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**Policy: Community Grant Policy****Department: Legislative Services****Effective Date: April 6, 2017****Revision Date:****Review Date:**

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**1. Coverage**

This policy applies when groups or organizations make financial requests of Council that are not accommodated through existing departmental programs.

**2. Policy Statement**

Bruce County recognizes the role philanthropy plays in strengthening our community and that the benefits of such acts ultimately improves the quality of life for all residents. Therefore, annually, through the budget process, Council will determine an amount they deem appropriate to be given to not-for-profit groups or organizations for initiatives that uphold the County's strategic values for the community which are:

- Safe, clean and healthy
- Innovative, skilled
- Efficient, coordinated governance
- High quality of life for all residents
- A dynamic centre for economic development
- Proud and vibrant
- Well-connected and mobile

**3. Purpose**

A grant is defined as a contribution "in-cash or in-kind" that is awarded by Bruce County for specified purposes to an eligible recipient.

This policy outlines the scope, goals, objectives and guidelines for accessing Community Grants that are designed to invite, evaluate and distribute funds to philanthropic community organizations or groups.

#### **4. Scope**

This policy governs community based grants to support initiatives that benefit the Bruce County community and are aligned within specified granting priorities that support the County's strategic values and goals.

#### **5. Goals**

Bruce County offers this opportunity in order to support its strategic priorities categorized in the following streams.

Economic Prosperity and Innovation

- Assisting organizations or groups develop initiatives, programs, events or activities that impact the County's economy positively and that recognizes advancements across the region through innovation or creative thinking.

Cultural Enhancement and Diversity

- Assisting organizations or groups develop exemplary arts, culture and heritage-based capacity building projects including the advancement of knowledge, understanding and the appreciation of arts, culture and the County's heritage.

General Social Enrichment Programs or Events

- Assisting registered charitable and/or other community organizations or groups that serve County residents with their fund-raising or charitable events and activities. This includes organizations that support a better quality of life for all.

#### **6. Objectives**

1. To provide County funds within budgetary limits to an eligible applicant (s) as defined under eligibility below for approved community-based activities that align with a specific granting priority.
2. To ensure that all grant related activities and projects are administered and operated in a fiscally responsible manner by well organized, competent and properly structured organizations or groups.
3. To ensure accountability and transparency on the part of community organizations requesting and receiving approval for grant assistance and from the County in its administration of community-based grants.
4. To build and advance the self-sustainability and effectiveness of the not-for-profit sector by providing an appropriate level of support that strengthens the capacity of community organizations to deliver programs and services to the local community.

## **7. Procedure (Guidelines)**

### **A. Principle**

1. To evaluate each application or request on its own merit and ensure that all applications and/or requests are evaluated fairly and equitably utilizing criteria-based assessments.
2. Community grants issued by the County are designed to be supplemental to the overall requirements necessary to carry out a project for which an applicant is seeking grant assistance. Community-based grants should not be considered a primary source of assistance for a project or initiative.
3. Approved grants can only be used for a project or initiative that is open and accessible to all community members and satisfies all requirements of the Ontario Human Rights Code and/or the Charter of Rights and Freedoms.
4. Grant funding or assistance is not guaranteed. All grant programs or initiatives are subject to funding availability and are conditional on approval of the annual operating budget by Council. Council reserves the right to cancel or alter the Community Grant policy as needed.
5. The County reserves the right to restrict the number of applications submitted by a single organization in a calendar year based on the amount of funding or type of grants already awarded to the same community organization.
6. Approved grants or other types of assistance in any one year, or over several years, is not to be regarded as a commitment for future assistance and/or ongoing financial support.
7. Applicants may be required to demonstrate that they have fully explored alternate and/or other funding sources such as: private donors, federal and provincial grant programs.
8. Applicants who have or will have funding from alternate sources must disclose other grants or funding sources for the proposed project under grant consideration from the County in their application.

### **B. Eligibility:**

1. Not-for-profit corporations, non-profit organizations or groups, a registered charity, volunteer groups, and/or an affiliate of Bruce County or lower tier such as a community club are eligible to be considered for grant assistance. Eligibility requirements are subject to change without notice at the discretion of Council.
2. Eligible applicants must be in compliance with all conditions and requirements contained in the Ontario Human Rights Code and the Charter of Rights and Freedoms.
3. Eligible applicants must be located in Bruce County and/or must serve Bruce County in its catchment area. Eligible applicants that can demonstrate evidence of a specific Bruce County based project where the majority of participants are Bruce County residents may also be considered for a grant.

4. Eligible applicants must be able to demonstrate financial need and how denial of grant assistance would impact their ability to carry out the project or initiative for which they are seeking grant assistance from the County.

**C. Ineligibility:**

1. Any project, organization or group as determined by the County that falls under the scope or jurisdiction of another municipality, the Federal Government, the Provincial Government and/or demonstrates a better alignment with another grant funding organization.
2. Any project located or being held outside of the Bruce County unless otherwise approved by Council.
3. Funding or projects to raise money for core operating expenses, paying for accumulated deficits, debt, payroll or making direct financial grants to a third party and/or any other activity that does not uphold the County's strategic values or align with its strategic goals represented in the funding streams.
4. Travel and accommodation expenses for an organization's members or for a third-party to participate in a Bruce County based project.
5. For-profit entities, individuals and commercial ventures or other individual-specific projects, such as individual athletic competitions, religious or faith-based groups.

**D. Process:**

1. Requests for financial support consideration are submitted via the Community Grant application form found on the Corporate Website. Note that there are two application forms. The "Short Form" is for requests up to \$5,000. The "Long Form" is for requests over \$5,000. Completed applications are directed to the County Clerk on or before June 1 for consideration in the next funding year. This is to ensure its inclusion, if deemed warranted, in the annual budget process.
2. Applications must be completed in full to be considered.
3. Following the application deadline, accurately submitted applications will be assessed and evaluated.
4. Both successful and unsuccessful applicants will be notified.
5. Applications are done on an annual basis. Unsuccessful or incomplete applications for one year will not automatically be considered in future years. They must be re-submitted each year for consideration.

**E. Evaluation:**

1. Requests for financial grants will be considered on the merits of the application, relevance to the County's strategic priorities and annual budget consideration.
2. Requests are assessed in terms of the need for the project or initiative, financial viability, cost effectiveness and achievable goals.
3. Council will make the final decision on all grants.

**F. Recognition:**

1. Organizations or groups receiving financial support should acknowledge the County's contribution through any printed material or associated promotional means where appropriate.
2. The County's logo should appear in printed or on line promotional material.
3. Prior approval on proper logo placement and usage is required.

**G. Accountability:**

1. Those approved for a grant will be held accountable for the expenditure of the funds in accordance with the stated objectives and goals.
2. The funds awarded are not transferrable between projects, organizations or groups. The awarded funds must be used for the specific purposes outlined.
3. If the project, initiative or event does not go forward, the grant shall be returned.
4. A final project / initiative report is required to be submitted to the County Clerk within 30 days of the project / initiative end date or agreed upon date by the recipient and the County clerk. This report includes details on how the funds were used to meet the goals of the project / initiative, its' positive impact on the community and how Bruce County was recognized.

Section I:

1. Application Eligibility

- A. Will your project, initiative or event uphold the County's strategic values for the community?

Check all that apply:

- ☐ Safe, clean and healthy
- ☐ Innovative, skilled
- ☐ Efficient, coordinated governance
- ☐ High quality of life for all residents
- ☐ A dynamic Centre for economic development
- ☐ Proud and vibrant
- ☐ Well-connected and mobile

- B. Legal Name of the organization:

\_\_\_\_\_

- C. Full Legal Address and Contact Information:

Street / PO Box: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_ Cell: \_\_\_\_\_

Email: \_\_\_\_\_

Main contact on project: \_\_\_\_\_

- D. Type of Organization or Group: Circle One

Service Club      Arts/Culture Event      MUSH/Government Agency

Other-Specify \_\_\_\_\_

- E. Is the organization registered with CRA as a charity? Yes No

- F. Is the organization incorporated as a non-profit with the Province? Yes No

G. What is the mandate or main purpose of your organization or group?

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H. Who is your organization's or group's audience / who does your organization or group serve?

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## Section II:

### 1. Funding Details

A. Amount of request: \_\_\_\_\_

B. Select the type of support you are applying for:

Seed Funds   One-Time Event   Multi-Year Event   Unique Need

C. Have you received funding from the County in the last two years?      Yes      No

D. If Yes, indicate the amount \$ \_\_\_\_\_ and year received: \_\_\_\_\_

Have you submitted a final report?      Yes      No

## Section III:

### 2. Project or Event Details

A. Please select the strategic priority category you are applying for:

☐ **Economic Prosperity and Innovation**

Assisting organizations or groups develop initiatives, programs, events or activities that impact the County's economy positively and that recognizes advancements across the region through innovation or creative thinking.

☐ **Cultural Enhancement and Diversity**

Assisting organizations or groups develop exemplary arts, culture and heritage-based capacity building projects including the advancement of knowledge, understanding and the appreciation of arts, culture and the County's heritage.

☐ **General Social Enrichment Programs or Events**

Assisting registered charitable and/or other community organizations or groups that serve County residents with their fund-raising or charitable events and activities.

**B.** Please describe your Project or Initiative:

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**C.** Please indicate the project goals:

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**Section IV:**

**3. Application Signature**

I certify that the information supplied in this application is, to the best of my knowledge, exact and complete, and that the project has received the approval of the organization I represent.

Name: \_\_\_\_\_ Signature: \_\_\_\_\_

Title: \_\_\_\_\_ Date: \_\_\_\_\_

**Please note: Completed applications are due to the County Clerk by 4:30 p.m. on or before June 1 for consideration in the next funding year.**

**Return completed form to:** Clerk  
County of Bruce  
30 Park Street  
P.O. Box 70  
Walkerton ON N0G 2V0



## Application - Long Form More than \$5,000

### Section I:

#### 1. Application Eligibility

##### A. Will your project, initiative or event uphold the County's strategic values for the community?

Check all that apply:

- ☐ Safe, clean and healthy
- ☐ Innovative, skilled
- ☐ Efficient, coordinated governance
- ☐ High quality of life for all residents
- ☐ A dynamic Centre for economic development
- ☐ Proud and vibrant
- ☐ Well-connected and mobile

##### B. Legal Name of the organization:

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Please list Board of Directors / Organizing committee including addresses (or attach)

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##### C. Full Legal Address and Contact Information:

Street /Box: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_ Cell: \_\_\_\_\_

E-mail: \_\_\_\_\_

Main contact for project: \_\_\_\_\_

##### D. Type of Organization or Group: Circle One

Service Club          Arts/Culture Event          MUSH/Government Agency

Other-Specify \_\_\_\_\_

##### E. Is the organization registered with Revenue Canada as a charity?          Yes          No

F. Is the organization incorporated as a non-profit with the Province? Yes No

G. What is the mandate or main purpose of your organization or group?

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H. Who is your organization or group’s audience / who does your organization or group serve?

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**Section II:**

**1. Funding Details (Please attach a proposed budget)**

A. Amount of request: \_\_\_\_\_

B. Please complete the budget in “Appendix A”

C. Select the type of support you are applying for:

Seed Funds      One-Time Event      Multi-Year Event      Unique Need

D. Has your organization or group received funding from the County in the last two years?

Yes      No

E. If you answered Yes above, please indicate the amount

\$\_\_\_\_\_and year received: \_\_\_\_\_

Have you submitted a final report?      Yes      No

**Section III:**

**2. Project / Event Details**

A. Please select the strategic priority category you are applying for:

☐ **Economic Prosperity and Innovation**

Assisting organizations or groups develop initiatives, programs, events or activities that impact the County’s economy positively and that recognizes advancements across the region through innovation or creative thinking.

