

Town of Bonnyville

POLICY TITLE: Capital Projects Assistance Grant		
NEW POLICY NO. 24-FN-092		
ORIGIN/AUTHORITY: Town of Bonnyville Finance Department	ADOPTED BY: Town of Bonnyville – Council June 25, 2024	EFFECTIVE DATE: January 1, 2025
REVISION DATE:		

1. Policy Statement:

The Town of Bonnyville believes that the annual costs of delivering recreational and cultural services in the Town of Bonnyville is a shared responsibility between the Town and local organizations. To this end, the Town will offer a grant program to eligible organizations to support Capital Project Costs. The Capital Projects Assistance Grant is intended to restore, enhance, or build facilities and improvements, and to enable the purchase of equipment and goods that will improve or maintain the delivery of services by eligible organizations.

2. Definitions:

“Capital Project Expenses” means costs associated with the purchase of equipment, or goods, or costs associated with renovation, construction, or other non-reoccurring repair and maintenance costs.

“Enhancement Projects” means projects that aim to expand or increase existing service levels.

“Major Requests” means requests that are over \$5,000.00.

“Minor Requests” means requests that are \$5,000.00 and below.

“the Program” means the Capital Projects Assistance Grant Program as established by this policy.

“Recreational and Cultural Organizations” are those organizations with a core mandate of delivering programs or services with the objective, amusement, pleasure, or contemplation. This includes organizations such as museums, community halls, agricultural halls, senior clubs, art clubs, sports organizations, and service clubs.

“Replacement Projects” means projects that repair, replace, or rehabilitate existing equipment building, improvements, or equipment with the intention or preserving existing service levels.

3. Principles:

- Annually, Council will allocate funding for the Program. 80% of the funding allocated for the Program will be reserved for Major Requests, with the remaining 20% of funds reserved for Minor Requests.
- Administration may approve funding for Minor Requests without Council approval.
- Administration will review applications for Major Requests and make a recommendation



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to Council.

Eligibility:

- Administration's project recommendations to Council, or funding approval decisions, will meet the following requirements:
 1. Applicant organizations and their projects must meet eligibility criteria identified in the procedure section of this policy.
 2. The Town grant will not exceed 50% of eligible project expenses.
 3. Non-Town sources of funding must be secured at the time of the application submission.
 4. Costs incurred prior to the submission of a grant application will be considered ineligible.

Project Prioritization:

- Administration will prioritize projects.
- Major and Minor projects will be prioritized separately.
- The number of projects Administration recommends for funding will be based on amount of funding Council has made available for the Program as part of the annual Town budget.
- Qualifying projects will be recommended for funding, subject to budget availability.
- Repair Projects will be recommended for funding ahead of all other projects.
- If there is budget remaining after all Repair Projects are considered, or if there is insufficient budget to fund all Repair Projects, projects will be prioritized based on the following, where Priority One takes precedence over priority Two, and so on:
 - Priority One: Combined need and the effectiveness (how badly is the project needed, considered in combination with the overall effectiveness of addressing that need, including costs, overall outcomes, etc.)
 - Priority Two: Leveraging of non-Town resources (the more non-Town revenues to fund the project, the higher the rating).
 - Priority Three: Previous capital funding over the last 3 years (less funding received from the Town means a higher rating).
- The previous notwithstanding, Administration may consider other unique or important considerations which are not listed above.
- If there is leftover funding for Major Requests once all the recommendations are made, it will be added to the funding available for Minor Requests, and vice versa.



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Amendments to Projects:

- Administration may make amendments to activities and timelines of an approved project if it does not change the overall intended scope of the project.

Funding Decisions:

- These parameters outlined in this policy are only intended to set an expectation as to how funding is recommended to Council by Town Administration. It is not intended to imply, or to be interpreted as the amount of funding the Town is obligated to provide. Council reserves the right at its sole, unfettered discretion, to approve funding for any applicant organization different than what is recommended by Administration on the basis of any factor which Council considers relevant.

4. PROCEDURE:

Roles and Responsibilities:

1. Town Council will:
 - a) Determine the high-level policy direction of this program, including the basic mechanisms that significantly impact funding levels;
 - b) Authorize Administration to manage the Program;
 - c) Provide oversight for the Program and approve amendments or changes to the Program;
 - d) Authorize Administration to sign agreements related to the Program in accordance with this procedure;
 - e) Annually, allocate funding for the program; and
 - f) Make the final determination on the grant allocation for Major Requests.
2. Administration will:
 - a) Manage and administer the Program in accordance with the Policy;
 - b) Monitor and evaluate the effectiveness of the Program;
 - c) Make recommendations to Council regarding the overall nature of the program, when necessary;
 - d) Make annual funding recommendations following the receipt and review of applications for Major and Minor Requests;
 - e) Make funding determinations for Minor Requests; and
 - f) Report to Council monthly, or as required, regarding awarded funding.



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Organization Eligibility:

3. In order to be eligible to receive funding, organizations must meet the following criteria:
 - a) The organization must fit the definition of a Recreational and Cultural Organization;
 - b) The organization must own their own facility, or have a long-term lease, with at least 3 years remaining on the lease as of the date of the application submission;
 - c) The facility in question must be a community hall, agricultural hall, seniors centre, museum, outdoor recreation, or sports ground, or other similar indoor or outdoor space;
 - d) Membership to the organization must be open to the public, and the organization must offer programs or services that serve the general public;
 - e) The organization must be physically based within the Town of Bonnyville, and primarily serve the residents of the Town of Bonnyville;
 - f) The organization is non-profit organization;
 - g) The organization is provincially or federally incorporated and in good standing;
 - h) b and c do not apply to organizations submitting Minor Requests; and
 - i) Organizations with mandate of delivering social services or are religious or political in nature are not eligible for funding.

Eligible Projects:

- a) Project activities must align with the policy statement of the Program.
- b) The project must take place in the Town of Bonnyville.
- c) The project must benefit the residents of the Town of Bonnyville.
- d) The project must directly contribute to the organization's mandate as a Recreational and Cultural Organization.
- e) Eligible projects may include feasibility studies, engineering, design, along with the actual purchase and construction costs of a project.

Ineligible Projects:

- a) Projects which are already heavily subsidized by the Town are ineligible for funding.
- b) Other projects may be considered ineligible, at the discretion of the Town.

Eligible and Ineligible Expenses:

- Eligible expenses must be directly connected to the delivery of the project.
- The following is a list of expenses that are considered eligible:
 - a) Service contracts costs for construction, renovation, repair, etc.;
 - b) Service contracts for assessments, studies engineering, designs, etc.;
 - c) Construction insurance;
 - d) Permit costs;
 - e) Raw building materials like siding, roofing, lumber, nails, insulation, etc.;
 - f) Equipment purchases that fall outside of the regular ongoing operations of the

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- organization: and
- g) Other expenses, at the discretion of Administration.

- The following expenses are ineligible:
 - a) Purchase of land;
 - b) Expenses associated with the regular, ongoing operations of the organization;
 - c) Fundraising and event costs;
 - d) Programming costs;
 - e) Travel and accommodation expenses, or other overhead costs incurred by members of the organization;
 - f) Routine repair and maintenance costs;
 - g) Employee salaries, honorariums, and fundraising costs;
 - h) Debt reduction;
 - i) GST; and
 - j) Other expenses, at the discretion of Administration.

Grant Matching Requirements

- Both cash and in-kind expenses are eligible and may be used for grant matching. These expenses must meet the requirements identified in the “Eligible Expenses” section.
- In-kind expenses are subject to the following:
 - a) Unspecialized labor will be valued at \$20.00/hour.
 - b) Skilled labor will be valued at \$35.00/hour.
 - c) All in-kind expenses used for grant matching must be supported with documentation, including:
 - i. Sign-in sheets for the project with the date, name, nature of work provided, and numbers of hours provided: or
 - ii. Signed letter and/or other documentation from the organization or business providing the service indicating the fair market value of the service/materials provided.

Funding Agreement and Program Conditions

- Administration may develop application forms, guidelines, memos, or other forms of communication to relay the requirements and parameters of the Program to organizations.
- The requirements imposed on an applicant and recipient organization by this policy and procedure shall be reflected in the grant application, guidelines, grant funding agreements, and final report, and any other related documents, which administration will create for the purposes of the funding program established by the policy.
- Grant funding agreements will incorporate requirements in addition to those outlined in the policy and procedure, which are those conditions and requirements that are deemed appropriate and necessary.



