Documentary Heritage Communities Program Guidelines

2021–22

Contents

I. Overview

Library and Archives Canada (LAC) provides $1.5 million in contributions each year through the DHCP ("the Program").

This is a conditional payment issued to a recipient organization for a specific purpose, as outlined in a funding contribution agreement. LAC and the recipient organization sign a contribution agreement, which specifies the terms and conditions to receive payment. Every recipient organization is required to submit an interim report and a final report to LAC.

LAC receives applications once every year through a call for proposals and funds the best project proposals after rigorous reviews of eligibility, feasibility and merit.

Objectives

The DHCP aims to ensure that Canada's continuing memory is documented and accessible to current and future generations.

The DHCP provides financial assistance to the Canadian documentary heritage community for activities that:

- increase access to, and awareness of, Canada's local documentary heritage organizations and their holdings; and
- increase the capacity of local documentary heritage organizations to better sustain and preserve Canada's documentary heritage.

Application deadline

The next call for proposals will open on October 15, 2020, for projects starting April 1, 2021. The deadline to submit applications is January 12, 2021, at 11:59 p.m. Pacific Standard Time (PST).

II. Who can apply

Local documentary heritage organizations eligible to apply to the DHCP are **non-profit organizations** that hold collections of **mainly local or regional significance**:

- Archives
- Genealogical organizations/societies
- Historical societies
- Indigenous organizations/government institutions
- Libraries
- Organizations with an archival component
- Professional library or archival associations

All applicants must be **privately funded** (50% or more) with the exception of Indigenous organizations/government institutions.

Different funding conditions apply to incorporated and non-incorporated organizations.

Ineligible applicants

- Businesses (for profit)
- Government institutions (except Indigenous government institutions)
- Publicly funded organizations (such as municipal libraries)
- Educational institutions (such as schools, colleges, universities)

Furthermore, non-profit organizations that are administered by a government entity or that receive more than 50% of their annual operating funding from any level of government without having to request it, are ineligible to apply for funding under the DHCP.

An ineligible applicant can still participate and/or collaborate in a project submitted by an eligible applicant, by providing the latter with in-kind or financial assistance. However, an ineligible organization cannot act as a co-applicant or official partner, nor can it benefit financially from the contribution.

III. What can be funded

The DHCP can provide funding for projects and activities that relate to either or both of the program's objectives.

Objective 1: Increase access to, and awareness of, Canada's local documentary heritage organizations and their holdings.

- Collection-, catalogue- and access-based management
- Commemorative projects
- Conversion and digitization for access purposes
- Development (research, design and production) of virtual and physical exhibitions, including travelling exhibits

Objective 2: Increase the capacity of local documentary heritage organizations to better sustain and preserve Canada's documentary heritage.

- Conservation and preservation treatment
- Conversion and digitization for preservation purposes, including recording interviews for oral history projects
- Increased digital preservation capacity (excluding digital infrastructure related to day-to-day activities)
- Training and workshops that improve professional competencies and build the organization's capacity
- Development of standards, performance and other measurement activities

Eligible projects and activities

Examples:
- Migrating a collection or holdings to an online database
- Enhancing your finding aid with archival standard descriptions, translations and transcriptions
- Recording interviews with local veterans about their experiences during the Second World War or interviews with local Indigenous Elders about their experiences, traditions and culture (oral history interviews) *
- Conserving and/or restoring portraits or photographs of historical and/or local significance
- Creating an exhibition based on a specific collection
- Developing and sharing best practices and policies for processing holdings
- Digitizing a mixed media collection or local oral history interviews
- Digitizing newspapers for which the applicant owns the copyright
- Organizing a documentary heritage conference

Organizations applying to the DHCP must own the documentary heritage collections for which they seek funding. This means, your organization must have cleared any questions related to rights and permissions before you submit your application.

Furthermore, artifacts or objects (such as statues, globes or medals) are not eligible for inclusion in projects funded under the DHCP.

