



# 2023 Heritage Project Grant Guidelines

## 2023 Heritage Projects Guidelines

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## About Heritage Projects

The Heritage Grant Program is intended to support projects that increase public awareness of and access to Tacoma’s history.

This funding can be used for exhibitions, workshops, events or educational activities, development and production of interpretive materials, professional services required to research a historical publication or register nomination, documentation of an artifact or historical site, a historic site assessment, conservation materials.

Admission may be charged for grant-funded programs, as long as the application demonstrates public benefit (see definition). Activities receiving heritage funding may be one-time events or a small number of events that are closely related, or may also be an ongoing program or neighborhood public history project. Additional consideration will be given to projects that include other funding from individuals, businesses, or organizations.

Funding for Heritage Projects is determined through a competitive application process. Funding from year to year is not guaranteed. Contract awards will be based on budgetary factors and the evaluation criteria detailed in these guidelines.



The City of Tacoma does not discriminate on the basis of handicap in any of its programs or services. To request this information in an alternative format or to request a reasonable accommodation, please contact the Planning and Development Services Department at (253) 591-5056 (voice) or (253) 591-5820 (TTY).

## Eligibility

*Applicants must have their offices or primary location of activities within the Tacoma city limits. The following organizations are eligible for the Heritage Grant Program:*

- Private non-profits with any 501(c) designation
- Organized group of community volunteers (for example, a business district or neighborhood council with an advisory body, business license, and organizational bank account). Submissions must come from an organization.
- Public agencies and educational institutions

## Eligible Projects

In general, projects must be related to the history of Tacoma or Tacoma’s cultural or historic resources, be located within Tacoma City Limits (see exceptions), and be accessible to all audiences. The Heritage Grant supports the following types of projects:

- Exhibitions, workshops, events or educational activities
- Development and production of interpretive materials
- Professional services required to research a historical publication or register nomination
- Documentation of an artifact or historical site, a historic site assessment
- Conservation supplies and equipment
- In some limited cases, or staff/volunteer training (not including travel or lodging) for organizations for which heritage or historic preservation is its primary mission.

## Eligibility (continued)

### Ineligible Projects and/or expenses

The Heritage Grant Program *does not* support the following types of activities:

- General operating expenses or overhead costs (planning, staffing, logistics or marketing not directly attributable to the proposed project)
- Acquisition of artifacts or historic resources; however, funds may be used to purchase conservation related supplies and equipment
- Commercial enterprises
- Direct support to individuals
- Projects for which funding has been or will be received by the City of Tacoma for the same services via other processes or contracts
- Lodging and travel costs
- Receptions or fundraisers, including purchase of alcohol
- Organizations that do not have primary offices/venues within Tacoma
- Events or activities that occur outside of Tacoma city limits, except where the theme or primary content is directly related to Tacoma history
- Debt service, scholarships or endowment building
- Political or religious activities
- Heritage project funds cannot be used to pay administrative staff who are current members of the Tacoma Landmarks Preservation Commission or City of Tacoma employees.

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## Funding Details

- Applicants can apply for anywhere between \$1,000 and \$10,000 for their project. Actual amounts will be based upon the availability of funds and review of each application as measured against the evaluation criteria detailed in these guidelines.
- Applicants must employ a variety of revenue sources to fund their project.
- Applicant must match Heritage Projects funding at least 1:1 with other sources of cash or in-kind support. Taxing authorities, schools, and school-based auxiliary organizations must match Heritage Projects funding at least 1:1 with other sources of cash.
- A broad funding base indicates both community support for, and the financial stability of, the project and organization.
- Money will be reimbursed to the applicant following the execution of a contract for services with the City and the completion of the funded project according to the contract terms. Recipients (contractors) must be prepared to cover the costs of the project until successful completion of the project and eligibility for reimbursement.

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## General Requirements

In the event that an application is funded, the services contract with the City will be subject to at least the following terms and conditions.

### Location

All funded projects must occur inside Tacoma city limits, except where the theme or primary content is directly related to Tacoma history and the location has been selected for its relevance to Tacoma history.

### Access

Funded programs must be open to the public and fully accessible to all audiences, including individuals with disabilities. For activities located in historic buildings or sites that present accessibility challenges, applicants must

consult with the City of Tacoma ADA coordinator to determine if reasonable accommodations can be made. This is only appropriate in cases where the site is directly related to the theme of the funded project. In all other cases, the venue must be fully ADA compliant.

#### **Audit**

The contractor shall manage all of its operations in accordance with a policy of keeping books and records open to the City. The City shall be and they are hereby authorized, at such times as they may deem necessary and proper, to perform periodic audits of and monitor the contractor's activities to ensure the contractor's compliance with the requirements of the funding contract.

