

2011 COMMUNITY GRANT PROGRAM



City of Peterborough
Community Services
Department

Changes to 2011 process

- Application forms now electronic
- On City website
- www.peterborough.ca/communitygrants
- Must complete on-line
- Must submit 1 original copy and 10 photocopies for review

THE GRANT CATEGORIES

The 2 grant programs for applicants are:

- **Community Project Grants** \$20,000 (\$250 - \$1000) up to 50% (match in-kind)
- **Community Investment Grants** \$205,000 (\$1000 - \$15,000) up to 33%
- **Community Service Grants** (contracted service or service City should otherwise provide; at City discretion) \$15,000 +; up to 25%

FUNDING STREAMS

Projects/events, activities, or programs for:

- Arts
- Culture
- Environment
- Heritage
- Recreation
- Social Services/Health

City Funding Priorities

- Enhance and protect human health and well-being
- Preserve and protect the City's built and cultural heritage and the natural environment
- Enhance the City as a creative community by developing, promoting and providing access to arts, culture and heritage
- Enhance the City as a sports and recreational leader by promoting and providing access to physical recreational and leisure activities
- Contribute to a sustainable local economy by forming creative partnerships within sectors, across sectors, and with the local business community.

Participant Priorities

- People with low incomes, at risk, isolated or marginalized
- Persons with Disabilities
- Neighbourhood Associations
- Youth/ Seniors
- Families with Children

Funding Use

- Project (specific activity)
- Program (series, e.g. education program)
- Operating (contribution to annual operating budget)

MUST DEMONSTRATE

- City priorities and participant priorities
- Community need
- Community support
- Community benefit/impact
- Financial need
- Sound financial management and revenue generation
- Accountability/mechanism for evaluation
- Feasibility
- Evidence of community collaboration, partnerships
- Impact of previous year's funding support

INELIGIBLE APPLICANTS

- NFP's receiving other City grants
- NFP's receiving direct or indirect City support in more than 3 ways (parades, tax relief, capital funding)
- individuals
- for-profit
- political
- fund-raising
- promoting specific religion
- hospitals
- school boards/ schools
- in legislated mandate of government
- provincial/national with no municipal branch
- orgs with 80% funding from senior government
- outside the City
- renovations
- capital projects
- deficit reduction

COMMUNITY PROJECT GRANTS

TO BE ELIGIBLE, ORGANIZATIONS MUST:

- Be new or existing, incorporated or unincorporated NFP's, or Neighbourhood Associations
- **Be located and conduct the majority of activities within the geographic boundaries of the City of Peterborough**
- **Can't be committees or subcommittees of organizations receiving funding through either the investment or service grant programs**

PROJECT GRANT APPLICATION

- 6. ORGANIZATIONAL MANDATE

Please state your group's mandate (purpose)

- 7. 2009 FUNDING

If your organization received a Project Grant in 2009, please report on project results or outcomes including the number of people who participated.

- 8. PURPOSE OF FUNDING

Describe how the requested funds will be used in 2010.

PROJECT GRANT APPLICATION

- 9. NEED

Explain how your organization's proposed activity or service will fill a need in this Community and/or impact on this Community.

- 10. SUPPORT

What other Community support (funding, partnerships, in-kind, volunteers) do you have for this activity/service?

PROJECT GRANT APPLICATION

- 11. PARTICIPANTS

Who is your target audience and how many clients or patrons do you expect to serve this year?

- 12. EVALUATION

How will you measure the success of your proposed project?

- 13. RECOGNITION

If successful, how will you formally recognize the City's contribution?

PROJECT GRANT APPLICATION

- 14. GROUP/COMMITTEE/BOARD MEMBERS

Provide a list of the committee members' names, addresses, positions on the committee, and phone numbers.

PROJECT GRANT APPLICATION

FINANCIAL INFORMATION PAGE

- Salaries/Benefits
- Administration
- Program Costs
- Furniture & Equipment costs
- Evaluation
- Miscellaneous
- Other (SPECIFY!)

PROJECT GRANT APPLICATION

FINANCIAL INFORMATION PAGE

Revenues:

City: no more than 50%

Other Municipal

Federal

Provincial

Earned

In-kind

**SUBMISSION DEADLINE: 3 pm Friday, Feb 25,
2011**

PROJECT GRANT APPLICATION

ASSESSMENT PROCESS

Applications are reviewed in detail by a cross departmental team of City staff, following the same process as the Grant Review Committee, which will be expanded upon later. They provide a report to Council for approval.

As the requests for financial support may exceed the funds available, this is a competitive process. Applicants are not guaranteed funding.

COMMUNITY INVESTMENT GRANT

MUST:

- **Be incorporated NFP**, local Board of Directors
- Be in the City of Peterborough
- Be past recipient of 2 Community Grants
- Have been in existence for **5 years** if requesting multi-year funding;
- Have sound financial management and good standing with the City;
- Have effective, accessible, open, and inclusive manner

INVESTMENT GRANT APPLICATION

- **1. ORGANIZATION INFORMATION**
 - **1 yr funding or 3 yr funding**
 - **3 year funding not guaranteed if requested**

INVESTMENT GRANT APPLICATION

- 6. ORGANIZATIONAL MANDATE

Please state your group's mandate/
purpose

- 7. USE OF PREVIOUS GRANT MONEY

If approved last year, how was the 2009
Community Grant Funding used? How
many people were served by your
organization or event last year?

- 8. ANNUAL PROGRAM

Please describe your annual program of
activities or services in the current fiscal
year.

INVESTMENT GRANT APPLICATION

- 9. PURPOSE OF FUNDING

Describe how the requested funds will be used in 2010.

