Title: Council Community Grant Policy		
Resolution: 112-2015, 2017-0014 Jan 23/17	**Revised:**	**Jan 23/17**
Special Notes/Cross Reference:	**Next Review Date:**	**Budget 2018**

POLICY STATEMENT   :

The Town of Westlock has established a Community Grant Program to provide financial assistance towards projects or events that are Community driven to enhance and enrich the Town of Westlock. Through the program, the Town of Westlock wishes to encourage initiatives from locally-based, registered, non-profit organizations that will impact a broad cross-section of the community, which are innovative in nature and promote Council's vision of *A Community with Spirit!*

PURPOSE   :

The Town has established a Community Grant Policy to offer grants to not for profit community groups, teams or organizations within the Town of Westlock for community development purposes. Projects, events, activities and recreational accomplishments focused on attaining positive outcomes for the community may be funded through this program.

The community grant program supports innovation while addressing community needs that are in line with Council's goals for Westlock.

- Westlock is a Community that People are Proud of.
- Westlock is Ready for the Future
- Westlock has Increased the Assessment Base and Achieved its Growth Targets
- Westlock is a Leader in Building Relationships.

GUIDELINES / PROCEDURES / RESPONSIBLITIES

PART 1

DEFINITIONS

Applicants refers to not-for-profit community groups, teams, organizations and associations of the Town of Westlock supporting an eligible project that request support under the Community Grant Program. An applicant may also be not for profit from outside of t h e   Town, but is supporting an eligible project within the Town.

Capital Cost means one-time expense incurred in goods / equipment that help the applicants accomplish their goals. Capital costs do not include staff, technology, or rental space.

Council means the Town of Westlock Council.

Fundraising is where funds are being requested for a project or event that will take place in the Town of Westlock.

Matching Funds is 50% of the project costs to be contributed via cash, services in-kind, equipment, materials or volunteer hours.

Project is a general term to describe eligible events, services, programs and initiatives.

Services in Kind are those services provided by the Town of Westlock or volunteers for the Organization towards the project to which the applicant will not be invoiced for.

Volunteer Hours are equivalent to:
$15.00 per hour for unskilled labour working directly on the project.
$60.00 per hour for heavy equipment (including operator) working directly on the project.
$30.00 per hour for skilled labour working directly on the project.

Donated labour that is not eligible as matching funding for a project includes any other volunteer time that provides general benefit to the organization such as volunteer hours relating to fundraising, time spent preparing the grant application, time spent in meetings or any activities related to planning for the project or any other planning activities for the organization.

1.0   GUIDING PRINCIPALS

Initiatives must support the Town of Westlock's Vision and Goals as previously noted, as well as meet one or more of the following:

1.1   Meet a need or fill a gap in the community
- Show an understanding of our community, its needs, and existing services
- Respect our community's diversity
- Identify creative, innovative and practical approaches

1.2   Strengthen organizational capacity when required
- Enhance community organizations' capacity to deliver services
- Address organizational stability/sustainability
- Leverage financial and in-kind support

1.3   Promote collaboration and sharing among agencies to reduce duplication of programs or improve effectiveness of services.
- Complement existing initiatives in the community in a positive and useful way
- Develop new partnerships or networks

1.4   Contribute a new understanding about community issues

1.5   Enhance public buildings and spaces

1.6   Promote and encourage volunteerism and community spirit by enhancing the work of local volunteer organizations.

1.7   Host a Community wide event or do a project that promotes and/ or enhances our Community.

1.8   Engage in the development of youth

2.0   FUNDING CATEGORIES

   2.1   **Areas of Consideration are:**

   a)   **Arts/Culture:** The application should strengthen and develop literary, visual, performing, heritage, and media arts.

   b)   **Recreation/Sport Development:** The application should enhance development of initiatives that support healthy living through strategies, programs and activities.

   c)   **Community Development:** Support may be given to significant key projects that have a major role in facilitating community life and well-being, and demonstrates long term sustainability.

   d)   **Seed Grants:** Funding to help launch a new project, program or initiative.

   e)   **Capital Grants:** Funding for equipment, repairs and renovation

   f)   **Project/Program Grants:** Funding for a specific and/or recurring initiative with specific objectives and a predetermined cost.

3.0   ELIGIBILITY

Consideration of applications will be given only if the Applicants meet the following criteria:

   3.1   The applicant is a Westlock area locally-based, registered, non-profit organization or association.
   3.1.1   The applicant may be from outside of the Westlock area, supporting a project occurring within the Community.

   3.2   The applicant has demonstrated the significant value and benefits that the project will have to the community by developed partnerships and volunteer opportunities.

   3.3   Applicants will have completed previous, required final reports before new applications will be considered as eligible.

   3.4   If a request falls within one of the categories below, it will not be considered:
   • Deficit funding
   • Debt Retirement
   • Emergency Funding
   • Salaries, Wages and Benefits
   • Religious or faith based organization – that focus on one spiritual tradition
   • Gaming Activities
   • Purchase of alcohol
   • Any expenses incurred prior to the Council's decision date
   • Political organizations
   • Facility Fees to Town operated facilities

- Registration, Certification/Professional Associations/Auditor

3.5   Prior funded projects will receive a lower priority.

3.6   Major source of funding from other government grants will receive a lower priority.

4.0   APPLICATION PROCESS

4.1   An organization is eligible to apply if they are a registered non profit organization serving the greater Westlock area. The organization must be a non-profit, registered for a minimum of one year under provincial or federal statute.

4.2   Applicants will be required to complete the Community Grants Application.

4.3   Applicants are required to provide the most recent approved Society Annual Return from Service Alberta.

4.4   Applicants must provide the current year Financial Statements.

4.5   Late or incomplete applications will not be accepted.

4.6   Only one application per organization will be considered in a calendar year.

4.7   Council has the discretion to waive criteria for specific applications.

4.8   All applications must be legible on Schedule A, B, C. Typewritten applications are recommended.

4.9   Council may request additional documentation to assist in the evaluation of any application prior to council meeting.

4.10   Applicants will be notified within seven (7) working days of Council decision.

4.11   Applicants that do not submit the required final report as indicated in Section 6.0 must return the full community grant allotment within thirty (30) days of the final report deadline and will not be eligible to apply for future community grants until all requirements have been met.

5.0   FINANCIAL

5.1   Applications funding deadlines are March 31 and September 30 at 4:30 p.m.

5.2   Funding will be awarded approximately thirty (30) days after submission deadline.

5.3   Funding is subject to the total amount of funds approved by Council as per the budget.

5.4   Council has the right to refuse any application or reduce requested amounts.

5.5   Funding is limited to a maximum of $2,500.00 for any one application.

5.6   Matched funding from the applicant must be at a minimum, fifty percent (50%) of the total related expenses.

5.7   Requests for services for in kind support from the Town of Westlock is considered part of the total funding applied for. Combined support of in-kind services and grant awarded shall not exceed a maximum value of $2,500.00.

6.0   ACCOUNTABILITY

6.1   Grant recipients must:

a)   Be prepared to enter into a "Letter of Agreement" with the Town of Westlock if the application is approved;

b)   Be prepared to meet an insurance requirement;

c)   Agree that any project cost shortfalls or resulting ongoing funding requirements will be their responsibility;

d)   Agree to recognize the Town's contribution to the project in all related public information, printed material and media coverage, Contact the Economic Development Officer at 780-349-4444 and;

e)   Agree to provide the Town of Westlock with a final report on the project supported by the grant. This report is to be received no later than sixty (60) days following completion of the project and must include a budget summary indicating how the grant monies were expended.

7.0   REVIEW PROCESS

7.1   Administration shall check that applications are complete and that the required documentation is included.

7.2   Council will review the applications.

7.3   Administration may make changes to Schedules A, B C, D as required.

PART 2 - Small Grant Process $0 - $500.00

1.0   Does not require a grant application, requires a letter of application.

   1.1   Small grant process to maximum of $500.00.

   1.2   Funding is subject to the total amount of funds approved by Council as per the budget.

   1.3   Small grant process is to be administrated by Administration.

   1.4   Open year round application process.

   1.5   Limited to once per calendar year; per individual, team, or organization.

   1.6   Due to timing of events, if approved, funds may not be disbursed until after the project.

   1.7   Letter of application must include the following:

   a) Full name of the individual, team, or organization
   b) Complete address for individual, team, or organization
   c) Are you part of a larger organization, and if so the name and address
   d) What is the project?
      i) Date, location
      ii) Number of individuals supported by the project
   e) Total cost of project
   f) Proposed revenue - list
   g) Proposed expenses – list
   h) Contact name and phone number for the applicant(s)
   i) Cheque is made payable to:
   j) Will the cheque be picked up or mailed?

   1.8   The Westlock Town logo must be clearly displayed on sponsorship materials. Contact the Economic Development Officer at 780-349-4444.

   1.9   The Town may request further clarification or further information.

2.0   Eligibility

   A.   Travelling Out of the Westlock Greater Area

   2.1   Individuals, Teams, and Organizations travelling out of the Westlock greater area (out of their league, region).
   Examples but not limited to: festivals; provincial tournaments; training opportunities; workshops.

   2.2   Financial assistance may be considered, based on demonstrated need to a maximum of two hundred dollars ($200.00).
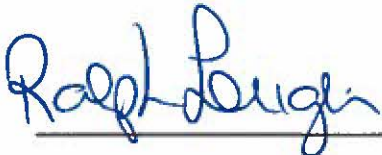
B.   Westlock as Host

2.3   Individuals, Teams, and Organizations hosting a project in Westlock.
Examples but not limited to: festivals; provincial tournaments; training
opportunities; workshops.

2.4   Financial assistance may be considered for hosting an event, based on
demonstrated need to a maximum of $300.00.

C.   Special Projects

2.5   Requests for funding of special projects may be considered based on
demonstrated need to a maximum of $500.00.

Mayor, Ralph Leriger   CAO, Dean Krause

COMMUNITY GRANT PROGRAM CHECKLIST

1. THE APPLICATION

☐ Ensure there are two contacts

☐ Ensure that the grant funds requested are MATCHED OR GREATER to the amount funded by the Applicant for the event/program

☐ I have requested a dollar amount no more than $2,500

☐ The Declaration is signed by a chairperson and a separate board member

☐ Keep a copy of the Final Reporting Documentation to submit within 30 DAYS of the event/program completion

☐ I have stated that I am a registered non-profit organization for a minimum of one year

2. I HAVE ATTACHED THE ADDITIONAL REQUIRED DOCUMENTATION:

☐ Most recent approved Society Annual Return from Service Alberta

☐ Current Year Financial Statements

☐ Completed Previous Final Reports, if applicable

☐ Any other documentation either required by the application dependent on the type of event/program, including additional information you feel would be beneficial to attach

3. OTHER

☐ I have reviewed and understand the Town of Westlock Policy No. P-76-2015 Community Grant Program

CHEAT SHEET INFORMATION:

Application Form: Pages 1 – 4: Initial Application

Supporting Documentation with Initial Application: Sample Financial statements and Sample Annual Return (highlighted information with red notes shows where to find certain information to fill in the Initial Application properly)

Application Form: Pages 5 – 7: Final Reporting Package to be provided with supporting documentation (AFTER funds are used and program/activity is complete)

APPLICANT INFORMATION: Schedule A

Name of Organization:			
Name of President/Chair of Organization:			
Mailing Address of Organization:			
Town:		Province:	
Postal Code:			
Telephone No:		Cell Phone No:	
Email Address:		Website Address:	
Is your organization a registered charity or non-profit?	Yes		No
Alberta Corporate Registry No:		Date of Incorporation:	
Provide a photocopy of registry?	Yes		No
If not available, why?			
Is your organization located within Town of Westlock?	Yes		No
If no, where is the organization located:			
Cheque is made payable to:			
Primary contact person for application:			
Position:		Telephone No:	
Email address:		Preference of Communication:	email	phone
Secondary contact person:			
Position:		Telephone No:	
Email address:		Preference of Communication:	email	phone

PROJECT PLAN   Schedule B

Name of Project:	

Location of the event in the community:

Date of Event:	Anticipated # of participants:

Target Population: (please indicate appropriate target)

children youth	adults	seniors	families	other

If other, please specify:

Please check the box that BEST describes the category of funding as per Grant Guidelines:

Arts/Culture	Sport/Rec	Community Development	

Is this the first time the organization has requested funding for this project?	Yes	No
Do you require assistance from the Town?	Yes	No

Specify the type of assistance required (i.e.; staff, material, signs):

Will your event/project require road closures?	Yes	No

If yes, attach documentation regarding the roads to be closed.

Goals: (Please describe what you would like to achieve overall with this project. If more space is required attach documentation to this application)

Financial Sustainability: Please explain how your organization plans to be sustainable after funding.

Marketing of your project: What publications and media tools are you using to promote the project? (Please circle appropriate lines.)			
Brochure	Poster/Flyer	Booklet	Other
Newspaper	Website	Radio	Social Media

Westlock Town logo will be clearly displayed on marketing materials meeting corporate identity standards:	Yes	No

If no, state reason:

For logo information contact Economic Development at 780-350-2109 once grant approval has been given.
Final design of logo on marketing material must be approved before printing has started.

Resident Impact: Please describe how your event/project significantly impacts the residents of our community.

Volunteers:

Total # of volunteers	Total # of volunteer hours

Roles of volunteers:

Community Partnerships: please list below the project partnerships for this program/event

Name:

Their role in the program/event:

PROJECT BUDGET   Schedule C

Income	Proposed
Organization Funding:	
Monetary	
In Kind Calculation: (See Policy P-76-2015 for more information)	
Earned Revenue from project/event specific programs:	
Donated material & equipment (In Kind):	
Total A:	
Community Grant Request: *(Max $2,500.00 with matched or greater funding provided by the applicant)*	
Monetary	
Town in kind	
Total B:	
Project Income Total (A + B):	

Expenses	Proposed
Contracted services:	
Rentals:	
Transportation:	
Marketing Material:	
Volunteer Expenses:	
Event Insurance:	
Other:	
Project Expenses Total:	

Note: If budget shows a surplus (excess of revenue over expenditures), a statement of intended use must be included in this application.

Declaration

I certify that to the best of my knowledge the information provided in this application is accurate and complete.

_____
Applicant Signature   (Chairperson)   Date

_____
Applicant Signature   (Board Member)   Date

Community Grants Application Final Report

Schedule D

Please note: This report must be completed and submitted within sixty (60) days of the completion of the event/program.

Final Report Checklist: has been completed

Project Summary
Partnership / Volunteer List
Financial Summary
Marketing material including media coverage provided

Name of Project:

_____

Name of Organization:

_____

Name of Contact Person for Application:

_____

Date Event:

_____

Actual # of Participants: _____

Final report prepared by: _____

Date: _____

Under Section 38 of the Freedom of Information and Protection of Privacy Act, Municipalities must protect the personal information it collects by making reasonable security arrangements against such risks as unauthorized access, collection, use, disclosure or destruction. Municipalities must comply with Section 39 and 40 when using and disclosing personal information.

Project Summary *(In 200 words or less summarize your project)*

If additional space is required please attach documentation to this report.

List of Partners	Their role in project
Actual # of volunteers	Actual # of volunteer hours
Volunteer's role in project:	

Financial Summary

Income	Proposed Revenue	Actual Revenue
Organization Funding		
In Kind Calculations		
Earned Revenue from Event		
Donated Material and Equipment		
Council Community Grant		
Total		

Expenses	Proposed Expenses	Actual Expenses
Contracted Services		
Rentals		
Transportation		
Marketing material		
Volunteer Expenses		
Event Insurance		
Other:		
Total		

Marketing Material & Media Coverage:		
Photocopies provided and attached to this report:	Yes	No
If no state reason:		