

SECTION: II - Administrative Services
SUBSECTION: Legislative Services
SUBJECT: Cultivating Opportunity Grant Program

Approved by: Perth County Council

Venue approved: Regular Meeting

Date approved: July 7, 2022

Applicable By-law:

Revision Date:

Repeal Date:

Background:

Community organizations play an essential role in improving the quality of life of residents. The County's role in supporting these organizations is guided by the Strategic Plan and Council's vision of creating an active, rural, caring, and diverse community. The Cultivating Opportunity Grant Program ("Grant Program") supports the Strategic Plan by aligning with the following goals: Growth and Economic Development, Customer Service Excellence, Community Development and Planning, and Corporate Sustainability.

Legislative Authority

The authority for a municipality to provide a grant program in the interests of the municipality can be found in the *Municipal Act, 2001*, S.O., 2001, c. 25:

Section 107 (1) Despite any provision of this or any other Act relating to the giving of grants or aid by a municipality, subject to section 106, a municipality may make grants, on such terms as to security and otherwise as the council considers appropriate, to any person, group or body, including a fund, within or outside the boundaries of the municipality for any purpose that council considers to be in the interests of the municipality.

Policy:

Council provides an annual allocation of the corporate operating budget to fund a balanced structure of grants to local organizations and the Lower Tier municipalities

(Tree Planting). The grant program is called the “Cultivating Opportunity Grant”. The County of Perth has two streams for the grant program:

1. Community Stream
2. Tree Planting Stream

Definitions:

“Acknowledgement” means crediting the County as the source or partial source of the funding on promotional and informational materials related to tree planting activities and community projects for which grant funding was received.

“Application Assessment” is the process of reviewing a grant application and evaluating it based on the approved scoring matrix.

“Community Stream” means the portion of the annually budgeted grant funds that eligible not-for-profit and/or registered charities may apply for to offset a portion of costs associated with eligible projects.

“Completion Report” is a prescribed form submitted by a grant recipient detailing how the funds were used and demonstrating that conditions of the grant were met. Completion Reports are used for compiling statistics for program evaluation and promotion.

“Cultivating Opportunity Grant” is the grant program established by the County of Perth that consists of a Tree Planting Stream and a Community Stream.

“Funding Amount” is the annual amount allocated in the County of Perth budget that is available for the Community Stream and to which not-for-profit and registered charities may apply for.

“Grant Acknowledgement” means a grant recipient crediting the County of Perth as a source of funding by including the County’s logo and the phrase “Supported in part by a Perth County Cultivating Opportunity Grant” on relevant promotional material and other published content related to project for which funding was received.

“Local Community or Cultural Milestone” refers to notable anniversaries, achievements, commemorations, and other events that have local significance and are celebrated by communities in Perth County.

“Social Services Sector” means services provided at the local government level related to the Ontario Works program, as well as associated programs such as housing and childcare. This includes municipal social service departments as well as local partners in the provision of social services that already receive funding from any level of government.

“Tree Planting Stream” means the portion of the annually budgeted grant funds that are transferred to the Lower Tiers based on weighted assessment for the purpose of planting trees.

Cultivating Opportunities Grant - Tree Planting Stream:

The Tree Planting Stream consists of an annual grant allocation of \$25,000. This amount is determined by Council through its annual budgeting process.

Purpose:

Promote the County tree canopy by providing funding to the Lower Tier Municipalities for the purpose of planting trees.

Eligibility Requirements:

The Lower Tier municipalities administer how they are to use the grant as long as the funds are used to plant trees. The \$25,000 budget for the Tree Planting Grant is allocated to the Lower Tiers based on weighted assessment.

The County requires a Grant Acknowledgement to be included with promotional materials for their tree planting programs (see **Successful Applicants and Logo Use**).

Completion Report:

The Lower Tier municipalities are required to submit a report to the County demonstrating how the funds were used to plant trees within their jurisdictions. Information to be provided includes:

- Total number of trees planted
- Species planted
- Quantity of each species
- Number of trees planted in urban/settlement areas
- Number of trees planted in rural areas
- Number of private landowners (residential, agricultural, commercial, industrial, etc.) that received funding
- Percentage of funds used by Municipality to plant trees directly
- Percentage of funds used to reimburse citizens/businesses/organizations that planted trees
- The County was acknowledged as a source of funding
- Include links to or copies of materials that include the acknowledgement

The Lower Tier municipalities will be provided with a standardized form for their report. The form will be circulated to the Clerks of the Lower Tiers and will be due on December 31st of each year.

Cultivating Opportunities Grant - Community Stream:

Purpose:

This stream of the Cultivating Opportunity Grant is intended to support not-for-profit organizations and registered charities whose programs and services benefit Perth County residents and align with the goals of the County's strategic plan.

