



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

# GRANTS INFO SESSION

## What We Will Cover

---

- **Overview of the NEW City of Beaumont Municipal Grant Funding Program**
  - 4 funding streams, each with their own granting priorities
- **Details about the NEW Operating & Major Projects Grant funding stream**
  - Eligibility, and what it supports
  - How to apply
  - Walk through the General Application, EOI, and Full Application forms
  - Reporting
- **Q & A**
- **Tips & Guiding Questions**



# For Assistance and More Information



**Email**

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

**or call**

**780-328-9926**

**Online**

**[www.beaumont.ab.ca/299](http://www.beaumont.ab.ca/299)**



# About the NEW Municipal Grant Funding Program

---

**Established  
January 2024**

## **What is the Municipal Grant Funding Program?**

- An umbrella program that coordinates the delivery of 4 distinct funding streams/programs
  1. Operating and Major Project Grants
  2. Arts Grants
  3. Community Grants
  4. Micro Grants
- Governed by Council Policy #C52 Municipal Grant Funding Program
- Provides support for projects, programs, and services that enhance quality of life and are in line with the City's strategic objectives.
  - Council Strategic Plan and other supporting directional plans



## Grant Stream

	Operating and Major Projects Grants		Arts	Community	Micro
	Operating	Major Project			
<b>What</b>	4 categories (admin, facility, programming, established events)	Significant project over \$10K	Focus on the Arts	Projects within 12 months, Operating if less than 5 years	Small grass-roots initiatives
<b>Who</b>	Orgs (older than 3 yrs)	Orgs (older than 3 yrs)	Arts orgs, ad hoc groups/collectives, individual artists	Orgs	Orgs, ad hoc groups/collectives, individuals
<b>How Much</b>	up to \$50K per year (all operating combined)	up to \$50K per year	Per project up to: Orgs and collectives - \$20K. Artist - \$10K.	Up to \$10K per project	Up to \$1K per project
<b>When and How</b>	1 intake, 2-stage application (EOI: June 15, Full App: Sept. 10) Apply the year before (for 1, 2, or 3 years)	1 intake, 2-stage application (EOI: June 15, Full App: Sept. 10) Apply the year before (for 1, 2, or 3 years)	2 intakes (Apr. 1 & Oct. 1) Apply now for activities taking place over the next 12 months	2 intakes (Apr. 1 & Oct. 1) Apply now for activities taking place over the next 12 months	Rolling until fully prescribed Apply now for activities taking place over the next 12 months*
<b>Stream Limits</b>	\$50K per year	\$50K per year	Orgs and collectives - \$60K. Artist - \$10K.	Orgs - \$20K	Max 1 active grant, and max \$3K per applicant
<b>Overall Max Limits</b>	Orgs: \$100K per year   Ad hoc groups/collectives: \$60K per year   Individuals: \$10K per year				
<b>Total Available Funding</b>	2024: ~\$170K 2025: Based on requests, TBD during budget (fall 2024)		2024: \$100K	2024: \$70K	2024: \$0 *(announced, slated to begin in 2025)
<b>Payment</b>	Normally: Up to \$25K, 100% up front. Over \$25K, 75% up front, 25% after reporting		Orgs: 75% - 25% Collectives: 50% - 50% Artists: 0% - 100%	75% - 25%	0% - 100%



# Council Budget Process

- 1<sup>st</sup> – Operating and Major Project Grants (approved per applicant)
- 2<sup>nd</sup> – Sets amounts for Arts, Community, and Micro Grants

## Terms and Conditions – all funding streams

- Can receive multiple grants, MUST be for different reasons, and within overall limits
- Approval NOT automatic
- Assessment: align with grant criteria and directional plans (e.g. Strat Plan, Master Plan); demonstrate merit, impact, and viability; consider total grant funding received (*may* give priority to new applicants)
- Funding agreement – funding may be revoked if fail to comply with terms and conditions
- Spend funds as described in application, MUST report (financials and outcomes)
- Recognize the support from the City of Beaumont



# About the Operating and Major Projects Funding Stream

## Who can apply:

- Registered non-profit organizations, 3 years+
- Demonstrate sound operations and fiscal responsibility

