

Heritage Organization Development Grant (HODG)

2019-20 PROGRAM and APPLICATION GUIDELINES

APPLICATION DEADLINE

Completed applications with all mandatory documents must be submitted online through the Grants Ontario **no later than 5:00 p.m. Eastern Daylight Time on Tuesday, July 2, 2019.**

Applicants are encouraged to read these guidelines before completing and submitting a HODG Grants Ontario application.

Applicants are encouraged to submit their completed applications well in advance of the deadline.

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WHAT YOU NEED TO KNOW BEFORE YOU APPLY

Grant Description and Deadline

The Heritage Organization Development Grant (HODG) is an annual, statutory-based operating grant designed to promote public awareness of Ontario's rich and diverse heritage. The program provides local historical societies, smaller community museums and other heritage associations, located throughout the province, with a portion of their annual operating support.

Before filling out the 2019-20 application:

1. Know the Submission Deadline
2. Read the entire 2019-20 Program and Application Guidelines
3. Complete and submit the online applications including supporting materials through the [Grants Ontario portal](#)
4. Grants Ontario Technical Support and Program contacts

If you wish to apply for a grant, and have not done so before, please send your inquiry to: HODG-SSAHC@ontario.ca.

Application Submission and Deadline

Applications must be completed and submitted with the supporting materials no later than **Tuesday, July 2, 2019 at 5:00 p.m. (Eastern Standard Time)** through the Grants Ontario web portal. Late applications will not be accepted.

Ensure that you have answered all the questions and attach the related supporting documents. It is your responsibility to ensure that your application has been successfully submitted.

After submitting an application, you should receive a confirmation notice by email immediately. If you do not receive such confirmation, please contact the Grants Ontario customer service (see **Contacts** below).

CONTACTS

HODG Enquiries contact

Shannon Khan
Culture Programs Advisor
Phone # (416) 314-5186
Email: HODG-SSAHC@ontario.ca

Grants Ontario Technical Support

Customer Service
Monday - Friday 8:30 a.m. to 5:00 p.m.
Toronto: 416-325-6691
Toll Free: 1-855-216-3090
E-mail at GrantsOntarioCS@Ontario.ca

You can log in to Grants Ontario at www.grants.gov.on.ca

WHO CAN APPLY

Eligibility

Eligible organizations are non-profit bodies that are actively involved in local outreach activities such as the production of displays and promotional materials, public programs, lecture series, walking tours and special activities designed to inform and educate the general public about their community heritage.

The Heritage Organization Development Grant is distributed to recipients operating a year-round or seasonal facility in accordance with [Regulation 879](#), Grants to Incorporated Historical Societies and Associations under the [Ontario Heritage Act](#).

Additional Considerations

The Ministry of Tourism, Culture and Sport cannot guarantee funding to all applicants, nor can it ensure that the total amount requested by successful applicants will be granted. Past funding does not guarantee program funding.

Organizations must not be in default of the terms and conditions of any grant or loan agreement with any ministry or agency of the Government of Ontario.

APPLICATION SECTIONS

New this year, the 2019-20 Heritage Organization Development Grant (HODG) application has been customized and streamlined. The instructions and requirements are outlined within each section of the application. All questions in each section must be answered. Listed below are the sections in the application.

All documents must be attached to the “Case Attachments” tab in Grants Ontario. Identify each attachment with the organization’s name (e.g. “XYZ Heritage Society 2018 Board Minutes”).

Sections in the Application

Sections A and B are pre-populated based on information extracted from the Transfer Payment Common Registration Process (TPCR).

Before continuing with the application process, please ensure that this information is current and accurate. If it is not accurate, please complete an Assistance Request through Grants Ontario.

Mandatory questions and fields are noted in each section with an asterisk symbol. “*”

Section A - Organization Information

- o Organization Name
- o Organization Legal Name

Section B - Organization Address Information

- o Business Address
- o Mailing Address

Section C - Application Contact

The primary contact is assigned the role of applicant. This person will be responsible for the grant administration and ministry correspondence.

Section D – Organization Contact Information

Identify three contacts: (1) Most Senior Official in your organization: with whom the Minister of the Crown would correspond; (2) Other senior staff person: the most senior member of the organization aside from the person listed as the most senior official (e.g., Chief Executive Officer, Director, Treasurer; and (3) Payment Contact: the person to contact about banking information.

Section E - Grant Payment Information

All Applicants must complete this section.

The information in this section will be used to process payments. This person must have signing authority. If you are successful, payment will be deposited by Electronic Funds Transfer. Please ensure that banking information is accurate and active. If your organization's banking information has changed in any way, you must submit a [new Electronic Funds Transfer form](#) (EFT).

Section F – Community Engagement Activities

Applicants must complete these sections. The character limit is 1000.

Applicants must report on their community engagement activities during the past year. You may submit your organization's official 2018 Annual Report by attaching it to your case in Grants Ontario.

If your organization does not produce an Annual Report, a report must be created that details your activities in 2018. **See Appendix "A"**.

French Mandate

All Applicants must complete this section.