#### **Compliance with Applicable Laws and Regulations**

Programs must comply with the laws and requirements of the Federal Government, the State of Washington and the City of Tacoma.

#### **Non-Discrimination**

The contractor agrees to take all steps necessary to comply with all federal, state, and City laws and policies regarding nondiscrimination and equal employment opportunities. The contractor shall not discriminate in any employment action because of race, religion, color, national origin or ancestry, sex, gender identity, sexual orientation, age, marital status, familial status, or the presence of any sensory, mental or physical handicap. In the event of non-compliance by Contractor with any of the non-discrimination provisions of this agreement, the City shall be deemed to have cause to terminate the funding contract in whole or in part.

#### **Public Benefit**

The City of Tacoma cannot use public funds in any way that may be construed as a gift to an individual or organization. Each contract will specify a specific 'deliverable' that will be provided to the residents of Tacoma.

Examples of public benefit include but are not limited to:

- Ensuring that the heritage project is accessible and affordable
- Providing cultural and heritage interpretive experiences that are not otherwise available to residents of Tacoma
- Producing free publications with significant heritage or historic interpretive content
- Allowing the public to access and witness the creation of new artistic work
- Providing special outreach within the neighborhoods or business districts

#### **Acknowledgment**

Heritage Projects Grant recipients **must acknowledge the City's funding** in all appropriate publications, promotions, and social media. City of Tacoma Landmarks Preservation Commission logo placement shall also be used when appropriate. Appropriate sponsor recognition may include curtain speeches, programs, signage, websites, email, advertisements, press releases, public service announcements, season brochures, flyers, postcards, newsletters, letters, posters, social media, and other media. Please tag Tacoma Historic Preservation on Facebook and Tacoma\_Culture on Twitter and Instagram. **Refusal to fully acknowledge the City's funding may be grounds for termination of a contract.**

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## Evaluation Criteria

Funding is not guaranteed. The review process is competitive and the Tacoma Landmarks Preservation Commission may receive requests totaling more than the money available. Evaluations are based on three factors (percentages indicate the weight of each factor in relation to the final score):

- 1. Historic importance or significance of the subject matter (10 pts)**
  - Is the proposed project of significance to a broad number of Tacoma residents?
  - Does it involve a building, site or object that is listed on or appears to be eligible for listing on a historic register?
  - Will the project enhance public understanding of significant historical events, or provide new insight or new perspectives on well-documented events?
  - Does the project involve an underrepresented or poorly understood/documented historical theme or context?
  - Will the project generally promote a greater understanding of Tacoma history (for training, supplies, or capacity grant applications – please include a brief description specifying how the funds will further overall heritage organizational missions).
- 2. Level of community impact (10 pts)**
  - The financial need of an applicant organization is not considered when evaluating applications. The most successful applicants will document how proposed activities will reach large audiences and/or underserved/underrepresented segments of the community (which can include underrepresented historical themes or contexts), and support the City of Tacoma’s policy goals regarding equity and antiracism.
  - Projects that are taking place in a public or private location must have a letter of agreement from the property owner to indicate their acceptance of the proposed project.
  - Funding should help meet an important community need and contribute to the richness and vitality of Tacoma. All heritage activities supported by the Tacoma Landmarks Preservation Commission must be accessible to the full breadth of Tacoma’s citizenry.
- 3. General quality of the proposal (5 pts)**
  - Project outcomes are clearly communicated
  - Clear planning—the application refers to the project’s goals, and organization’s strategic and/or business objectives
  - Feasibility of budget - demonstrated in the proposed project budget and through funding matches
- 4. Organizational commitment to history and heritage (5 pts)**
  - Is history or heritage part of the primary mission of the organization?
  - If not, include information describing how this heritage project links to or fulfills your organizations core mission or objectives.
- 5. Demonstrated ability to execute and complete the project (5 pts)**

A successful application should demonstrate that the organization has the capacity and commitment to produce the proposed project. Applications must demonstrate:

  - Skilled leadership of board and key staff, paid or unpaid
  - Effective marketing to target audiences—demonstrated by marketing work samples
  - Fundraising skill—as demonstrated by a well-prepared application and diverse mix of confirmed funders
  - Documentation and evaluation plan - the application lays out plans for documenting and self-evaluating the project

## Application Process

### 1. Virtual Pre-Application Workshop

The Landmarks Preservation Commission will host a free application workshop specific to Heritage Projects on March 9, 2023 from 4:00 – 5:00pm via Zoom:

- Link: <https://www.zoom.us/j/81592633550>
- Dial: 253-215-8782
- Webinar ID: 815 9263 3550

All applicants are strongly encouraged to send a representative to the workshop.

