



## **2027 COMMUNITY CAPITAL GRANT GUIDELINES**



# Table of Contents

## Contents

|                                                      |    |
|------------------------------------------------------|----|
| <b>1. Purpose of the Grant</b>                       | 2  |
| <b>2. Grant Eligibility</b>                          | 2  |
| 2.1 Eligible Organizations                           | 2  |
| 2.2 Ineligible Organizations                         | 2  |
| 2.3 Eligible Capital Projects                        | 3  |
| 2.4 Ineligible Capital Projects                      | 3  |
| 2.5 Eligible Capital Expenses                        | 3  |
| 2.6 Ineligible Capital Expenses                      | 4  |
| <b>3. Funding Conditions</b>                         | 4  |
| 3.1 Funding Limit                                    | 4  |
| 3.2 Governance Training Requirement                  | 4  |
| <b>4. Assessment Criteria</b>                        | 5  |
| 4.1 Applicant Capacity                               | 6  |
| 4.2 Project Feasibility                              | 6  |
| 4.3 Evidence of Need                                 | 6  |
| 4.4 Contribution to Community Resilience             | 6  |
| <b>5. Application Process</b>                        | 6  |
| <b>6. Funding Disbursement Process</b>               | 8  |
| <b>7. Reporting Requirements</b>                     | 8  |
| 7.1 Report Evaluation                                | 9  |
| <b>8. Acknowledgement Standards and Requirements</b> | 10 |
| <b>9. Protection of Privacy Act (POPA)</b>           | 10 |
| <b>10. Disclosure of Information</b>                 | 10 |
| <b>11. Contact Information</b>                       | 10 |
| <b>Appendix</b>                                      | 11 |
| <b>A1. Key Dates</b>                                 | 11 |
| <b>A2. Definitions</b>                               | 13 |
| <b>A3. Application Evaluation Scoring Sheet</b>      | 16 |

## 1. 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 within the Regional Municipality of Wood Buffalo.

## 2. Grant Eligibility

### 2.1 Eligible Organizations

#### Organizations must:

- Be a registered non-profit organization.
- Have been residing within the Region for a minimum of one year.
- Conduct operations within and provide services to residents of the Region.
- Not hold unrestricted net assets exceeding annual operating expenses, outlined in the most recent financial statement (unless unrestricted net assets are less than \$50,000).

Full eligibility criteria can be found in the Community Investment Program Policy FIN-220

**Note: Internally or externally restricted net assets must be specified in the financial statements, and the organization must provide a copy of the board minutes and a written explanation detailing the purpose of the restrictions.**

### 2.2 Ineligible Organizations

- For-profit organizations.
- Political organizations or organizations engaged in political activities, including rallies, endorsing candidates, lobbying, or advocating for specific government policies or legislation.
- Federal and provincial governments and affiliated bodies.
- Organizations that have overdue or incomplete accounting or reporting requirements related to any grant previously awarded by Municipality.
- Organizations that do not demonstrate adherence to policy, strategic priorities and relevant outcome measurements.
- Organizations that do not meet the minimum eligibility requirements.

**Note: When an organization attempts to influence or contact a Community Investment Program Approval Committee (CIPAC) Member outside the established process, CIPAC may vote to deem the organization ineligible for funding during the funding cycle.**

## 2.3 Eligible Capital Projects

Capital projects must result in long-term improvements to publicly accessible facilities or assets that benefit the broader community. Eligible projects may include:

- **New Construction or Expansion:**
  - Constructing a new or expanding existing public-use facility to accommodate a greater number of users.
- **Renovation and Upgrades:**
  - Renovating public-use facilities to improve accessibility (e.g., adding ramps, elevators, or accessible washrooms).
  - Upgrading core infrastructure—such as lighting, insulation, or flooring—to boost energy efficiency and extend the facility's useful life.
- **Facility Enhancements:**
  - Installing new features within a public-use facility to enhance the delivery of community programs and events.
  - Creating outdoor gathering spaces to support seasonal community programs, encourage social interaction, and host community events.
- **Capital Equipment Acquisition:**
  - Purchasing capital equipment with a useful life of more than one year to support the delivery of community programs or events.
  - Acquiring maintenance equipment necessary for the ongoing upkeep and operation of public-use facilities.

## 2.4 Ineligible Capital Projects

- Projects that fall under Federal or Provincial jurisdictions.
- Private or Commercial in Nature.
- Projects that support religious or political activities, or that restrict public access or participation based on religious or political affiliation or beliefs.
- Routine Maintenance or Minor Repairs.
- Duplication of Municipal Services:
  - Projects that replicate or compete with existing municipal infrastructure or services
  - Projects that replicate or compete with existing infrastructure or services that are already funded by the Municipality

## 2.5 Eligible Capital Expenses

All direct capital expenses that are directly related to the capital project are considered eligible, unless otherwise listed in the Ineligible Expenses section.

## 2.6 Ineligible Capital Expenses

- Salaries for administration or program staff that are not directly tied to the capital project
- Fundraising or marketing costs
- Expenses incurred before grant approval (i.e. retroactive costs)
- Routine maintenance and repairs
- Debt repayment, interest or depreciation of assets
- Occupancy costs (e.g. rent, utilities)
- Operating costs

## 3. Funding Conditions

### 3.1 Funding Limit

CIP funding is intended to promote sustainability and reduce long-term reliance on municipal grants.

**Funding Limit** – CIP may fund up to:

- 50% of eligible planning and design costs
- 50% of eligible construction and acquisition costs
- 50% of eligible land purchase costs

**Other Revenue Sources:** Applicants must contribute a minimum of 50% of the capital costs from other revenue sources. The contribution can be secured or in progress at time of application. It must be directly related to the project and may include:

- Other grants,
- Cash donations,
- Donated labour, materials or services (in-kind support).

**Note:**

- Municipal funding may be used to leverage additional funding sources. However, no funds will be disbursed until the applicant has secured their required contribution.
- If the actual funding exceeds 50% of the total eligible capital costs as determined in the final report evaluation, the excess amount may be requested to be returned.

### 3.2 Governance Training Requirement

Beginning in the **2027 Grant Cycle**, required governance training for all CIP-funded organizations' Boards of Directors will be a phased expectation.

Training is being introduced as a requirement this year. A phased approach is designed to give applicants time to understand expectations, prepare for full implementation, and take steps for compliance.

## For the 2027 grant cycle

- Training is expected, but applicants will not be penalized if their Boards have not yet completed it during the 2027 grant year.
- Applicants are strongly encouraged to begin identifying training options and planning how their Board's will meet the requirement.
- Applicants should assess their Board's current governance capacity and plan for full compliance as the requirement is monitored in future.

## What Is “Relevant Governance Training”?

Relevant governance training refers to a structured learning that helps Board of Directors strengthen effective oversight, understand fiduciary responsibilities, and support accountability with public funding requirements. Training should introduce or reinforce core governance concepts, such as board roles and responsibilities, fiduciary and financial oversight, risk management, ethical and equitable decision-making, and grant accountability.

Training should be delivered by a credible educator and provide a certificate or record of completion for organizational files and grant reporting. The RMWB recognizes the following training programs as fulfilling requirements of relevant governance training:

- Social-profit or government networks e.g., FuseSocial (local), Edmonton Chamber of Voluntary Organizations (Alberta Board Member Essentials Training), Government of Alberta Community Development Unit
- Nationally recognized governance training institutes (e.g., Capacity Canada, First Nations Information Governance Centre)
- Universities or colleges offering board governance courses (online or in-person, hybrid learning, workshops, etc.)
- Sector-recognized trainers and consultants

Other equivalent training programs may qualify, to confirm, please reach out to CIP team and provide the training details.