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Application Submission Process and Timelines

- Applications will be made to the General Manager of Corporate Services, or their designate.
- Unless otherwise indicated, August 31 is the standard intake deadline for applications.
- With reasonable notice, Administration may move the intake period to an earlier date, if the intake deadline is extended, no notification will be given.
- Late applications will be processed at the discretion of Administration.
- One separate application should be submitted for each project.

Application Submission Requirements

- A submission for funding must use the application forms and any additional forms and templates or documents prescribed by the Town.
- The application form will require, at a minimum:
 - a) The organization's legal name;
 - b) Act which the organization was incorporated under;
 - c) Contact information;
 - d) Confirmation of eligibility criteria;
 - e) Location of the project;
 - f) Description of the project; and
 - g) Project needs and benefits.
- The application form must be accompanied by a project budget which identifies:
 - a) The amount of grant funding requested;
 - b) Non-Town cash revenues;
 - c) Eligible Project Expenses; and
 - d) Eligible In-Kind contributions.
- The application must also be accompanied by:
 - a) The organization's most recent financial statement (if not already provided);
 - b) A list of the organization's officers and directors, and their contact information; and
 - c) A board approved motion supporting the application.
- As part of an application, or throughout the year while a funding agreement remains active, an organization may be required to provide the Town with any of the following information:
 - a) Proof of non-Profit Society Status for the current year;
 - b) Proof of Insurance;
 - c) Pending and awarded grants for the year for which the application was made, including those from other Town departments, the Province, Federal Government, or other agencies;
 - d) Most recent facility inspection;



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- e) Organization's Bylaws;
- f) Any other information requested by Administration to ensure that the Organization is operating in a transparent, responsible, safe, and fiscally responsible manner.

Funding Review and Approval

- The General Manager of Corporate Services, or their designate, will review applications for completeness and compliance with eligibility criteria.
- Administration may seek additional information to supplement what the organization has originally provided.
- The General Manager of Corporate Services, or their designate, will bring the grant requests to Council for review. This will include, at a minimum:
 - a) The amount of funding requested for Minor and Major Requests for eligible applications;
 - b) The amount of funding approved for Minor Requests by Administration;
 - c) The amount of funding recommended for Major request for eligible applications; and
 - d) A list of applications which have been submitted which do not meet eligibility requirements.
- Organizations which are approved for funding will receive written notification.
- Organizations which are approved for funding will be required to enter into an agreement with the Town.
- Approved funding will only be released following the approval of an applicant's request, as well as the approval of the Town annual budget. Administration may choose to release the funding in full or advance a portion of the funding.

Use of Grant Funds

- Approved grant funding may only be spent on eligible expenses incurred by the applicant organization.
- The final amount of funding provided for a project will be based on the expenses in the final reporting.
- Grant funding will not exceed the actual eligible cash expenses incurred by the organization.
- The organization cannot apply Town grant funding to expenses which are already supported by other grant funding.

Acknowledgement of Funding Contribution

- Organizations that receive capital grant funding must acknowledge the Town of Bonnyville as a sponsor for the project unless it is not practical or reasonable to do so.



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Appeals of Funding Decision

Appeals of funding decisions will be handled on a case-by-case basis and only for decisions made by the Town Administration.



- The General Manager of Corporate Services will review appeals and make a recommendation to the Senior Management Team.
- Administration will not field appeals for funding decisions that are made by Council.

Grant Reporting

- Organizations will be required to submit their organization’s financial statement and final report using any prescribed form.
- Organizations will normally be required to submit a final report within 3 months of the project completion.
- The final report must identify, at a minimum:
 - a) Total eligible expenses, including invoices;
 - b) Total project revenues by major category;
 - c) In-kind contributions, including documentation;
 - d) Description/Project Summary; and
 - e) Photos of the completed project.
- Unspent grant funding, based on the conditions of the funding agreement, must be returned to the Town upon request. Alternatively, Administration may subtract unspent grant funding from the organization’s allocation in the following year.
- Organizations which fail to submit reporting documents, have demonstrated poor management of funds, have unaddressed conflict of interest issues, have been found to be in contravention with the *Societies Act* or *Agricultural Societies Act*, or other act under which they are incorporated, or in any other way unfit to responsibly handle public funds, may have their ability to submit future applications suspended.

