



With **spirit** | Avec **esprit**

# **Community Grant Funding Program**

## **Grant Writing Workshop Updated for 2022 Intake 2**

SEPTEMBER 2022



# What We Will Cover

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- **About the City of Beaumont Community Grant Program / Granting Priorities**
- **Application Process Overview, Timelines & Key Dates**
- **Eligibility**
- **Application Form & Final Report – How To & Tips**
- **Q & A**



# About the Community Grant Funding Program

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## **How it started:**

- Approved late 2018, first intake April 2019
- Awarded over \$185,000 in the past 3 years

## **What the grants support:**

- Operating expenses (developmental stage)
- New and one-time projects and initiatives
- Events

## **Organizations can submit more than one application per intake and/or year**

- Submit separate applications

## **Joint applications are welcome!**



# Grant Priorities

Funds will be allocated to activities that:



- **build efficiency and sustainability through measurable outcomes**
- **best meet program eligibility and priority criteria**
  - ✓ **primarily for/to the general population**
  - ✓ **enhance community safety**
  - ✓ **attract visitors**
  - ✓ **significantly contribute to the local economy**
  - ✓ **promote volunteerism**
  - ✓ **add value to Beaumont and its residents**



# Application Process Overview

- 1. Review guidelines and confirm eligibility**
- 2. Submit application(s)**
- 3. Applications screened**
- 4. Applications reviewed by the Grant Funding Advisory Committee (GFAC)**
  - **Min. 3 – max. 5 citizens-at-large**
  - **Option - max. 10 minutes Q&A during the review process**
- 4. GFAC recommendations to Council**
- 5. City Council decision is final**
  - **may grant all, none, or a portion of the funding requested**
- 6. Outcome - All applicants notified**
- 7. Funds distributed**
  - **80% upon application approval**
  - **20% after final report approved**



# For Assistance and More Information



**Email**

**[CommunityGrantApplications@beaumont.ab.ca](mailto:CommunityGrantApplications@beaumont.ab.ca)**

**or call**

**780-328-9926**



2022 – Intake 1	2022 – Intake 2 <i>For projects taking place between November 1, 2022 – November 30, 2023</i>
<b>CLOSED</b>	<b>August 1 – October 1, 2022:</b> Applications open
	<b>October 2022:</b> GFAC Reviews applications
	<b>Late October/ Early November 2022:</b> GFAC presents recommendations to Council. Council makes final decisions.
	<b>November 2022:</b> City administration informs all applicants of results and distributes funds to successful applicants.
	<b>November 2022 – November 2023:</b> Projects executed, and final reporting submitted. Final payments issued.

# Timelines & Key Dates





<b>2023 – Intake 1</b> <i>For projects taking place between  May 1, 2023 – May 30, 2024</i>	<b>2023 – Intake 2</b> <i>For projects taking place between  November 1, 2023 – November 30, 2024</i>
<b>February 1 – April 1, 2023:</b> Applications open	<b>August 1 – October 1, 2023:</b> Applications open
<b>April 2023:</b> GFAC Reviews applications	<b>October 2023:</b> GFAC Reviews applications
<b>Late April / Early May 2023:</b> GFAC presents recommendations to Council. Council makes final decisions.	<b>Late October/ Early November 2023:</b> GFAC presents recommendations to Council. Council makes final decisions.
<b>May 2023:</b> City administration informs all applicants of results and distributes funds to successful applicants.	<b>November 2023:</b> City administration informs all applicants of results and distributes funds to successful applicants.
<b>May 2023 – May 2024:</b> Projects executed, and final reporting submitted. Final payments issued.	<b>November 2023 – November 2024:</b> Projects executed, and final reporting submitted. Final payments issued.