## What the grants support:

- Initiatives that enhance the quality of life and contribute to long-term development of the community
  - In areas such as: arts, culture, heritage, leisure, recreation, sport, environment, social services and wellbeing, and community spirit.
- Operating expenses – up to 100% up to \$50K per year across 4 categories (admin, facility, recurring programming, established community events/festivals)
- Major project – up to 100% up to \$50K per year for a significant one-time project, over \$10K
- Can request EITHER or BOTH, if both up to \$100K per year
- 1-, 2-, or 3-year funding commitments

## When to apply:

- Apply in 2024 for activities in 2025+
- Decisions made by Council during 2025 Budget deliberations in fall 2024



# Application Process

## How to apply:

- 1 intake only – EOI deadline of June 15, and Full Application by September 10
- Stage 1:
  - Submit General Application (if req'd) and EOI by June 15
  - General Application is your organizational profile
  - EOI is an overview of your request (how much, for how many years, summary of what it is for)
- Stage 2:
  - Submit Full Application by September 10
    - Detailed description of how grant funds would be used (what activities supported, goals, planned outcomes, needs being met, benefits, impact, etc.)
    - Detailed budget (provided as separate document if preferred)
    - Address if/how proceed with partial funding or without funding
    - Address sustainability beyond the grant term
  - Appear before Council for a 10-min Q&A (to be scheduled for Oct-late November)





# Application Process (cont.)

## Decisions:

- Final decisions are made as part of the annual budget process (late-November to mid-December)
- Monies approved are for the next fiscal year(s)
- All applicants told outcomes; no appeals
- Successful applicants enter a funding agreement, receive payment in early 2025
- Unsuccessful applicants may apply to Arts Grants and/or Community Grants

## Fund disbursement:

- \$25K or less = 1 lump sum payment
- More than \$25K = initial payment of 75%, followed by remaining 25% (after update/reporting)
- If multi-year agreement, same schedule each year

## How often to apply:

- If a 1-year commitment, apply every year
- If a multi-year commitment, apply in the last year of the term
- Funding terms may overlap if requesting/awarded both Operating Grant AND Major Project Grant



# Who Can Apply

**Community non-profits who have been in operation for 3 years+ and who are registered and 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.)

---

- ✓ **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**
- ✓ **Demonstrate sound operations and fiscal responsibility**



# Those Not Eligible

---

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



# Eligibility Requirements

See Section 4 of the Guidelines

- ✓ **1 submission per applicant**
- ✓ **1 operating or 1 major project or both together on the same application**
- ✓ **Does not exceed overall limit**
- ✓ **Previous reporting requirements met**
- ✓ **Eligible expenditures only**
- ✓ **Clearly demonstrate benefits to residents and community of Beaumont**
- ✓ **Operating grants: supported activities are to take place Jan. 1 – Dec. 31 (details and number of years in funding agreement)**
- ✓ **Major project grants: completed in 1, 2, or 3 years of approval, with timelines and milestones in funding agreement)**



# Applicant Contributions

**Grants can support up to 100% of expenses, however, organizations are encouraged to secure other revenue and contributions where possible.**

- For example: contributions from the organization itself, registration fees, ticket sales, donated equipment or services and volunteer time, funds from other granting bodies, donations, and/or sponsorships

**This program is competitive. Eligibility does not guarantee funding. Applicants may receive full funding, partial funding, or no funding. Taxpayers cannot fund every worthwhile project and organizations are encouraged to create long-term funding sustainability plans suitable to their mandates and initiatives.**



# 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 may be requested:**
  - 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

- ✓ **Organizational and administrative expenses (office supplies, bank charges, bookkeeping, salaries or professional fees related to general admin and operations)**
- ✓ **Facility operating expenses – heating, electricity, water, maintenance, rent/lease**
- ✓ **Honorariums, wages, fees - technical personnel, consultants, contractors, performers, artists, etc.**
- ✓ **Marketing and advertising**
- ✓ **Programming, event, project materials/supplies**
- ✓ **Equipment – purchase, lease or rent**
- ✓ **Insurance for project/event activities**
- ✓ **Venue rental and technology costs**
- ✓ **Cultural and other expenses related to Indigenous protocols and gift giving**





