



Staff Report

Finance and IT Services

Report To: Grants and Donations Committee
Meeting Date: December 4, 2020
Report Number: FAF.20.189
Subject: Grants and Donations Guidelines and Criteria
Prepared by: Ruth Prince, Director of Finance and IT Services

A. Recommendations

THAT the Grants and Donations Committee receive staff report FAF.20.189, Grants and Donations Guidelines and Criteria” for information purposes.

B. Overview

This staff report is to provide the Grants and Donations Committee with the current Council approved Grants and Donations Criteria.

C. Background

In 2020, the Grants and Donations Committee reviewed the current Grants and Donations Criteria and application form. The attached criteria and application form is being provided to the Committee for information. Any changes made to the current approved Criteria and application form must be approved by Council.

D. Analysis

The Town of The Blue Mountains Council, through the Grants and Donations Committee of Council considers funding requests from groups or individuals that demonstrate both a need for funding and meet the approved guidelines and criteria.

E. Strategic Priorities

1. Communications and Engagement

We will enhance communications and engagement between Town Staff, Town residents and stakeholders.

2. Organizational Excellence

We will continually seek out ways to improve the internal organization of Town Staff and the management of Town assets.

3. Community

We will protect and enhance the community feel and the character of the Town, while ensuring the responsible use of resources and restoration of nature.

4. Quality of Life

We will foster a high quality of life for full-time and part-time residents of all ages and stages, while welcoming visitors.

F. Environmental Impacts

None.

G. Financial Impact

All of the funds raised by the Grants and Donations Committee are disbursed through recommendations from the Committee to Council.

The 2020 Budget had approximately \$20,000 for subsidy request through the Grants and Donations requests. The subsidy amount is for those requests that are looking for the use of facilities and/or services from the Town. This amount is throughout the budget in various departments.

H. In consultation with

Tracy Petrescu, Administrative Assistant – Finance and IT Services

I. Public Engagement

The topic of this Staff Report has not been subject to a Public Meeting and/or a Public Information Centre as neither a Public Meeting nor a Public Information Centre are required. Comments regarding this report should be submitted to Ruth Prince, Director of Finance and IT Services at directorfit@thebluemountains.ca

J. Attached

1. Guidelines and Criteria for Grants and Donations
2. Guidelines and Criteria for Community Donations for COVID-19

Respectfully Submitted,

Ruth Prince
Director of Finance and IT Services

For more information, please contact:

Ruth Prince
directorfit@thebluemountains.ca
519-599-3131 extension 228



Town of The Blue Mountains Annual Grants and Donations Program

The Town of The Blue Mountains Council through the Grants and Donations Committee of Council will consider funding requests from groups or individuals that demonstrate both a need for funding and meet pre-established [guidelines and criteria](#), as listed below and approved by The Grants and Donations Committee and 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 the Finance and IT Services Administrative Assistant at finance@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 Grants and Donations Committee of Council, 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 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 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 Grants and Donations Committee will give consideration to events/initiatives/projects aligning with the Town's Vision: Encompassing the best of Ontario Experience. A complete community designed to last, where opportunities abound.

7. Only one application per organization will be accepted for consideration.
8. By submitting this Application, the applicant acknowledges that, to the best of their knowledge, the information provided in this application is accurate and complete and endorsed by the organization they represent.
9. The applicant's organization, within the fiscal year, must spend grant funding on the purpose for which it was awarded. Note: As part of the application consideration process, the Grants and Donations Committee encourages applicants to make themselves available for a presentation and interview process that will be public.
10. All local business associations must now request the funding through the Communications and Economic Development division and no longer need to submit an application for the funds through the Annual Grants and Donations program.

Note: Grants and Donations 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 Grants and Donations Committee of Council. 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. Below is the proposed timeline for the program:

Date	Action
January 20, 2020	Release application on the Town's website. Notify previous recipients of the application being available.
February 28, 2020	Application deadline for Grants and Donations. Any applications received after this date will not be considered.
April 3, 2020	Grants and Donations Committee will make recommendations to Council.
April 21, 2020	Council considers the recommendation of the Grants and Donations Committee
May 4, 2020	Council approves the recommendation of the Committee of the Whole

The amount of funds available to be distributed will be determined by the Grants and Donations Committee and will largely be a function of the fundraising success of that Committee in the calendar year.

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

Note: As part of the application consideration process, the Grants and Donations Committee encourages applicants to make themselves available for a presentation and interview process that will be public.

Please be Concise!

- Use only the space provided
- Keep your answers brief
- Do not include information other than that requested.



Town of The Blue Mountains Grants and Donations Committee Application Form

Applicant Information

Legal Name of Agency/Organization/Group: _____

Address: _____

City/Town: _____ Postal Code: _____

Contact Person: _____ Position/Title: _____

Telephone: _____ Fax: _____

Email: _____ Website: _____

Organization Information

What is your Organizations status? ☐ For profit
☐ Not-for-profit

Fiscal year of Organization (Month/Year to Month/Year) _____

Amount of Grant Request

Cash: _____ Subsidization: _____

Financial Information:

If successful, indicate how the funding would be used by your organization.

