

Community Green Fund Framework

Background

Council passed resolution W-283-2005 to receive Planning and Development Report 2005-51; Environmental Progress Action Plan.

By means of this resolution, Council endorsed the recommended Environmental Progress Action Plan and authorized the Town's Environmental Progress Officer (EPO) to take steps to begin implementation of the Plan including continued consultation with related Town Departments and other appropriate stakeholders.

One of the immediate actions was preparation of a framework for establishing a Caledon "Green Fund". Funds (\$15,000) were approved for the Green Fund during the 2006 budget cycle. In 2007 and 2008, Council approved \$20,000 for the Fund.

Policy Statement

The annual Community Green Fund is intended to assist local, not for profit or volunteer based groups leverage provincial, federal or other funds to carry out important environmental work. The Fund will award two types of grants: fast track or project funding. A table is provided as Appendix A to highlight the key differences between fast track and project funding.

Fast track funding is for smaller projects or events that have timing constraints. This funding will also support proposal development to further explore a project idea. Applications for fast track funding can not exceed \$1000.

Project funding will be distributed as a fee for service or in a program delivery manner. For fee for service, "x" amount of dollars will be provided for each environmental service or visit delivered by the community group. The total funds disbursed will depend on the number of services delivered. For program delivery, funds will be provided to assist with the implementation of a specific program/project or event. Applications for project funding can not exceed \$5000.

All applicants are expected to provide a business plan or other strategic document (ex. funding proposal, work plan) which identifies organizational objectives, accomplishments, priorities and future direction. Any unspent funds must be returned to the Town of Caledon upon completion of the project.

General Information

Fast track funding

A **maximum of four applications** will be accepted throughout the year provided that dollars remain in the Community Green Fund. A letter of intent is not required.

Project funding

As noted below, there will be an annual spring submission deadline and if funds permit, there will be a fall application deadline. Project applications entail a two-stage (letter of intent, full proposal) application process.

Please note that late applications will not be accepted and grants will not be automatically renewed each year.

Green Fund information will be posted on the Town's website throughout the year. (www.caledon.ca) (click on "environment" under Town Hall). In addition, the EPO will send out e-mails regarding updates and whether a fall submission will occur. If you would like to be added to this distribution list, please contact Jeremy Schembri at 905-584-2272, x4269 or jeremy.schembri@caledon.ca.

Deadlines

As per 2009, the 2010 spring deadline and for every year hereafter will be as follows:

Green Fund Application Deadlines (2009 and hereafter)	Letters of Intent	Full applications
Project	February 28	March 31
Fast track	n/a	March 31

*Please note, groups are encouraged to apply for the first round (spring) of funding as available funding dollars are limited.

Application Criteria

- Applicants who apply to the Community Green Fund cannot apply to the Town's Municipal Agricultural and Community Organization Grants Program for the same project.
- Applicants must be not for profit or volunteer based organizations that are based in Caledon and which serve Caledon residents. These organizations must operate under a formal organizational structure with an active Board of Directors and/or Executive Committee/Officers. If the volunteer based organization already receives funding from the Town, the funds must be used for a special project.
- In addition to the Application Form, fast track applicants and project applicants, who have been invited to submit a full application, are required to submit:
 - A project budget which identifies other revenue sources and anticipated expenditures. (Budget form provided)
 - Financial statements from the previous year.
 - A list of board members and/or executive and staff members (please include qualifications and/or brief biographies).
 - A business plan, strategic document, annual report, work plan or recent funding proposal. If fast track applicants have not developed this material, other information may be deemed suitable by the Environmental Progress Officer.
 - Maximum one-page project description which explains how the project addresses the project requirements (listed below on page 3) and outlines the project timeline. (Please use the template provided in this package).
 - Optional supplementary information to strengthen your application (ex. media clippings, brochures, etc). This information should be a maximum of 10 pages.
 - Optional letters of support from other contributing (financial or in-kind) partners.
- To encourage a paper-less application process, the Application Form and other documents (ex. Budget Form, Project Description Form), will be available on the Town's website. The Town strongly encourages applications to be submitted by e-mail although applications by mail or fax are accepted.

Project Requirements

Eligible projects are those that:

- have clear environmental focus (air, climate change, energy, waste/water*, green economy)
- engage the community
- specify projected outcomes (# of visits or services, events)
- include a monitoring and evaluation plan
- provide meaningful, measurable results (ex. greenhouse gas reduction, energy savings, number of citizens engaged)
- support the Town's environmental policies (i.e. the Environmental Progress Action Plan, Healthy Horticultural Landscapes By-Law)
- demonstrate collaboration between groups**

*It is recommended that groups who have a waste or water project apply to the Region of Peel's Public Works Community Programs Funding. This funding is specifically for the promotion of waste management and water and wastewater programs. (www.region.peel.on.ca/pw/other/community-funding)

**Collaboration with other like-minded groups is encouraged but is not a requirement for funding.

Projects should be completed by calendar year-end (ex. December 2006).

Selection Procedures

Fast track funding

1. Applications will be screened by the EPO to ensure all information is provided. If any information is missing, groups will have one-week to supply the information.
2. The Environmental Progress Officer will forward all eligible applications to an Environment Committee fast track sub-group (3 committee members) for review.
3. The sub-group will review the application using a one-page checklist.
 - a. If the sub-group is satisfied with the application, it will be approved.
 - b. If the sub-group is not satisfied, it will be forwarded to all Committee members for discussion at the next full Environment Committee meeting.
4. Once selections are made, a recommendation will go forward to Council for final approval. Please note, applications may be included as a public document on the Council Agenda.

Project Funding

1. To pre-screen applications and to expedite the application process, a one-page letter of interest will be required. (A template letter of interest is available on the Town's website, www.caledon.ca under the "environment" or "greenest town in Ontario" section). The EPO will review the letters and then, invite some or all applicants to submit a full application. Groups will have three weeks to submit a full application.
2. Once the full applications are received, an electronic letter of acknowledgement will be sent to each applicant.

3. The Environmental Progress Officer will review the full applications and if any of the applications are incomplete, the applicant will be notified by phone and will have one week to provide the information. If the information is not provided, the application will be closed.
4. Applications will be forwarded to the Environment Committee for selection. Applications will be assessed using a matrix or similar analysis tool that relies on a point system. Successful projects will have to meet the above mentioned criteria and eligibility requirements. In addition, applications should convey the organization's stability, the project's viability and alignment with the Town's environmental policies.
5. Once selections are made, a recommendation will go forward to Council for final approval. Please note applications may be included as a public document on the Council Agenda.
6. Successful and non-successful applicants will be notified by a letter. Successful applicants will be required to meet with Committee members and other appropriate staff to receive the funds and to discuss what constitutes a measurable project result, recognition guidelines and other issues. Non-successful applicants will be provided with constructive feedback so future applications can be improved.

Recognition

Once the Green Fund recipients are selected, the Town will issue a Media Release to notify the public of the groups and projects that will be funded.

Recipients who initiate promotional material (e.g. media releases, newspaper articles, brochures, etc.) are requested to:

1. Obtain approval of any and all use of the Town of Caledon logo from the Town's EPO and/or Communications Specialist prior to publication of any material.
2. Provide the Town's EPO with all copies of final printed material for reference/reporting purposes.

Reporting

Fast Track Funding

A Progress Report is not required. A Final Report (similar to the requirements below) will be necessary and ten-percent of the grant will be held back until the Report is received.

Project Funding

Successful applicants will be required to submit a brief Progress Report (mid-way through the project) and a Final Report to demonstrate results. Holdbacks for project funding will be based on a graduated scale:

- 15% holdback for grants less than \$2500
- 20% holdback for grants \$2500 - \$5000

A Progress Report should include early successes and challenges and progress made towards meeting projected outcomes and measurable results. Also, an interim budget summary should be provided to demonstrate how the funds have been spent. A Progress Report Form is provided.

A Final Report must demonstrate how the funding was spent including original copies of invoices, receipts and timesheets. In addition, each projected outcome and measurable result should be discussed. For the

monitoring and evaluation plan, sample copies of evaluation forms, surveys or equivalent means to seek feedback should be provided. A Final Report Form is provided.

Application Checklist

- Signed Application Form (provided)
- Project Budget Form (provided)
- Project Description Template (provided)
- Financial statements from the previous year
- List of board members and/or executive and staff members with brief (2-4 sentences) biographies
- Copy of business plan, recent funding proposal, annual report, work plan or other strategic document. (This may differ for fast track applicants).
- Copy of organizational mission statement or mandate
- Optional supplementary information: media clippings, brochures (maximum 10 pages)
- Optional letters of support from other contributing (financial or in-kind) partners

Appendix A: Table, Key Differences between Project and Fast Track Funding

	PROJECT FUNDING	FAST TRACK FUNDING
Criteria and Application Requirements	<ul style="list-style-type: none"> ◆ Maximum request: \$5000 ◆ Two-stage application process: letter of intent and full proposal. 	<ul style="list-style-type: none"> ◆ Maximum request: \$1000 ◆ One-stage application process: no letter of intent required. ◆ Maximum of 4 fast track applications per year
Project Requirements	<ul style="list-style-type: none"> ◆ Fee for service, program delivery. 	<ul style="list-style-type: none"> ◆ Small budget projects or events with timing constraints or proposal development.
Selection Procedures	<ul style="list-style-type: none"> ◆ 4-6 week expected turnaround time ◆ Point system analysis tool 	<ul style="list-style-type: none"> ◆ 2-3 week expected turnaround time
Reporting	<ul style="list-style-type: none"> ◆ Progress and Final Report required ◆ 15% holdback (grants less than \$2500) or 25% hold back (grants greater than \$2500) upon receipt of Final Report 	<ul style="list-style-type: none"> ◆ Final Report required ◆ 10% hold back upon receipt of Final Report

