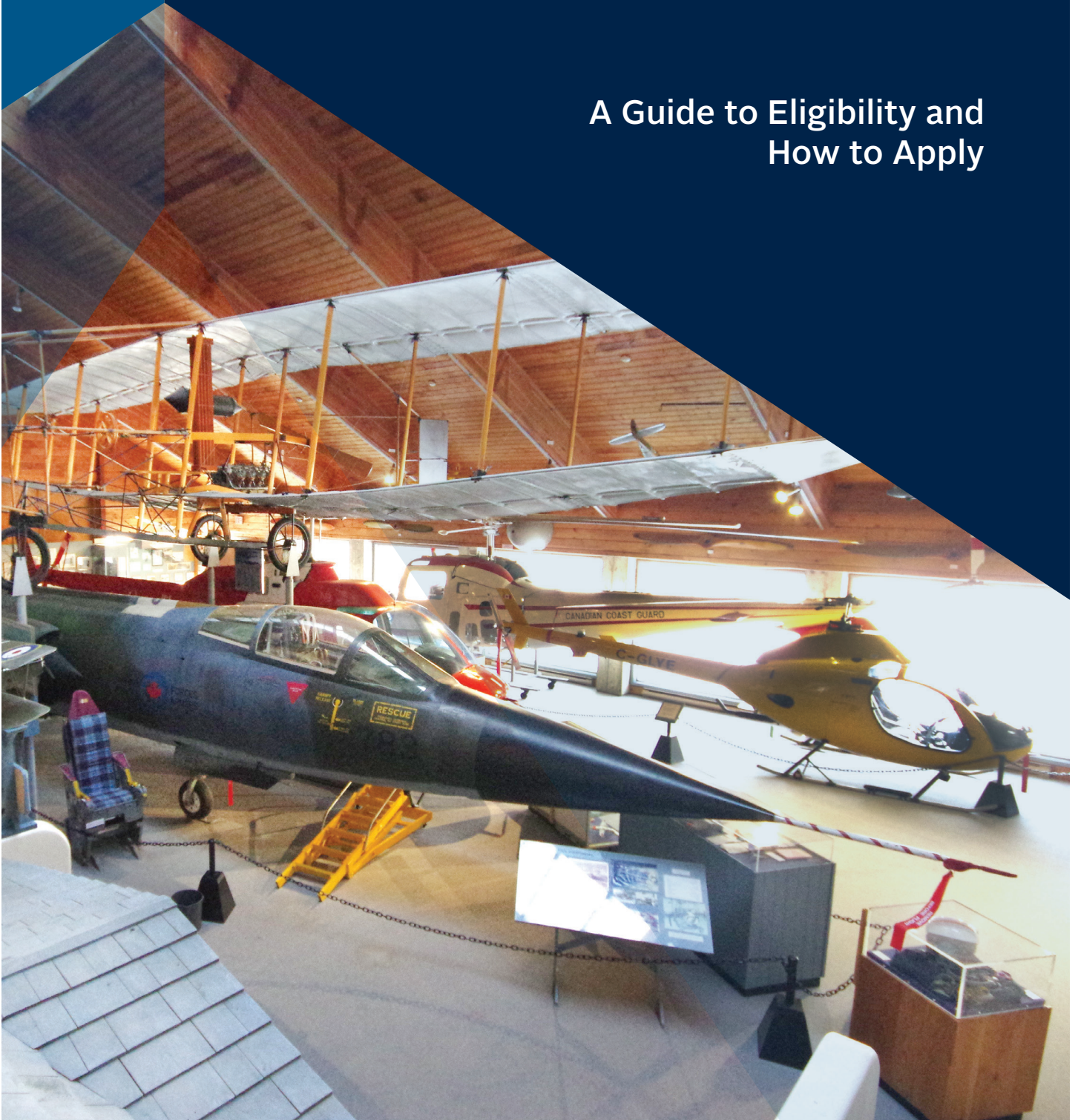


HALIFAX

Community Museums Grants Program

Administrative Order 2018-010-ADM

A Guide to Eligibility and
How to Apply





1. The Army Museum Halifax Citadel, Halifax (National Historic Site)

The Army Museum” is housed in the Cavalier Building within the Halifax Citadel, a federally-owned National Historic Site operated by Parks Canada. Their mandate is “dedicated to the collection, preservation and exhibition of material related to the military history of Atlantic Canada, with a focus on Nova Scotia, and to preserving the memory of Atlantic Canadian soldiers”. The society own a substantial collection of artifacts and archival materials including armaments and accessories, uniforms, insignia, photographs, documents, a small collection of books, and a special collection of “trench art” (Image provided by Gary Melville, *Army Museum Halifax Citadel*) .



2. Fort Sackville Foundation—Scott Manor House, Bedford

The Foundation lease the HRM-owned registered heritage property known as *Scott Manor House* (c.1770). The colonial-style two and a half storey residence was constructed by Lt. Col. Joseph Scott a member of the British military who pursued local business interests and later served as a member of the Nova Scotia government. The property is located adjacent to what remains of Fort Sackville a military outpost constructed circa 1749 as part of the Halifax Garrison defenses. Their primary mandate is to maintain and preserve the historic residence and to collect, preserve and promote the history and cultural heritage of Bedford. The collection includes photographs and artwork, newspaper clippings, maps, books, small artefacts (tools, household items, period clothing/costumes), and self-published monologues. (Image provided by Dave Reyno, *Fort Sackville Foundation*).



3. S.S. Atlantic Heritage Park Society—S.S. Atlantic Heritage Interpretation Park, Terence Bay

The society's mandate is to “educate, promote, and preserve the stories of the S.S. *Atlantic* wreck and rescue and to collect, research, and interpret marine and village life and culture at Terence Bay and Lower Prospect at the time of the S.S. *Atlantic* disaster”. Their facility is located on land leased by St. Paul's Anglican Church, the site of the burial ground for those who perished in the disaster. (Image Provided by John Corbett, *S.S. Atlantic Heritage Park Society*)

Front Cover: Atlantic Canada Aviation Museum Society—Atlantic Canada Aviation Museum, Goffs

The society currently lease a facility from the Province which is used exclusively for the Museum. Their mandate is to “maintain, develop and strengthen a permanent aviation museum in the Atlantic Provinces by researching, documenting, retrieving and restoring artifacts, objects and aircraft”. The society's collection includes large-scale artifacts (civilian and military aircraft), engines, armaments, artifacts and memorabilia, a small aviation library, art collection, and records regarding notable aviation personnel and events. (Image provided by David McMahon, *Atlantic Canada Aviation Museum*).

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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/business/doing-business-halifax/community-museums-grant-program**

Introduction

The *Community Museums Grant Program* supports registered non-profit and charitable organizations that operate a community museum as defined in Administrative Order 2018-010-ADM. The purpose of this program is to provide financial assistance for core museum operations and build the organizational capacity of eligible community museums located in the Halifax Regional Municipality.

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.

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

The *Community Museums Grant Program* has one application intake per year that is advertised in a newspaper circulating throughout the region and on HRM's website at: www.halifax.ca/business/doing-business-halifax/community-museums-grant-program. The web page also has 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**

Eligibility of an Organization

Applicants must be a registered non-profit organization or a registered Canadian charity. A non-profit organization includes the following forms:

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

An organization applying for admission to the program:

- 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 - www.halifax.ca/sites/default/files/documents/city-hall/legislation-by-laws/2018-010-ADM.pdf;
- 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).

Operational Definition: Community Museum

The *Community Museums Grants 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, institutional, corporate and private museums;
- linguistic or heritage societies that do not own a collection;
- broad-based cultural or membership-based advocacy organizations;
- stand-alone archives;
- 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; and
- 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 *Community Museums Grants Program*.

1. **Operating Grant:** funds towards “core” recurring operating expenses which are ongoing, fixed general and administrative expenditures required to operate the museum and manage its collection. These awards may be multi-year subject to the program’s budget capacity.
2. **Project Grant:** funds towards a specific project undertaken by the museum in the year for which application has been made for a grant. These are “one-time” grants meaning that they are not multi-year municipal funding commitments.

An organization can 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.

Museum Operating Grant

An Operating Grant is available at three levels:

- Tier I: up to a maximum of \$25,000 per fiscal year for a community museum that participates in the provincial *Museum Evaluation Program* and has attained a score of 50/100 or higher;
- Tier II: up to a maximum of \$10,000 per fiscal year for a community museum that does not participate in the provincial *Museum Evaluation Program* and/or has received a score below 50/100 with yearly operating expenditures averaging more than \$10,000 over the three (3) years immediately preceding application to the program; or
- Tier III: a developmental award of up to \$5,000 per fiscal year to a community museum that does not participate in the provincial *Museum Evaluation Program* and/or has received a score below 50/100 with yearly operating expenditures averaging \$10,000 or less over the three (3) years immediately preceding application to the program.

The value of an Operating Grant may be moderated to recognize indirect government assistance, the scale of museum operations, property ownership, the significance of the collection, and the scope of educational/outreach programming.

Because the level of funding (described as a “Tier”) is linked to (i) voluntary participation in the provincial *Museum Evaluation Program* and (ii) the organization’s evaluation score—either of which can change over time—a recipient of an Operating Grant may apply to the program to move to another Tier.

- To apply for a re-assignment from Tier II to Tier I the applicant must provide proof of participation in the provincial *Museum Evaluation Program* and documentation to show that they have attained a score of 50/100 or higher.
- To apply for re-assignment from Tier III to Tier II the applicant’s financial statement must demonstrate that its’ annual operating expenditures average over \$10,000 over the preceding three (3) years.

A change in funding level (Tier I, II or III) does not presume an increase in the value of an Operating Grant. All awards remain subject to the program’s annual budget. The value of an Operating Grant may also be moderated to account for the combined level of government operating funding; this is called a “government funding threshold”. The combined municipal, provincial and federal government operating funding, including any Operating Grant from this program, shall not exceed 80% of total operating revenues for annual

administrative and core museum program costs¹. A limit on the combined value of government operating funding is intended to:

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

Organizations that are eligible for inclusion in the program but whose combined government operating funding exceeds the 80% threshold for an Operating Grant may apply under the Project Grant category.

Note: the 80% threshold applies to government monetary/cash assistance not indirect assistance, for example a rent discount, tax relief, sales tax rebate, or HST rebate. However, indirect assistance is considered when evaluating applications and the value of an Operating Grant.

Eligible Expenses: Operating Grants may be used to pay ongoing general and administrative expenses directly associated with the operation of a community museum. These “fixed” costs will vary by organization, but the following list is provided as a general guide and to illustrate how an organization might prioritize how an Operating Grant is used:

- i. **“Core” operating expenses**—meaning that if these commitments are not met operations could cease. For example:
 - insurance, including general liability, property insurance, business interruption/loss of earnings insurance, commercial vehicle insurance, Directors and Officers liability, tenant insurance, intellectual property/identity theft, and additional contents insurance;
 - rent or mortgage payments;
 - real property taxes;
 - snow and ice control; and
 - utilities.
- ii. **“Fixed” operating expenses**—meaning that if these costs are not paid operations could be compromised and/or additional costs/risk incurred. For example:
 - preventive maintenance and repairs including mandatory or warranty inspections and scheduled preventive servicing, includes water/septic testing;
 - telecommunications, including telephone and Internet service charges, web site hosting and domain fees;
 - fire prevention and emergency measures;
 - janitorial and sanitary supplies; or
 - licensing, as applicable (e.g. public health standards).
- iii. **“Discretionary” operating expenses**—meaning that these expenditures maintain or enhance the quality of visitor experience or the museum’s standards of practice. For example:
 - collections management including professional conservation assessment and treatment;
 - archival materials and storage equipment;

¹ The government funding threshold may be moderated in 2021 and 2022 to allow for the financial impact of COVID-19. Non-recurring, project-specific grants are not included in the government funding threshold.

- professional fees for the preparation of an annual audited financial statement or internal audit;
- remuneration to a seasonal or temporary employee, including a residency, apprenticeship or internship;
- marketing;
- office supplies; or
- participation in a recurring observance day organized by the applicant or a community-based non-profit or charitable organization that fosters awareness of the museum, its' thematic or geographic mandate, encourages volunteerism and/or collaboration, and enhances community engagement. For example, Nova Scotia Heritage Day.

iv. “Ancillary” operating expenses—that are not an annually recurring obligation, but that enhance standards of practice or sustainability. For example:

- expenditures related to the applicant's participation in or preparation for assessment under the provincial *Museum Evaluation Program* as applicable, including re-evaluation;
- retail operations integral to the museum visitor experience wherein the product is linked to the museum's interpretive theme(s) and revenues generated are directed to support museum operations.

Expenditures not listed above may be considered on a case-by-case basis.

Project Grants

The Project Grant category has three (3) sub-categories:

1. Regular Project Grant—up to \$5,000;
2. Special Project Grant—up to \$20,000 or up to \$10,000 towards hosting an anniversary event; and
3. Capital Grant—up to \$25,000.

Application can be made to more than one sub-category but, subject to the program's budget capacity, not all submissions may be funded or may receive an award lower than that requested. Therefore, if applying to more than one Project Grant sub-category is it advisable to indicate their priority.

Note: A Project Grant is not a multi-year funding commitment.

1. Regular Project Grant

A grant of up to a maximum of \$5,000 to support one or more non-recurring initiatives that enhance educational programming, public access, organizational capacity building, an awareness and appreciation of museums and community heritage, the museum, its collection, programs or services.

A Regular Project Grant may be used to pay for a combination of expenses, not exceeding \$5,000 in total, associated with one or more non-recurring initiative, including the following:

- exhibit hosting or development;
- staff or volunteer training in museum practice;
- community-based research or self-publishing;
- independent professional services for any of the following:
 - design and/or fabrication fees;
 - legal fees;
 - strategic planning;
 - building condition and lifecycle planning;

building conservation assessment and report;
energy, safety or accessibility audit;
environmental assessment;
program evaluation;
an appraisal of an artefact or building for insurance or conservation purposes; or
a defined program or service.

2. Special Project Grant

A grant of up to a maximum of \$20,000 to support a non-recurring, exceptional or unique opportunity with the potential to attract provincial or national attention, significantly increase the organization's revenue or profile, or the commemoration of a place, person or historical event related to the museum's location or theme.

or

A Special Project Grant of up to \$10,000 towards hosting a quarterly anniversary event (25th, 50th, 75th, 100th etc.) ineligible for consideration under the HRM Regional Special Events Grants Program.

To confirm if a proposed anniversary event is eligible for consideration under the Significant Anniversaries category of the Regional Special Events Grants Program please refer to Administrative Order 2014-021-GOV which is posted on the HRM website.

3. Capital Project Grant

A grant of up to a maximum of \$25,000 to support one of the following:

- the acquisition, maintenance or capital improvements to fixed assets owned by the organization, including land, buildings, vehicles or equipment; or
- the acquisition of an artefact of social, cultural or historical significance for the museum's collection the value of which is verified by an independent appraisal² ; or
- the commission or purchase of an original work of art for the museum's permanent collection or site the value of which is verified by an independent appraisal ; or
- the design and construction of an exhibition or display. Preference may be given to permanent installations.

Note: Quotes or estimates are not required to support an application, but a request may be strengthened by demonstrating, for example, value, specialization, or quality in materials and/or supplier.

An organization may make application to, and receive funding from, any combination of the Project Grant funding sub-categories in any given year.

Ineligible Expenditures

Grants shall not be used for the following purposes:

- expenditures unrelated to the operation of a community museum, its programs or services;
- remuneration to a member or officer of the applicant's Board of Directors;
- 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;
- consulting fees to a member of staff or member of the Board of Directors;

² For example, valuations provided by individuals, institutions or companies recognized by the National Archival Appraisal Board, the Art Dealers Association of Canada, the Canadian Art Dealers Association, or the Appraisal Institute of Canada.

