

## Heritage Organization Development Grant (HODG)

### 2023-24 PROGRAM and APPLICATION GUIDELINES

#### **APPLICATION DEADLINE**

Applications must be submitted online through the Transfer Payment Ontario system **on Friday, June 30, 2023, no later than 5:00 p.m. Eastern Daylight Time.**

Applicants are encouraged to read these guidelines as it contains specific instructions that you will need to know for each section of the application and to gather the required documents you will have to submit. Applicants are encouraged to submit their completed applications well in advance of the deadline.

***First time Applicant*** - Before completing an application, please review the eligibility requirements on page 4.

# Table of Contents

WHAT YOU NEED TO KNOW BEFORE YOU APPLY ..... 3

    Application Deadline ..... 3

    Contacts..... 3

WHO CAN APPLY ..... 4

    Grant Description and Eligibility..... 4

APPLICATION SECTIONS ..... 6

    Section A - Organization Legal Name..... 6

    Section B - Organization Address ..... 6

    Section C - Application Contact ..... 6

    Section D - Grant Payment Information ..... 7

    Section E - Community Engagement Activities 2022 ..... 7

    Section F - Succession Planning ..... 7

    Section G - Budget: Revenue and Expenses 2022..... 7

    Section H - Performance Measures 2022 ..... 8

    Section I - Checklist and Attachments ..... 8

APPENDIX “A” - Section G - Revenue and Expenses 2022..... 9

APPENDIX “B” - Section H - Performance Measures 2022..... 12

HOW TO APPLY USING TRANSFER PAYMENT ONTARIO ..... 13

## WHAT YOU NEED TO KNOW BEFORE YOU APPLY

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### Getting Started

#### Transfer Payment Ontario (TPON)

The Transfer Payment Ontario (TPON) system is your one-window access to apply for funding

- New users to TPON will create a My Ontario Account profile or can use a previously created My Ontario Account.
- Users who have a ONE-key or GO Secure ID will be required to create a My Ontario Account for secure access to TPON.
- Instructions to create a My Ontario Account will be available on [Get Funding from the Ontario government](#) as of April 17 to support this change.
- Existing TPON users will have the opportunity to migrate their profile to My Ontario Account by creating an account with their TPON associated email.

**NOTE:** TPON requires Adobe Acrobat Reader to fill out the PDF application form.

*See Page 13 for more details.*

#### How to Apply:

For detailed instructions on how to apply for the program please visit the [Transfer Payment Ontario](#) web page.

#### Application Deadline

**The deadline to apply is 5:00 p.m. (EDT) on Friday, June 30, 2023, through the Transfer Payment Ontario (TPON) System.**

*Note: Only online application will be accepted. Late applications will not be accepted.*

#### Contacts:

HODG Program Enquiries contact	Transfer Payment Ontario Client Care and Technical Support
Shannon Khan Culture Programs Advisor Email: <a href="mailto:HODG-SSAHC@ontario.ca">HODG-SSAHC@ontario.ca</a>	Monday - Friday 8:30 a.m. to 5:00 p.m. Toronto: 416-325-6691 Toll Free: 1-855-216-3090 E-mail: <a href="mailto:TPONCC@ontario.ca">TPONCC@ontario.ca</a>

## WHO CAN APPLY - Eligibility

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### Grant Program Description

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.

This 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](#).

### Eligible Organizations

Eligible organizations are non-profit bodies that have been in operation and incorporated for at least one year, with its head office in the Province of Ontario, 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.

### Eligibility Requirements

In order to be considered an eligible applicant to the program, your organization will need to meet the following requirements:

- be a registered non-profit corporation or an affiliate of the Ontario Historical Society;
- have been in operation and incorporated for at least one year;
- have as its primary objective the support, encouragement and facilitation of the conservation, protection and promotion of your community's heritage;
- be governed by a Board of Directors;
- have spent in the preceding fiscal year at least \$250 on outreach activities (education or extension programmes that support activities designed to increase knowledge, awareness and promotion of your community's heritage).

***New Applicants:*** If you are a first-time applicant and your organization meets the above requirements, you must submit with your application a copy of your organization **Constitution and By-laws**.

Funding is not guaranteed and is dependent upon funds available.

The HODG program does not provide funding for project grants or capital projects

### Maximum Grant

The maximum grant is \$1,545.

**Additional Considerations**

The Ministry of Citizenship and Multiculturalism 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 funding in the current year.

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

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The Heritage Organization Development Grant (HODG) application consists of the sections below with instructions and requirements 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 Transfer Payment Ontario. Identify each attachment with the organization’s name (e.g. “XYZ Heritage Society 2022 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 Transfer Payment Ontario. Mandatory questions and fields are noted in each section with an asterisk symbol “\*”.

#### **Section A - Organization Legal Name**

- o Organization Operating Name
- o Organization Legal Name

#### **Section B - Organization Address**

- 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 - Grant Payment Information**

*Applicants must complete this section.*

The information in this section will be used to process payments. This person must have signing authority. If your application is successful, and you have direct deposit payments set-up, we will use the banking information previously provided to make the payments. If you **do not** have direct deposit setup, please complete and submit the EFT form and ensure that your banking information is active. If your organization's banking information or address has changed in any way, you must submit a *new online* [Electronic Funds Transfer Form](#) (EFT).

## **Section E - Community Engagement Activities 2022**

*Applicants must complete this section. The character limit is 1000.*

Applicants must report on their community engagement activities during the past year. You may submit your organization's official 2022 Annual Report. If your organization does not produce an Annual Report, a report must be created that details your activities in 2022.

