

GRANT APPLICATION

(PLEASE PRINT)

Name of Organization	Cowichan Historical Society
Address of Organization	130 Canada Avenue, Duncan, BC
Full Mailing Address	PO Box 1014, Duncan, BC, V9L 3Y2
Telephone Number & Email	250-746-6612 cvmuseumarchives@gmail.com
Contact Person/Title	Sheila Kitson / President and Chairman

Primary purpose of organization: Preserve the historical material of the Cowichan Valley and area

Category under which greatest portion of services fall:

Social Service Sports Cultural Economic Development Other _____

Services available to all members of community: Yes No

If no, please list criteria for receiving your service: _____

Total Number of people that used your service within the Municipality last year: 7,000

Approximate number of your clients that reside in North Cowichan: 3,000

(Please note that North Cowichan includes the communities of Chemainus, Crofton, Maple Bay, and the Duncan area north of the Cowichan River, and outside the one square mile Duncan core.)

Amount of grant requested: 6,200

Describe how the grant will be used: *(e.g. special projects, operations, maintenance, etc.)*

The requested \$6,000 will be used to sustain core operations and public-facing programming at the Cowichan Valley Museum & Archives, ensuring consistent access to local history for residents of North Cowichan. Specifically, funds will support frontline service and research assistance during open hours (casual staffing stipends), collections care and preservation (acid-free enclosures, environmental monitoring supplies, and minor archival rehousing), and program delivery materials for school visits and community events. A portion will also strengthen digital access and outreach by updating records and educational content on our website and social channels, producing print collateral for programs, and supporting modest accessibility improvements that remove barriers to participation. Together, these uses will maintain safe stewardship of the collection, expand inclusive learning opportunities, and deepen engagement with the region's heritage. (Illustrative allocation: 55% staffing/program delivery, 25% collections care supplies, 15% outreach/communications, 5% minor facility and accessibility needs.) If preferred, we can adjust the allocation to match municipal priorities or specific deliverables. Please see attached Statement

In order to be considered for a Municipal grant, please ensure that you enclose the following: **most recent financial statement and the proposed operating budget.**

Other Information: Have you obtained a previous grant from the Municipality? Yes No

Have you applied to another local government for funding? Yes No

If yes, please list: The City of Duncan

Applicant's signature: FIPPA s. 22(1) **Date:** 10/14/2025

In order to be eligible for consideration for a 2026 grant-in-aid, this application and all requested supporting materials must be received no later than October 15th, 2025.

Please submit in person at 7030 Trans Canada Hwy or email to finance@northcowichan.ca

Print Form

Note: Personal information is collected by the Municipality of North Cowichan under the authority of section 26(c) of the Freedom of Information and Protection of Privacy Act for the purpose of processing and administering grant-in-aid applications. Should you have any questions about the collection of this personal information, please contact the Deputy Director of Corporate Services, (250) 746-3100, 7030 Trans-Canada Highway, Duncan, BC V9L 6A1.

Cowichan Valley Museum & Archives/Cowichan Historical Society

Statement of Program Quality & Merit, Organizational Effectiveness and Capacity, and Community Engagement and Impact

The Cowichan Historical Society, operating the Cowichan Valley Museum & Archives in partnership with the City of Duncan, gratefully acknowledges the Municipality of North Cowichan's support. The attached budgets (2025 in-year and 2026 projection) demonstrate a lean operating plan with limited contingency for fixed-cost increases. A Grant-in-Aid enables us to sustain indispensable services for North Cowichan residents: school and public programming grounded in local primary sources; a well-run museum that contributes to cultural tourism; and, as an institutional member of the Archives Association of BC, archives services that complement municipal services by preserving and providing access to the community's documentary heritage. The Cowichan Valley Museum & Archives is a regional museum that provides school and public programming—including exhibitions both in the museum and off site—and archival services to the residents of North Cowichan. Our location in the Duncan Train Station provides a cultural tourism site that serves the entire region and anchors year-round public access to local history. Although we are located in downtown Duncan, we are mandated to collect, preserve, and present historical material related to areas in North Cowichan—from Cobble Hill to Westholme, and from Paldi to Maple Bay—for the benefit of all residents in the Cowichan Valley.

