

HERITAGE PROGRAM – COLLECTIONS MANAGEMENT FOR HERITAGE INSTITUTIONS General Granting Criteria for Organizations

PREAMBLE

The Shevchenko Foundation supports projects and programs that

- Have an identifiable Ukrainian and/or Ukrainian Canadian content;
- Are on a national or regional level;
- Reflect a high degree of excellence, and
- Reach a diverse and broad audience.

Furthermore, applicants need to be aware that

- The Shevchenko Foundation funds only up to 50% of total project or program costs.
- Each application must provide a full budget, including **all** sources of revenue and **all** expenses for the entire project or program.
- Applicants will retain copyright integrity.
- Submission of an application does not guarantee that the Shevchenko Foundation will provide any financing for the project.

WHO IS ELIGIBLE?

Organizations:

- Canadian not-for-profit professional, semi-professional and amateur groups governed by a board of directors or a body responsible for the organization.

HOW OFTEN CAN ONE APPLY?

- Applications can be made for one project per year, and must be made in advance of the starting date of the project.
- No new application will be accepted if a Final Report has not been submitted from a previous grant.
- Applications for projects that are phased over more than one year will be accepted. Funding will be granted in phases, subject to meeting annual reporting requirements.

APPLICATION DEADLINES

Unless otherwise specified, deadlines for grant applications are APRIL 1 for projects beginning after July 1, and OCTOBER 1 for projects beginning after January 1.

HERITAGE PROGRAM – COLLECTIONS MANAGEMENT FOR HERITAGE INSTITUTIONS Objectives and Eligibility for Organizations

Eligible Applicants:

The Heritage Program provides support to individuals, groups, organizations and institutions to collect, study and preserve material and intellectual heritage of Ukrainian life in Canada. The actual amount of assistance will depend on the scope of the project and available Foundation resources. **Deadlines for application submissions are April 1 for projects beginning after July 1 and October 1 for projects beginning after January 1.**

Eligible Projects:

The Collections Management for Heritage Institutions Sector of the Heritage Program funds projects related to:

- Acquisitions by recognized and established institutions of heritage items or collections at risk;
- Collections management funding to established heritage institutions with permanent collections, such as archival repositories, museums, libraries and art galleries for the professional maintenance of permanent records of the Ukrainian Community, e.g. conservation supplies, environmental monitoring controls, collections management software, costs associated with the classification and cataloguing of collections, professional development in collections management, among other.

CANADIAN REVENUE AGENCY

Individuals and organizations who do not have their own charitable number as defined by the Canada Revenue Agency (CRA) may be subject to participation in an Agency Agreement with the Shevchenko Foundation. The Agency Agreement documents the disbursement of funding, the roles and responsibilities of the individuals or organization receiving funding, and the monitoring and reporting procedures. For more information please take the time to read the Government of Canada Charities Policies and Guidance Document.

HERITAGE PROGRAM – COLLECTIONS MANAGEMENT FOR HERITAGE INSTITUTIONS – Application Checklist for Organizations

Your application must include all the items on this checklist and be submitted in this same order.
Incomplete applications will not be considered.

1. **Grant Registration Form** (pages 4 and 5 of this file)
2. **Institutional Profile:** (3 pages maximum) Describe the mandate or purpose of your institution, its mission and visions statements. Explain how your institution brings to life its mandate or purpose in the management of a permanent collection and in the delivery of public programs and how these relate to the advancement of Ukrainian heritage in Canada. Describe the individuals that participate in your institution, your organizational structure and governance model. Provide some background on your permanent collection.
3. **Project Proposal:** (3 pages maximum) Describe the proposed collections management project providing information about its goal, plan of action and expected outcomes. Describe the significance of the project to the preservation of Ukrainian heritage material in Canada and the benefit it will provide to your institution and to the community.
4. **Project Budget** (pages 6 and 7 of this file): Your budget should list **ALL** sources of revenue for the project. These should include the amount you are requesting from the Shevchenko Foundation, the contribution of your organization toward the project, the monies you expect to raise through fundraising, the amounts of grants you are seeking from other funding agencies, and any other sources of revenue. The budget should also list **ALL** expenses for the project. These may include travel and accommodation costs, communication or promotional costs, professional fees, equipment or facility rental, distribution costs, licensing and copyright fees among others. The Shevchenko Foundation encourages prudent and responsible fiscal planning. Hence, total project expenses should not exceed total project revenue.
5. **Support material relevant to your project**, such as your institution's promotional material, sample of your collections policy, conservation policy, description of relevant collection, among others.
6. **Additional documents required:**
 - List of the organization's Board of Directors
 - Constitution and by-laws (if applying for \$10,000 or more)
 - Most recent audited financial statement, inclusive of balance sheet
 - Most recent monthly or quarterly financial statement, inclusive of balance sheet
 - Most recent Annual Report of the organization