### 2. Submit Application by April 28, 2023

Applications are due on April 28, 2023 by 11:59 pm. Please email a digital copy to [sjohnson7@cityoftacoma.org](mailto:sjohnson7@cityoftacoma.org). Applications received after this date will not be reviewed and will be deemed ineligible for funding regardless of the merit of the program.

### 3. Staff Review

Staff will review each application for completeness and legal compliance. Organizations may be asked to supply corrections, clarification and missing material. Failure to respond by the deadline given will disqualify the application. Incomplete applications or applications with material deficiencies may be rejected at the discretion of staff or review panel.

### 4. Selection Process

Each application goes before a review panel comprised of peers, Landmarks Commissioners and other qualified members. Panel recommendations will be forwarded to the Landmarks Preservation Commission for approval in May 2023. Applicants will be notified by email by May 31, 2023. An award notification letter is not a contract. Funding is not guaranteed for a particular project until the contract has been fully executed.

### 5. Contracting

Staff will contact each recipient to negotiate the contract and accompanying documents and deliverables. Payment will not be made if the contract is executed after the project has begun or if the organization does not return the contract. If the organization and the City cannot agree to the terms of a contract the award will be withdrawn.

### 6. Site Evaluation

A Landmarks Commissioner and/or staff member may perform a site evaluation for each recipient. If an organization's programs do not clearly reflect the content of the application or violate any of the above requirements, the City may withhold payment for the contract. The City of Tacoma will not execute additional contracts with the organization through the Heritage Projects program unless and until the contract disagreement is resolved. Information gathered in the site evaluation will be used in evaluating subsequent applications to this program. **Applicants must send staff the event date/time/location before the event occurs.**

### 7. Reporting & Payment

As soon as the contracted programming is completed, the organization must submit a Project Report and invoice to the Planning and Development Services Development Department in order for the payment process to begin. A Project Report form will be provided which requests the following information:

- Number of people served (volunteers, students, seniors, Tacoma citizens, cultural tourists)
- Brief programmatic evaluation
- Accessibility and accommodation for people with disabilities
- Educational components

- Marketing and publicity summary
- Matching funds
- Budget reconciliation

All Project Reports are due to the Planning and Development Services Development Department on or before May 31, 2024 (projects can be completed and request for payments submitted any time prior to May 31). Typically, payment is mailed approximately four weeks after the report and invoice is received. Awarded funds will not be dispersed until the funded project has been completed. Applicants must be prepared to cover their expenses before requesting payment. The Planning and Development Services Development Department will issue payment only upon timely receipt of an invoice and Project Report.

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### Important Dates

**Virtual Workshop:** March 9, 2023, 4:00– 5:00 pm

- Link: <https://www.zoom.us/j/81592633550>
- Dial: 253-215-8782
- Webinar ID: 815 9263 3550

**Deadline:** April 28, 2023, 11:59 pm

**Notification by:** May 31, 2023

*Funded projects must occur between June 1, 2023 and May 31, 2024*

# 2023 Heritage Projects Grant Application

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Please read all information carefully. Incomplete or illegible applications will not be considered. We will confirm applicant eligibility for a Heritage Project award.

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## Format

To assist the processes of application preparation and evaluation, please:

- Type or clearly print all application materials.
  - Use black ink and an 11 point or larger font.
  - Do not reduce or condense type or line size.
  - Restrict responses to the spaces provided. Don't add pages or write on the backs of pages.
  - Do not submit anything that is not on the checklist. It will not be reviewed.
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## Submission

Email your application to:

[sjohnson7@cityoftacoma.org](mailto:sjohnson7@cityoftacoma.org) by 11:59pm on April 28, 2023

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## Questions

For assistance, please call Historic Preservation Coordinator Susan Johnson at 253.281.7445 or email [sjohnson7@cityoftacoma.org](mailto:sjohnson7@cityoftacoma.org).

## Application Checklist

A **Complete Application Packet** should include, in this order:

- One completed copy of this Application Checklist
- One complete and signed General Information Form
- One complete Budget Page
- One Application Narrative
- Optional Attachments
- One copy of the organization's business determination (i.e. 501(c) letter or business license)
- A letter of agreement from the property owner indicating their acquiescence to the submitted proposal (letter is not needed if applicant organization is hosting project at a location they own)
- List of key project personnel and their credentials
- List of current Board of Directors (for non-profits)
- Email digital copy of complete Application Packet to [sjohnson7@cityoftacoma.org](mailto:sjohnson7@cityoftacoma.org)**

# 2023 Heritage Projects Grant Application

## GENERAL INFORMATION FORM

### SECTION 1: APPLICANT INFORMATION

Applicant Type:

Nonprofit organization

Washington UBI # \_\_\_\_\_

Public agency

Federal Employer Identification Number:  
\_\_\_\_\_

Corporation, partnership, or other legal entity

Applicant/Primary Contact Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: (        ) \_\_\_\_\_

Authorizing Official's Name \_\_\_\_\_

Title: \_\_\_\_\_

Authorizing Official's Signature: \_\_\_\_\_

By signing this form, I state that I am authorized to commit the above-named organization in financial matters and will ensure that any funds received as a result of this application are used only for the purposes set forth herein. The undersigned certifies that the information in this application is true and complete; to the best of his/her knowledge, and this information is provided for the purpose of securing financial support for the project described.

### SECTION 2: PROJECT INFORMATION

Project Title: \_\_\_\_\_

Project Location: \_\_\_\_\_

What type of activity will be funded by this grant?

- Exhibitions, workshops, events or educational activities
- Development and production of interpretive materials
- Professional services required to research a historical publication or register nomination
- Documentation of an artifact or historical site, or a historic site assessment
- Conservation supplies and equipment
- Staff/volunteer training (available to heritage organizations)

Dates of Grant Project Activities (must be completed by May 31, 2024): \_\_\_\_\_



# 2023 Heritage Projects Grant Application

## BUDGET

### Expenses

Item	Heritage Grant Funding Request	Applicant Match		TOTAL PROJECT BUDGET
		Cash Contribution	In-Kind Contribution	
Project Staff/Personnel (list volunteer time as "in-kind")				
Materials, supplies, equipment				
Space Rental				
Marketing/promotions				
Other				
<b>TOTALS</b>				

Grants are awarded on the basis of funds available and applications received. Are you willing to accept partial funds for your project if the need exceeds the amount available?

YES

NO

## APPLICATION NARRATIVE

Please attach a two-page narrative answering the following questions. Submit the narrative section on 8 1/2" x 11" white paper and type in a clearly legible font with a minimum size of 11 points. Please check that you have answered all questions completely. The panel cannot make assumptions about your proposed project; you must be very explicit about your project and how it addresses the evaluation criteria.

### 1. General Description

Describe the project overall, so that the Review Panel thoroughly understands it. Include project type, the intended audience, location of activities, how it will benefit the public, what the goals/objectives are, and how exactly, if funded, the grant will be spent.

### 2. Historic importance or significance of the subject matter (10 pts)

Examples:

- Is the proposed project of significance to a broad number of Tacoma residents?
- Does it involve a building, site or object that is listed on or appears to be eligible for listing on a historic register?
- Will the project enhance public understanding of significant historical events, or provide new insight or new perspectives on well documented events?
- Does the project involve an underrepresented or poorly understood/documented historical theme or context?
- Will the project generally promote a greater understanding of Tacoma history (for training, supplies, or capacity grant applications – please include a brief description specifying how the funds will further overall heritage organizational missions).

# 2023 Heritage Projects Grant Application

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## 3. Level of community impact (10 pts)

- The financial need of an applicant organization is not considered when evaluating applications. The most successful applicants will document how proposed activities will reach large audiences and/or underserved/underrepresented segments of the community (which can include underrepresented historical themes or contexts), and support the City of Tacoma’s policy goals regarding equity and antiracism.
- Projects that are taking place in a public or private location must have a letter of agreement from the property owner to indicate their acceptance of the proposed project.  
Funding should help meet an important community need and contribute to the richness and vitality of Tacoma. All heritage activities supported by the Tacoma Landmarks Preservation Commission must be accessible to the full breadth of Tacoma’s citizenry.

## 4. General quality of the proposal (5 pts)

- What are the project’s goals, and organization’s strategic and/or business objectives? Is the project a component of a broader plan or set of activities?
- How will the proposed budget Feasibility of budget - demonstrated in the proposed project budget and through funding matches

## 5. Organizational commitment to history and heritage (5 pts)

- Is history or heritage part of the primary mission of the organization?
- If not, include information describing how this heritage project links to or fulfills your organizations core mission or objectives.

## 6. Demonstrated ability to execute and complete the project (5 pts)

A successful application should demonstrate that the organization has the capacity and commitment to produce the proposed project. Applications should demonstrate:

- Skilled leadership of board and key staff, paid or unpaid
- Effective marketing to target audiences—demonstrated by marketing work samples
- Fundraising skill—as demonstrated by a well-prepared application and diverse mix of confirmed funders
- Documentation and evaluation plan - the application lays out plans for documenting and self-evaluating the project

## OPTIONAL

You are welcome to include any materials that illustrate additional information about your organization or your project proposal. Please do not staple.