

COMMUNITY INVESTMENT PROGRAM



2024 COMMUNITY CAPITAL GRANT GUIDELINES



Purpose of the Grant

The Community Capital Grant provides funding to registered non-profit organizations to support the enhancement, development or renovation of public use facilities. The proposed capital project must contribute to three or more funding priorities that are aligned with Council's Strategic Plan and other Council approved Plans.

Council approved plans:

- [Council's Strategic Plan](#)
- [Wood Buffalo Age-Friendly Work Plan](#)
- [Diversity & Inclusion in Wood Buffalo](#)
- [Wood Buffalo Culture Plan](#)
- [Wood Buffalo Public Art Plan](#)
- [Wood Buffalo Sport Strategic Plan](#)
- [Municipal Development Plan \(MDP\)](#)

Community Investment Program funding priorities:

- Partnership and collaboration
- Rural and Indigenous communities & relationships
- Social participation
- Community support services and wellness
- Value of culture, heritage and regional pride
- Diversity, inclusion and accessibility
- Hosting events and/or new business and visitors

Grant Eligibility

The Applicant must:

- Be a registered non-profit organization.
- Have resided or operated within the Regional Municipality of Wood Buffalo for at least one year.
- Have operations within and provide services to residents of the Regional Municipality of Wood Buffalo.
- Propose a capital project that aligns with three or more funding priorities set forth in Council's Strategic Plan or other Council approved plans.

Not hold unrestricted net assets in excess of the organization's annual operating expenses, as reflected in the financial statements of the most recent fiscal period prior to application unless the total unrestricted net assets are less than \$50,000.

The Community Investment Program will not fund:

- Individuals (with the exception of Games Legacy Grant).
- For-profit organizations.
- Political organizations.
- Federal and provincial governments, and affiliated bodies.
- Applicants that have overdue or incomplete accounting or reporting requirements related to any grant previously awarded by the Municipality.
- Applicants who request funding for programs or services that are provided by a group or organization that is already funded by the Municipality.
- Applicants who request funding for programs or services that conflict or compete with other programs or services funded or provided by the Municipality.
- Applicants that do not demonstrate adherence to policy, strategic priorities and relevant outcome measurements.
- Applicants who request funding for programs, activities or facilities which are the mandate or responsibility of the federal or provincial governments, including but not limited to health care, education, religious, housing and childcare programs and facilities.
- Applicants who request funding for debt retirement, depreciation or financing charges.
- Applicants who request funding for retroactive payments (i.e., costs incurred before Grants are approved), with the exception of Games Legacy Grants.
- Applicants who request funding amounting to more than 75% of the budget of the program, project, event, service or facility operations (with the exception of Games Legacy Grant).
- Applicants that do not meet the minimum eligibility requirements.

Funding Amounts

Community Capital Grants are subject to the following funding limitations:

- Up to 50% of total planning and design costs for the capital project.
- Up to 50% of total construction costs for the capital project.
- Up to 50% of total land purchase costs for the capital project.

The amount of the grant is subject to the availability of funds.

Application Process

Pre-Application Meetings and Support

During the Call for Applications, Community Investment Program (CIP) staff are available to answer any questions.

A pre-application meeting is required for applicants for Community Capital Grant. During a pre-application meeting, CIP staff will review eligibility, how the grant process works, accessing and

completing applications in the CIP Grant Portal and other key information.

To schedule a pre-application meeting, you may send a request to CIP@rmwb.ca. If possible, please provide:

- Organization name.
- A brief description of what you are requesting funds for.
- Your availability for a meeting.

Stage 1 - Application Submission

1. Review these guidelines to ensure your organization is eligible for grant funding.
2. All grant applications will be submitted through the CIP Grant Portal. CIP will notify you via email when the application is available in the CIP Grant Portal. Log in to your CIP Grant Portal account and complete the application.
3. Submit the application, including required attachments, related budgets for January-December of the grant year, and Financial Statements of the most recent fiscal year end (Year-end date must fall between July 1, 2022, and June 30, 2023). The CIP Grant Portal will accept applications until **4:30 p.m. on November 1, 2023**. Late applications will not be eligible.
4. CIP will conduct a preliminary review of the application and supporting documents to ensure eligibility and completeness.
5. If clarification on the submitted application is required, you will receive an email notifying you that revisions have been requested. Please log in to the CIP Grant Portal to provide clarifications. The CIP Grant Portal will accept requested revisions until **4:30 p.m. on November 24, 2023**.
6. All complete and eligible applications will move forward to **Stage 2 - Application Scoring and Ranking**.

