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STAFF REPORT: Finance & IT Services



REPORT TO: Committee of the Whole
MEETING DATE: March 17, 2014
REPORT NO.: FIT.14.14
SUBJECT: 2015 Grants and Donations Program – Application Criteria
PREPARED BY: Robert Cummings, CMA
 Director of Finance & IT Services

A. Recommendations

THAT Council receive Staff Report FIT.14.14, “2015 Grants and Donations Program – Application Criteria” for information purposes; and

THAT Council endorse the current Guidelines and Criteria set out in Grants and Donations Program Application for the purposes of the 2015 Grants and Donations Program Application.

or

THAT Council amend the Guidelines and Criteria for the purposes of the 2015 Grants and Donations Program Application as per the recommendations made by the Committee of the Whole being as follows:

B. Background

For seven years, The Town of The Blue Mountains has administered a Grants and Donations Program for Community Groups and Business Associations that make an application for financial or in-kind support for their operations, events and activities. Beginning in 2011, a Local Business Association Initiative was established to separate funding for any applications that were received from Business Associations.

When applying for financial or in-kind support, both Community Groups and Business Associations are required to fill out the same application to ensure specific criteria is met. Since 2009 the Grants and Donations Application has contained the same general criteria and guidelines and is clearly stated on the first page of the Application (Attachment 1). Currently, the following information makes up the Criteria for applicants applying to the Grants and Donations Program:

1. Grants are given only to not-for-profit organizations which, in the judgment of the Finance and Administration Committee, make a unique contribution to the quality of life in our community.
2. The event or activity for which funding is being sought, must be located in our community, and/or primarily provide benefits for our local residents.
3. The grants and donations program funds operating projects only, not capital projects.

4. Organizations are eligible for grants provided they demonstrate managerial expertise and good financial management as measured by the Applicant's responses within this application.
5. The Committee will give consideration to events/initiatives/projects aligning with one or more of the following Town endorsed plans:
 - Our Sustainable Path;
 - Red Hot and Blue;
 - Community Improvement Plan; and/or
 - Strategic Plan.

The evaluation framework for both Community Groups and Business Associations was reviewed by the Finance and Administration Committee in July 2011 as part of Staff Report CEDC.11.17. Council has requested a review of these criteria to ensure the efficacy of the framework and to identify any potential improvements to the process.

C. The Blue Mountains' Strategic Plan

The continuance of the Grants and Donations program supports the Town's Strategic Action 3.5; "Continue to support cultural groups and community events."

D. Environmental Impacts

None.

E. Financial Impact

The Communication and Economic Development Division has an annual budget of \$30,000 for the Grants and Donations Program and \$15,000 for the Local Business Association Initiative.

F. In Consultation With

Katherine Dabrowa, Finance.

G. Attached

1. 2014 Grants and Donations Application

Respectfully submitted,

Rob Cummings

Robert Cummings, CMA
Director of Finance & IT Services

For more information, please contact:

Robert Cummings
rcummings@thebluemountains.ca
519-599-3131 x245



TOWN OF THE BLUE MOUNTAINS 2014 GRANTS AND DONATIONS APPLICATION

The Town of The Blue Mountains Council will consider funding requests from groups or individuals that demonstrate both a need for funding and meet the pre-established criteria below, as approved by Council.

Please note that this application form shall also be used by applicants seeking rental subsidization of Town-owned facilities (i.e. Beaver Valley Community Centre, Beaver Valley Arena, etc.). Please calculate the request for rental subsidization into a dollar amount for the purposes of the application. For assistance in determining the dollar amount of your request, please contact Katherine Dabrowa, Finance and IT Services Administrative Assistant at kdabrowa@thebluemountains.ca or 519-599-3131 ext. 227.

GUIDELINES AND CRITERIA

1. Grants are given only to not-for-profit organizations which, in the judgment of the Finance and Administration Committee, make a unique contribution to the quality of life in our community.
2. The event or activity for which funding is being sought, must be located in our community, and/or primarily provide benefits for our local residents.
3. The grants and donations program funds operating projects only, not capital projects.
4. Organizations are eligible for grants provided they demonstrate managerial expertise and good financial management as measured by the Applicant's responses within this application.
5. The Committee will give consideration to events/initiatives/projects aligning with one or more of the following Town endorsed plans:
 - Our Sustainable Path;
 - Red Hot and Blue;
 - Community Improvement Plan; and/or
 - Strategic Plan.

NOTE: All organizations meeting the criteria will not necessarily receive a grant or the amount for which they applied. Grant allocations are dependent on individual application review and the amount of grants and donations funding contained within the approved municipal budget.

NOTE: Priority will be given to **applications completed and received by Friday November 29, 2013**. The Town's total budget for grants and donations in 2013 was \$30,000. The 2014 Proposed Budget will be reviewed in the upcoming months.

NOTE: Grants and donations are not given automatically from year to year. Applicants must apply annually for funding.



2014 GRANTS AND DONATIONS APPLICATION FORM

LEGAL NAME OF THE ORGANIZATION:

LEGAL ADDRESS OF THE ORGANIZATION:

TAX STATUS OF THE ORGANIZATION:

A) FOR PROFIT _____
B) NOT FOR PROFIT _____

AMOUNT OF GRANT REQUEST:

\$ _____

DATE OF APPLICATION:

FISCAL YEAR OF THE ORGANIZATION:

FROM _____ TO _____

COMMUNICATION CONCERNING THE APPLICATION IS TO BE ADDRESSED TO:

NAME: _____

TELEPHONE: _____ (DAYTIME)
_____ (EVENING)

E-MAIL: _____

APPLICATION WAS PREPARED BY:

PRINT NAME: _____

SIGNATURE: _____

SUMMARY OF PREVIOUS YEARS' ACTIVITIES: (add additional pages if necessary):

List and comment on your program activities for previous years and, where possible, indicate the number of participants. (Participants may or may not be applicable).

SUMMARY OF PREVIOUS GRANT(S) (include subsidies):

Indicate how the previous municipal grant/s was applied by your organization.
Indicate if you received funding from sources other than the municipality.
Indicate the source of funding and amount (i.e. service club or local organization).

FINANCIAL INFORMATION:

If successful, indicate how the funding would be disbursed by your organization.
Include a copy of your projected budget for the event or activity.
Include a copy of your latest financial statement.

FUNDRAISING:

Indicate your organization’s fundraising policy. Comment on your organization’s fundraising plans for both the current and upcoming years.

DEFICIT:

Has your organization accumulated a deficit? If yes, indicate your organization’s plans for reduction.

Explain how your organization’s event/initiative/project aligns with one or more of the following Town endorsed plans:

- Our Sustainable Path;
- Red Hot and Blue;
- Community Improvement Plan; and/or
- Strategic Plan

Checklist:

Please ensure your application includes the following:

- A) Bylaws and constitution (if applicable)
- B) List of board directors (if applicable)
- C) Total membership and membership fees (if applicable)
- D) Current financial statement
- E) Projected budget
- F) Completed application form

Please submit your completed application to:

Katherine Dabrowa
Finance and IT Services
Box 310
32 Mill Street
Thornbury, Ontario
N0H 2P0

If you have questions regarding the application, or application process, please contact Katherine Dabrowa at kdabrowa@thebluemountains.ca or 519-599-3131 ext. 227.