Does your organization's mandate include providing programs and services to promote and preserve Francophone culture?

Board Members

Applicants must complete this section. The character limit is 2000.

List or provide the board members' names, position and years served on the Board.

Section G – Succession Planning

All Applicants must complete this section. The character limit is 2000.

Succession planning is developing new leaders who can replace former leaders when they leave the organization. Please list any new Board Executives in this section.

Section H – Budget/ Revenue and Expenses/Financial Report and Proof of Not for Profit status

All Applicants must complete this section.

Financial Report: Applicants must submit *

Applicants must submit a financial report.

Applicants must submit proof of current Not for Profit status.

See Appendix "B".

Revenue and Expenses

All Applicants must complete this section.

Revenue - Report revenue generated for the operation of the society/heritage organization, as defined by [Regulation 879](#). **See Appendix "B"**.

Expenses - Report eligible expenditures directly associated with the operating of the organization. **See Appendix "B"**.

Section I – Performance Measures

All applicants must complete this section.

Performance measures are part of the requirements of Regulation 879. **See Appendix "C"** for details

Section J – Checklists and Attachments

See Appendix "D"

APPENDIX “A”

Section F - Community Engagement Activities

- Number and description of exhibits/displays/audiovisual installations circulated in 2018
- Number and description of educational or promotional events and programs (e.g. heritage fairs, presentations, member events, etc.) conducted in 2018
- Number and description of heritage tours conducted within the community in 2018
- Number and description of heritage assets acquired/conserved/archived in the year 2018
- Number of operating days of your Heritage Resource Centre

APPENDIX “B”

Section H - Budget - Financial Reports and Proof of Not-for-Profit Status

1. Financial Returns

The following information is required as proof that the applicant’s not-for-profit status is current. If your organization’s incorporation is not of a type that files the returns below, contact your Heritage Programs Advisor to discuss acceptable alternate documentation.

Not-for-profit status - Any one of the following as filed by your organization annually:

- a. Current Letter of “Good Standing” from Ontario Historical Society; or
- b. Most recently filed Registered Charity Information Return (CRA form T3010); or
- c. Non-Profit Organization (NPO) Information Return (CRA form 1044)

And

2. Financial Report - You must also submit **one** of the following:

- a. An audited financial statement or review engagement; or
- b. Treasurer’s report for the previous fiscal year signed by the President or Treasurer.

APPENDIX “B”

Budget – REVENUE AND EXPENSES 2018-19

Revenue

Report revenue generated for the operation of the society/heritage organization, as defined by [Regulation 879](#). Report only cash generated revenue; do not include contributions of goods or service in lieu of cash.

REVENUE SOURCES	
Government of Canada	Enter the total amount of contributions and/or grants from federal ministries, departments, and agencies.
Government of Ontario	Enter the total amount of contributions and/or grants from provincial ministries, departments, and agencies. Please include 2018 MTCS HODG grant amount in your total.
Municipal Grants	Enter the total amount of contributions and/or grants from municipal and/or regional government(s).
Membership Dues/Fees	Total revenues from annual membership fees.
Publications Sales	Enter dollar amounts for revenue generated through subscription fees or direct sales of newsletters, journals, and other periodicals produced by your organization.
Advertising Revenue	Enter revenue generated through the sale of advertisement space within publications, websites/social media platforms, or on physical property.
Foundations	Enter the total amount of contributions and/or grants from public and/or private foundations (community-based foundations, family foundations, etc.
Donations	Charitable gifts of money given to your organization from individuals, corporations, or groups.
Other (Please Specify)	Enter any other revenues earned by your organization that fall outside of the previous categories. You must specify type/source in the fillable blue line on the form.

REVENUE AND EXPENSES 2018-19

Eligible Expenses

Only expenditures directly associated with the operating of the organization should be included. The total of these expenses is used as a basis for calculation of the organization's operating grant, following the criteria set out in [Regulation 879](#).

OUTREACH ACTIVITIES	
Travelling or virtual exhibits and audio-visual programs.	Costs related to production and circulation, including fees for honoraria. Exhibit/program may be for community audience or for circulation.
Community Presence: promotional events and programs.	Costs relating to planning and development including fees, or honoraria and travel expenses for speakers, but not including food.
Community Engagement: tours, consultations, member recruitment.	Costs related to planning and delivering architectural or community heritage walking or driving tours promoting the community's heritage. Costs related to planning and delivering community advocacy or consultations, member recruitment strategies.
Accessible Archival/Library/Artifact Collections	Costs of making collections accessible to the public for research, exhibits and public programming either physically through a local facility, or digitally via the organization's own website or through partnership with another organization. These costs can be related to acquisition, conservation, storage, digitization and display of archival, library and artifact collections.

HERITAGE RESOURCE CENTRE	
Community Collections Expenses	Enter expenses related to the operation and maintenance of a heritage resource center for which the sole or primary purpose is to house the collection and make it available for public research and extension/outreach activities for the benefit of the community. Costs may include property taxes, rent, repairs, cleaning and utilities.
Office Expenses/ Administration	Enter expenses incurred for maintaining office premises except when offices are housed in a heritage resource center for which operating expenses are being claimed.
Staff Expenses	Enter expenses incurred in Staff salaries and benefits.
Board Governance and Development Expenses	Enter expenses for board meetings related to succession planning for the board (to bring new knowledge and skills to the organization) or strategic and financial planning sessions for the organization. In 2018 such meetings might focus on preparing the board and reviewing the organization's by-laws for the transition to Ontario Not-for-Profit Corporations Act .

APPENDIX “C”

Section I - Performance Measures

1.	Full-Time Staff	Number of full-time employees (FTE = 30hrs+/week) in 2018
2.	Part-Time Staff	Number of part-time employees in 2018
3.	Volunteers	Number of active volunteers in 2018
4.	Volunteer Hours	Total number of hours contributed by all volunteers in 2018
5.	Bylaw Quorum	Minimum number of voting Board members required to meet quorum as stated in organization’s bylaws
6.	AGM Attendance	Number of voting members in attendance at the 2018 AGM
7.	Board Meetings	Total number of times Board met in 2018, including AGM.
8.	Membership	Number of members in 2018
9.	Members Meetings	Number of membership meetings held in 2018
10.	Website	Number of site visits to your organization’s website in 2018
11.	Social Media	Number of combined followers on all social media platforms used by your organization (Facebook, Twitter, Instagram, etc.)

APPENDIX “D”

Section J - Checklist and Attachments

The checklist below identifies **four documents** that are required. The required documents are also identified in the application.

1. Registered Returns:
 - a. Registered Charity Information Returns (T3010); or
 - b. Letter of “Good Standing” from the Ontario Historical Society, or
 - c. NPO Information Return (form T1044)
2. Community Engagement Activities
3. Annual General Meeting (AGM) Minutes
4. Financial Report

HOW TO APPLY USING GRANTS ONTARIO

Grants Ontario is the Government of Ontario's online grants management system. It provides a one- window access to information about government grants, how to apply for grants, and how to check the status of your application.

Step 1: Access the Grants Ontario System. Sign in to your User Account or create a new [ONE-key ID](#)

- Before applying to the CMOG funding program, you must create a ONE-key ID and password. To create a One-Key account, please refer to the [Grants Ontario System Reference Guide for Applicants](#) for instructions. You will not be able to access the Grants Ontario System without a ONE-key login and password.

Step 2: Organization Profile Update - Transfer Payment Common Registration

- All organizations applying to a funding program managed in the Grants Ontario System must complete the [Transfer Payment Common Registration \(TPCR\)](#). TPCR is a one window self-serve registration system for submitting and updating organization profile information.

Step 3: Download the Mandatory Application Form

- In your Grants Ontario profile, select “Apply for Grant”.
- **Select** “Heritage Organization Development Grant 2019” Category.
Note: If you get pop-up error, click on the allow pop-up from Grants Ontario.

Step 4: Complete the Mandatory Application Form - Sections identified by asterisk *

- Select and open the Heritage Organization Development Grant Application instructions on how to complete this document are included in the application form itself.
- Some of the information requested in the first few sections of the Grants Ontario Application Form (e.g., address, contact information, etc.) will be pre-populated using data from the registration process. Ensure this data is up-to-date.
- Once the program application is started online in the Grants Ontario System, it may be saved at any point and returned to later (refer to the [Grants Ontario System Reference Guide for Applicants](#) for instructions on how to save and submit).

Step 5

A: Complete the Mandatory Fields of the Application – Sections identified by asterisk *

- All information provided in the application and the related attachments must be true, correct and complete (as verified by an authorized official).

Step 6: VALIDATE and Submit Your Completed 2019 Organization Development Grant Application

- **Upload your validated** Grants Ontario Application Form into the Grants Ontario System.
- **Attach** all mandatory documents.

Note: Grants Ontario System will only accept validated application. Ensure that your Grants Ontario application number matches the upload application case number.

Step 7: Application Submission Confirmation

- Once your 2019-20 application is uploaded and submitted electronically through the Grants Ontario System, an email will be sent to the main application contact confirming receipt.
- **It is your responsibility to ensure that your application has been successfully submitted.** If you have not received a confirmation notice by email within 24 hours, please contact Grants Ontario customer service (see the **Contact** section of this Guide).

RECIPIENT OBLIGATIONS

Applicants are expected to comply with the [Ontario Human Rights Code](#) (the “Code”) and all other applicable laws. Failure to comply with the letter and spirit of the Code will render the applicant ineligible for a grant and, in the event a grant is made, liable to repay the grant in its entirety at the request of the Ministry.

Applicants should be aware that Government of Ontario institutions are bound by the [Freedom of Information and Protection of Privacy Act, R.S.O. 1990, c.F.31](#), as amended from time to time, and that any information provided to them in connection with your application may be subject to disclosure in accordance with that Act. Applicants are advised that the names and addresses of organizations receiving grants, the amount of the grant awards, and the purpose for which grants are awarded is information made available to the public.