Stage 2 - Application Scoring and Ranking

1. A review panel consisting of subject matter experts from Municipal departments will complete application scoring based on established assessment criteria.
2. Eligible applications will be prioritized based on the highest ranking and greatest positive impact on the community.
3. CIP will finalize the grant recommendations to be presented to the Approval Committee for **Stage 3 - Approval Committee Review and Final Decision**.

Assessment Criteria (See Appendix A for Scoring Sheet template)

Category	Weight
Applicant capacity	25%
Project feasibility	25%
Evidence of need	25%
Contribution to community resilience	25%
TOTAL	100%

Stage 3 - Approval Committee Review and Decisions

1. At the final stage of the application process, the Approval Committee will assess and approve the successful grant applications in accordance with the budget set by Council and Council's Strategic Plan.
2. Applicants will be notified of the Approval Committee's decision and their assessment score by January 15, 2024.
3. There is no appeal of the Approval Committee's decision.

Formal concerns with the grant approval process may be addressed by submitting a complaint under the Whistleblower Policy LEG-150.

Fund Disbursement Process

Grant funding will be disbursed only to recipients in accordance with the terms and conditions of the agreement.

The following must be satisfied and will be verified by the Municipality prior to awarding of grant funding:

- Property taxes must be current and paid.
- Utility bills must be current and paid.
- There must not be a related unresolved order to comply with the Land Use Bylaw, Building Code, Fire Code, Community Standards Bylaw or other regulation.
- Applicant must not be a party to a legal dispute with the Municipality.
- All necessary municipal permits and permissions must have been received for the project and are closed and without deficiencies.

Exceptions to the above will be at the discretion of the Municipality on a case-by-case basis.

Reporting Criteria

A successful applicant will be required to complete and/or upload the following in the CIP Grant Portal:

- Certificate of Insurance within 30 calendar days of execution of grant agreement.
- Quarterly Status Report, on or before 30 days following the end of the calendar quarter, until the project is complete.
- Capital Project Costing Report on or before April 30 of the year following the end of the term.
- Financial Statements determined by the total grant thresholds that the recipient receives from CIP for the grant year:
 - < \$100,000 - Summary of Revenue and Expenditures.
 - \$100,000 - \$499,999 - Review Engagement Financial Statements.
 - >\$500,000 - Audited Financial Statements.

A commemorative plaque or sign may be required to be displayed at the facility or site, or on the equipment, acknowledging the financial support from the Municipality.

CIP may require additional reporting on a case-by-case basis.

Any reporting requirements not met by the recipient may result in termination of the grant or ineligibility to receive grants in the future.

All funds not used for the approved purpose must be returned to the Municipality, as per the guidelines below unless the Municipality approves, in writing, their use for another purpose:

- Amounts below \$2,500 may be forgiven.
- Amounts greater than \$2,500 and below \$25,000 may be requested to be repaid in full or be subject to reduction in future requests.
- Any amounts over \$25,000 will be requested to be repaid in full.

Disclosure of Information

A condition of accepting funding is that the Municipality has the authority to examine recipients' records at any time to ensure funds are being used in the manner originally agreed upon. Any funds not used as described in the agreement may have to be returned.

Contact Information

If you have any questions or would like clarification, please contact CIP@rmwb.ca or call Pulse at **780-743-7000** or toll-free at **1-800-973-9663**.

Key Dates

Date	Key Action
September 15, 2023	Applications open
During Call for Applications	Pre-application meeting, information sessions and one-on-one support (contact CIP@rmwb.ca).
October 25, 2023	Deadline for pre-application meeting.
November 1, 2023	Applications close. Deadline to submit your application is 4:30 p.m. MST. Applications will not be accepted after this time.
November 3 - 24, 2023	Requested application revisions from CIP, where applicable. Deadline to submit your required revisions is 4:30 p.m. MST on November 24. Information will not be accepted after this time.
November 30, 2023	CIP completes preliminary review of applications.
December 1 - December 14, 2023	Review Panel will complete application scoring and ranking.
Early December (TBD)	Council Meeting – Community Capital Grant budget approval.
Early January (TBD)	Approval Committee meeting and final decisions.
January 15, 2024	CIP sends Approval Committee’s decision to applicants.
January 31, 2024	CIP sends grant agreements to applicants.
Within 30 days of execution of Grant Agreement	Grant funding distribution – 1 st Installment.
Within 30 days of execution of Grant Agreement	Recipient submits Certificate of Insurance.
On or before 30 days following the end of the calendar quarter, until the project is complete	Recipient submits Quarterly Status Reports.
April 30 of the year following the end of the term	Recipient submits Capital Project Costing Report.
120 days following the fiscal year end of the organization	Recipient submits Financial Statements.