5. Supporting Documents:

1. Capital Projects Assistance Grant Program Application Form
2. Capital Projects Assistance Grant Program Guidelines
3. Capital Projects Assistance Grant Project Budget Reporting Form
4. Capital Projects Assistance Grant Project Accountability Forms 1 and 2
5. Capital Projects Assistance Grant Draft Agreement

Approved by: 	Date Signed: June 25, 2024
Approved by: 	Date Signed: June 25, 2024

FN-24-092 CAPITAL PROJECTS ASSISTANCE GRANT PROGRAM

APPLICATION FORM



Directions for completing the grant application:

- Read the Capital Projects Assistance Grant Guidelines.
- Answer all questions on the form.
- Include all required documentation.
- Return completed applications to:
Town of Bonnyville
Bag 1006
Bonnyville, AB T9N 2J7
or by email at recreation@town.bonnyville.ab.ca
- For information on completing this application visit our website at www.town.bonnyville.ab.ca
- For questions, contact the Town Administration Office at 780-826-3496 or by email at recreation@town.bonnyville.ab.ca
- A separate application must be submitted for each project.

Applications must be submitted by August 31st for projects in the coming year, unless otherwise directed.

Organization Information

1. Incorporated Legal Name of Organization (must match your provincial incorporation name):
2. Act your group is registered under (e.g. Societies Act, Agricultural Societies Act):
3. Location of Organization's Facilities:
4. Organization Phone Number:
5. Organization Email:

Applicant Contact Information

Primary Contact Person:

6. Primary Contact Person:	
7. Primary Contact Email:	
8. Primary Contact Phone:	9. Primary Contact Phone (cell):



Secondary Contact Person

10. Secondary Contact Person:	
11. Secondary Contact Email:	
12. Secondary Contact Phone:	13. Secondary Contact Phone (cell):

Organization Eligibility Checklist

Does your Organization:	(Yes/No)
14. Operate for the purpose of providing cultural or recreational services to residents of the Town of Bonnyville?	
15. Own a facility in the Town of Bonnyville, or have a long-term lease for a facility in the Town of Bonnyville and will continue to lease the facility for at least 3 more years?	
16. Is this facility a museum, community hall, agricultural hall, seniors club, outdoor recreation or sports grounds, or other similar indoor or outdoor space?	
17. Offer membership and services to members of the public?	

Project Eligibility Checklist

Does your Project:	(Yes/No)
18. Does your project take place in the Town of Bonnyville?	
19. Does your project primarily benefit residents of the Town of Bonnyville?	
20. Does your project help your organization deliver cultural or recreational services?	
21. Does your organization currently have the matching funds or in-kind support secured, so that it has all the required resources to complete the project if the Town approves your grant request?	

Project Information

22. Please indicate the name of your project:
23. Please indicate the location of your project:
24. Please provide a description of your project:
25. Please indicate the projected project start and completion date. The project start date is the date you start incurring or commit to project expenses.
26. Is your project meant to enhance or preserve your organizations service levels? Please explain your answer. (Projects which enhance service levels are those which build a new asset, expand a facility, create a new service, help expand existing services, or improve existing facility amenities. Projects which preserve service levels are those that repair damage, replace broken or failing equipment, or restore the use of the facility or its equipment to its previous level of functionality.)
27. Why is this project needed?



28. How will your project help address this need? Please identify outcomes of the project in relation to the need it is addressing.

29. Does your organization own the land where the project will be constructed/installed/etc.? If not, who is the legal owner? A letter of support or other documentation may be required if your organization is not the legal owner.

30. Will this project increase the annual operational costs of your organization? If yes, please explain.

31. Does your organization intend to hire or purchase goods and services from persons who are, or are related to, members of your board or the organization's employees? If yes, what steps will your organization take to ensure it is procuring goods and services in a fair and transparent manner?

32. How has your organization estimated the cost of the project (quotes, pricing research, etc.)? If your organization has obtained quotes, have multiple quotes been obtained for the purpose of comparing prices?

Submission Attachment Checklist

Required Attachments

1. Project Budget (using the provided budget template)
2. Organization's most recent financial statements (if not previously provided)
3. List of the organization's officers and directors, and their contact information
4. Board Approved Motion Supporting the Application

Other Additional Information that may be Requested

1. Land Owner Approval Letter or other documentation
2. Lease Agreement
3. Feasibility Studies, design drawings, blueprints
4. Quotes
5. Organization's 5-year business plan
6. Letters from business confirming in-kind support
7. Other relevant information