- debt retirement other than a mortgage;
- investments or savings;
- awards or prizes, banquets, dinners, receptions, souvenirs, personal gifts, or donations;
- scholarships or bursaries;
- the purchase of goods for resale;
- fundraising and fundraising events;
- lease, insurance, registration, inspection, repairs or maintenance for a private vehicle; or
- retroactive expenditures or the pre-payment of expenditures for goods and services to be utilized in the following fiscal year;
- private events, marketing, trade or consumer events, seminars, clinics, symposia, an awards event, a sporting event, political event, or conference;
- events that occur prior to April 1st of the respective fiscal year;
- leasehold improvements; or
- costs associated with the purchase of a surplus municipal property, or a lease or license of municipal property.



Community Museums Grants Program

Application Form: Operating Grant

Application Deadlines: application deadlines may vary annually. Please check program web site

Name of Applicant Organization:	
Registration Number(s):	
☐ non-profit society under the <i>Societies Act</i> (1989) ☐ non-profit association incorporated under the <i>Co-Operative Associations Act</i> (1989) ☐ not-for-profit corporation under the <i>Canada Not-for-profit Corporations Act</i> (2009) ☐ 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:
☐ Seasonal (operates minimum of 3 months) ☐ Year-round	
Applicant Contact: Name, mailing address, telephone number and email address.	
Operating Grant Category (check only one):	
☐ Tier I: participated in the provincial Museum Evaluation Program and has attained a score of 50/100 or higher, up to a maximum of \$25,000 per fiscal year; ☐ Tier II: did not participate in the provincial Museum Evaluation Program or has received a score below 50/100 with yearly operating expenditures averaging more than \$10,000 over the three (3) years immediately preceding application to the program, up to a maximum of \$15,000 per fiscal year; and ☐ Tier III: available to a community museum that does not participate in the provincial Museum Evaluation Program or has received a score below 50/100 with yearly operating expenditures averaging \$10,000 or less over the three (3) years immediately preceding application to the program, up to a maximum of \$5,000 per fiscal year.	

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 Museums Grants Program

Application Form: Project Grant

Application Deadlines: application deadlines may vary annually. Please check program web site

Name and Address of Applicant Organization(s):	
Registration Number(s):	
☐ non-profit society under the <i>Societies Act</i> (1989) ☐ non-profit association incorporated under the <i>Co-Operative Associations Act</i> (1989) ☐ not-for-profit corporation under the <i>Canada Not-for-profit Corporations Act</i> (2009) ☐ 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.	
Type of Project and Location: (Capital, Project, Special)	
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:		
<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>		
_____	_____	_____
Name (please print)	Signature	Date
_____	_____	_____
Name (please print)	Signature	Date
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.		
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 acceptance into the *Community Museums Grant Program* and an Operating Grant the applicant must complete the *Application Form: Operating Grant* provided by HRM and include the following:

- 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.

By mail to:

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:

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

In person drop-off can also be made at any HRM Customer Service Centre. Please request a receipt or the envelope date-stamped to confirm compliance with the application deadline. For a list of HRM Customer Services Centres see: www.halifax.ca/311/InPerson.php

By email to:

nonprofitgrants@halifax.ca

Please do not send an application to an individual email address. The email address provided above is a shared/designated repository and allows for quicker processing.

HRM will provide a letter or email confirming receipt of your application.

Please keep a copy of your application(s) for your files.

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 its 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 (one or two pages) describing the expenses or activities supported by HRM's grant, including a description of the impact on the museum and its collection or programming.

Mandatory Reporting: Project Grant(s)

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; and
- proof of expenditures.

It is also helpful to include information on the project's completeness.

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 for consideration.

Owing to limited funds, not all eligible applicants may receive funding.