- Number and description of exhibits/displays/audiovisual installations circulated in 2022.
- Number and description of educational or promotional events and programs (e.g. heritage fairs, presentations, member events, etc.) conducted in 2022.
- Number and description of heritage tours conducted within the community in 2022.
- Number and description of heritage assets acquired/conserved/archived in the year 2022.

French Mandate

*Applicants must complete this section.*

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

## **Section F - Succession Planning**

*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.

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 - Budget: Revenue and Expenses 2022 (Description in Appendix "A")**

*Applicants must complete this section.*

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

**Expenses** - Report eligible expenditures directly associated with operating the organization.

## **Section H - Performance Measures 2022 (Description in Appendix “B”)**

*Applicants must complete this section.*

Enter the amount for the Performance Measure under “Results” for each metric.  
Please use this section to report the Ministry Provided Performance Metrics.

## **Section I - Checklist and Attachments**

*Please submit the following:*

- 1a) Financial statement or treasurer’s report that includes Revenue and Expenses for your last fiscal year signed by the President or Treasurer.
- 1b) *In addition*, you must submit **one** of the following as proof of your current not-for-profit status:
  - Current “Letter of Good Standing” from Ontario Historical Society.
  - Most recently filed Registered Charity Information Return (CRA form T3010).
  - Non-Profit Organization (NPO) Information Return (form T1044).
2. Community Engagement Activities or Annual Report
3. Annual General Meeting (AGM) Minutes

### **New Organizations Applying for the First time**

In addition to the above you will also need to submit:

- A copy of the Constitution and By-laws of your organization.



## APPENDIX “A” - REVENUE AND EXPENSES 2022

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### Description of 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 2022 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 though 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.

## EXPENSES 2022

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### Description of Eligible EXPENSES

Only expenditures directly associated with operating the organization should be included. The total of these expenses is used to calculate the HODG grant amount, following the criteria set out in [Regulation 879](#).

<b>OUTREACH ACTIVITIES</b>	
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.

<b>HERITAGE RESOURCE CENTRE</b>	
Community Collections Expenses	Enter expenses related to the operation and maintenance of a <b>heritage resource centre</b> 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 centre 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 2022 such meetings might focus on preparing the board and reviewing the organization's by-laws for the transition to <a href="#">Ontario Not-for-Profit Corporations Act</a> .

## APPENDIX “B” - PERFORMANCE MEASURES 2022

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### Section H

1.	Full-Time Staff	Number of full-time employees (FTE = 30hrs+/week) in 2022
2.	Part-Time Staff	Number of part-time employees in 2022
3.	Volunteers	Number of active volunteers in 2022
4.	Volunteer Hours	Total number of hours contributed by all volunteers in 2022
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 2022 AGM
7.	Board Meetings	Total number of times Board met in 2022, including AGM
8.	Membership	Number of members in 2022
9.	Website	Number of visits to your organization’s website in 2022
10.	Social Media	Number of followers combined on all social media platforms used by your organization (Facebook, Twitter, Instagram, etc.)
11.	Community Engagement Activities - Exhibits	Number of exhibits/displays/audiovisual installations circulated in 2022
12.	Community Engagement Activities - education and promotions events	Number of educational or promotional events and programs (e.g. heritage fairs, presentations, member events, etc.) conducted in 2022
13.	Community Engagement Activities - tours	Number of heritage tours conducted within the community in 2022
14.	Community Engagement Activities - Heritage Assets	Number of heritage assets acquired/conserved/archived in the year 2022
15.	Operating Days	Number of operating days of your Heritage Resource Centre in 2022

## HOW TO APPLY USING TRANSFER PAYMENT ONTARIO (TPON)

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Transfer Payment Ontario provides one-window access to information about available funding, how to apply for funding and how to check the status of an application.

**TPON website:** <https://www.ontario.ca/page/get-funding-ontario-government>.

### Register for Transfer Payment Ontario:

**Step 1:** Create a [My Ontario Account](#) to access Transfer Payment Ontario. We strongly recommend that you create Account Recovery Info during this process should you forget your login information.

**Step 2:** Register your organization on TPON. The following items are required for registration: Canada Revenue Agency Business Number (CRA BN), Legal Name, Operating Name, and information on at least two contacts within the organization.

***Note:** TPON could take up to 5 business days to process your request.*

**Step 3:** As soon as your organization is registered, you will see the “Funding Opportunities” button appear. From here you can **Apply for a Grant** and manage your application submissions. Select and download the “2023-24 Heritage Organization Development Grant”.

***Note:** If you get a pop-up error, select allow pop-up from Transfer Payment Ontario.*

**Step 4:** Complete the Application - Mandatory Fields are 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 5: VALIDATE** and Submit Your Completed 2023-24 Heritage Organization Development Grant Application

- Upload your validated Application into the Transfer Payment Ontario System;
- **Attach** all mandatory documents.

***Note:** Transfer Payment Ontario will only accept validated applications. Ensure that your Transfer Payment Ontario application number matches the HODG 2023-24 upload application case number.*

## **Step 6: Application Submission Confirmation**

Once your 2023-24 application is uploaded and submitted electronically through the Transfer Payment 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 email within 24 hours, please contact Transfer Payment Ontario Client Care (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 (<http://www.ohrc.on.ca/en/ontario-human-rights-code>). 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 (<https://www.ontario.ca/laws/statute/90f31>), as amended from time to time, and that any information provided to them in connection with this 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.