Please email this registration form along with your completed application as ONE PDF DOCUMENT to admin@shevchenkofoundation.ca

You are welcome to contact our office at toll-free 866-524-5314 if you have any questions or require assistance with your application.

**HERITAGE PROGRAM – COLLECTIONS MANAGEMENT FOR HERITAGE INSTITUTIONS
GRANT REGISTRATION FORM for Organizations**

Legal Name of Organization _____

Name of Contact Person _____

Mailing Address (office/headquarters) _____

City _____ Province _____ Postal Code _____

Telephone (contact person) _____ (Alternative) _____

Email of Organization _____ Website of Organization _____

Is your organization incorporated Yes - Date of incorporation (d/m/y) _____
 No Year founded _____

Is it registered as a non-profit organization Yes No
 If Yes, Charitable # _____

Project Title _____

Project Summary

A brief description of no more than 25 words which the Shevchenko Foundation can use in its promotional & reporting needs.

This project will begin on (d/m/y) _____ and finish on (d/m/y) _____

Unless otherwise indicated, deadlines for grant applications are APRIL 1 for projects beginning after July 1, and OCTOBER 1 for projects beginning after January 1.

Amount requested _____

Have you received funding from Shevchenko Foundation in previous years? ___ YES ___ NO

If YES, please note that no new application will be accepted if a Final Report has not been filed from a previous grant. Please indicate the most recent year funding was received _____ Amount received _____

For Internal Use Only: Grant File # _____ Client # _____

Date Application Received _____ Amount Approved \$ _____

Date Approved _____ Date Final Report Rcvd _____

DECLARATION

- We have read the General Granting Criteria, and Sector Objectives and Eligibility criteria of the Shevchenko Foundation Grants Program.
- We accept the conditions of this program and agree to abide by the decision of the Shevchenko Foundation.
- We understand that the Shevchenko Foundation is subject to the Freedom of Information and Protection of Privacy Act and the above information is protected under the Act.
- We confirm that the statements in this application are true.

Print Name

Print Name

Signature (President)

Signature (Treasurer/Secretary)

Date Signed _____

**HERITAGE PROGRAM – COLLECTIONS MANAGEMENT FOR HERITAGE INSTITUTIONS
Project Budget Form (Part 1)**

Name of Organization	
Project Title	
Prepared by	

Please use budget notes area if you have additional information.

Proposed Project Budget

REVENUES	Amount	%	Check if confirmed
Amount requesting from Shevchenko Foundation:			
Government Grants:			
subtotal	\$		
Other Grants:			
subtotal	\$		
Fundraising:			
subtotal	\$		
In-Kind:			
subtotal	\$		
Other:			
subtotal	\$		
Total Revenues	\$		

**HERITAGE PROGRAM – COLLECTIONS MANAGEMENT FOR HERITAGE INSTITUTIONS
Project Budget Form (Part 2)**

Please use budget notes area if you have additional information.

Proposed Project Expenses

EXPENSES	Amount
Salaries/Professional Fees	
Program Costs	
Equipment & Supplies	
Other (specify)	
Total Expenses	\$

BALANCE	\$
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*revenue must equal expenses with a zero balance

Budget notes: