

DISTRICT OF CARLETON NORTH

COMMUNITY INVESTMENT POLICY

POLICY NO. A-03

Category:	Administration
Policy Number:	A-03
Effective Date:	March 14, 2023
Approval by Council:	March 14, 2023
Supersedes:	Not applicable
Amended:	Not applicable

1. BASIC STATEMENT:

The District of Carleton North has many non-profit organizations who, through their active membership, provide foundational support in many communities in our area. This policy reflects the willingness and financial ability of the District of Carleton North to recognize and support the ongoing efforts of our volunteers who serve a vital role in providing valuable programs and services throughout our district. This policy is adopted under authority of Section 102 of the *Local Governance Act*, RSNB 2017, c. 18.

2. PURPOSE:

To provide:

- 1) Annual operating funding to eligible organizations that can demonstrate their positive contributions to our Town.
- 2) Sponsorship funding and one-time donations to eligible organizations for their positive contributions to our Town.
- 3) In-Kind support to eligible organizations for events that will benefit the residents of the District of Carleton North.

3. TYPES OF SUPPORT:

There are three types of support for which organizations may apply:

- 1) Annual Operating Grants:
 - a) Provides operational funding support to community-based organizations for their programs and operational expenses.
 - b) Provides operational funding support to tourism, recreation and cultural organizations for their programs and operational expenses.
- 2) Sponsorships:
 - a) Provides funding for tournament hosting / travel and District of Carleton North facility discounts.

- b) Provides a means for organizations to apply for funding where they do not meet the registered charitable or registered non-profit requirements of the funding organization.
- c) One-time monetary donations to organizations and/or individuals affiliated with eligible organizations.
- 3) In-Kind support
 - a) Provides support to organizations through use of Town equipment, facilities, or staff time.

4. ELIGIBILITY REQUIREMENTS:

- 1) Annual Operating Grant
 - a) Any organization applying for funding under this policy shall meet ALL of the following requirements:
 - i. Be a not for profit or charitable organization.
 - ii. Have a volunteer board of directors or executive.
 - iii. Have been in operation for at least one year.
 - iv. Demonstrate the ability to raise funds through their own means.
 - v. Provide their organization's annual revenue and expenses and demonstrate a need for operating funding assistance.
 - vi. For grants over \$5,000, financial statements are required; and
 - vii. Demonstrate how their application for funding will benefit the residents of the District of Carleton North.
 - b) The following types of organizations are not eligible to apply for Annual Operating Grant support:
 - i. For Profit Organizations and/or Businesses;
 - ii. Federal and Provincial Government mandated service delivery responsibilities;
 - iii. Political organizations; and
 - iv. Churches
- 2) Sponsorships
 - a) Demonstrate the ability to raise funds through their own means;
 - b) Demonstrate how their application for funding will benefit the residents of the District of Carleton North.
- 3) In-Kind support
 - a) Demonstrate the ability to raise funds through their own means;
 - b) Demonstrate how their application for in-kind support will benefit the residents of the District of Carleton North.

5. APPLICATION & REVIEW PROCESS:

- 1) **Annual Operating Grants:**
 - a) The District of Carleton North shall issue a call for funding once per year.

- b) All organizations shall complete the Annual Operating Grant Application Form and submit the form in full by the deadline advertised. Failure to do so may disqualify the applicant.
- c) All applications will be considered until the annual budget allocation has been depleted.

2) **Sponsorships & Donations:**

- a) Sponsorship & Donation Applications may be submitted at any time throughout the year, up to the annual budget allocation.
- b) Any applications requesting support of **\$500 or less** shall be referred to the Tourism, Heritage, and Culture Manager for consideration up to the annual budget allocation, and **must be received two (2) weeks prior to when the support is required**. The Manager shall follow a guideline provided by the Administration Committee and guidelines will be reviewed annually by the Administration Committee.
- c) All organizations requesting support **over \$500** shall submit the application form in full to the Tourism, Heritage, and Culture Manager **at least six (6) weeks prior** to when the sponsorship is needed to ensure Committee and Council have time to meet, review and approve. Applications will be considered until the annual budget allocation has been depleted.
- d) Requests for Sponsorship of an application to another funding organization shall be submitted at least four (4) weeks in advance of the funding organization's application deadline to ensure Council have time to meet, review and approve the request.
- e) Sponsorships & Donations shall be issued throughout the year, based on meeting the established criteria.

3) **In-Kind Support:**

- a) The District of Carleton North shall review the In-Kind Support Applications at any time throughout the year.
- b) All organizations requesting support valued at **\$500 or less** shall complete the In-Kind Support Application Form and submit the form in full to the Tourism, Heritage, and Culture Manager at **least four (4) weeks prior** to when the sponsorship is needed.
- c) All organizations requesting support valued at **over \$500** shall submit the application form in full to the Tourism, Heritage, and Culture Manager **at least six (6) weeks prior** to when the sponsorship is needed to ensure Committee and Council have time to meet, review and approve.
- d) Applications received shall be subject to availability of the Town staff, services, facility or equipment being requested.
- e) The application procedure shall be repeated any time an in-kind support is sought.

6. GENERAL CONDITIONS:

- 1) Grants may be awarded with certain terms and conditions. The letter of award shall state if any particular restrictions apply to the grant. Funding may be revoked for failure to comply with the terms and conditions stipulated in the letter.
- 2) Funding may be revoked should there be a misappropriation of funds, failure to report or misrepresentation by the receiving organization.

- 3) The group or organization receiving a grant under this policy shall recognize the District of Carleton North as a sponsor when applicable.
- 4) Approvals for financial assistance under this policy shall be at the discretion of the District of Carleton North Town Council.
- 5) The Director of Corporate Affairs shall provide to Council a monthly summary of requests received and the amount approved.

Certification for the District of Carleton North Policy Manual:

I certify that this *Community Investment Policy*, as indicated above was adopted by Council.

Mayor

March 14, 2023

Date of Council Resolution

Clerk

March 14, 2023

Date Policy in Effect

Schedule A: COMMUNITY INVESTMENT OPERATING GRANT APPLICATION

Instructions:

- Use this cover sheet as the first page of your application.
- Please submit all documents from the application checklist prior to the annual submission deadline for Annual Operating Grants.
- Incomplete submissions may disqualify your request for funding.
- If you do not have enough space to answer a question, please attach a separate sheet.
- The policy governing the District of Carleton North Community Investment program is available on the Town's website at <https://carletonnorth.com/town-hall/policies-2/> or by contacting the Town at (506) 392-6763.
- Please forward completed application to:

District of Carleton North
Attn: Director of Corporate Affairs
19 Station Road
Florenceville-Bristol, NB E7L 4L7
Email: amy.mcintosh@carletonnorth.com
Fax: 506-392-5211

APPLICATION CHECKLIST

Organization Name:

- ☐ Your District of Carleton North **Operating Grant Application** delivered in person, mailed, emailed or faxed.
- ☐ **Proof of current registration as a non-profit or charitable organization, if applicable.** Include a copy of current Charitable Registration Number from Canada Revenue Agency. If your organization is in the process of applying for registration, please include a copy of your application.
- ☐ For requests over \$5,000, the most recent **financial statement** for your group/organization (showing all revenue and expenses).
- ☐ The **current operating budget** for your group/organization (showing all revenue and expenses).
- ☐ A **report of the activities during the previous year** (Annual Report) for your group/organization.
- ☐ The organization has a Volunteer board of directors.
- ☐ This organization has been in operation for more than one year.

PART A: APPLICANT INFORMATION

Community group/organization (applicant):

Title of project:

Contact name:

Title:

Mailing address:

Telephone:

Fax:

Email:

Federal Charitable Status Number (if applicable):

PART B: APPLICANT ORGANIZATION INFORMATION

All applications will be evaluated based on the information provided in this application.