Use of previous grant funds (integrated operations).

Municipal funds were integrated into our operating budget to underwrite paid professional work that sustains public access and responsible stewardship. Specifically, the grant supported research and reference services for residents and educators; collections management and archives access (accessioning, rehousing, description, and environmental monitoring); and the development and delivery of school and public programs and exhibitions on site and off site. A modest portion covered essential operating supports—utilities, communications, and insurance—to ensure safe, reliable service. Concentrating resources on these core functions kept doors open, improved program quality, and protected the community's documentary heritage to recognized standards.

Program quality and community merit.

Our organization is aligned with municipal goals—advancing inclusivity; maintaining a safe, accessible environment; and engaging the community through collaborative relationships, including with Cowichan Tribes and intercultural partners. We collaborate with educational institutions such as Vancouver Island University and the University of Victoria to expand learning opportunities and build research capacity. We advocate for the Cowichan Valley's tangible and intangible heritage and translate that mandate into practical, everyday service—assisting family researchers, teachers, students, and local organizations with reliable primary sources and interpretation. The amount of funding requested likely understates the number of North Cowichan residents we serve: school and public programming aligned with the K–12 curriculum brings students and teachers to the museum and archives for content related to local history, diversity, and Indigenous topics that complement classroom learning, while steady demand for archival research reflects community reliance on our services for genealogy, land-use history, and evidence-based storytelling.

Public service impact.

With municipal support, we deliver dependable, year-round access to local history resources. The archives assist residents on-site and remotely helping with obituaries, historic photographs, building histories, and environmental due-diligence research; supporting other cultural organizations; and guiding authors, journalists, and students. Regular open hours, scheduled appointments, and digital responses provide a predictable, low-barrier service. When building work temporarily affects access, we prioritize collection safety and continuity of service, returning to standard operations as quickly as conditions allow.

Accessibility and inclusion.

We continue to improve access and remove barriers for visitors with disabilities. Recent efforts include maintaining elevator access to the archives, streamlining research request processes, and using modest, low-cost outreach so residents can readily find exhibitions, school programs, and archival services. We are working toward further barrier-reduction measures as resources permit, prioritizing improvements with the greatest impact on safety, dignity, and independence. Core research assistance is offered without charge; nominal cost-recovery applies only to specialized services such as reproduction. Our holdings reflect diverse voices across the Cowichan Valley, including Indigenous and Asian Canadian donors.

Collections care and professional standards.

Municipal support helps us meet essential conservation practices—acid-free enclosures, secure storage, environmental stability—and maintain up-to-date description and discoverability online. Trained volunteers extend staff capacity through digitization preparation, database updates, and researcher triage, multiplying the effect of every municipal dollar and reducing backlogs while improving turnaround for public inquiries.

Stewardship, accountability, and prudent budgeting.

We use municipal operating funds to stabilize essential functions first (staffed access, collections care, essential facility costs) and grow program extras only as additional resources are confirmed. This conservative approach ensures public dollars are applied where they deliver the greatest community value: reliable access, safe stewardship, and measurable public benefit. Spending is tracked to clear line items aligned with our operating plan; we report transparently to funders and provide documentation that funds were used for intended purposes.

Looking ahead.

Demand for archives access is steady and expectations for digital discovery are rising. Continued municipal investment will sustain staffed access hours and research assistance; uphold professional standards of collections care; improve description and online discoverability; and maintain core operating capacity so more resources reach front-line service. In short, a Grant-in-Aid directly translates into accessible public history, strengthened collections care, and a welcoming, regional site at the Duncan Train Station that serves North Cowichan residents—today and in the future.