* Recording an oral history interview is an eligible activity under the DHCP, whereas editing the recording is not (with the exception of adding subtitles and translations). Editing oral history recordings is considered to be creating new documentary heritage, such as books, documentaries, podcasts, etc.

Ineligible projects and activities

Examples:
- Acquiring a new collection
- Projects involving documentary heritage collections that the applicant does not own, or for which the applicant does not hold appropriate rights and/or permissions
- Activities related to artifacts or objects (such as statues, globes or medals)
- Creating a book, magazine, theatre script, documentary film or podcast that features a collection
- Editing oral history recordings into documentaries or short clips for publication on the web
- Clearing backlogs of received materials, which the applicant organization would normally process as part of its ongoing operations
- Developing an exhibition with material that is not in the applicant's custody
- Renovating a building

Eligible costs include:

LAC may provide financial assistance for **project-related expenses** only, which may include:

- Translating project-related communications material or descriptive information (such as metadata) into English or French, particularly for official-language minority communities
- Administration, shipping, promotion and communication expenses related to the project
- Salaries and wages for project staff and consultants, as well as honoraria for Indigenous Elders and any travel expenses (consistent with the National Joint Council's Travel Directive)
- Buying and/or renting equipment and software required for the project (for example, to convert, digitize, preserve or catalogue)
- Purchasing materials required for the project (such as archival boxes)
- Project launch event costs, such as hospitality and acknowledgement/visibility of the contribution provided by the Government of Canada
- Gifts to Indigenous Elders, valued at less than $100 each
- Insurance costs for a travelling exhibition
- Professional costs for conservation/preservation treatments
- Project results evaluation costs (for example, staff or consultants to report on progress and results)
- Training, competency and capacity-development activities

Expenditures for general administrative (such as office supplies) and travel costs combined **must not exceed 20% of the total contribution** provided (this does not apply to projects involving travelling exhibitions or workshop delivery/attendance).

Ineligible costs include:

LAC does not provide funding for salaries, wages, travel, material, supplies, capital assets and other costs related to **ongoing operations**, as well as to costs related to:

- Acquiring documentary heritage
- Expenses that would have been incurred if the project had not been undertaken
- Capital expenditures (related to fixed assets)
- Creating content about documentary heritage (like books or documentaries based on a collection)
- Developing a project proposal or application for the DHCP or other funding programs
- Employment Insurance, Canada Pension Plan and other benefits
- Hospitality, other than the exceptions listed above
- Maintenance costs including office space rent/lease, heating, repairs, and maintenance of the building, systems and/or equipment
- Salaries paid to staff at any level of government
- Percentage for contingency expenses
- Taxes (for organizations that are exempt or eligible for reimbursement)

IV. Available funding

DHCP funding can cover up to 100% of a project's eligible expenses. However, we encourage organizations who have received funding from the DHCP in the past to submit applications in partnership with other eligible organizations, as well as to secure other sources of funding.

The Program offers two contribution categories:

Small contributions: Up to $24,999

- Both incorporated and non-incorporated non-profit documentary heritage organizations can apply.
- Indigenous organizations/government institutions can apply.
- Multi-year funding: Only recipients who have received DHCP funding in the past may submit a multi-year funding request for up to two years. Total funding cannot exceed $24,999.

Large contributions: Between $25,000 and $50,000 (or up to $60,000 for organizations located in remote areas)

- Only incorporated non-profit documentary heritage organizations can apply.
- Indigenous organizations/government institutions can apply.
- Multi-year funding: Only recipients who have received DHCP funding in the past may submit a multi-year funding request for up to three years. Total funding cannot exceed $150,000 (or $180,000 for an organization in a remote area).

Additional assistance for organizations in remote areas

Since the cost of living and business is higher in remote areas, the Program provides additional assistance to organizations in remote areas.

Consult the Canada Revenue Agency's list of locations included in prescribed zones to help determine your eligibility as an "organization in a remote area." Your organization also qualifies if it is located 80 kilometres or more from the nearest established community with a population of at least 1,000 people.