Definitions

Agreement	The agreement between the recipient and the Municipality that sets out the terms and conditions for participating in the Program.
Applicant	Any group, club, individual or organization incorporated as a non-profit, charitable, or Subsidiary Corporations or registered as a society under the Alberta Societies Act and is in good standing under its relevant legislation who submits an application.
Approval Committee	The Council Committee to approve grant recommendations, which is composed of Council-appointed members at large and supported by members of administration who provide information and guidance as needed.
Audited Financial Statements	Means a review of the organization’s financial statements by an independent Chartered Professional Accountant (CPA), including but not limited to the grant. The financial statements are to be prepared in accordance with generally accepted accounting principles for not-for-profit organizations. In accordance with section 200 of the CPA Canada Handbook – Assurance an audit provides an “expression of an opinion by the auditor on whether the financial statements are prepared, in all material respects, in accordance with an applicable financial reporting framework.” The audit of the financial statements must be approved by the Board of Directors and signed by the chair and treasurer. The organization must retain all supporting agreements, invoices and receipts. The organization must provide the audited financial statements upon finalization, accompanied by the CPA’s audit engagement report where the value of the grant is \$500,000 or more.
Capital	An enhancement, development or renovation of public use facilities that are accessible, affordable, and inclusive and that provide broad opportunity for community members, including planning, construction, land or equipment purchase where the capital asset will belong to the applicant.
Capital Project Costing Report	A report detailing all costs spent by the organization for the project, consisting of a summary of all costs for the project by expense category, details of all costs for the project and copies of all invoices and receipts for those costs.
Certificate of Insurance	For details on the level of insurance required, please contact CIP.
Council	Mayor and Councilors of the Regional Municipality of Wood Buffalo.
Good Standing	An organization has satisfied all its legal obligations.
Grant	Transfer of monies from the Municipality to an applicant for a project or purpose according to the requirements of the Community Investment Program.
Municipality	The Regional Municipality of Wood Buffalo.

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Program Grants	The different grant options available under the Community Investment Program.
Quarterly Status Report	A quarterly report which includes the percentage of project completion, funds expended, committed and estimated costs to completion and highlights of the project to date.
Recipient	An applicant that has been approved to receive a grant and has signed an agreement with the Municipality.
Regional Boundary	The physical area of the Municipality that includes any lands comprising of First Nation Reserve located within the Municipality's geographical boundaries.
Review Engagement Financial Statements	A review of the organization's financial statements by an independent Chartered Professional Accountant (CPA), including but not limited to the grant. The financial statements are to be prepared in accordance with generally accepted accounting principles for not-for-profit organizations. In accordance with section 8100 of the CPA Canada Handbook - Assurance (as amended): "Reviews are distinguishable from audits in that the scope of a review is less than that of an audit and therefore the level of assurance provided is lower." The review of the financial statements must be approved by the Board of Directors and signed by the chair and treasurer. The organization must retain all supporting agreements, invoices and receipts. The organization must provide the reviewed financial statements upon finalization, accompanied by the CPA's review engagement report where the value of the grant is more than \$100,000, but less than \$500,000.
Review Panel	A panel consisting of subject matter experts from Municipal departments including but not limited to Community and Protective Services, Indigenous and Rural Relations, Public Works and Communications and Engagement.
Societies Act	A society may be incorporated under this Act to promote any benevolent, philanthropic, patriotic, religious, charitable, artistic, literary, educational, social, professional, recreational, sporting or any other useful object, but not for the purpose of carrying on any trade or business.
Term	The effective date and duration of the agreement.
Unrestricted Net Assets	Accumulated net assets that the organization has not set aside for a particular purpose or earmarked by a donor for specific program or project, as reflected on the organization's financial statements.

For more information, please visit the
Community Investment Program website at www.rmb.ca/CIP.

