010-ADM have been grouped into categories as shown below in Table 2 and “weighted” to reflect their relative priority. Individual scores are not published in reports but feedback is available upon request.

Table 2. Project Grant: Evaluation Criteria and Weighted Scoring

Criteria	Description	Points
Strategic Opportunity	Ability to capitalize on a non-recurring opportunity (eg. exhibition hosting, collaboration, technological innovation); ability to leverage funding or visibility.	40
Funding Impact	Enhancement of museum collection (artefact acquisition or loan); exhibit development, display or interpretation; development or enhancement of a defined program or service.	30
Public Benefit	Public access (community outreach, accessibility); community-based research or self-publishing; program enrichment.	20
Capacity Building	Staff or volunteer training in museum practice; volunteer recruitment and retention; strategic planning or program/service evaluation; building conservation or lifecycle plan; appraisal or audit; small-scale or specialized equipment (costing under \$5,000 per item).	10
Total		100

Terms and Conditions of Funding

Payment

Unless conditions are applied to the contrary, grants will be issued in full upon Council's award decision.

Grant Notification Letter

HRM will provide applicants with written notification of an award, the amount and conditions of funding, and a reporting form as applicable. Those applicants declined funding will be provided a brief explanation and may request further feedback by contacting the Grants & Contributions office.

Mandatory Reporting: Operating Grant

The recipient of a multi-year Operating Grant must submit an annual financial statement and a brief summary of expenses and/or activities supported by HRM's grant (including the impact on the museum and the collection) within 30 days of the reporting deadline stated in the letter of award notification. If, after 30 days, reporting has not been received eligibility for further funding may be suspended pending receipt of reporting and may result in a reduction in the value of any subsequent grant proportionate to the duration of the default. Reporting must include:

- a financial statement; and
- a brief summary of the expenses or activities supported by HRM's grant, including a description of the impact on the museum and the collection.

Mandatory Reporting: Project Grant

The recipient of a Project Grant must submit a report on the form provided by HRM by March 31st of the fiscal year in which the grant was awarded. Reporting must include:

- total project costs;
- proof of expenditures; and
- a description of the final project, including confirmation of the project's commencement and information on its completeness.

Inability to Proceed

If the operations of the recipient organization cease or are diminished, or a funded project cannot be undertaken or completed as planned, please contact the Grants & Contributions office for guidance. In some cases, it may be necessary to refund all or a portion of a grant. Ineligible expenditures might also be recovered by the Municipality.

Acknowledgement

For guidance on acknowledgement of municipal funding or use of the Halifax Regional Municipality logo please contact Grants & Contributions office at: nonprofitgrants@halifax.ca.

Guidelines for Presentation of Financial Information

It is understood that some organizations operate a community museum within a broader mandate of programs, services, or advocacy¹⁰. Consequently, the organization's annual financial statement will include revenues and expenditures unrelated to the community museum. To assist in the presentation of **only recurring operating expenses directly related to the operation of a community museum** (Section 6 of Administrative Order 2018-010-ADM) a financial template is included on page 15 of this guidebook.

The operating budget template is based on the provincial government's *Community Museum Assistance Program* ("CMAP"). Those organizations already in receipt of CMAP funding should find it easy to transpose the information from the provincial to the municipal form. For those organizations seeking evaluation or admission to the CMAP program, the presentation of information could be used to develop an annual financial statement with the appropriate level of detail.

Applicants are encouraged to add notes to financial information as applicable. For example, where reserves or revenues are restricted.

"Restricted funds" are monies that the donor or funder stipulates may only be used for a specific purpose or project. These funds may be a grant subject to specific terms and conditions, for example, an individual, corporate or foundation donation or a bequest. The restriction provides reassurance to the donor/grantor that their contribution will be used in the manner they have chosen.

"Internally restricted funds" are conditions on expenditures applied by the organization's Board of Directors. Technically, these are "unrestricted" under non-profit accounting protocols, in part because they are discretionary and not the subject of a contractual agreement. A Board may limit the use of funds, such as a reserve, to create a contingency in the event of a revenue short-fall or unforeseen events.

See: Canadian Professional Accountants Canada "A guide to financial statements for not-for-profit organizations (NFPs): Questions for directors". Please see: <https://www.cpacanada.ca/en/business-and-accounting-resources/strategy-risk-and-governance/not-for-profit-governance/publications/nfp-financial-statements-guide-directors-questions>

¹⁰The organization's mandate is not exclusively or even primarily the operation of a museum and collections management.

Presentation of Financial Information: Museum Operations	
GENERAL REVENUES—MUSEUM OPERATIONS	Projected Revenue
Earned Revenues	
Admission Fees	
Membership Dues	
Programming Fees	
Gift Shop/Retail Sales	
Rental Revenue	
Fee-for-Service Revenue	
Interest Earned	
Transfer from Reserves	
Sub Total	\$
Donations and Fundraising	
Corporate Donations	
Individual Donations	
Foundations	
Sponsorship	
Special Fundraising Events (non-recurring)	
General Fundraising Activities (recurring)	
Sub-Total	\$
Government Funding (Monetary)	
Federal Government Grant	
Provincial Government Grant	
Municipal Government Grant	
HST Rebate	
PST Rebate (registered heritage property)	
Sub-Total	\$
TOTAL	\$
Indirect or In-kind Government Support: Attach a list any recurring operating cost not charged back to the organization by the property owner (e.g. insurance, utilities etc.), any in-kind goods or services, a rent discount, loan or financing, or tax relief. Where possible, include the monetary value of the consideration, discount, or in-kind goods and services. See: Notes to Financial Statement: Museums Operations Template on page 18.	

EXPENDITURES—MUSEUM OPERATIONS	Projected Expenses
Interpretation and Programming	
Exhibition Costs	
Programming Costs	
Other (interpretation and programming)	
Sub Total	\$
Collection and Access to Information	
Cataloguing Supplies and Expenses	
Preservation and Storage Materials	
Research	
Other (collection and access)	
Sub-Total	\$
Marketing, Fundraising and Retail	
Advertising and Promotion	
Fundraising Costs	
Retail Operations: Purchase for Resale	
Retail Operations: Other	
Other (marketing, fundraising or retail)	
Sub-Total	\$
Facility	
Mortgage	
Rent (lease or license)	
Insurance	
Utilities	
Property Taxes (includes area rate or local improvement charge)	
Custodial Services	
Sanitary Supplies	
Security	
Repairs and Maintenance (fire inspection/water and septic testing)	
Grounds-keeping (snow and ice control, lawn mowing)	
Other (facility)	
Sub-Total	\$

EXPENDITURES—MUSEUM OPERATIONS (continued)	Projected Expenses
Administrative/Management	
Full-time Employees	
Part-time Employees	
Benefits and Mandatory Contributions	
Summer Students	
Volunteer Recognition	
Professional Fees (financial statement, Revenue Canada remittance)	
Other (temporary employee, residency, internship, apprenticeship)	
Sub Total	\$
Office Expenses	
Bank Charges	
Equipment Leasing	
Equipment Servicing	
Postage and Delivery (post office box rental, courier)	
Office Supplies	
Office Equipment	
Communications (telephone, internet)	
Sub-Total	\$
Ancillary Administrative Expenses	
Credit Card Fees	
Membership Fees (organizational membership)	
Professional Fees (non-recurring)	
Training	
Travel	
Other	
Sub-Total	\$
TOTAL	\$

Notes to Financial Statement: Museum Operations Template

The use of the Presentation of Financial Information: Museum Operations template is optional.

- **Indirect or In-kind Government Support:** There is significant variance among community museums in terms of the extent of direct and indirect government assistance. Typically, in-kind or indirect assistance is not quantified with a dollar value in a financial statement. To be fair to organizations who do not receive this type or level of public subsidy all applicants are asked to disclose this form of operating assistance and, where practical or permissible, the current dollar value.
- **Federal Government Funding:** Excludes one-time capital funding.
- **Provincial Government Funding:** Excludes one-time capital funding.
- **Municipal Funding:** Excludes Capital Grants received under the *Community Grants Program*, *District Capital Fund*, or by resolution of Council. Includes any tax relief, less than market value rent, or operating grant.
- **Heritage Property Rebate:** The provincial *Heritage Property Program* offers a partial HST refund on the purchase of building materials used to repair, improve or restore the exterior of a registered heritage property occupied for a non-commercial use or owned and occupied by a non-profit organization. Some exclusions apply. Information available online—Nova Scotia Department of Communities, Culture & Heritage.



1. Hooked Rug Museum of North America – Hooked Rug Museum of North America Society - Hubbards

Founded in 2006, the Hooked Rug Museum preserves the history of hand-hooked rugs and the patterns and tools used in their production. Seasonal programming includes workshops and exhibitions of both traditional and contemporary works. (Image courtesy of Hooked Rug Museum of North America Society)



2. Musquodoboit Harbour Heritage Society—Musquodoboit Harbour Railway Museum

The original Musquodoboit Railway system connected resource industries in Northern Nova Scotia with the urban shipping centres of Halifax and Dartmouth. The railway station building is a registered heritage property and will celebrate the railway's 100th Anniversary in 2018. (Image provided by Halifax Regional Municipality).



3. Shearwater Aviation Museum—Shearwater Aviation Museum Foundation

In 2018, 12 Wing Shearwater will commemorate their 100th Anniversary.

During WWI convoys sailing from Halifax to supply allied forces in Europe needed protection from submarine attacks. The United States Navy supplied pilots, seaplanes and kite-balloons until the Canadian Naval Air Service was established. The first flight left Shearwater on August 25, 1918. The museum preserves Canada's naval aviation history with a collection of aircraft, an archives and art gallery, and interactive exhibits. (Image courtesy of Shearwater Aviation Museum)



Halifax Regional Municipality
Grants and Contributions
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