Summary of available funding

Available funding	Small Contributions	Large Contributions
Maximum funding per year	$24,999	$50,000 ($60,000 for organizations in remote areas)
Multi-year project funding available (for past DHCP recipients only)	Yes	Yes
Maximum duration of multi-year projects	2 fiscal years	3 fiscal years
Maximum funding for multi-year projects	$24,999	$150,000 ($180,000 for organizations in remote areas)

Limit of government assistance

To ensure your project's success, we encourage you to secure other sources of funding. This may include contributions from your organization, the private sector or other levels of government. The maximum level of financial assistance from LAC and other levels of government (federal, provincial or territorial, and municipal) for the same project cannot exceed 100% of eligible project-related costs.

V. How to apply

Before you start:

1. Read these guidelines in their entirety.
2. Complete the questionnaire in the LAC Funding portal to determine organizational and project eligibility.

You must meet all eligibility requirements and submit a complete application package prior to the application deadline to be considered for funding.

Apply through the LAC funding portal

The LAC funding portal enables you to submit your application and complete any requirements easily and securely. **Please note that LAC will not accept any application submitted by another method, such as email or mail**. LAC strongly recommends that **each applicant organization create and use only one account**. Once created, the account can be used for multiple funding requests.

Applications must be submitted in either English or French.

During the call period, you may save your information on the LAC funding portal and later return to complete your application.

Once you have submitted your application, you will receive a **confirmation email**. At this point, your application will be locked and you will not be able to make any further changes.

Completing the application package

A complete online application package includes the following:

- Organization profile, including supporting documents as requested in the LAC funding portal:
  - Proof of non-profit status or registration as a charitable organization*
  - Proof of incorporation, if incorporated*
  - Letter of reference (if not incorporated), from a recognized national association or any level of government (municipal, provincial or territorial)*

- o Financial statements for your last two completed fiscal years (audited if available)
        - o Annual report or strategic plan
        - o Organizational chart
        - o List of current board members and full-time staff
- Project information, including mandatory forms as requested in the LAC funding portal:
        - o Project Budget Form
        - o Project Timeline Form

Depending on the proposed project, you may also need to include the following supporting documents:

- o Proposals, agreements and/or terms of reference for tenderers, consultants, etc.
        - o Letters of intent or confirmation letters (for example, from project hosting venues)
        - o Confirmation of other sources of funding
        - o Partnership information (if you are submitting a project in partnership with another eligible organization)
            - ▪ Identify the organization as partner in your application
            - ▪ Provide an organization profile and supporting documents (see list above) for your partner
        - o Confirmation of copyright, if a project involves a newspaper collection.

* Required from all applicants, with the exception of Indigenous government institutions.

If your organization submits more than one project, you must clearly indicate the order of priority.

Application deadline

The deadline for submitting a completed application package is **January 12, 2021, at 11:59 pm Pacific Standard Time (PST)**. We will not accept proposals received after the deadline.

Deadline for submitting questions

- General questions about this call for proposals: **December 18, 2020, before noon PST**.
- Technical questions related to the LAC funding portal: **January 12, 2021, before noon PST**.

In keeping with our service standards, we aim to respond to telephone and email queries within three business days.

VI. How applications are evaluated

Assessment process

To be considered for funding, organizations must meet the eligibility criteria and submit a complete application package.

LAC evaluates all applications in three phases:

The DHCP assessment process is guided by the Program's objectives, LAC's priorities, and broader government of Canada objectives. In addition, the Program is focused on continuing to strengthen local documentary heritage communities and networks across Canada.

We encourage organizations to work together when developing and pursuing their projects. Collaboration and partnerships are particularly valued in cases where past DHCP-funded organizations play a leadership role in the documentary heritage community. Furthermore, we encourage non-incorporated organizations to partner with incorporated organizations.

LAC bases its funding decisions on organizational and project eligibility, project feasibility, comparative merit, program priorities, available funding and regional representation.

The DHCP is highly competitive. Total requested funding always exceeds available resources. If your organization and project are eligible, submitting an application is therefore by no means a guarantee of funding.

Funding decisions

The DCHP External Advisory Committee recommends the most meritorious projects to the Librarian and Archivist of Canada, who makes the final funding decision.

The funding decision of the Librarian and Archivist of Canada is **final** and not subject to review or appeal.

We usually announce DCHP recipients in the spring.

Project assessment criteria

Relevance and community engagement

- The project clearly aligns with DHCP objective(s).
- The applicant organization clearly identifies the relevance and benefits of the project (for example, collection, learning events and other activities) to its target audience.
- Applicant organizations partner with each other to develop and pursue projects. This is particularly relevant in the case of past recipients partnering and/or collaborating with new applicant organizations, especially with small organizations and/or organizations in remote areas.
- The project responds to a need (internal or external) demonstrated by the applicant organization.

Large contributions only:

- The applicant organization demonstrates its relevance and role in the documentary heritage and broader community (for example, by playing a leadership role or by collaborating or working in partnership with organizations, including organizations in remote areas or in official-language minority communities).
- The project is relevant and has a significant impact in the documentary heritage community and in the broader community (for example, it fosters collaboration or sharing outcomes such as knowledge or resources with organizations in remote areas or official-language minority communities).

Project planning and management

- The project budget is feasible and human resources are adequate to accomplish the project.
- The organization demonstrates sound project-management methods, including realistic and attainable timelines for project activities, implementation, milestones and deliverables.
- The organization clearly outlines project activities and planned risk mitigation measures.
- The project incorporates relevant best practices and established standards, or innovative design and/or delivery elements that contribute to achieving the expected results.

Budget analysis

- The applicant organization provides a forecast and timeline of eligible expenditures and revenues for the project.
- The project receives financial or other support from other sources.
- The contribution amount requested meets the minimum level required to support the achievement of the stated objectives and expected results.
- The contribution amount requested is appropriate, given the other sources of funding provided to the applicant organization.

Evaluation/expected outcomes

- The evaluation strategy includes clearly identified qualitative and/or quantitative performance measures, is based on clearly articulated outcomes that align with project objectives, and is adequate to assess the success of the project.
- The selected sources of data, the collection methodologies and the tools are identified.
- The project and its short- and long-term outcomes are clearly identified and realistic.

Applicant organization's capacity to deliver

- The applicant organization's operating budget reflects fiscal responsibility (in other words, expenses and revenues are appropriate).
- If an applicant organization is seeking funding for more than one project, it demonstrates its capacity to undertake and manage multiple projects simultaneously.

Large contributions only

- A comprehensive and effective governance structure is demonstrated through a clear organizational purpose; a governance structure; the balance of skills, experience, background and knowledge on the governing board; and a strategic plan/annual report which demonstrates sound organizational capacity.

Risks associated with the proposed initiative

- The project proposal demonstrates knowledge of potential risks (for the applicant organization, partner organization and/or the proposed initiative) and potential mitigation measures.

Application processing time

Please refer to the Documentary Heritage Communities Program service standards or contact the Program.

You will receive a system-generated email within 24 hours of submitting your application package through the LAC funding portal. That email serves as an official acknowledgement of the receipt of your application.

VII. After you apply

How funding is provided

LAC provides financial assistance in the form of contributions. A contribution is a conditional payment issued to your organization for a specific purpose, as outlined in a contribution agreement. LAC and the recipient organization sign this agreement, which specifies the terms and conditions to receive payment.

Both parties must sign a contribution agreement before LAC can provide funding.

Recipients of small contributions (up to $24,999) will receive 100% of funds at the beginning of the project (this does not apply to multi-year funding).

Recipients of large contributions ($25,000 and over) will receive 85% of funding at the beginning of the project and LAC will withhold 15% percent until it has received and approved the Interim Report.