# Expenses – What is Not Eligible

- × **Expenses incurred prior to application deadline (retroactive grant funding)**
- × **Costs already supported by the City of Beaumont through other programs**
- × **Fundraising where the surplus is awarded to a beneficiary other than the applicant**
- × **For-profit commercial ventures or private organizations**
- × **Debt retirement, deficit reduction, and/or endowments**
- × **Activities advancing specific political, moral, or religious points of view**
- × **Activities inconsistent with the City's values or goals**



# Getting Started

---

## Beaumont's Municipal Grant Funding Program & 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 reporting and when applying for other grants)**
- **Plan time for feedback and revisions**
  - Ask someone who is not familiar – do they understand?
  - Proofread – formatting, errors/omissions, spelling, and grammar



# Completing the General Application Form

---

**REQUIRED ONCE PER YEAR**  
*update if changes*

## Is this your 1<sup>st</sup> grant application of 2024?

- Yes – Submit the General Application
- No – Only submit the General Application and/or provide new supporting documentation if there have been changes
- **Complete PART A – applicant profile for orgs**
- **Do NOT complete PART B**
- **Complete PART C – previous funding**
- **Complete PART D – provide all required and up-to-date documentation**
  - Financial statements
  - Last filed annual general return
  - Certificate of incorporation
- **Sign the Declaration**



# Completing the Expression of Interest (EOI) Form

## SUMMARY OF REQUEST

*Keep a copy of your EOI – you will reference this when completing the Full Application*

- **Operating OR Major Project OR both**
- **If YES for Operating:**
  - ✓ How much each year and total over 3 years
  - ✓ Total budget of the organization
  - ✓ % of budget this request represents
- **If NO for Operating:**
  - ✓ \$0
- **If YES for Major Project:**
  - ✓ How much each year and total over 3 years
  - ✓ Total budget of the organization
  - ✓ % of budget this request represents
- **If NO for Major Project:**
  - ✓ \$0
- Add it up for **yearly combined and total request**
- **100-Word Description** – what the grant is for
- **Sign the Declaration**



# Stage 2: Completing the Full Application Form

BY INVITATION AFTER SCREENING FOR ELIGIBILITY

---

## Information **MUST** match EOI

### Part A:

- ✓ Confirm General Application is current (or provide new/updated)
- ✓ Acknowledge requirement to appear before Council (10-min Q&A in Oct/Nov)

### Part B:

- ✓ **Complete ONLY if requesting an Operating Grant**
- ✓ EOI indicated generally an operating grant – now get specific about which of the 4 categories funds will be used for
- ✓ Same funding amount request details as EOI
- ✓ Detailed Description: a complete overview of how funds will be used



# Stage 2: Completing the Full Application Form (cont.)

## Part B cont.:

- ✓ Funding not guaranteed: address if/how proceed with partial funding or no funding
- ✓ How will City of Beaumont be recognized?
- ✓ After the grant term: address sustainability of operations, facility, programming, event and/or festival beyond the grant term (long-term financial plan)
- ✓ **Budget: complete provided charts or supply your own**
  - If your own, ensure the same info is captured (type, amount, description of expense/revenue, how much grant funding directed to this category of operating expenses)
  - Provide details and explanations → confidence that budget is appropriate and complete
  - If including in-kind this should be reflected in both expenses and revenues
  - Balance your budget
- ❑ **Optional additional documents (listed in Part D):**
  - 1 page – any additional info not already shared
  - Max 5 pages (saved as 1 document) – additional budget details (e.g. quotes, estimates, etc.)