1. Briefly describe your organization's mandate/objectives.

2. Describe the community, area and/or group(s) your organization serves.

PART C: DETAILS OF SUPPORT BEING REQUESTED

3. Requested amount of funding.

\$

4. What type of expenses will the Community Investment be put towards? (Select one)

- ☐ Programming and Operational Support (power bill, insurance, maintenance, programming, etc.) –
Specify the Operating expense type: _____

COMPLETE PART D ONLY

- ☐ Project costs (construction, renovations, events, etc.) – **COMPLETE PARTS D AND E**

PART D: ORGANIZATION'S FISCAL REQUIREMENTS

All applications will be evaluated based on the information provided in this application.

- 5. Does your organization generate revenue and raise funds (fundraising activities, charge admission to events/programs, membership dues, apply for grants, etc.)? if so, provide details and amounts.**

- 6. Provide details of partnerships with local businesses. (businesses who cover some costs, advertise your events, etc.)**

- 7. What types of programs does your organization offer, and how often are they held?**

Youth and Seniors:

Sport & Recreation:

Musical and Cultural Events:

Community Celebrations and Events:

Tourism:

Other:

- 8. How many volunteers are in your organization, and approximately how many hours per month are volunteered in total?**

Volunteers:

Average # hours/month:

<p>9. Does your organization have a property to maintain?</p> <hr/> <p>Grounds to maintain (ballfields, rinks, etc):</p> <p>A building that is used to deliver programs and host events:</p> <p>Other:</p>
<p>10. State property assessed value and property tax expense.</p> <hr/> <p>PID or Property Address:</p> <p>Property Assessed Value: \$</p> <p>Property Tax Expense: \$</p>
<p>PART E: PROJECT DETAILS (Not required for Programming or Operational Support)</p> <p>All applications will be evaluated based on the information provided in this application.</p>
<p>11. Describe your organization's specific project requiring support.</p> <hr/>
<p>12. Describe the benefits your project will provide to the District of Carleton North.</p> <hr/>
<p>13. Will you partner with other organizations or businesses on your project?</p> <hr/>

14. PROJECT EXPENSES: Outline the planned expenditures for your project.	
15. PROJECT REVENUE: List any other funding sources to which you have applied for this project, including amount, funding agency, and status of those applications.	
COMMUNITY INVESTMENT REQUESTED FROM THE DISTRICT OF CARLETON NORTH <i>(Select one)</i>	REQUESTED
16. <input type="checkbox"/> Operational support	\$
17. <input type="checkbox"/> Project costs	\$
18.	

DECLARATION

The information provided on this application form and accompanying documentation is accurate to the best of my knowledge. I hereby give the District of Carleton North authority to verify any and all information pertaining to this application.

Application prepared by:

_____	_____	_____
<i>Signature</i>	<i>Print Name</i>	<i>Date</i>

Board authorization (if applicable):

_____	_____	_____
<i>Signature</i>	<i>Print Name</i>	<i>Date</i>

District of Carleton North approval:

☐ Application approved for: \$_____

To the following organization: _____

☐ Application denied

_____	_____
<i>Director of Corporate Affairs</i>	<i>Date</i>

Schedule B: COMMUNITY INVESTMENT SPONSORSHIP & DONATION APPLICATION

Instructions:

- Use this cover sheet as the first page of your application.
- The policy governing the District of Carleton North Community Investment program is available on the Town's website at <https://carletonnorth.com/town-hall/policies-2/> or by contacting the Town at (506) 392-6763.
- **Please apply at least two (2) weeks prior to required date for requests of \$500 or less, and at least six (6) weeks prior to required date for requests over \$500.**
- Requests for Sponsorship of an application to another funding organization shall be submitted at least four (4) weeks in advance of the funding organization's application deadline to ensure Council have time to meet, review and approve the request.
- Please forward completed application to:

District of Carleton North
Attn: Director of Corporate Affairs
19 Station Road
Florenceville-Bristol, NB E7L 4L7
Email: amy.mcintosh@carletonnorth.com
Fax: 506-392-5211

APPLICATION CHECKLIST

Organization Name:

- ☐ Your **District of Carleton North Sponsorship Grant Application** delivered in person, mail, email or fax.
- ☐ A **report of the activities during the previous year** (Annual Report) for your group/organization.
- ☐ A **report on the programs/activities proposed for the upcoming year** for your group/organization.
- ☐ The application to the funding organization, for those requesting Sponsorship of an application, showing the applicant as *Your Organization's Name* c/o District of Carleton North.

PART A: APPLICANT INFORMATION

Community group/organization (applicant):

Title of project:

Contact name:

Title:

Mailing address:

Telephone:

Fax:

Email:

Federal Charitable Status Number (if applicable):

PART B: APPLICANT ORGANIZATION INFORMATION

All applications will be evaluated based on the information provided in this application.

1. Briefly describe your organization's mandate/objectives.

2. Describe the community, area and/or group(s) your organization serves.

PART C: TYPE OF SUPPORT BEING REQUESTED

3. What type of support are you requesting?

- ☐ Event Sponsorship (tournament hosting / travel, District of Carleton North facility discounts, etc.)
- ☐ Sponsorship of an application to another funding organization
- ☐ One-time monetary donation to organization or individuals affiliated with an eligible organization

FUNDING/SUPPORT REQUESTED	AMOUNT REQUESTED
<input type="checkbox"/> Event Sponsorship	\$
<input type="checkbox"/> Sponsorship of application	\$
<input type="checkbox"/> One-time monetary donation	\$

PART B: PROJECT DESCRIPTION

Provide a brief description of the project:

DECLARATION

The information provided on this application form and accompanying documentation is accurate to the best of my knowledge. I hereby give the District of Carleton North authority to verify any and all information pertaining to this application.

Application prepared by:

Signature

Print Name

Date

Board authorization (if applicable):

Signature

Print Name

Date

District of Carleton North approval:

☐ Application approved for: _____

To the following organization: _____

☐ Application denied

Director of Corporate Affairs

Date

Schedule C: COMMUNITY INVESTMENT IN-KIND GRANT APPLICATION

Instructions:

- Use this cover sheet as the first page of your application.
- The policy governing the District of Carleton North Community Investment program is available on the Town's website at <https://carletonnorth.com/town-hall/policies-2/> or by contacting the Town at (506) 392-6763.
- **Please apply at least four (4) weeks prior to required date for requests of \$500 value or less, and at least six (6) weeks prior to required date for requests over \$500.**
- Please forward completed application to:

District of Carleton North
Attn: Director of Corporate Affairs
19 Station Road
Florenceville-Bristol, NB E7L 4L7
Email: amy.mcintosh@carletonnorth.com
Fax: 506-392-5211

APPLICATION CHECKLIST

- ☐ A signed original of your **Community Investment In-Kind Grant Application**.
- ☐ A **report of the activities during the previous year** (Annual Report) for your group/organization.
- ☐ A **report on the programs/activities proposed for the upcoming year** for your group/organization.

PART A-APPLICANT INFORMATION

Community group/organization (applicant):

Title of project:

Contact name:

Title:

Mailing address:

Telephone:

Fax:

Email:

Federal Charitable Status Number (if applicable):

IN-KIND SUPPORT REQUESTED FROM THE DISTRICT OF CARLETON NORTH

Please check all that apply and briefly describe your requirements.

☐ Staff time:

☐ Services:

☐ Equipment:

☐ Facilities:

☐ Other:

PROJECT DESCRIPTION

Provide a brief description of the project for which you require the resources and why they are needed.

DECLARATION

The information provided on this application form and accompanying documentation is accurate to the best of my knowledge. I hereby give the District of Carleton North authority to verify any and all information pertaining to this application.

Application prepared by:

Signature

Print Name

Date

Board authorization (if applicable):

Signature

Print Name

Date

District of Carleton North approval:

☐ Application approved for use of: _____

To the following organization: _____

☐ Application denied.

Director of Corporate Affairs

Date