Appendix B: Application Form

Organization Information	
Name:	_____
Address:	_____
Phone:	_____ Fax: _____ E-mail: _____
Website:	_____
Is the organization not for profit?	_____ If yes, is it incorporated _____
Date of Incorporation	_____
Does the organization have charitable status?	_____ If so, provide number: _____
Is the organization based within the Town of Caledon?	_____
Does the organization directly benefit Caledon Residents?	_____
Programs and Services offered by your organization:	_____
Organizational Mandate and/or Mission Statement (As a separate attachment)	

Application Contact	
Name:	_____
Relationship to organization (staff, volunteer, board member, etc)	_____
Length of time affiliated with organization:	_____
Will the application contact also assume responsibility for overseeing the project or services for which the funds are received?	_____
If not, who will the project manager be?	_____
Phone:	_____ Fax: _____ E-mail: _____

Project Summary:

Title: _____

Start Date: _____

Anticipated End Date: _____

*As a separate attachment (maximum 1 page), please explain how your project meets the criteria and project requirements. Please indicate how the requested funds will contribute to the success of your project.

Amount Requested (up to a maximum of \$5000 if project funding request, up to a maximum of \$1000 if fast track funding request): _____

Certification

We certify that the information contained in this application, including all attachments, is accurate to the best of our knowledge, and that we are authorized to sign on behalf of the organization.

If approved for funding, I further acknowledge and agree to:

1. Comply with all relevant policies and secure any required permits for this project and acknowledge the Town bears no responsibility in respect to this project.
2. Allow the Town of Caledon to use the project name and any images associated with the project to promote the Community Green Fund.
3. Return all unspent funds to the Town of Caledon upon completion of the project.
4. Permit the Town of Caledon to claim ownership of greenhouse gas emission reductions which resulted from the project.

Applicant Signature: _____ Date: _____

Board Member or Chair of Group if different from applicant signature: _____ Date: _____

Appendix C: Project Budget Form

Revenue Source	
Grants:	
Trillium	
Provincial	
Federal	
Local	
Membership Fees	
Revenue Generation	
Other	
Other	
Total Revenue	

Expenditures	
Human resources	
Administration (office rental, office supplies, telephone, internet, etc.)	
Public education and/or marketing	
Materials	
Other project costs	
Total Expenditures	

Appendix D: Project Description Form

In 2-3 sentences, please indicate how your project meets each of the following eligibility requirements.

Clear Environmental Focus (i.e. environmental education or awareness, climate change/air quality or energy efficiency/conservation or renewable energy initiative, etc.)

Community Engagement

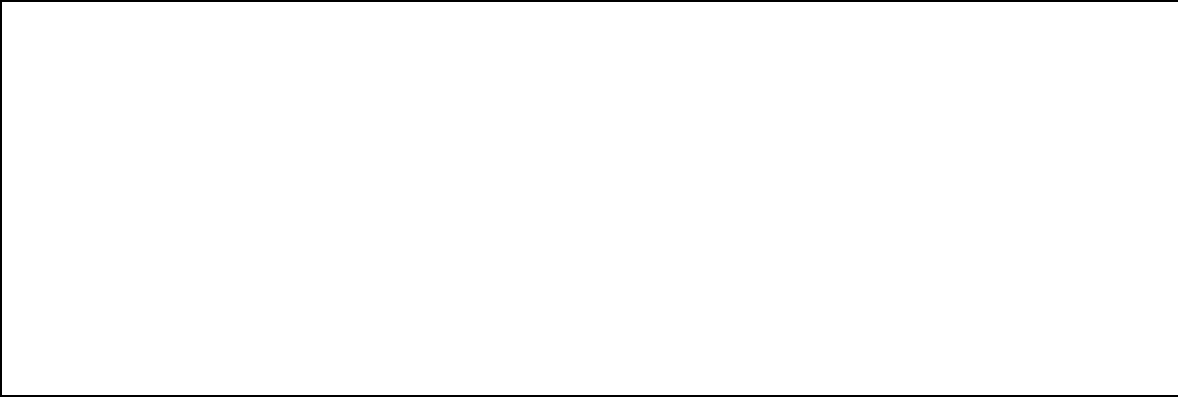
Clear Specific Deliverables (number of events, number of residents/volunteers engaged by activity, etc.)

Monitoring and Evaluation (Please explain how you intend to evaluate the project's success)

Provide Measurable Results (i.e. greenhouse gas reduction, energy savings, numbers of citizens engaged, etc.)

Support the Town's Environmental Policies (i.e. Priority area contained in Environmental Progress Action Plan, Healthy Horticultural Landscapes By-Law. A copy of the Plan is available on the Town's website at www.caledon.ca under "environment" under Town Hall).

Also, please provide a brief timeline below.

A large, empty rectangular box with a thin black border, intended for the user to provide a brief timeline as requested in the text above.