Cowichan Historical Society / Cowichan Valley Museum & Archives

Operating Budgets — 2025 In-Year and Projected 2026 (Detailed)

Type	Line Item	2025	2026	Notes
REVENUES				
Revenue	City of Duncan Grants	\$22,650	\$23,350	
Revenue	North Cowichan Grant (request)	\$5,500	\$6,200	
Revenue	Community Gaming Grant	\$39,000	\$40,150	
Revenue	Admissions	\$17,500	\$18,500	
Revenue	Gift Shop Sales	\$24,500	\$25,200	
Revenue	Membership Fees	\$2,400	\$2,450	
Revenue	Donations	\$3,300	\$3,650	
Revenue	Fundraising	\$1,500	\$1,550	
Revenue	Archives Services/Fees	\$700	\$700	
Revenue	Other	\$950	\$1,250	
	Total Revenues	\$118,000	\$123,000	
EXPENSES				
Expense	Wages & Benefits – Summer Staff	\$12,700	\$13,100	
Expense	Wages & Benefits – Curator	\$11,100	\$11,450	
Expense	Wages & Benefits – Accessioner	\$22,650	\$23,350	
Expense	Rent Contribution to Building Fund	\$16,150	\$16,650	
Expense	Computers / IT	\$2,000	\$2,050	
Expense	Office Expenses – Museum	\$1,900	\$1,950	
Expense	Hydro	\$3,900	\$4,200	
Expense	Janitorial	\$1,950	\$2,000	
Expense	Internet/Phone – Museum	\$1,550	\$1,600	
Expense	Supplies – Gift Shop/Museum	\$200	\$200	
Expense	Gift Shop Inventory (COGS)	\$8,000	\$8,250	
Expense	Security	\$850	\$900	
Expense	Accounting	\$6,000	\$6,350	
Expense	Repairs & Maintenance	\$3,500	\$3,800	
Expense	Insurance – Museum & Archives	\$6,200	\$6,650	
Expense	Supplies – Archives	\$600	\$600	
Expense	Internet/Phone – Archives	\$500	\$500	
Expense	Website	\$2,000	\$2,050	
Expense	Exhibits	\$4,700	\$5,100	
Expense	Advertising/Promotion	\$950	\$1,150	
Expense	Fundraising (event expenses)	\$2,600	\$2,700	
Expense	Off-site Storage	\$4,800	\$5,100	
Expense	Other	\$3,200	\$3,300	
	Total Expenses	\$118,000	\$123,000	
	Projected Surplus / (Deficit)	\$114,800	\$119,700	

COWICHAN HISTORICAL SOCIETY

Financial Information

Year Ended December 31, 2024

COWICHAN HISTORICAL SOCIETY

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Year Ended December 31, 2024

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**WESTWICK
& ASSOCIATES INC**

**CHARTERED
PROFESSIONAL
ACCOUNTANTS**

COMPILATION ENGAGEMENT REPORT

To the Members of Cowichan Historical Society

On the basis of information provided by management, we have compiled the statement of financial position of Cowichan Historical Society as at December 31, 2024, and the statements of revenues and expenditures and changes in net assets for the year then ended, and Note 2, which describes the basis of accounting applied in the preparation of the compiled financial information ("financial information").

Management is responsible for the accompanying financial information, including the accuracy and completeness of the underlying information used to compile it and the selection of the basis of accounting.

We performed this engagement in accordance with Canadian Standard on Related Services (CSRS) 4200, *Compilation Engagements*, which requires us to comply with relevant ethical requirements. Our responsibility is to assist management in the preparation of the financial information.

We did not perform an audit engagement or a review engagement, nor were we required to perform procedures to verify the accuracy or completeness of the information provided by management. Accordingly, we do not express an audit opinion or a review conclusion, or provide any form of assurance on the financial information.

Readers are cautioned that the financial information may not be appropriate for their purposes.

*Westwick
& Associates Inc.*

Duncan, British Columbia
March 4, 2025

CHARTERED PROFESSIONAL ACCOUNTANTS

COWICHAN HISTORICAL SOCIETY

Statement of Financial Position

December 31, 2024

	2024	2023
ASSETS		
CURRENT		
Cash	\$ 118,242	\$ 156,911
Term deposits	17,065	16,554
Accounts receivable	500	-
Inventory	4,078	8,135
	<u>139,885</u>	<u>181,600</u>
PROPERTY, PLANT AND EQUIPMENT <i>(Note 4)</i>	<u>67,446</u>	<u>73,026</u>
	<u>\$ 207,331</u>	<u>\$ 254,626</u>
LIABILITIES AND NET ASSETS		
CURRENT		
Accounts payable	\$ 5,105	\$ 6,122
Deferred income	49,481	42,946
Reserves	37,000	90,000
	<u>91,586</u>	<u>139,068</u>
NET ASSETS	<u>115,745</u>	<u>115,558</u>
	<u>\$ 207,331</u>	<u>\$ 254,626</u>