- 10. NEED

Explain how your organization's proposed activity or service will fill an identified need in this Community

- 11. SUPPORT

What other Community support (funding, partnerships, in-kind) do you have for this activity/service?

INVESTMENT GRANT APPLICATION

- 12. PARTICIPANTS

How many people do you expect to serve through this project or service this year (audience/clients)?

- 13. FEES/PRICES

Is there a charge for your proposed project or services? Please indicate price range and/or structure.

- 14. EVALUATION

How will you measure the success of your proposed project or service?

INVESTMENT GRANT APPLICATION

- 15. VOLUNTEERS

Describe the role and number of volunteers involved in your organization.

- 16. SUMMARY OF YOUR REQUEST

Please describe how you would like your request worded in the public report requesting funding approval from Council (twenty five words or less)

INVESTMENT GRANT APPLICATION

- 17. RECOGNITION

If successful, how will you formally recognize the City's contribution?

- 18. BOARD MEMBERS

Provide a list of Board members' names, addresses, positions on the Board, numbers of years on the Board, phone numbers, and occupations.

INVESTMENT GRANT APPLICATION

■ FINANCIAL INFORMATION PAGE

➤ What is your fiscal year?

	ORGANIZATION NAME	Previous Fiscal Year From: _____ (m/yr) To: _____ (m/yr)		Request Year From: _____ (m/yr) To: _____ (m/yr)
	PLEASE FILL IN !	BUDGET	ACTUAL OR PROJECTED	PROJECTED FOR 2010

INVESTMENT GRANT APPLICATION

■ REVENUE

- Total Funding from the City of Peterborough (up to 33% of total budget)
- Federal funding (SPECIFY!)
- Provincial funding (SPECIFY!)
- Another Municipality (SPECIFY!)
- Trillium
- Donations
- Fund raising
- Earned Revenue
- Other (SPECIFY!)

INVESTMENT GRANT APPLICATION

■ EXPENDITURES

- Staff costs
- Administration costs
- Facility costs
- Program Costs
- Expenses such as bank, dues, etc.
- Fund raising expenses
- Travel & Professional Development
- Other (SPECIFY!)

INVESTMENT GRANT APPLICATION

■ BUDGET SUMMARY

- Surplus or deficit beginning of this fiscal year
- Projected or actual surplus or deficit this fiscal year
- Projected surplus or deficit at the end of this fiscal year.
- Projected revenues and expenditures should balance unless a surplus or deficit is anticipated.
How will a surplus or deficit be handled?

INVESTMENT GRANT APPLICATION

FINANCIAL STATEMENTS

1. **Complete Audit** – price based on size and risk assessment
2. **Review Engagement** – auditor looks at books and provides a negative assurance (\$1,000 - \$1,500)
3. **Notice to Reader** – auditor organizes all financial information into a readable financial statement (~\$1000)

SUBMISSION DEADLINE: 3 pm, Friday, Feb 25/11

Review Process

- Staff review to ensure complete, accurate, complies
- “sore-thumbing”: connect with applicant for additional information/ clarification
- Preparation of review packages

Review Process

- Project Grants: 1 staff committee
- Investment Grants: 1 community advisory committee/ 2 subcommittees: 1 for ACH,R &E; 1 for SS & H
- Committee members review all grants in category
- Structured review: rotating leads, individual assessment/ comments

Review Process

Rating	Ineligible 0	Poor 1	Fair 2	Good 3	Excellent 4
Funding Level	\$0	\$1000- \$3999	\$4000- \$7499	\$7500- \$10,999	\$11,000- \$15,000

Approval Process

- Committee reaches consensus on ratings
- Staff recommend \$ amount based on rating
- Sore thumbing meeting to review final results
- Staff report to Committee of the Whole
- Council approval
- Cheques issued

Appeal Process

- Get feedback from staff on nature of concerns raised by committee
- Will go over comments but will not provide written comments from the review meetings
- Should attend Committee of the Whole
- Can attend Council meeting the following week and appear as a delegation to plead case
- Council can approve, modify, reject or refer matter back to staff

2010 Report

- **Project Grants:**
- Received 34 applications including 15 new applicants (up from 27 in 2009)
- 5 ineligible; 11 ACH
- **First time allocated all \$20,000**
- **Average \$690; \$923 in 2007**
- **Trends: > recreation & environment;
>'d demand**
- **Request for \$10,000 > in 2011 denied**

2010 Report

- **Investment Grants:**
- 39 applications with requests totaling \$282,425
- **Including 9 pre-approved multi-year**
- 3 ineligible; 1 relegated
- Average \$5,700; \$5,400 in 2007
- Trends: **some orgs shifted from Social/ Health to Culture**
- No \$> requested for 2011

Service Grants

- 2007: Kawartha Food Share \$30,000* (\$11,500) 260%
- Hutchison House \$20,000* (\$6,000) 333%
- 2008: New Canadian Centre \$10,900*
- YWCA \$13,500* (1 year only)
- 2009: Market Hall \$35,000* (\$12,500) 280%
- **=\$54,400 re-allocated within CI**

Service Grants

- 2011: Hutchison House increase by \$6,000 to \$26,000
- Market Hall increase by \$35,000 to \$70,000
- New Canadian Centre increased by \$10,000 to \$20,900 (Canada Day)
- Request for annual inflationary > denied

2011 Grant Review

- Review stats & trends
- Community Engagement: survey grant recipients, focus groups, Advisory Committees, Public meeting
- Meet with other local grantors, especially Community Foundation
- Interview Councillors
- Develop strategic directions for review
- Report to Council

2011 COMMUNITY GRANT PROGRAM



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