## 4. Assessment Criteria

Each capital project will be assessed based on the following criteria (**See Appendix A3-Application Evaluation Scoring Sheet**):

| Criteria                             | Weight      |
|--------------------------------------|-------------|
| Applicant Capacity                   | 25%         |
| Project Feasibility                  | 25%         |
| Evidence of Community Need           | 25%         |
| Contribution to Community Resilience | 25%         |
| <b>TOTAL</b>                         | <b>100%</b> |

#### 4.1 Applicant Capacity

Assesses an organization's ability to manage and deliver the project including past grant compliance, mission alignment, financial sustainability, leadership and governance.

#### 4.2 Project Feasibility

Evaluates the clarity, scope, and uniqueness of the application, ensuring it meets community needs. It also considers community support through partnerships, other funding sources, and volunteer involvement.

#### 4.3 Evidence of Need

Assesses whether the application demonstrates an existing community need aligned with project goals. Support for equity-deserving groups and Indigenous culture is strongly encouraged but not mandatory.

#### 4.4 Contribution to Community Resilience

Evaluates the anticipated impact and evaluation methods, considering past success with CIP funding for experienced applicants and proposed outcome measurements for new ones, along with partner collaboration to enhance impact.

### 5. Application Process

#### Stage 1 – Application Submission and Preliminary Review

| Step                                | Deadline                         | Details                                                                                                                                                                                                                                                                                                                                                                          |
|-------------------------------------|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Review Grant Guidelines             | Before Applying                  | Confirm eligibility of your organization and proposal by reviewing the grant guidelines.                                                                                                                                                                                                                                                                                         |
| Pre-Application Meeting and Support | September 2 – September 18, 2026 | Pre-application meetings are required for all applicants as a prerequisite for consideration for an invitation to apply.<br>Email <a href="mailto:CIP@rmwb.ca">CIP@rmwb.ca</a> with the following details to schedule: <ul style="list-style-type: none"><li>- Organization name</li><li>- Brief description of the proposal</li><li>- Your availability for a meeting</li></ul> |
| Applications Open                   | September 2, 2026                | CIP will notify you via email when the application is available in the CIP Grant Portal.<br>Log in to your <a href="#">CIP Grant Portal account</a> and complete the application.<br>Contact <a href="mailto:CIP@rmwb.ca">CIP@rmwb.ca</a> for support.                                                                                                                           |

| Step                                   | Deadline                                    | Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|----------------------------------------|---------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Submit Required & Supporting Documents | Application Submission                      | <p>Complete the application in the CIP Grant Portal and attach the following documents:</p> <ul style="list-style-type: none"> <li>Detailed financial statements containing expense breakdown by category and Board signature for the most recent fiscal year-end (Year-end date must fall between July 1, 2025, and June 30, 2026)</li> <li>Relevant supporting documentation i.e. proof of secured funding, maps, diagrams, feasibility studies, quotes etc.</li> </ul> |
| Applications Close                     | September 30, 2026, 4:30 p.m. MDT           | Late submissions will <b>not</b> be considered and will be withdrawn by CIP.                                                                                                                                                                                                                                                                                                                                                                                              |
| Preliminary Review & Revisions         | October 1 – October 21, 2026, 4:30 p.m. MDT | <p>CIP reviews for eligibility and completeness.</p> <p>If key information is missing, application revisions will be requested.</p> <p>Applicants may be notified at any time during this period.</p> <p>Requested revisions must be submitted through the CIP Grant Portal within 48 hours of notification and no later than October 21, 2026, at 4:30 p.m. MDT.</p> <p>Information will not be accepted after the deadline.</p>                                         |
| Preliminary Review Decision            | October 30, 2026                            | Ineligible applicants will be notified by CIP.                                                                                                                                                                                                                                                                                                                                                                                                                            |