Part A: General Information

Board of Directors

Please use the space below to provide the name and title for each member of your organizations Board of Directors, along with each member's title.

Describe who your organization serves

For example, who is your organization's audience?

Describe your organization's membership

Include the number of members, as well as any membership fees.

Summary of previous year's activities

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

Part B: Financial Information

Fundraising

Indicate your organizations fundraising policy. Comment on your organizations fundraising plans for both the current and upcoming years.

Fundraising Revenues

Does your organization raise enough money through fundraising to cover its expenses? If not, indicate your organizations plan to pay these expenses.

Part C: Grant Information

Summary of previous grant(s)

Include any subsidies. Indicate how the previous municipal grant(s) was applied by your organization. Indicate if you received funding from sources other than the municipality.

The Town of The Blue Mountains Vision

Explain how your organization's event/initiative/project aligns with the Town's Vision:
"Encompassing the best of Ontario Experience. A complete community designed to last, where opportunities abound."

Part D: Projected Budget

Please fill out the projected budget for your organization's event/initiative/project in the chart below.

Revenue Description	Budget Amount
Grants – Federal and/or Provincial	\$
Grants – Town of The Blue Mountains	\$
Donations/Sponsorships	\$
Earned Income	\$
Applicant Contribution	\$
User Fees	\$
Membership Fess	\$
Fundraising Efforts	\$
Other (please specify)	\$
Other (please specify)	\$
Other (please specify)	\$
Other (please specify)	\$
Total Revenue	\$

Expenses Description	Budget Amount
Salaries and Benefits	\$
Advertising and Promotion	\$
Entertainment	\$
Administration	\$
Facilities Rental	\$
Prizes and Awards	\$
Other (please specify)	\$
Other (please specify)	\$
Other (please specify)	\$
Other (please specify)	\$
Total Expenses	\$

Please ensure that your application also includes your organization's most recent financial statement.

Part E: Signatures

By signing below, the authorized representatives of the organization acknowledge that they have fully read and understand the [Guidelines and Criteria](#) for the Grants and Donations Program and that the information included in this application is true and correct to the best of their knowledge.

Print Name

Signature

Position/Title

Date

Print Name

Signature

Position/Title

Date

Please submit your completed application to:

Grants and Donations
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 finance@thebluemountains.ca or 519-599-3131 ext. 227.



Town of The Blue Mountains Grants and Donations Program Guidelines and Criteria for Community Donations for COVID-19 Approved 06/01/2020

The Town of The Blue Mountains Council through the Grants and Donations Committee of Council will consider requests from groups or individuals that demonstrate an ability to meet pre-established guidelines and criteria, as listed below and approved by The Grants and Donations Committee and Council.

The Town of The Blue Mountains COVID-19 Recovery Task Force via the Grants and Donations Committee has successfully raised funds to address possible food and essential living insecurity issues in the community resulting from COVID-19.

Guidelines and Criteria

1. The Grants and Donations Committee is asking that the applying organization submit a letter indicating how they can assist the Town in providing COVID-19 related food/grocery/essential needs support to the community resulting from COVID-19.
2. Grants are given only to not-for-profit organizations which, in the judgment of the Grants and Donations Committee of Council, make a unique contribution to the food/grocery/essential needs support of the community.
3. The food/grocery/essential needs support to the community must be located in our community and supply food/grocery/essential needs support to the Town of The Blue Mountains community.
4. The Grants and Donations Program funds operating projects, events or activities only, and does not fund capital projects or debt payments.
5. Organizations eligible must demonstrate managerial expertise and good financial management. Only one application letter per organization will be accepted for consideration.
6. The applicant's organization, within the fiscal year, must spend grant funding on the purpose for which it was awarded. Note: As part of the application consideration process, the Grants and Donations Committee encourages applicants to make themselves available for a presentation and interview process that will be public.

Note: Grants and Donations 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 letter review and the amount of grants and donations funding available. Each application letter will be reviewed by Town Staff prior to review by the Grants and Donations Committee of Council. 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. Below is the proposed timeline for the program:

Date	Action
September 18, 2020	Release Guidelines and Criteria on the Town's web site.
October 2, 2020	Applications are closed and should be submitted to finance@thebluemountains.ca .
Week of October 5	Grants and Donations Committee will make recommendations to Council.
October 19, 2020	Council approves the recommendation of the Grants and Donations Committee.

The amount of funds available to be distributed will be determined by the Grants and Donations Committee and will largely be a function of the fundraising success of that Committee.

Note: As part of the application consideration process, the Grants and Donations Committee encourages applicants to make themselves available for a presentation and interview process that will be public.