The Program may provide advance funding based on a demonstrated need, such as the recipient organization's identification of cash-flow requirements. Advance payments may be non-conditional (issued without receipt of a report) or conditional upon the receipt of a financial report and/or other report deemed relevant to the Program.

Recipient organizations may redistribute funding to one or more eligible third parties, but must indicate the name and contact information of all third parties and the nature of the work they will undertake.

Funding conditions

For a complete description of funding conditions, consult the General Terms and Conditions of the Contribution Agreement. Please note the following:

- LAC provides financial assistance in the form of contributions and may modify the requested funding amount following its review of projected expenses.
- All recipient organizations are required to submit an **Interim Report** (October) and a **Final Report** (April) through the LAC funding portal—exact dates are indicated in the contribution agreements.
- For multi-year projects, recipient organizations must complete and submit an **Interim Report** and a **Final Report** for each government fiscal year in order to receive the subsequent year's funding.
- Should recipient organizations not submit a Final Report, they will not be eligible for future DHCP funding and may be asked to repay the contribution received.
- Once the contribution agreement has been signed and funding has been allocated, recipient organizations may transfer up to $5,000 between expenditure categories in their project budget. If more than $5,000 is to be re-allocated, recipient organizations must contact the DHCP Team in order to obtain written approval from LAC.

Official-languages requirements

The DHCP ensures that all necessary measures are put into place to support the development of official-language minority communities in Canada and to promote the full recognition and use of English and French (Advancement of English and French, section 41 of the *Official Languages Act*) in Canadian society.

The term "official language minority communities" refers to English-speaking communities in Quebec and French-speaking communities in the rest of Canada.

The DHCP encourages organizations that apply for funding to provide their products in both official languages (for example, translations of item descriptions).

Public acknowledgement of financial assistance

In accepting funding from LAC, all recipient organizations are required to publicly acknowledge the financial assistance they receive as per the Guide on the Public Acknowledgement of Financial Assistance from Library and Archives Canada. All funding information is considered confidential until LAC has made a public announcement of the funded projects.

Disclosure of information

By submitting your application package, you authorize LAC to disclose any information submitted with this application within the Government of Canada or to outside entities for the purposes of:

- reaching a decision
- evaluating the results of the project
- transparency, accountability and citizen engagement

Audit of recipients and evaluation of program

The Librarian and Archivist of Canada reserves the right at any time during the term of the contribution agreement with a recipient organization and, for up to five years after the end of the agreement, to undertake an evaluation to ensure compliance with the terms and conditions of the agreement.

VIII. Contact us

Documentary Heritage Communities Program
Telephone: 819-997-0893 📞 or 1-844-757-8035 📞 (toll free in Canada and the United States)
Teletypewriter (TTY): 613-992-6969 📞 or 1-866-299-1699 📞 (toll free in Canada)
Email: bac.contributions.lac@canada.ca

Subscribe to the DHCP mailing list

To receive updates from the Program, subscribe to the DHCP mailing list.

IX. Glossary

Administrative costs

Examples of administrative costs include office supplies, shipping fees, long-distance telephone calls, postage, messenger services, photocopies and printing services.

Applicant

An organization that submits an application for funding.

Archives

An organization responsible for maintaining records of enduring value (of individuals, families, organizations or communities) and housing archival collections.

Artifact

An object of cultural or historical interest, such as a statue, globe or medal.

Audit

The review of a process or organization, in terms of accuracy and effectiveness, to ensure compliance with the terms and conditions of the contribution agreement.

Business plan

A working tool for turning a strategic plan into reality. It provides a road map for board, staff and organizational partners, and may be used to attract particular private-sector funders (foundations, corporations or individual donors). Typical business plans project organizational growth for the next three to five years. They usually include financial projections and targets, the size of markets (actual and potential) and information on market trends. A business plan describes how the organization is accountable to the community, and its methods for monitoring and evaluating progress. A business plan may be incorporated into the organization's strategic plan or may be presented as a separate document.

