



## United Counties of Leeds & Grenville

Section:	Finance	Policy No.	CS-1002
Policy:	<b>Grant Requests for Financial Assistance</b>	Date Issued: By-Law:	18-11-2004 (04-62)
Coverage:	UCLG	Revision No.	
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### **POLICY STATEMENT:**

This policy is intended to outline the framework and criteria regarding requests for grants to financially assist incorporated non profit organizations which would benefit and/or contribute to the well-being of the citizens of the United Counties of Leeds & Grenville.

### **PROCEDURE:**

#### **1.0 Purpose**

The Grant Assistance Program is designed to act as a catalyst to assist the community in starting new ventures or a one-time event on the basis of the following criteria:

- Assisting worthwhile organizations in creating new programs or projects (seed funds) which provide a benefit or service to the United Counties of Leeds & Grenville by way of promoting civic, cultural, and sports organizations or events.
- Promoting an event of municipal, provincial or national significance, which could be expected to bring economic and/or public relations benefits to the County.
- An urgent or pressing event or natural disaster, i.e. fire, flood, earthquake, etc.

#### **2.0 Funding Period**

- The funding period for the application being considered will be within the fiscal year of the budget.
- Funding limits will be determined each year during the annual budgeting process.
- Projects that expect to be considered for funding in future years must indicate this on the application, but must re-apply each year for consideration.

## **2.0 Funding Period (Cont'd)**

- Funding in any subsequent year will be considered based on the success of the first year, the availability of funds, the priorities for funding and the strength of other proposals received each year.
- No project/program will receive more than three (3) years' funding. It is expected that organizations will demonstrate that they are seeking alternative sources of funding on an on-going basis to achieve self-sufficiency.

## **3.0 Eligibility**

- The organization must be an incorporated non-profit group, whose goal and purpose is to provide a service or benefit to the community.
- Funds requested are to be utilized to create new programs or projects within the boundaries and jurisdiction of the United Counties of Leeds & Grenville.
- Funding of other local initiatives will be at the sole discretion of Council.
- It is expected that organizations will demonstrate that they are seeking alternative sources of funding on an on-going basis to achieve self sufficiency.
- The program/event must be sponsored by an incorporated non-profit organization and/or is a registered charity.
- Any eligible organization may submit only one application per year.
- Funds will not be provided to cover the costs of an organizations' financial deficit.
- No more than 20% of the project budget can be for administrative/overhead costs.
- Funds may not be provided for project activities already receiving municipal funds through other programs.
- Funds may not be provided to organizations that do not provide equal access to services to individuals of diverse cultures or with disabilities, where appropriate and feasible.

## **4.0 Application Process**

Application forms are available on-line at [www.uclg.ca](http://www.uclg.ca) or from the office of the Treasurer, 25 Central Avenue West, Suite 100, Brockville, ON K6V 4N6.

#### **4.0 Application Process (Cont'd)**

- Completed application forms must be received in the Treasurer's office prior to December 1<sup>st</sup> in order to be considered for the following years' budget.
- A review team consisting of the Warden, Chair of the Governance and Finance Committee, Chair of the Public Works Committee, Director of Corporate Services/Treasurer, Director of Community and Social Services, and the Economic Development Officer, will evaluate the applications based on the assessment criteria. Recommendations will then be forwarded to the Governance and Finance Committee by the Treasurer for consideration and inclusion in the annual budget.
- Final grant approval will be subject to Council's adoption of the annual budget.

#### **5.0 Submission Requirements**

- A completed application properly executed by the applicant.
- The project budget itemizing all revenue and expenditures.
- Statement of the organizations' current bank balance for the project.
- A specific amount shall be requested and a need must be demonstrated, as evidenced in the budget.
- Previous years' project/event's financial statement if applicable.
- Applicants must submit the signed original application as well as five (5) photocopies. Please do not send by fax or email.

#### **6.0 Application Approval/Funding**

- Once a project has been approved, the applicant must enter into a formal agreement/contract with the County outlining the terms of the funding and the reporting requirements.
- Funds will not be provided for activities/expenditures that were not outlined or approved in the original submission.
- Funds will be released on a quarterly basis on the achieved business plan objectives as defined in the agreement and original submission. Failure to meet these requirements may result in the cancellation of the approved funding.

**The United Counties of Leeds & Grenville  
Grant Request For Financial Assistance**

**Organization Requesting Assistance.**

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

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Incorporated as Non-Profit Organization:  Yes (Provide Copy)  No

**Application details.**

This application is made under the following County criteria:

- Assisting worthwhile organization in creating new programs or projects (Seed funds) which provide a benefit or service to the United Counties of Leeds and Grenville citizens by way of promoting civic, cultural, and sports organizations or events.
- Promoting an event of municipal, provincial or national significance which could be expected to bring economic and/or public relations benefits to the County.
- An urgent or pressing event or natural disaster, i.e. fire, flood, earthquake, etc.

Please provide complete details: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Year for which funding is being applied for: \_\_\_\_\_ Funding amount requested \$ \_\_\_\_\_

Have you received funding from the United Counties of Leeds & Grenville in the past?

No  Yes Year \_\_\_\_\_ Amount \_\_\_\_\_ Year \_\_\_\_\_ Amount \_\_\_\_\_

Will you be requesting funding for future years?  Yes Number of years \_\_\_\_\_  No

**Project Funding.** Indicate from what other sources funding has been applied for.

- Does your organization receive funds from the United Counties of Leeds & Grenville for any other purpose?

No

Yes (If yes, provide details below)

Other levels of government

Private Sector

Memberships / Fees

Donations

Fund Raising Events

Please provide specific details: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Additional documentation.** Please attach the following supportive documentation:

- Budget for the year in which the grant is applicable, outlining sources of revenue and expected expenditures.
- If funding was received from the United Counties of Leeds & Grenville in the previous year - a final financial statement for that years' event.
- Letter of incorporation, and outline of the mandate of the organization.
- Slate of officers, including name, address, telephone and position held.
- Other documentation deemed to be of importance
  - \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_
  - \_\_\_\_\_

Signed on behalf of the organization by authorized officers:

_____	_____	_____
Signature	Position	Date
_____	_____	_____
Signature	Position	Date

The United Counties of Leeds & Grenville's policy regarding grant requests for financial assistance is as follows:

- Requests will be considered based on the following criteria:
  - Providing start-up (seed) funds for worthwhile organizations which provide a benefit or service to the United Counties of Leeds & Grenville's citizens, promote civic, cultural, and sports organizations or events.
  - Requests for financial assistance for events of a municipal, provincial or national significance which would be expected to bring economic and/or public relations benefit to the County.
  - Request for financial assistance for urgent and pressing events and natural disasters, i.e. fire, flood, earthquake, etc. will be considered on their individual merit.
  - The organization must demonstrate that it is presently exploring, or has fully explored, potential funding from other sources, from other levels of government, the private sector, memberships, donations and fund raising activities.
- Organizations seeking assistance must be incorporated or in the process of applying for incorporation as a non-profit organization and/or is a registered charity.
- Organizations must demonstrate that they are seeking alternative sources of revenue on an on-going basis to achieve self-sufficiency.
- Grant applications must be submitted prior to December 1 to be included in the following years' budget.
- Grant applications must be accompanied with a budget for the year in which the grant is applicable, outlining all other sources of revenue, and expected expenditures.
- Any eligible organization may submit only one (1) application per year.
- Funds requested are to be utilized to create new programs or projects within the boundaries and jurisdiction of the United Counties of Leeds & Grenville.

**The United Counties of Leeds & Grenville  
Grant Request For Financial Assistance**

**Budget**

Year \_\_\_\_\_

Organization Requesting Assistance: \_\_\_\_\_

Bank Balance From Previous Years' Events \$ \_\_\_\_\_ (a)

**Revenue**

- Support from parent organizations \$ \_\_\_\_\_
- Provincial grant subsidies \$ \_\_\_\_\_
- Federal grant subsidies \$ \_\_\_\_\_
- Assistance from other municipalities \$ \_\_\_\_\_
- Membership dues \$ \_\_\_\_\_
- Fees or admission charges \$ \_\_\_\_\_
- Donations from public campaigns \$ \_\_\_\_\_
- Donations from service clubs \$ \_\_\_\_\_
- Other \_\_\_\_\_ \$ \_\_\_\_\_
- Amount requested from United Counties of Leeds & Grenville \$ \_\_\_\_\_

**Total Budgeted Revenue** \$ \_\_\_\_\_ (b)

**Expenses**

- Specify \_\_\_\_\_ \$ \_\_\_\_\_
- Specify \_\_\_\_\_ \$ \_\_\_\_\_
- Specify \_\_\_\_\_ \$ \_\_\_\_\_
- Specify \_\_\_\_\_ \$ \_\_\_\_\_
- Specify \_\_\_\_\_ \$ \_\_\_\_\_
- Specify \_\_\_\_\_ \$ \_\_\_\_\_
- Specify \_\_\_\_\_ \$ \_\_\_\_\_

**Total Budgeted Expenditures** \$ \_\_\_\_\_ (c)

**Anticipated Surplus / (Deficit) = a + b - c** = \$ \_\_\_\_\_

Staff: Number of paid staff \_\_\_\_\_

Number of volunteers \_\_\_\_\_

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