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

1. For acceptance into the Community Museums Grant Program (this is an initial application to determine program eligibility and the value of any Operating Grant):

- the incremental impact of municipal funding (how will a grant improve the operations of the museum by comparing the before/after funding?);
- the extent of public access (for example, hours of operation, access to the collection, communications, community engagement or outreach programming);
- the significance of the museum collection (for example, accession and de-accession policies; specialized, unique or comprehensive collection; scale and focus);
- 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;
- confirmation of property ownership, lease or license agreement, or letter of agreement and terms attached thereto;
- all municipal, provincial and federal government funding, including any indirect or in-kind assistance to museum operations;
- the proportional cost of museum operations as distinct from unrelated or ancillary programs and services;
- reliance on volunteer labour and self-directed fundraising and/or earned revenues;
- financial stewardship as demonstrated through the submission of itemized financial statements; and
- 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.

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, interpretation, the facility or its amenities.

If approved for a multi-year Operating Grant, the recipient organization simply submits an annual financial statement and a brief progress report by a stated due date. The progress report is a form of self-evaluation and helps collect feedback from grant recipients that can be used in an evaluation of the program's effectiveness.

The criteria used to evaluate applications has been grouped into categories as shown below in Table 1 and "weighted" to reflect their relative priority. Individual scores are not published in staff 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 (for example, 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

2. Applying for a Project Grant (these are project-specific awards and not multi-year commitments)

The evaluation of an application for a Project Grant differs from that of an Operating Grant—there is less emphasis on sustainability and higher priority placed on how a specific project addresses the purpose of each sub-category. These grants represent an opportunity to, for example, capitalize on a unique opportunity, address an issue in-depth, commemorate a significant anniversary, or to enhance the quality of the collection or museum amenities.

The criteria used to evaluate applications has been grouped into categories as shown below in Table 2 and “weighted” to reflect their relative priority. Individual scores are not published in staff 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/unique opportunity (for example, exhibition hosting, collaboration, technological innovation, commemorative anniversary); ability to leverage funding or visibility (for example, capital).	40
Funding Impact	Public safety (e.g. staff/volunteers/visitors or water and septic system or fire prevention/emergency measures); enhancement of museum's permanent collection (e.g. artefact acquisition or exhibit development); development or enhancement of a defined program, service or interpretive feature.	30
Public Benefit	Public access; 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; equipment.	10
Total		100

Terms and Conditions of Funding

Payment

Unless conditions are applied to a specific Project Grant, funds will be issued to the successful in full following Council's award decision.

Grant Notification

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.

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 advocacy. 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 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*. Those organizations already in receipt of *Community Museum Assistance Program* 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 *Community Museums Assistance Funding* 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's, 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>

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 funding from the *HRM District Capital Fund*, or by resolution of Council. Includes any tax relief, less than market value rent, or operating grant.
- **Provincial 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. Sheet Harbour & Area Heritage Society—MacPhee House, Sheet Harbour

The Society is a registered non-profit organization whose mandate is to preserve, collect and display the history of Sheet Harbour and area. They entered a sub-lease with the Sheet Harbour Chamber of Commerce to formalize their occupancy of MacPhee House, a registered heritage property owned by HRM. MacPhee House (c.1875) was purchased by the Province of Nova Scotia in 1985 and moved to its current location to avoid demolition.



2. Nova Scotia Sports Hall of Fame Society—Nova Scotia Sports Hall of Fame

Established in 1964 as the Nova Scotia Sport Heritage Centre and incorporated as a non-profit society in 1983, the initial collection of sport memorabilia and inductees was housed in the Industrial Building of the Halifax Forum. In 2004, the society changed its name to the *Nova Scotia Sport Hall of Fame*. Although the Society is seeking a new location, they continue to offer an online presence. The society describes itself as having a “dual role as a Hall of Fame and a sport history museum” with a mandate to “permanently record, research, publish, conduct programs of educational training relating to, and pay tribute to achievements of historical significance to sport in Nova Scotia”. The museum has a significant collection of artifacts including extensive digital text and image files recording the sports history of Nova Scotia, a library, and trophies.



Halifax Regional Municipality
Grants and Contributions
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