# Timelines & Key Dates



# When To Apply Based on Project Date

<b>2022 Intake 2 (Oct 1)</b>									
<b>2023 Intake 1 (Apr 1)</b>									
<b>2023 Intake 2 (Oct 1)</b>									
	<b>Nov</b>	<b>Feb</b>	<b>May</b>	<b>Aug</b>	<b>Nov</b>	<b>Feb</b>	<b>May</b>	<b>Aug</b>	<b>Nov</b>
	<b>2022</b>	<b>2023</b>			<b>2024</b>				



# Who Can Apply

**Community non-profits (registered & in good standing)  
under the following Acts:**

## **PROVINCIAL LEGISLATION**

- ✓ **Agriculture Societies Act**
- ✓ **Part 21 of the Business Corporations Act – Extra-Provincial Corporations**
- ✓ **Cemeteries Act or Cemetery Companies Act**
- ✓ **Companies Act, Part 9 (Non-profit Companies)**
- ✓ **Libraries Act**
- ✓ **Societies of Alberta Act**
- ✓ **Special Act of the Alberta Legislature**

## **FEDERAL LEGISLATION**

- ✓ **Special Act of the Parliament of Canada**
- ✓ **Canada Not-for-Profit Corporations Act and must be registered in Alberta under the Business Corporations Act**
- ✓ **Income Tax Act of Canada and operating in the province of Alberta (Charities)**



# Who Can Apply (cont.)

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- ✓ **First Nations and Metis Settlements**
- ✓ **Foundations established and regulated under Alberta's Regional Health Authorities Act**
- ✓ **Universities, colleges and institutes as defined under Alberta's Post-Secondary Learning Act**



# Those Not Eligible

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- × **For-profit organizations**
- × **Any other organizations not registered\* under one of the above-mentioned Acts**
- × **Organizations with overdue or incomplete accounting or reporting**
- × **Individuals**

*\* Apply through an eligible group*



# Project Eligibility Requirements

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See Section 4 of the Guidelines

- ✓ **Funding request: min. \$1,000 – max. \$10,000**
- ✓ **Eligible expenditures only**
- ✓ **Matched-grant basis**
- ✓ **Previous reporting requirements met**
- ✓ **Clearly demonstrate benefits to residents of Beaumont**
- ✓ **Measurable targets and outcomes**
- ✓ **Project dates meet requirements**
- ✓ **Can receive funding for 3 consecutive years, then take 2 intakes off**



# How Much To Ask For – Your Budget

- **Min. \$1,000 | Max. of \$10,000**
- **Request a max. 50% of total cost**
  - **your organization must MATCH (or exceed) the amount requested**
- **Matching funding can be in the form of any combinations of:**
  - ✓ **Money**
    - **Club contributions, cash donations, registration/participation fees, tickets sales, sponsorships, etc.**
  - ✓ **Donated equipment, services and/or materials**
  - ✓ **Volunteer time**
  - ✓ **Other grants (approved and/or requested)**



# Value of Gift-In-Kind Donations

- **Value of Donated Labour, Equipment and Materials:**
  - **\$20/hr – unskilled**
  - **\$35/hr – skilled**
  - **\$70/hr – heavy equipment + operator**
  - **Materials & professional services – verified Fair Market Value (FMV)**
- **Supporting Documentation for Donations:**
  - **Volunteer sign-in sheets incl: date, name, signature, nature of work, number of hours, rate per hour, and total value**
  - **Donation letters on business letterhead – clearly indicated FMV of professional service(s) and/or material(s) donated**





# Expenses – What is Eligible

- ✓ **Project materials/supplies**
- ✓ **Equipment – purchase, lease or rent**
- ✓ **Insurance for project/event activities**
- ✓ **Honorariums, contract wages, and fees paid to professionals, technical personnel, consultants, contractors, speakers, performers, artists, etc.**
- ✓ **Marketing and advertising**
- ✓ **Venue rental and technology costs**
- ✓ **Cultural and other expenses related to Indigenous protocols and gift giving**
- ✓ **Operating (core) expenses**
  - **Maximum twice within first 5 years of incorporation**



# Expenses – What is Not Eligible

- × **Debt retirement**
- × **Deficit reduction and/or retroactive grant funding (refer to Section 4.3)**
- × **Operating (core) costs not linked to measurable targets and outcomes**
- × **For-profit commercial ventures or private organizations**
- × **Endowments**
- × **Beneficiaries are solely/primarily outside Beaumont (may occur outside Beaumont boundaries, however majority benefit must be to Beaumont residents)**
- × **Advancing specific moral or religious points of view**



# Getting Started

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## Beaumont's Community Grant & Grants in General

- **Start early**
- **Review full grant package**
- **Create/update 'Organizational Profile'**
  - **Mandate, mission and vision**
  - **History of group**
  - **Budget – overall and project specific**
  - **Project/initiative/event description**
- **Keep a copy (use for other grants)**
- **Plan time for feedback and revisions**
  - **Proofread – spelling and grammar**



# Completing the Application Form

## PART A: APPLICANT INFO

### PART A: APPLICANT INFORMATION

Organization Name:	
Fiscal Year End:	
Mailing Address:	
Contact Person (full name and position/title):	
Contact Email:	
Contact Phone:	
Charitable Number (if applicable):	
Incorporation Number (if applicable):	

Organization is registered and in good standing under the following legislation (select the applicable option):			
PROVINCIAL LEGISLATION		FEDERAL LEGISLATION	
Agriculture Societies Act	<input type="checkbox"/>	Special Act of the Parliament of Canada	<input type="checkbox"/>
Part 21 of the Business Corporations Act - Extra-Provincial Corporations	<input type="checkbox"/>	Canada Not-for-Profit Corporations Act and must be registered in Alberta under the Business Corporations Act	<input type="checkbox"/>
Cemeteries Act or Cemetery Companies Act	<input type="checkbox"/>	Income Tax Act of Canada and operating in the province of Alberta (Charities)	<input type="checkbox"/>
Companies Act, Part 9 (Non-profit Companies)	<input type="checkbox"/>	<b>OTHER</b>	
Libraries Act	<input type="checkbox"/>	First Nations and Metis Settlements	<input type="checkbox"/>
Societies of Alberta Act	<input type="checkbox"/>	Foundations established and regulated under Alberta's Regional Health Authorities Act	<input type="checkbox"/>
Special Act of the Alberta Legislature	<input type="checkbox"/>	Universities, colleges and institutes as defined under Alberta's Post-Secondary Learning Act	<input type="checkbox"/>



# Completing the Application Form

## PART A: APPLICANT INFO CONT.

Has your organization received previous financial support from the City of Beaumont?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
If yes, list previous project(s), amount(s), and year(s) your organization has received funding from the City of Beaumont for the last four years:		
<b>Project</b>	<b>Amount</b>	<b>Year</b>
	\$	
	\$	
	\$	
	\$	
If yes, have final reports been submitted for previous financial support?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Do you wish to appear before the Beaumont Grant Funding Advisory Committee for an optional 10-minute question and answer opportunity?	YES <input type="checkbox"/>	NO <input type="checkbox"/>



# Project Details

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## The Heart of Your Application

- ✓ **Tell a compelling story**
- ✓ **Balance conciseness with enough detail**
- ✓ **Write out acronyms (1<sup>st</sup> time) and avoid lingo**
- ✓ **Use wording from the Guidelines (*true for ALL grants!*)**
  - **Tailored to each grant program**
- ✓ **Use numbers to show impact**
- ✓ **Write → Rewrite → Edit**
  - **Brainstorm – write everything**
  - **Sequence for logical flow**
  - **Rewrite into complete sentences**
  - **Cut what repeats / doesn't elevate**
  - **Get feedback from outside your group**



# Completing the Application Form

## PART B: PROJECT INFORMATION

### BASICS

#### PART B: PROJECT INFORMATION

(For more information on filling out this section please refer to Section 8 of the Application Guide.)

##### PROJECT DETAILS

Project Name:	
Funding Amount Requested:	
Project Start Date: (mm/dd/yyyy)	
Project End Date: (mm/dd/yyyy)	

#### PROJECT SUMMARY

Please include a clear overview of the project describing what your project will achieve, how it will be achieved, who will benefit, and why it is important.