Collaborator/Contributor

An organization that participates in a project by providing in-kind or financial assistance to an eligible organization's project. If the collaborator/contributor is an ineligible organization, it cannot be a co-applicant, named partner to an eligible organization's project, or third party. A collaborator/contributor cannot benefit financially from a contribution.

Collection-, catalogue- and access-based management

Systematic, planned and documented process of maintaining and preserving collections. This includes activities to enhance the archival standard descriptions of collections in order to increase physical, intellectual and bibliographical access to them.

Consultant

An individual (or groups of individuals) with specialized knowledge and/or skills. A consultant is not part of an applicant's staff, management or board, but is contracted for a fee to provide specific services to an organization.

Contractual relationship

A legal relationship between two or more parties evidenced by a contract or appearing in other official business documents, such as an organization's financial statements.

Contribution

A conditional payment issued to your organization for a specific purpose, as outlined in a contribution agreement. LAC and recipient organizations sign contribution agreements, which specify the terms and conditions to receive payment. Every recipient organization is required to submit an interim report and a final report.

Contribution agreement

A legal document between a donor department and a contribution recipient that describes the obligations of each party.

Documentary heritage

Documentary heritage includes records and publications of interest to Canada about the experience of a specific local community or group. This may include photographs, audiovisual recordings, treaties, dictionaries and lexicons, portraits, early journals and observations, and cartographic material.

Documentation

Documents related to the project and made available to the public, such as documentary heritage, catalogues, synopsis, brochures, pamphlets, etc.

Educational institution

An organization, which follows a set curriculum to educate children or adults, whether receiving funding in whole or in part from the government, or through fees. Includes public and private institutions, as well as institutions of higher learning (such as colleges, universities or trade schools).

Fixed assets

Assets that are purchased for long-term use and are not likely to be converted quickly into cash, such as land, buildings and equipment.

Genealogical association

An association that promotes the study of ancestry.

Government institutions

Any department, organization or agency within the three main levels of government: federal, provincial/territorial and municipal.

Historical society

An organization that seeks to preserve and promote interest in the history of a region, a period or a subject, typically focusing on a province or a community. It often has collections of artifacts, books and records.

Indigenous government institution

A First Nations, Inuit, and/or Métis Nation band council or government organization.

In-kind contribution

A donation to a project by an individual, business or organization of materials, goods, services or time that would otherwise have been paid for by the recipient. Such a contribution is provided without any expectation of compensation or remuneration. It involves non-cash asset transactions (for example, securities, land, buildings, equipment, and use of facilities, labour and goods). To be eligible as an in-kind contribution, the donation must:

- be essential to the project's success;
- represent an expense that would not otherwise be incurred and paid for by the recipient as part of the project;
- be mentioned in the recipient's contribution agreement, documented and recorded in the recipient's accounting books;
- be reasonably estimated at fair value on the date it is made, using either market value or an appraisal; and
- contribute to the total cost of the project but not be reimbursable, as no monies change hands.

Key archival functions

Standard established practices in the main areas of collections-related activities within an archive or historical society, such as appraising, acquiring, conserving, preserving, converting, digitizing, and providing access to documentary heritage through exhibits.

Key library functions

Standard established practices in the main areas of published materials within a library, such as acquisition, conservation, research, collections information management, exhibitions and education.

Letter of intent

Written statement presented by an interested organization to the applicant organization or partner organization, acknowledging serious intent, willingness and ability to enter into a formal agreement. The letter should include a brief description of the project and the nature of the collaboration between the two organizations, including financial considerations and the timeline for implementing the project. The document does not constitute a definitive contract; it is subject to due diligence and fulfillment of certain conditions.

Letter of reference

Written statement presented by a recognized national association or a municipal/provincial/territorial government to Library and Archives Canada acknowledging the capacity and ability of the applicant to undertake a proposed project. The letter should include a brief description of the applicant and the nature of its work in the community.