Community Investment Program
Community and Protective Services
Regional Municipality of Wood Buffalo
9909 Franklin Avenue
Fort McMurray, AB T9H 2K4
CIP@rmb.ca



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Community Investment Program
2024 Community Capital Grant
Applicant Evaluation Scoring Sheet

Score: 0.00

Applicant:

Capital Project:

Applicant Capacity	Not Applicable - N/A Not Met - 0 Needs Work - 1 Needs Some Work - 2 Good - 3 Exemplary - 4	Weight	Score
The organization complied with Schedule B of all previous agreements. (past 2 years)*		25%	0.00
Program or Project aligns with organization's mission and mandate.**			
Organization has demonstrated financial sustainability and ability to deliver project as outlined?*			
The organization has demonstrated sound leadership/governance - board and director structure.			

Project Feasibility	Not Met - 0 Needs Work - 1 Needs Some Work - 2 Good - 3 Exemplary - 4	Weight	Score
Organization provided a clear, easy to understand, and concise application (including relevant attachments)? Relevant attachments MAY include but not limited to: <input type="checkbox"/> Completed Risk Evaluation to support pursuit of project <input type="checkbox"/> Completed Sensitivity Analysis to support pursuit of project <input type="checkbox"/> Studies and reports available to support scope development (i.e. safety, environmental and etc.) <input type="checkbox"/> Completed Market evaluation to support reasonable estimations in scheduling		25%	0.00
Application includes a clear project scope that outlines what the funding will be used for?			
Project is accessible, relevant, adaptable and targets identified needs in the community in accordance with project outcomes. **			
Project has community support, demonstrated by additional funding sources, non-funding support (e.g. in-kind), partnership/collaboration, and volunteer involvement. (Consider ability to support project without CIP funding).			
Proposal meets at least three objectives of Council's funding priorities, including demonstrated alignment to Council's strategic plan?*			

Evidence of Need	Not Met - 0 Needs Work - 1 Needs Some Work - 2 Good - 3 Exemplary - 4	Weight	Score
Has the application effectively demonstrated community need?		25%	0.00
Has the application identified health, safety and/or environment impact? <input type="checkbox"/> Eliminates risk or hazard to public health and/or safety that endangers the community <input type="checkbox"/> Significantly reduces hazards or risks for the community <input type="checkbox"/> Improves environmental protection			
Will the proposed capital project: <input type="checkbox"/> Improve quality of life for all or majority of the community or the municipality <input type="checkbox"/> Improve community and regional appearance; will attract cultural and/or recreational opportunities <input type="checkbox"/> Introduce new services for the community or region			
Will the proposed capital project contribute to building and sustaining necessary community-based resources to collectively meet the social wellness of residents?			
Will the proposed capital project: <input type="checkbox"/> Positive support confirmed via recent public or Indigenous engagement/evaluation <input type="checkbox"/> Directly supports Truth and Reconciliation Calls to Action <input type="checkbox"/> Reduces identified barriers for equity-deserving groups to support full participation in economic and social life in the region			

Contribution to Community Resilience	Not Applicable - N/A Not Met - 0 Needs Work - 1 Needs Some Work - 2 Good - 3 Exemplary - 4	Weight	Score
The proposed capital project contributes to risk reduction impacting our communities' social & culture values and growth by: <input type="checkbox"/> Improving community well-being and belonging <input type="checkbox"/> Reducing barriers to equitable participation in civil society <input type="checkbox"/> Increasing access to social supports <input type="checkbox"/> Strengthening important community relationships		25%	0.00
The proposed capital project will generate cost savings and/or revenue enhancements <input type="checkbox"/> Costs can be estimated reasonably <input type="checkbox"/> Contributes to performance improvement, including value-add (improvement/enhancement) <input type="checkbox"/> Return on Investment (ROI) is measurable with a positive calculated outcome			
The proposed capital project addresses risk reduction with respect to: <input type="checkbox"/> Expected loss of value to a heritage asset <input type="checkbox"/> Supporting the preservation of an Historical/Ancstral/Heritage asset <input type="checkbox"/> Supporting the provision of one or more Principles of Reconciliation			
Prior success with outcomes of CIP funding. (Past 2 years)*			
The proposed capital project involves appropriate partners to amplify impact through collaboration.			

Note:

* Questions with N/A answers will be omitted in weighting. Applicant will not be penalized for not meeting the criteria.

** Questions will be weighted higher