#### Project Summary = Elevator Pitch

- ✓ **What your project will achieve**
- ✓ **How you will achieve it**
- ✓ **Who will benefit**
- ✓ **Why it is important**



# Completing the Application Form

## PART C: COMMUNITY BENEFIT / FINANCIAL NEED / ABILITY TO MANAGE PROJECT

### Assessment – Ranking & Weighting

Needs assessment, analysis, and planned evaluation with measurable targets/outcomes	20 PTS
Cost Benefit Value	20 PTS
Degree of financial need of applicant/how much self help	20 PTS
Demonstration of thorough project plan	15 PTS
Number of people impacted an how (includes special considerations)	10 PTS
Financial stability/demonstrate how matching funds/resources/revenue will be raised	10 PTS
Credible previous management of project/activity/organization	5 PTS
<b>TOTAL</b>	<b>100 PTS</b>





# Part C: Q1

## NEEDS ASSESSMENT, ANALYSIS AND PLANNED EVALUATION WITH MEASUREABLE TARGETS / OUTCOMES

Needs assessment, analysis, and planned evaluation with measurable targets/outcomes

20 PTS

### Needs Assessment – consider:

- ✓ How was the need for this determined?
- ✓ Why is it needed in Beaumont?

### Analysis – consider:

- ✓ How will your proposal address these conditions / this need?
- ✓ Who supports this proposal? (From outside your organization?)

### Measurable Targets / Outcomes – consider:

- ✓ What are your goals? (Broad statements of purpose)
- ✓ What are the desired outcomes? (Specific and measurable results)
- ✓ How will you assess how well your goals / targets have been met?



# Part C: Q2

## COST BENEFIT VALUE

Cost Benefit Value

20 PTS

### Cost Benefit Value – consider:

- ✓ How does the project demonstrate an appropriate use of municipal funds
- ✓ What is the anticipated benefit to the community immediately, in the short-term, in the long-term?
- ✓ What would be the anticipated negative consequences be?
- ✓ What is the consequence if the project is not funded? (What is the “cost” of not funding this proposal?)
- ✓ How does the benefit outweigh the cost?



# Part C: Q3

**DEGREE OF FINANCIAL NEED  
HOW MUCH SELF-HELP**

Degree of financial need of applicant/how much self help	20 PTS

## Degree of need / self help – consider:

- ✓ **Is your organization new?**
- ✓ **Is the overall sustainability affected by the success of this project?**
- ✓ **Previous funding from Beaumont for this project and/or other project(s)**
- ✓ **Have you applied for/received other grants?**
- ✓ **Will funds be used to leverage other grants or revenue sources?**
- ✓ **What other support has been sought out? (sponsors, donations, manpower, gifts-in-kind)**



# Part C: Q4

## DEMONSTRATION OF THOROUGH PROJECT PLAN

Demonstration of thorough project plan

15 PTS

### Thorough Plan – consider:

- ✓ **Aligns with project goals and desired outcomes? Overall mission, vision, short- and long-term strategies?**
- ✓ **Who will participate / be impacted?**
  - **Have they been involved in the planning?**
- ✓ **Viability**
  - **Are actions outlined with enough detail and appropriate timelines?**
  - **What risks could negatively impact the project? How will you manage these risks?**
- ✓ **How many phases / stages for the project?**
  - **Are funds secured for each phase?**



Number of people impacted and how (includes special considerations)	10 PTS

## Number Impacted & How – consider:

- ✓ Which demographic(s) will benefit?
- ✓ Extent of benefit to the broader community of Beaumont
- ✓ What conditions are being improved? How will the improvement be measured?
- ✓ When will people benefit – immediately? For the duration of the project? Beyond the project?
  - ✓ How will benefits be sustained?
- ✓ How many people will be positively impacted?
- ✓ Number of people vs quality of impact

# Part C: Q5

**NUMBER OF PEOPLE IMPACTED  
AND HOW (INCLUDES SPECIAL  
CONSIDERATIONS)**



Financial stability/demonstrate how matching funds/resources/revenue will be raised

10 PTS

## Part C: Q6

### FINANCIAL STABILITY & ABILITY TO RAISE MATCHING FUNDS

#### Financial Stability – consider:

- ✓ How long has your organization been operating?
- ✓ Do you have a fundraising strategy?
- ✓ Is there a solid volunteer / membership base?
- ✓ Are your sources of matching funds already secured?
- ✓ What do our organization's financial statements indicate about the health of your organization?



Credible previous management of project/activity/organization	5 PTS
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## Part C: Q7

**CREDIBLE PREVIOUS  
MANAGEMENT OF PROJECT /  
ACTIVITY / ORGANIZATION**

### **Credible Management – consider:**

- ✓ **Have you successfully completed projects in the past?**
- ✓ **Are there successful past projects of similar scale to your current project?**
- ✓ **What are the qualifications, skills and experiences of the managing personnel or volunteers?**



# Part C: ALL

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## REMEMBER GRANT PROGRAM PRIORITIES & FINAL REPORT REQUIREMENTS

**Review how responses to questions align with the grant program priorities.**

**Remember, you will need to report on:**

- ✓ **Donated labour, services, materials and equipment**
- ✓ **Paid expenses (keep receipts)**
- ✓ **Project Results**
- ✓ **How the City of Beaumont was acknowledged in marketing/promotional materials**

**Plan for this as you develop your project plan and budget.**





# Completing the Application Form

## PART D: PROJECT BUDGET

Please include details regarding project expenses and funding sources. If there is not enough room in the space below you can submit your project budget as a separate document/attachment. (For more information on filling out this section please refer to Sections 4.3 and 8 of the Application Guide.)

Do your TOTAL ANTICIPATED EXPENSES balance with your TOTAL ANTICIPATED REVENUE?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
It is expected that your expenditures and revenues will balance. If they do not balance, please explain why below:		

- **Your proposed budget (expenses and revenue) will be evaluated.**
  - ✓ **Is it realistic? (Complete? Appropriate?)**
  - ✓ **Has funding or support been pursued / secured from other sources?**
- **List anything mentioned in part B or C under EXPENDITURES if it requires money or resources to be completed.**
- **Total anticipated expenses and total anticipated revenue should balance.**



# Completing the Application Form

## PART D: PROJECT BUDGET

PROJECT FUNDING SOURCES	
Examples of sources of funding/revenue include: club contributions, event registration/participation fees/ticket sales, other grants*, sponsorships, gifts-in-kind** (value of donated material/equipment/labour), etc. *When listing other grants please specify if funding has been confirmed. **See Section 4.3.3 of the Application Guide for valuing donated resources.	
ANTICIPATED REVENUE	COST
City of Beaumont Community Grant Fund Request (eligible for up to 50% of project costs, to a maximum of \$10,000.00)	\$
	\$
	\$
	\$

PROJECT EXPENDITURES	
(Costs for materials and/or activities that are directly related to carrying out the proposed project. See Section 4.3 of the Application Guide.)	
ANTICIPATED EXPENSE	COST
	\$
	\$
	\$



# Completing the Application Form

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## PART E: SUPPORTING DOCUMENTS

### Submit:

- ✓ **Financial Statements**
- ✓ **List of Executive/Board Members**
- ✓ **Last filed Annual General Return**

### If applying as a non-registered group:

- ✓ **Meeting minutes of the registered eligible group with carried motion indicating approval to sponsor application**



# Financial Summary and Final Report

- You must complete the Financial Summary Form and Final Reporting within one (1) year
- Remember Documentation for In-Kind
  - Volunteer Sign-In Sheets
  - FMV assessments
- Keep receipts showing actual amount paid (receipts and what is listed on Financial Summary Form must match)
- Keep track of lessons learned and what worked/didn't
  - This will be useful for future grants

## (A) DONATED LABOUR/SERVICES

DATE (mm/dd/yy)	DESCRIPTION OF WORK	# OF VOLUNTEERS	TOTAL HOURS WORKED	RATE/HOUR	TOTAL VALUE OF WORK
					\$ 0
					\$ 0
					\$ 0
					\$ 0
<b>(A) TOTAL:</b>					\$ 0

## (B) DONATED MATERIALS/EQUIPMENT

DATE (mm/dd/yy)	DESCRIPTION OF MATERIALS/EQUIPMENT	DONATED BY	TOTAL VALUE OF MATERIALS/EQUIPMENT
			\$
			\$
			\$
			\$
			\$
<b>(B) TOTAL:</b>			\$ 0

## (C) PAID EXPENDITURES

DATE (mm/dd/yy)	DESCRIPTION OF EXPENDITURE	CASH PAID REFERENCE	TOTAL PAID
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$
<b>(C) TOTAL:</b>			\$ 0

**TOTAL PROJECT COST (SUM OF A + B + C)**

**\$ 0**



# Questions