This stream is not intended to provide annual, ongoing funding to support the operations of an organization. Success in previous years does not automatically indicate success in future years. Furthermore, points will be awarded for organizations that did not receive a grant in the previous year to encourage a broader scope of applicants and support a wider variety of projects.

Eligibility Requirements

To apply to the Community Stream of the grant program, organizations must meet all of the following eligibility requirements:

1. Project aligns with the County's strategic goals.
2. Project provides a demonstratable community benefit.
3. Organization is a registered charity or not-for-profit organization that has been in operation of at least one year.
4. Organization is administered directly by a volunteer board/executive/organizing committee, preferably with at least 3 members and minimum of 2 members not related by family.
5. Organization holds an annual general meeting and have executive committee / directors elected from the general membership through a documented democratic election process.
6. Organization is able to provide financial information, bank statements, or filings to prove viability of the organization.
7. Organization is located within the geography of Perth County and/or project must serve the residents of Perth County directly.
8. Organization is mandated to primarily serve Perth County and its residents (75% of activities are held within Perth County and benefit the residents of Perth County).
9. Organization can demonstrate a track record of successful programming.
10. Organization can demonstrate sufficient resources to be able to deliver programming for which funding is being sought.
11. Organization can provide annual operating budget for the year in which the funds would be utilized.
12. The organization is in good financial standing with the County and its respective Lower Tier municipality.
13. Organization has completed all program requirements associated with any previously received grant from Perth County.
14. Completed application is received by the County by the established deadline for that year.

15. The amount being requested is not more than 50% of the total cost of the project.
16. Organization agrees to acknowledge the contribution of Perth County and to file a Completion Report.

Applicants **not** eligible for funding:

1. Individuals.
2. For-profit organizations.
3. Foundations, groups or individuals which raise funds for a not-for-profit, for-profit organization or another level of government and their associated groups or agencies.
4. Universities, colleges, schools and their associated/auxiliary groups or agencies.
5. Organizations considered to be within the social service sector.
6. Organizations whose purpose is related to political activity.
7. Organizations which are not in good financial standing with their municipality.

The Cultivating Opportunity Grant will **not** fund the following:

1. Programs that other levels of government have legislated responsibility for funding. This includes funds to 'top up' shortfalls for government mandated programs. Some examples include school board educational programs, public health programs, or social assistance programs.
2. Services which are primarily educational (i.e., academic or technical training).
3. Transportation or meal expenses.
4. Ongoing operational costs, such as staffing.
5. Processing legal or human rights cases.
6. Paying off deficits.
7. Attendance or registration fees for conferences, workshops or other training.
8. Total funding being requested from all sources exceeds 100% of estimated project budget.
9. Activities that could be deemed discriminatory as defined by the Ontario *Human Rights Code*.
10. Activities whose purpose is to promote religious doctrine or are being led by a person or organization whose mandate includes the promotion of religious doctrine.
11. Political and/or advocacy activities.
12. Retroactive payments. These are activities or costs incurred before grants are approved.
13. Secondary allocations or follow through funding. "Secondary allocations" refers to the process where funds received through the Cultivating Opportunity Grant are allocated to another organization by the applicant or a third party via a funding allocation process such as a grant program.

Application Assessment Criteria

Applicants will be required to fill out an application form via the County's website. All applications that are submitted by eligible organizations will be assessed against the following criteria:

1. Demonstrates meeting all of the requirements of the eligibility criteria.
2. Project is aligned to the County's Strategic Plan goals.
3. Preference will be given to organizations that have not received a grant in the previous year. Notwithstanding, all applications will be given consideration.

Application Assessment

All applications will be circulated to Council for assessment and to award grant amounts to successful applicants.

Cultivating Opportunity Grant Criteria and Evaluation Form

Council will assess the suitability of the applicant for this funding by completing a scoring matrix that corresponds to the information requested in the application form. If an applicant does not meet all of the eligibility criteria, they will be disqualified from further evaluation.

The second component of the scoring matrix consists of questions that are either scored with a numbered scale (0-3) or are issued a binary score (0-1 / yes or no). The following table illustrates how this scoring scale would be applied:

Score	Criteria
0	Application does not address this criterion.
1	Application does not meet expectations for this criterion.
2	Application meets expectations for this criterion.
3	Application exceeds expectations for this criterion.

Scores related to some key criteria will be weighted double to help ensure applications that are best aligned with the strategic priorities of the County are scored higher. This includes:

- Projects that relate to the goals of the Strategic Plan
- Projects that support goals of the County Charter for Diversity, Inclusion and Anti-Racism
- Projects that support the goals of the County Joint Accessibility Plan
- Projects that relate to important community or cultural milestones

Award Amounts

All grants are contingent on the allocation of funding as part of the County’s budget process. The total funding available for grants will be determined annually through the budget process.

Amounts awarded will be up to a maximum of \$2,500. Successful applicants may receive all or only a portion of their requested funding. Award amounts will be determined based on merit of application and the number of successful applications. As funding is limited, priority will be given to eligible applicants who score highest on the scoring matrix. Not all eligible applicants and projects are entitled to receive grant funding.

If the total of all successful applicant requests is less than the total funds budgeted, the remainder may be put into a reserve to fund future grant budgets.

Timeline

The Community Stream of the Cultivating Opportunity Grant will operate on an annual application cycle, beginning with marketing of the grant at the end of the third quarter and continuing until the budget is passed early in the following year:

Dates	Notes
July – August	Promotion of grant application process. Application materials and information made available via County website.
September – November	Applications may be submitted starting in September. Application deadline is at the end of November.
December – January	Applications are reviewed.
February/March – Budget Approval	Report to Council regarding successful applicants. Budget approved. Successful applicants are notified and funds circulated.

Completion Report

Recipients will be asked to complete the following questions by December 31st of the year their grant project was completed. The report will include the following components:

1. Evaluate the outcome of the project/event including financial outcomes
2. Identify how the project/event met its goals and objectives
3. Was the funding acknowledged on all promotional material?

4. How was the County's grant contribution recognized at the organization's event or activity?
5. Were there any surplus funds? If yes, please provide the amount.
6. How was the funding provided utilized?
7. How did the funding contribute to the overall goals and objectives of the organization?

Visual Identity and Marketing Plan

The visual identity and marketing requirements for both streams of the Cultivating Opportunity Grant include three components:

1. Marketing Plan
2. Successful Applicants and Logo Use
3. Success Stories

Marketing efforts contribute to raising awareness of the Grant Program and application period at the beginning of the process to ensure all eligible groups apply. The 'Successful Applicants and Logo Use' component will require successful applicants to use the County's logo on marketing materials as they relate to the objectives identified in the grant application. The success story component will allow the County to collect and share stories where Cultivating Opportunity grant funding was successfully used to help the organization achieve its objectives and to further promote the Grant Program.

Marketing Plan

To properly market this program, a mixed methods approach will be used including social media, the corporate website, a press release, and corporate newsletters. The goal of this component is to educate the public about the Grant Program and to encourage eligible applicants to apply. Development of marketing assets will be done in collaboration with Corporate Communications.

In addition to leveraging the County's messaging outlets, information regarding the Grant program may be circulated to the Lower Tier municipalities and other relevant organizations and media outlets.

Successful Applicants and Logo Use

Successful applicants are required to acknowledge the support of the County of Perth on all printed materials that relate to the grant request or as determined by staff. Acknowledgements will include the County logo and the following wording:

"Supported in part by a Perth County Cultivating Opportunity Grant."

Acknowledgement of the source of the grant is important for increasing the County's profile in the community as an entity that supports local initiatives. It also promotes the grant program so potential applicants are made aware of it and they can know to apply in subsequent years.

Acknowledgement will also be a requirement for the Lower Tier tree planting programs

that are supported by the Cultivating Opportunity grant. This includes the inclusion of the County logo on tree planting program related materials and a statement acknowledging the grant.

The logo was developed to represent the character and integrity of the Corporation of the County of Perth.

To support the Council and County contribution to the successful applicants, the Perth County logo should appear on promotional materials, including websites. When using this logo, the follow requirements must be met:

1. **Proper Proportions:** Never stretch the logo art. Always maintain horizontal and vertical proportions as not to distort the logo.
2. **Spacing:** Safe Spacing Maintain distance between the logo and other objects. Use the size of the letter “o” as a measurement for minimum margin. Do not allow any type or object to come inside the safe space area.
3. **Colour Use:** The logo is made up of three colours: GREEN, GOLD, RED. The logo has been designed for flexibility and ease of application in many different media, whether that is print or digital. The logo must be used exactly as shown in the permissible formats. Colour deviation, shading, tinting or transparencies are not permitted.

Logo files must be requested from the County. When the logo is used, the applicant must notify the County and allow 1-2 business days to review and approve proper logo use prior to any public release.

Public Promotion Media Releases and Launch Events

Should the successful applicant plan a media release related to the program, a request for a quotation from the Warden must be made a minimum of one week in advance. A full draft of the news release must be provided to the County as part of the request.

Should the successful applicant plan a launch event as part of the project, a request may be submitted to have a member of Council or County staff attend the event.

These requests must be made a minimum of four weeks prior to the event date and will be accommodated if scheduling allows.

Success Stories

Following project completion, the County will encourage recipients to share their success stories with County staff. Success stories will be shared on the corporate website and social media to congratulate and celebrate successful projects, as well as promote the program to encourage potential applicants to apply in subsequent years.