# Stage 2: Completing the Full Application Form (cont.)

## Part C:

- ✓ **Complete ONLY if requesting a Major Project Grant**
- ✓ EOI indicated generally a major project grant – now get specific about the project
- ✓ Project name (max. 10 words)
- ✓ Start and end dates
  - Length of time typically corresponds to years of funding requests
  - Consider breaking big projects down into stages
- ✓ Indicate project location and public access
- ✓ Same funding amount request details as EOI
- ✓ Detailed Description: a complete overview of how funds will be used
- ✓ Funding not guaranteed: address if/how proceed with partial funding or no funding
- ✓ How will City of Beaumont be recognized?
- ✓ After the grant term: address sustainability of operations, facility, programming, event and/or festival beyond the grant term (long-term financial plan)



# Stage 2: Completing the Full Application Form (cont.)

## Part C cont.:

- ✓ **Budget: complete provided charts or supply your own**
  - If your own, ensure the same info is captured (type, amount, description of expense/revenue, how much grant funding directed to this category of operating expenses)
  - Provide details and explanations → confidence that budget is appropriate and complete
  - If including in-kind this should be reflected in both expenses and revenues
  - Balance your budget
- **Optional additional documents (listed in Part D):**
  - 1 page – any additional info not already shared
  - Max 5 pages (saved as 1 document) – additional budget details (e.g. quotes, estimates, etc.)

## Part D:

- ✓ Optional additional documents – per category (as described above)

## Sign the Declaration





# REPORTING

---

## REQUIREMENTS SPECIFIED IN FUNDING AGREEMENT

**Funding must be used as intended and as specified in the application.**

- ✓ Changes approved in writing in advance

### **Report on:**

- ✓ Interim updates as requested/specified
- ✓ Financial report of actual revenue/expenses
  - Keep receipts, provide if requested
- ✓ May need details on donations/in-kind
  - Keep supporting documentation, provide if requested
- ✓ Activity/project results (what happened, outcomes)
- ✓ Acknowledging City of Beaumont support (marketing/promotional materials)

Plan for reporting as you develop your project plan and budget.



# Questions?

---

**Email**

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

**or call**

**780-328-9926**

**Online**

**[www.beaumont.ab.ca/299](http://www.beaumont.ab.ca/299)**



# Detailed Description

---

## The Heart of Your Application

- ✓ **Tell a compelling story**
  - **What will be achieved**
  - **How you will achieve it**
  - **Who will benefit**
  - **Why it is important**
- ✓ **Balance conciseness with enough detail**
- ✓ **Write out acronyms (1<sup>st</sup> time) and avoid lingo**
- ✓ **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**



# Tips & Guiding Questions – Detailed Description & Budget

- ✓ Provide information that demonstrates the **merit, impact, and the viability and sustainability** of what is being proposed
- ✓ Be clear and concise – start with a summary (how much \$, what the \$ will be used for, why/what will happen as a result), then go into more detail
- ✓ Viability and sustainability of the organization in general, and of the request specifically are being assessed
  - What do your financial statements indicate about the health of your organization?
  - Why do you need this grant?
  - Does the budget for the grant request correspond with the plans? Is it complete, appropriate, and realistic?
  - How is your organization planning to continue your recurring activities in the future and/or how will you build on the outcomes of your major project after it is complete?
- ✓ Why are these activities or this project needed? How was this need determined?
- ✓ Who will benefit? How many? What is the quality/extent of the impact? How will this be measured?



# Tips & Guiding Questions (cont.)

- ✓ What are the goals and desired outcomes? How will you measure how well these goals/outcomes have been met? Is the plan to achieve these goals and outcome realistic?
- ✓ How does benefit outweigh the cost? How does the request demonstrate an appropriate use of taxpayer dollars?
- ✓ What is the benefit to your target group and to the community of Beaumont at large? When will these benefits be realized and for how long?
- ✓ Who will be impacted (positive or negative) and how have they been involved in the planning?
- ✓ Will funds be used to leverage other grants or revenue sources? Have other sources of support (grants, sponsorships, donations, volunteer labour, and/or gifts-in-kind) been sought? Confirmed?
- ✓ Who else supports the proposal or project? (Assumed or confirmed? Why? How?)
- ✓ Risks – have factors and risks been considered and incorporated into your plans and your budget?
- ✓ 3 possible outcomes: full funding, partial funding, or no funding. What changes in your plans, budget, and outcomes if you receive partial or no funding?



# Thank you