ON BEHALF OF THE BOARD

FIPPA s. 22(1)

Director

FIPPA s. 22(1)

Director

See notes to financial information

COWICHAN HISTORICAL SOCIETY
Statement of Revenues and Expenditures
Year Ended December 31, 2024

	2024	2023
REVENUES		
Community Gaming Grant	\$ 26,500	\$ -
Community Gaming Capital Project Grant	20,000	20,000
Grants - Municipal	28,150	27,150
Grants - Other	1,000	50,000
Admissions	12,809	14,547
Sales - Gift Shop	14,587	12,809
Fundraising	5,094	5,618
Other Revenue	6,285	19,147
Reserve funds - Second Storey	33,000	-
Reserve funds - Washroom Project	20,000	-
	<u>167,425</u>	<u>149,271</u>
In-Kind Contribution - Museum Bldg Rent	29,720	29,720
In-Kind Contribution - Archives Rent	6,022	6,022
	<u>203,167</u>	<u>185,013</u>
COST OF SALES		
Duncan Train Station Rehabilitation	-	9,426
DTSR - HVAC System	-	62,269
DTSR - Washroom Project	40,485	-
DTSR - Upper Exterior Project	39,315	-
	<u>79,800</u>	<u>71,695</u>
GROSS MARGIN	<u>123,367</u>	<u>113,318</u>
EXPENSES		
Amortization	5,582	5,579
Wages - Tourist Info Centre	12,703	10,777
Insurance	5,001	4,450
Salaries - Regular	22,267	2,608
Other	10,334	22,024
Office	11,089	9,867
School program	8,330	11,072
Repairs and Maintenance	3,942	955
Supplies	4,646	5,789
Electricity	3,544	4,393
	<u>87,438</u>	<u>77,514</u>
In-Kind Museum Rent	29,720	29,720
In-Kind Archives Rent	6,022	6,022
	<u>123,180</u>	<u>113,256</u>
EXCESS OF REVENUES OVER EXPENSES	<u>\$ 187</u>	<u>\$ 62</u>

See notes to financial information

COWICHAN HISTORICAL SOCIETY
Statement of Changes in Net Assets
Year Ended December 31, 2024

	2024	2023
NET ASSETS - BEGINNING OF YEAR	\$ 115,558	\$ 205,496
EXCESS OF REVENUES OVER EXPENSES	187	62
TRANSFER TO RESERVES	-	(90,000)
NET ASSETS - END OF YEAR	\$ 115,745	\$ 115,558

See notes to financial information

COWICHAN HISTORICAL SOCIETY

Notes to Financial Information

Year Ended December 31, 2024

1. INCORPORATION AND NATURE OF THE ORGANIZATION

Cowichan Historical Society (the "Society") was incorporated under the Societies Act of British Columbia on May 31, 1974. The Society is a registered charity and is exempt from the payment of income tax under Section 149(1) of the Income Tax Act.

The Society's principal activities are to operate a museum and preserve historical records for the Cowichan area.

2. BASIS OF ACCOUNTING

The basis of accounting applied in the preparation of the statement of financial position of Cowichan Historical Society as at December 31, 2024, and the statements of revenues and expenditures and changes in net assets for the year then ended is the historical cost basis and reflects cash transactions with the addition of:

Revenue Recognition

The Society follows the deferral method of accounting for contributions. Restricted contributions are recognized as revenue in the year in which the related expenses are incurred. Unrestricted contributions are recognized as revenue when received or receivable. Membership dues are recognized as revenue in the year in which they are received.

Capital Assets

Purchased capital assets are recorded at cost. Contributed capital assets are recorded at fair value at the date of contribution if fair value can be reasonably determined. Amortization is provided using the straight-line method at rates intended to amortize the cost of assets over their estimated useful lives.