☐ **Cultural Enhancement and Diversity**

Assisting organizations or groups develop exemplary arts, culture and heritage-based capacity building projects including the advancement of knowledge, understanding and the appreciation of arts, culture and the County's heritage.

☐ **General Social Enrichment Programs or Events**

Assisting registered charitable and/or other community organizations or groups that serve County residents with their fund-raising or charitable events and activities.

**D. Please describe your Project / Initiative or Event - Include relevance to its Priority Category:**

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**E. Please indicate the project goals:**

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**F. Please explain how the contribution will help you achieve your goals:**

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**Section IV:**

**3. Application Signature**

I certify that the information supplied in this application is, to the best of my knowledge, exact and complete, and that the project has received the approval of the organization I represent.

Name: \_\_\_\_\_ Signature: \_\_\_\_\_

Title: \_\_\_\_\_ Date: \_\_\_\_\_

Please note: Completed applications are due to the County Clerk by 4:30 p.m. on or before June 1 for consideration in the next funding year.

Return completed form to: Clerk  
County of Bruce  
30 Park Street  
P. O. Box 70  
Walkerton ON N0G 2V0

## Project Budget

Project Name: \_\_\_\_\_

Revenue	Amount	Fundraising	Amount	Expenditures	Amount
(List all)		(List all activities)		(List all)	
		Total Fundraising (B)			
		(List all)			
Total Earned Revenue (A)		Total Government (C)		Total Expenditure (D)	
Budget Overview		Project Revenue		Total Expenditure (D)	Amount
		Total Earned Revenue (A)			
		Total Fundraising Revenue (B)			
		Total Government Revenue (C)		Variance (E-D)	Amount
		Total Project Revenue (E) (A+B+C=E)			

## Evaluation - Community Grants Evaluation Matrix

Scoring Criteria	Score
The project, initiative or event will serve the local interests of the residents of the County of Bruce and will uphold the Corporation's strategic values.	<u>20 Points</u>
The project, initiative or event will contribute to the strategic goals of the Corporation represented through the chosen granting streams of Economic Prosperity and Innovation, Cultural Enhancement and Diversity, General Social Enrichment.	<u>20 Points</u>
The project, initiative or event provides access to the arts, culture, environment, heritage, recreation, lifelong learning and/or health activities.	<u>20 Points</u>
The project, initiative or event demonstrates broad support by way of having adequate funds and support from other sources and stakeholders and/or significant evidence of broad community support.	<u>20 Points</u>
There is clear alignment between the project, initiative or event and its' intended goals.	<u>10 Points</u>
The project, initiative or event has other innovative, creative thinking attributes.	<u>10 Points</u>
<b>Total</b>	<b><u>100 Points</u></b>

## Report Back Template

A final report is required to be submitted to the County Clerk within 30 days following the project / initiative end date and/or agreed upon date by the recipient and the County clerk. Please use the following template.

Name of organization:
<b>Did your project, initiative or event contribute to the strategic goals of the Corporation represented through the granting streams of Economic Prosperity and Innovation, Cultural Enhancement and Diversity, General Social Enrichment?</b> Please explain how below:
<b>How did the grant help you to achieve your project, initiative or event goals?</b> Please explain how below:
<b>How did your project, initiative or event impact the Bruce County Community in a positive way? Indicate how this happened in relation to improving the quality of life in Bruce County for all residents. Speak in relation to the areas of arts, culture, environment, heritage, recreation, lifelong learning and/or health.</b> Please explain below:
<b>How was Bruce County recognized in the course of your project or initiative?</b> Please explain below:
<b>Is there anything else you would like us to know about your project or initiative?</b> Please comment here: