

HERITAGE GRANT PROGRAM

Program Summary: Goals, Review Criteria, and Restrictions

The City of Plano offers a heritage preservation grant to local nonprofit organizations that support heritage preservation and heritage tourism in Plano. This grant program, and the amount of funds awarded is available as funds permit. Grants are for approved expenses incurred within the City of Plano Fiscal Year, between October 1 and September 30 of the grant year.

PROGRAM PRIORITIES

A. The Plano Heritage Commission's Mission Statement

To preserve and promote the City of Plano's heritage thereby supporting and stimulating local business and strengthening the culture, prosperity, and welfare of Plano's citizens and visitors.

B. Plano Heritage Commission Goals

Goal #1 - Recognize, protect and utilize historic landmarks, icons, and cultures.

Goal #2 - Increase public awareness and civic pride about Plano's historic past.

Goal #3 - Enhance commission members' knowledge and understanding of heritage preservation.

C. Collaborative Fundraising

In recognition of the notable differences between available Hotel/Motel Tax funds and amounts of recent grant requests, the Heritage Commission respectfully requests that some or all of the prospective applicants work together to develop a joint grant writing and fundraising program. The commission recognizes that most preservation organizations do not have the resources to devote to an active ongoing fund raising effort.

APPLICATION REVIEW CRITERIA

Consideration of applications for financial support in all categories will be cumulatively weighted using all three (3) criteria below:

Heritage Tourism/Public Education - 50%

Heritage/Historic Preservation Merit - 25%

Administrative & Fiscal Responsibility - 25%

Heritage Tourism/Public Education (50%)

- Projects or programs that promote heritage tourism within Plano and support Plano's hospitality industry.

- System to track and quantify visitors from outside of Plano that come to view/participate in the organizations heritage projects or programs.
- Efforts to reach and attract new audiences through programming, services, and education that promote heritage education.
- Promotion of Plano as a historic center within the community, throughout the State of Texas, and beyond.
- Organized plan or methodology for education of the community.
- Measurable, ongoing efforts to involve individuals of different ethnic heritages.

Heritage/Historic Preservation Merit (25%)

- Activities that promote creativity, quality, and excellence in historic preservation/restoration.
- Innovation and creativity in programming, services, exhibits, capital projects.
- Activities that further the Heritage Commission's goals and objectives.

Administrative and Fiscal Responsibility (25%)

- Evidence of growth, fiscal responsibility and vision (as shown by such things as increasing private sector sponsorships and/or memberships, new sources of funding, on-time submission of quarterly reports to City of Plano for past grants, etc.).
- Ability to deliver programs, projects or services within the grant year.
- Realistic budget proposal, as evidenced by a funding request proportionate to the service/usage levels.
- Evidence of financial support from both private and other public sources.
- Leadership of staff, which can be measured by continual growth and a corresponding growth of audiences, participants and constituents.

LIMITATIONS AND RESTRICTIONS

- In addition to the use and limitation restrictions found in Texas Tax Code Chapter 351, specifically section 351.101, the City of Plano will not fund the following:
- Grants to individuals.
- Reduction of deficits from or expenditures related to activities of previous fiscal years, unless specifically approved by the City.
- Activities in which academic credit is given.
- Mortgage interest and depreciation on real property.
- Capital outlays that do not meet the definition of heritage projects.
- Scholarships and fellowships for employees and/or volunteers.
- Social functions, parties, receptions, openings, fundraising benefits, refreshments, or beverages, unless specifically approved by the city.
- Fines, penalties, or costs of litigation.
- Operating expenses (including maintenance expenses and salaries) for first time grant applicants or for returning applicants who did not receive heritage grant funding for operations for the 2009-2010 fiscal year.

- Any increase in operating expenses (including maintenance expenses and salaries) above the 2009-2010 funding level, for those recipients who received grant funds for operating expenses from the 2009-2010 Heritage Grant Program.
- Underwriting or subscriptions, investments, stocks, bonds or any financial obligation.
- Legal fees, out of pocket medical expenses, and moving expenses.
- Funds for approved heritage projects that are not completed within the grant year.

NOTE: Grants to an agency will generally not increase by more than 25% of the agency's previous fiscal year's expenditures minus the above-restricted expenses. Under unusual circumstances and needs, supported by very detailed and complete documentation, exceptions to the 25% limit may be requested by an applicant agency. Exceptions will only be recommended by a 2/3 favorable majority vote of the Heritage Commission.

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