Donations in Kind

Contributions of materials and services are recognized both as contributions and expenses in the statement of operations when a fair value can be reasonably estimated and when the materials and services are used in the normal course of the Society's operations and would otherwise have been purchased. The value of volunteer hours contributed is not recognized in the financial statements. In-kind rents are valued using 2022 appraised building values and a conservative lease of 4%.

Accounts Payable

Expenses are recognized when incurred. Expenses that are unpaid are recorded as accounts payable.

3. COLLECTIONS AND ARTIFACTS

The collections, including art and historic treasures, are not recorded as assets in the financial statements. Donated collections are recorded as revenue estimated at the fair market value of the gift based on appraisals by independent appraisers. The acquisition of both donated and purchased collections are expensed as incurred.

COWICHAN HISTORICAL SOCIETY

Notes to Financial Information

Year Ended December 31, 2024

4. PROPERTY, PLANT AND EQUIPMENT

	Cost	Accumulated amortization	2024 Net book value	2023 Net book value
Equipment	\$ 18,241	\$ 5,553	\$ 12,688	\$ 14,147
Canada 150 Capital Project	82,415	27,657	54,758	58,879
	\$ 100,656	\$ 33,210	\$ 67,446	\$ 73,026

The leasehold improvements completed under the Canada 150 Capital Project are being amortized by the straight-line method over the 20 years of the current building lease. Equipment is amortized on the straight-line basis at the rate of 8%.

5. GRANTS - MUNICIPAL

	2024	2023
District of North Cowichan	\$ 5,500	\$ 5,500
City of Duncan	9,150	9,150
City of Duncan Visitor Info Centre	13,500	4,500
City of Duncan – Duncan Train Station Rehabilitation	-	5,000
Cowichan Valley Regional Area - Area "E"	-	3,000
Subtotal	28,150	27,150
Deferral of Duncan Train Station Rehabilitation	-	-
	\$ 28,150	\$ 27,150

6. GRANTS - OTHER

	2024	2023
New Horizons for Seniors Grant (Canada)	\$ 25,000	\$ -
BC Musuemns Grant (Family Day)	1,000	-
The National Trust for Canada	-	50,000
Subtotal	26,000	50,000
Deferral of New Horizons for Senior Grant	(25,000)	-
	\$ 1,000	\$ 50,000

COWICHAN HISTORICAL SOCIETY

Notes to Financial Information

Year Ended December 31, 2024

7. OTHER REVENUE

	<u>2024</u>	<u>2023</u>
Donations	\$ 1,817	\$ 8,327
John Porter Archival Preservation Fund	750	750
Membership Dues	2,381	2,588
Archives	283	860
Sundry (Programs, Curator Services, etc.)	1,054	6,622
	<u>\$ 6,285</u>	<u>\$ 19,147</u>

8. DEFERRED REVENUE

	<u>2024</u>	<u>2023</u>
Duncan Train Station Rehabilitation Fund		
Received		
City of Duncan	\$ 5,000	\$ 5,000
Island Corridor Foundation	10,000	10,000
Donations	15,000	15,000
BC Community Gaming Capital Grant	20,000	20,000
Canada Heritage Recovery	11,448	11,448
New Horizons for Seniors Grant (Canada)	25,000	-
Expended		
Eligible Expenses	(47,778)	(29,313)
	<u>38,670</u>	<u>32,135</u>
 Heritage Book Project		
Received		
Cowichan Heritage Society Grant	14,311	14,311
Expended		
Author advance	(3,000)	(3,000)
Design work	(500)	(500)
	<u>10,811</u>	<u>10,811</u>
	<u>\$ 49,481</u>	<u>\$ 42,946</u>

COWICHAN HISTORICAL SOCIETY

Notes to Financial Information

Year Ended December 31, 2024

9. RESERVES

	<u>2024</u>	<u>2023</u>
Washroom Renovation	\$ 20,000	\$ 20,000
Expended:	<u>(20,000)</u>	<u>-</u>
	<u>-</u>	<u>20,000</u>
Second story shingle repair and/or replace	60,000	60,000
Expended:	<u>(33,000)</u>	<u>-</u>
	<u>27,000</u>	<u>60,000</u>
Archives Relocation Fund	<u>10,000</u>	<u>10,000</u>
	<u>\$ 37,000</u>	<u>\$ 90,000</u>