Library

An organized collection of published materials, including books, serials, sound and video recordings, and other formats.

Local documentary heritage organization

An organization that operates primarily at a community or regional level and has a collection that reflects and represents a local and/or regional audience.

Official language minority communities

English-speaking communities in Quebec and French-speaking communities in the rest of Canada.

Operational expenses

Cash expenses paid by an organization in return for goods or services that are not instrumental to the project. These expenses are ineligible for funding.

Oral history

A historical account memorized or recorded from the spoken words of people who have knowledge of past peoples, places, events and cultural traditions. Under the DHCP, recording an oral history interview is considered converting the account's analog form to its digitized form.

Note: Recording an oral history interview is an eligible activity under the DHCP, whereas editing the recording is not (with the exception of adding subtitles and translations). Editing oral history recordings is considered to be creating new documentary heritage, such as books, documentaries, podcasts, etc. For more details, see "What can be funded" in the Guidelines.

Organization

A group of people with an arrangement of responsibilities, authorities and relationships (corporation, association, institution, etc.).

Organization in a remote area

Any organization located within a remote community as per the Canada Revenue Agency's list of locations included in prescribed zones. Also, any organization located 80 kilometres or more from the nearest established community with a population of at least 1,000 people.

Organization with an archival component

An organization with a significant, defined documentary heritage collection that portrays the past of the organization, its predecessors or the community in which it is located. The archival component would provide a dedicated storage for the collection(s), include accessible high-level descriptions and be accessible to the public.

Owner of collection

The proprietor/possessor/title holder of the collection(s) related to the project for which funding is being requested.

Outcomes

Results of an effort to attain a goal. They describe the changes resulting from the project such as a change in awareness, knowledge, skills or access of a target population (short-term results), a change in a target population's behavior (medium-term result), or a

change of state or a social impact in a target population (long-term result). Outcomes must be realistic and measurable.

Outputs

Outputs are the direct products or services produced and delivered to a target group or population, such as an exhibition, the preservation, digitization/conversion and access to a collection, a workshop or seminar, etc.

Partner/Partnership

A documentary heritage organization that meets eligibility criteria, and that agrees to pool efforts and resources with the organization applying to the Program to achieve a common objective while keeping its independence. Organizations are not recognized as partners unless they contribute directly in cash or in-kind to the accomplishment of the project.

Performance measures

Indicators that provide qualitative and/or quantitative information needed to measure the extent to which a project is achieving its intended outcomes. Qualitative data can be expressed in terms of change or comparison between two states, while quantitative indicators can be in the form of a ratio, percentage, comparison or figure.

Privately funded organization

An organization that receives 50% or more of its annual operating funding from private sector funds, such as private donations. While financial support can be received from any level of government, this should not be a regular source of revenue or used for operational purposes.

Professional associations

Incorporated bodies that represent the interests of archivists, librarians, historians, authors or information managers and/or that are dedicated to their professional development.

Project

A set of activities or functions that a recipient proposes to undertake with the financial assistance provided by a department. A project has a clear start and end date, occurs within a reasonable period of time, and demonstrates measurable outputs and outcomes.

Publicly funded organization

An organization that automatically receives more than 50% of its annual operating funding from government (be it at the municipal, provincial or federal level) without making a request.

Recipient

An organization that receives financial assistance.

Stacking limit

The maximum level of total Canadian government funding authorized by the terms and conditions for a transfer payment program for any one activity, initiative or project of a recipient.

Strategic plan

A written document that clearly describes an organization's mandate, its short-, mid- and long-term goals or objectives, and priority actions to take. A strategic plan includes a time frame for its execution and identifies the part of the organization or the outside agent that will take responsibility for completing the actions necessary to realize the goals and objectives.

Third Party

An eligible organization that receives funding from a recipient for undertaking a specific role or service in a project.

Travelling exhibition

Type of exhibition that is available for circulation to one or more venues in addition to the premises of the organizing archive/library.