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**STAFF REPORT: Finance & IT Services**



**REPORT TO:** Committee of the Whole  
**MEETING DATE:** April 7, 2014  
**REPORT NO.:** FIT.14.19  
**SUBJECT:** Grants and Donations Program – Revised Application  
**PREPARED BY:** Robert Cummings, CMA  
 Director of Finance & IT Services

**A. Recommendations**

THAT Council receive Staff Report FIT.14.19, “Grants and Donations Program – Revised Application” for information purposes; and

THAT Council approve the Draft Grants and Donations Program Application and Criteria, as revised.

**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. 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.

During the Committee of the Whole Meeting on March 17, 2014 the Committee requested that some changes be made to the current Criteria and Application. These revisions include:

1. Adding specific examples to the definition of good financial management in Criteria #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.”
2. Requiring applicants to provide a list of the Organization’s governing body and the position each individual holds.
3. Clearly stating the funds given through the Grants and Donations Program cannot go towards paying down a deficit.
4. Adding a Communication piece to ensure all Applicants are aware of the timeline, process and evaluation framework.
5. Requiring two signatures from individuals included in the Organization’s governing body that have authority to act on behalf of the Organization.

The revised Application (Attachment 1) will ensure that all Applicants are able to act on behalf of the Organization or Business Association for which they are submitting an application, avoid duplicate applications from the same Organization and ensure clear

wording for the criteria and evaluation process. Staff will continue to review this 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 a projected annual budget of \$30,000 for the Grants and Donations Program and \$15,000 for the Local Business Association Initiative in 2015.

### **F. In Consultation With**

Katherine Dabrowa, Finance.

### **G. Attached**

1. Draft Grants and Donations Application

Respectfully submitted,

**Robert Cummings**

Robert Cummings, CMA  
Director of Finance & IT Services

For more information, please contact:

Robert Cummings  
rcummings@thebluemountains.ca  
519-599-3131 x 245



## **TOWN OF THE BLUE MOUNTAINS 2015 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, Lion's Park Pavilion, 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 [fitinquiries@thebluemountains.ca](mailto:fitinquiries@thebluemountains.ca) or 519-599-3131 ext. 227.

### **GUIDELINES AND CRITERIA**

1. Grants are given only to not-for-profit organizations and Business Associations which, in the judgment of the Committee of the Whole, 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, events or activities only, and does not fund capital projects or debt payments.
4. Organizations and Business Associations are eligible for grants provided they demonstrate managerial expertise and good financial management as measured by the Applicant's responses within this application. Good financial management will be measured by, but not limited to, such things as operating within the annual budget, lack of a deficit, internal controls and regular financial reporting.
5. A list of the Organization's Governing Body and the position each individual holds must be included with this Application, as well as signatures from two individuals that have authority to act on behalf of the Board/Organization.
6. 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:** Grants and Donations and Local Business Association Initiative Funding cannot be used to fund/pay off deficits.

**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. Each application will be reviewed by Town Staff prior to review by the Committee of the Whole. All applicants will be notified of the results from the initial review prior to the applications being presented to the Committee of the Whole for decision.

**NOTE:** Priority will be given to **applications completed and received by Wednesday October 15, 2014**. The Town's total budget for grants and donations in 2014 was \$30,000. The 2015 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.

**APPLICATION WAS PREPARED BY:**

\_\_\_\_\_  
PRINT NAME

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
POSITION WITHIN THE BOARD

\_\_\_\_\_  
DATE

I have authority to act on behalf of the Board:  YES  NO

\_\_\_\_\_  
PRINT NAME

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
POSITION WITHIN THE BOARD

\_\_\_\_\_  
DATE

I have authority to act on behalf of the Board:  YES  NO



## 2015 GRANTS AND DONATIONS APPLICATION FORM

**LEGAL NAME OF THE ORGANIZATION:**

\_\_\_\_\_

**LEGAL ADDRESS OF THE ORGANIZATION:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**TAX STATUS OF THE ORGANIZATION:**

- FOR PROFIT  
 NOT FOR PROFIT

**AMOUNT OF GRANT REQUEST:**

\$ \_\_\_\_\_

CASH

\$ \_\_\_\_\_

SUBSIDIZATION

**APPLYING FOR FUNDING THROUGH:**

- GRANTS AND DONATIONS PROGRAM OR  
 LOCAL BUSINESS ASSOCIATION INITIATIVE

**FISCAL YEAR OF THE ORGANIZATION:**

FROM \_\_\_\_\_ TO \_\_\_\_\_

**COMMUNICATION CONCERNING THE APPLICATION IS TO BE ADDRESSED TO:**

NAME: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ (DAYTIME)

\_\_\_\_\_ (EVENING)

E-MAIL: \_\_\_\_\_

**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).

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**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).

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**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.

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**FUNDRAISING:**

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

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**DEFICIT:**

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

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**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

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## **Checklist:**

Please ensure your application includes the following:

- A) Bylaws and constitution (if applicable)
- B) List of board directors (mandatory)
- 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 [fitinquiries@thebluemountains.ca](mailto:fitinquiries@thebluemountains.ca) or 519-599-3131 ext. 227.