**Note:** All applications will move to **Stage 2** including ineligible.

## Stage 2 – Community Investment Program Approval Committee (CIPAC) Review and CIP Review Panel Decision

| Step                               | Deadline       | Details                                                                                                                                                                                          |
|------------------------------------|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CIPAC Review, Scoring and Decision | November (TBD) | <p>CIPAC evaluates applications using the criteria in <b>Appendix A3</b>.</p> <p>Clarifications may be requested with strict deadlines. Information will not be accepted after the deadline.</p> |



| Step                               | Deadline             | Details                                                                                                                                                         |
|------------------------------------|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CIP Review Panel                   | Early December (TBD) | Evaluates CIPAC's Decisions                                                                                                                                     |
| Selection of Successful Applicants | Early December (TBD) | Successful applicants will be selected based on scoring, community impact, funding priorities and available budget.                                             |
| Notification of Decision           | December (TBD)       | Applicants are notified. Applicant Evaluation is available upon request within 2 weeks.<br>There is no appeal process. CIP Review Panel decisions by are final. |

## 6. Funding Disbursement Process

Before any funds are disbursed, the applicant must provide documentation confirming that at least 50% of the total capital project cost has been secured.

Acceptable documentation may include:

- Bank statements or letters confirming cash on hand
- Grant approval letters from other funders
- Donation receipts or commitment letters
- Valuation of in-kind contributions (with supporting documentation)

Once the 50% contribution is verified, funds will be disbursed in installments based on project milestones, in accordance with the terms and conditions outlined in the Grant Agreement.

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

- Property taxes and utilities are current and paid
- No outstanding compliance orders relating to Land Use Bylaw, Building Code, Fire Code, Community Standards Bylaw or other regulations
- No ongoing legal disputes with the Municipality
- Required permits are obtained and closed for the project without deficiencies

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

## 7. Reporting Requirements

Grant recipients must complete the following mandatory reports in the CIP Grant Portal as per the Reporting and Monitoring requirements of their Grant Agreement:

### 1. Certificate of Insurance

Submit within 30 calendar days of receiving the request.

### 2. Quarterly Status Reports

Submit within 30 days after each quarter ends until the project is complete.

### **3. Capital Project Costing Report**

Submit within 120 days after the capital project is completed with required Attachments.

### **4. The organization's Financial Statements**

Submit detailed statements containing expense breakdown by category and Board signature within 180 days after the organization's fiscal year end. If the organization's fiscal year does not align with the grant term (January 1, 2027 – December 31, 2027); the organization must submit financial statements for two consecutive fiscal years (e.g., Fiscal year ending in 2027 and Fiscal year ending in 2028) to ensure the entire grant term is covered.

- Organizations receiving annual grant(s) equal to or under \$100,000 must provide Board approved statement of revenue and expenses.
- Organizations receiving annual grant(s) between \$100,000.01 and \$499,999.99 must provide Board approved review engagement financial statements.
- Organizations receiving annual grant(s) equal to or over \$500,000 must submit Board approved audited financial statements.
- A separate schedule of revenue and expenses is required within financial statements for funded activities where the organization has multiple ventures under one registered non-profit, corporation, or governance structure.

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

#### **7.1 Report Evaluation**

CIP will evaluate all reports to ensure all grant agreement obligations are met.

If revisions are needed, recipients will be notified via email with a deadline. If actual expenses fall below the budget or additional revenue is received after grant approval, the grant amount will be adjusted to adhere to the funding limit (no more than 50% of actual eligible expenses). In such cases:

Excess funds may be requested to be returned unless alternate use is approved in writing by CIP.

- a. Amounts below \$2,500 may be forgiven.
- b. Amounts over \$2,500 may be requested to be repaid in full.

Once all requirements are met and any repayments are received, a File Closure Letter will be issued.

Failure to meet reporting requirements may result in termination of the grant and ineligibility for future grants.

Exceptions to these conditions are at the sole discretion of the Municipality on a case-by-case basis.

## 8. Acknowledgement Standards and Requirements

Grant recipients must acknowledge the municipality as a funding partner in all official communications.

- Use of the RMWB logo must adhere to the [Logo Standards Guide](#) via the [Logo Request Form](#).
- Funding recognition may include:
  - News release or media articles
  - Social media posts (e.g., X/Twitter, Facebook, Instagram, blog posts)
  - Website or newsletter mentions
  - Commemorative plaque or sign at the facility, site, or on the funded equipment to acknowledge the Municipality's support.

## 9. Protection of Privacy Act (POPA)

The personal information collected on the grant application is collected under the authority of Section 4(c) of the Protection of Privacy Act and is managed in accordance with the Act. It will be used to process the application and contact you if needed, during the review of the application. If you have any questions about the collection and use of personal information you may contact the Manager, Community Partnerships and Initiatives, at 9909 Franklin Avenue, Fort McMurray, AB T9H 2K4 or (587) 919-5522.

## 10. 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.

## 11. Contact Information

If you have any questions, or would like clarification, please contact the Community Investment Program.

**Email:** [CIP@rmwb.ca](mailto:CIP@rmwb.ca)

**Phone:** Pulse at **780-743-7000** or toll-free at **1-800-973-9663**

**Website:** [www.rmwb.ca/CIP](http://www.rmwb.ca/CIP)

### **By Mail:**

Community Investment Program  
Community Services  
Regional Municipality of Wood Buffalo  
9909 Franklin Avenue, 6<sup>th</sup> Floor  
Fort McMurray, AB T9H 2K4

## Appendix

### A1. Key Dates

| Date                               | Key Action                                                                                                                                                                     |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| September 2, 2026                  | Applications open.                                                                                                                                                             |
| September 2 – September 18, 2026   | Pre-application meeting, information sessions, and one-on-one support (contact <a href="mailto:CIP@rmwb.ca">CIP@rmwb.ca</a> ).                                                 |
| September 30, 2026, 4:30 p.m. MDT. | Applications close. Applications will not be accepted after this time.                                                                                                         |
| October 1 – October 21, 2026       | CIP may request revisions at any time during this period. Deadline to submit revisions: <b>October 21, 4:30 p.m. MDT.</b><br>Information will not be accepted after this time. |
| October 30, 2026                   | CIP completes preliminary review of applications                                                                                                                               |
| November (TBD)                     | CIPAC reviews applications and may request additional clarification with strict deadlines. Information will not be accepted after the deadline.                                |
| Early December (TBD)               | CIP Review Panel evaluates CIPAC's decisions.                                                                                                                                  |
| Early December (TBD)               | Council Meeting - 2027 budget approval.                                                                                                                                        |
| Early December (TBD)               | Successful applicants are selected.                                                                                                                                            |
| Early December (TBD)               | CIP sends decisions to applicants.                                                                                                                                             |
| Within 2 weeks of notification     | Applicants may request their application evaluation.                                                                                                                           |
| Early January 2027                 | CIP issues grant agreements.                                                                                                                                                   |
| Within 30 days of request from CIP | Recipient submits Certificate of Insurance.                                                                                                                                    |

| Date                                                                                    | Key Action                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-----------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Within 30 days following the end of the calendar quarter, until the project is complete | Recipient submits Quarterly Status Reports.                                                                                                                                                                                                                                                                                                                                                                                                              |
| 120 days after the project is complete                                                  | <p>Recipient submits Capital Costing Report.</p> <ul style="list-style-type: none"> <li>Organizations receiving annual grant(s) equal to or under \$100,000, Board approved <b>statement of revenue and expenses</b> are required.</li> </ul>                                                                                                                                                                                                            |
| 180 days after Organizations Fiscal Year End                                            | <p>Recipient submits Financial Statements as specified in Grant Agreement.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>Organizations receiving annual grant(s) between \$100,000.01 and \$499,999.00 must submit Board approved <b>review engagement financial statements</b>.</li> <li>Organizations receiving annual grant(s) equal to or over \$500,000 must submit Board approved <b>audited financial statements</b>.</li> </ul> |
| Within 30 days of Financial Statements due date                                         | CIP completes final review and evaluation.                                                                                                                                                                                                                                                                                                                                                                                                               |
| Within 30 days of Financial Statements due date                                         | CIP requests Report Revisions (if applicable) or issues a Repayment Letter (if applicable).                                                                                                                                                                                                                                                                                                                                                              |
| Within 60 days of Financial Statements due date                                         | CIP issues File Closure Letter once all requirements are met and repayments (if any) are received.                                                                                                                                                                                                                                                                                                                                                       |

**Note:** Any reporting requirement not met by the recipient may result in cancellation of the grant program or ineligibility to receive grants in the future.

## A2. Definitions

**Agreement** – The agreement between the recipient and the Municipality that sets out the terms and conditions for participating in the Community Investment Program.

**Applicant** – Organization incorporated as a non-profit, charitable or Subsidiary Corporation, or registered as a society under the Alberta Societies Act and in good standing under its relevant legislation who applies.

**Audited Financial Statements** – Financial statements audited by an independent Chartered Professional Accountant (CPA) in accordance with Section 200 of the CPA Canada Handbook – Assurance. An audit provides a professional opinion on whether the statements are prepared, in all material respects, in accordance with an applicable financial reporting framework. Statements must follow generally accepted accounting principles for non-profit organizations, be approved by the Board of Directors, and signed by the Chair and Treasurer. Final audited statements must be submitted with the CPA's audit engagement report.

**Board Governance** – Refers to the rules, processes, and structures that guide how a board of directors operates, including board composition, meeting procedures, and oversight responsibilities.

**Capital Costing Report** – Means a report prepared by the Organization that details all Project costs and funding sources and includes a summary of costs by expense category, detailed expenditure records, copies of invoices and proof of payment, and a summary of all funding sources, including those identified in the grant application. For Organizations receiving annual grant funding equal to or less than \$100,000, a Board-approved statement of revenues and expenses must also be provided.

**Certificate of Insurance** – For details on the level of insurance required, please contact CIP.

**Community Investment Program Approval Committee (CIPAC)** – The Council Committee to approve program grant recommendations, which is composed of Council-appointed members at large and supported by members of administration who provide information and guidance as needed.

**CIP Review Panel** – Refers to the Council-appointed panel established under the Community Investment Program Committees Bylaw No. 26-018 to review decisions made by Administration and the CIP Approval Committee regarding an Applicant's eligibility, approval or denial, and funding amount. The CIP Review Panel may, where deemed appropriate, overturn a decision of the CIP Approval Committee, vary funding amounts, deny an Applicant previously approved for funding, or select additional successful Applicants and determine funding amounts, subject to the budgeted amounts and the Program Eligibility and Assessment Criteria approved by Council.

**Council** – Mayor and Councilors of the Regional Municipality of Wood Buffalo.

**Financial Statements** – A structured summary of a non-profit organization's financial performance and position. It includes a minimum of Statement of Revenues and Expenditures for a period reflecting the organization's operational results (also called Statement of Operations, or Income Statement) and Statement of Financial Position at a point of time showing the organization's assets, liabilities, and net assets (also called Balance Sheet). The statements must at a minimum be reviewed and verified by a member-at-large of the organization, which may be prepared but not verified by an executive member (i.e. president, vice-president, or treasurer) of the organization.

**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 as per Community Investment Program requirements.

**In-Kind Donation** – Refers to non-monetary donations or support provided to a project or initiative. These contributions are typically goods or services rather than cash. i.e., volunteers working at an event, office space, equipment and material.

**In-Progress Revenue** – Funds or income that an organization expects to receive but has not yet been fully secured or guaranteed. In-progress revenue carries more uncertainty compared to secured revenue; therefore, it is not included in the grant request calculation.

**Member-at-large** – A Member-at-Large is a full board member who does not hold a specific, defined position within the board of directors (such as President, Vice President, Secretary, Treasurer or Chair). Instead, they serve as a general member of the board, contributing to overall decision-making and governance without specific responsibilities. A Member-at-Large does not have these specific duties and instead has a broader, more flexible role within the organization.

**Municipality** – The Regional Municipality of Wood Buffalo.

**Operating Expenses** – The operating costs to run the organization for a full year, as reflected on the organization's financial statement.

**Public-use Facilities** - Is a building, structure, outdoor amenity, or space that is regularly accessible to, and primarily benefits, the broader community rather than a restricted membership.

**Recipient** – An applicant approved for a grant who 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.

**Repayment Letter** – A letter issued by the municipality requesting an organization to return all or part of the funds received through the CIP. A repayment letter will be issued after a repayment is determined when the final report is evaluated or if the organization fails to comply with the grant agreement.

**Review Engagement Financial Statements** - Financial statements reviewed by an independent Chartered Professional Accountant (CPA) in accordance with Section 8100 of the CPA Canada Handbook – Assurance. A review provides limited assurance and is less extensive than an audit. Statements must follow generally accepted accounting principles for non-profit organizations, be approved by the Board of Directors, and signed by the Chair and Treasurer. The finalized statements must be submitted with the CPA's review engagement report.

**Restricted Net Assets**– Accumulated net assets that the organization has set aside for a particular purpose or earmarked by a donor for a specific program or project, as reflected on the organization's financial statements. These assets are excluded from the calculation that determines eligibility.

**Secured Revenue** – Funds or income that an organization has already received or has been guaranteed through formal agreements, contracts or commitments. This type of revenue is considered reliable and can be confidently counted on when planning budgets or financial strategies. Because it is assured, secured revenue can reduce the need for additional funding or grants.

**Shortfall** – An organization's expenses exceed its revenues, resulting in a financial deficit. The grant request cannot be higher than the projected shortfall (secured revenue minus budgeted expenses).

**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.

**Statement of Revenue and Expenditures** - A financial statement summarizing the organization's operating results including revenues and expenses during a specified period (typically the organization's fiscal year, or term of the Grant). The statement must reflect the organization's full operations, not limited to the Grant. It should be at minimum reviewed and verified by a member-at-large of the organization, which may be prepared but not verified by an executive member (i.e. president, vice-president, or treasurer) of the organization.

**Status Report** –Means a written report submitted quarterly to the CIP Administrator that outlines the Project's progress, including the percentage of Project completion, funds expended and committed, the estimated cost to complete the Project, and key Project activities, achievements, or milestones to date.

**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.



## A3. Application Evaluation Scoring Sheet

Community Investment Program  
2027 Community Capital Grant  
Applicant Evaluation Scoring Sheet

Score: 0.00

Applicant:

Capital Project:

| Applicant Capacity                                                                                                            | Not Applicable - N/A<br>Not Met - 0<br>Needs Work - 1<br>Needs Some Work - 2<br>Good - 3<br>Exemplary - 4 | Weight | Score |
|-------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------|-------|
| The organization has fulfilled all obligations under prior agreements, including those set out in Schedule B. (past 2 years)* | 0                                                                                                         | 25%    | 0.00  |
| The proposed capital project aligns with organization's mission and mandate.**                                                | 0                                                                                                         |        |       |
| Organization has demonstrated financial sustainability and ability to deliver project as outlined?*                           | 0                                                                                                         |        |       |
| The organization has demonstrated sound leadership/governance - board and director structure.                                 | 0                                                                                                         |        |       |

| Project Feasibility                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Not Met - 0<br>Needs Work - 1<br>Needs Some Work - 2<br>Good - 3<br>Exemplary - 4 | Weight | Score |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|--------|-------|
| The organization provided a clear, easy to understand, and concise application (including relevant attachments)<br>Relevant attachments MAY include but are not limited to:<br><input type="checkbox"/> Completed Risk Evaluation to support pursuit of project<br><input type="checkbox"/> Completed Sensitivity Analysis to support pursuit of project<br><input type="checkbox"/> Studies and reports available to support scope development (i.e. safety, environmental and etc.)<br><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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                   |        |       |
| The proposed capital project improves accessibility, addresses identified community needs, and aligns with the intended outcomes of the project.**                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                   |        |       |
| 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).                                                                                                                                                                                                                                                                                                                                                              |                                                                                   |        |       |

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

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

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