

# FERNIE COMMUNITY FUND

## 2019 Grant Application

### GUIDELINES

Thank you for your interest in applying for a grant from the Fernie Community Fund. The Grant Application form is attached to these guidelines. Please review the information and guidelines below PRIOR to completing a grant application.

*Please DO NOT include the 3 guideline pages when submitting your application.*

### About the Fernie Community Fund

The Fernie Community Fund (FCF) is led by a local volunteer Steering Committee and operates under the umbrella of the Community Foundation of the Kootenay Rockies (CFKR). The Community Foundation of the Kootenay Rockies is a locally-run, public foundation that builds and manages permanently invested endowment funds to support charitable activities in our region. The Fernie Community Fund improves the lives of area residents by keeping donated money local, supporting local projects, and helping local people.

The Fernie Community Fund is relatively new and is growing its endowment to provide annual grants to local community projects. Eligible projects will benefit the community and can effectively utilize a grant ranging from a few hundred dollars up to \$1,000.

### The Grant Application Process

The Fernie Community Fund takes a broad and inclusive view of what a community is, and provides grants to the widest possible range of organizations and initiatives in the areas of: Animal Welfare; Arts, Culture, and Heritage; Education; Environment; Mental Health and Addictions; Outdoor Recreation, Physical Activity, and Sports; Seniors' Programs; and Social/Health Services

The Fernie Community Fund invites eligible community organizations (*see "Things to know before applying" below*) to apply for funding by completing the attached Grant Application. An interview with, or further information from, a Fernie Community Fund Steering Committee member, may be requested by applicants. **Please contact Eric Johnstone, Fernie Community Fund Steering Committee Chair, by phone (250-430-7676) or email ([ejohnstone@ekccu.com](mailto:ejohnstone@ekccu.com)) to make interview arrangements.**

The 2019 application deadline is Friday, March 1, 2019 at 5:00 p.m. MT. Applications received after the deadline will either be returned to the applicant, or, if applicable, may be held for the next granting cycle.



Applications will be reviewed for eligibility and completeness by the Fernie Community Fund Steering Committee, which evaluates all eligible applications and provides granting recommendations to the CFKR Board.

All organizations will be notified of their application status once the CFKR Board's granting decisions are finalized, typically five (5) to seven (7) weeks after the application deadline.

## Things to know before applying

1. In order to be eligible, the applying organization must:
  - Be providing services that directly benefit the citizens within the Fernie Community Fund catchment area, which includes the City of Fernie as well as the surrounding area: east to Hosmer, west to Elko, Tobacco Plains Indian Band, and the South Country.
  - Hold a current Revenue Canada Charitable Registration Number.
    - If the organization that is applying is not a registered charity, an agency agreement with a registered charity, stating that the registered charity will accept the funds on behalf of the applicant, **MUST** be included in the grant application package. For further information, contact the Fernie Community Fund Steering Committee.
  - Make services available without discrimination.
  - Provide all information requested according to the Grant Application requirements.
  - Demonstrate fiscal and management responsibility by providing the required documentation.
2. Because granting funds are limited, the Fernie Community Fund will give priority to applications from organizations and/or projects that did not receive funding in the prior granting period.
3. Grants provided generally range from a few hundred dollars up to \$1,000, per approved project.
4. Grants are only awarded for specific purposes and projects covering a specific time period. *An application may include up to 10% of related operating expenses.*
5. Funds may be available for start-up projects that meet a recognized need in a unique way. Such projects must include provision for an evaluation and a realistic plan for fiscal viability beyond the pilot phase.
6. The Fernie Community Fund encourages applicants to secure other funding sources and may consider matching or challenge grants in order to stimulate participation from other sources.
7. **Successful applicants will be required to provide the Fernie Community Fund with a one-page written report, including photos when possible, upon the completion of their project, and no later than December 31, 2019.**

## 8. Grant requests for the following are generally deemed to be INELIGIBLE:

- Research
- Publication of studies, educational material
- Seminars, conferences or workshops
- Tours or travel outside the community
- Scholarships or fellowships
- Activities of religious organizations that primarily serve their membership and/or their direct religious purposes
- Political organizations
- Advertising, marketing, videos, etc.
- Fund-raising campaigns
- General endowment or sustaining funds
- Core operating costs\*
- Operating or capital deficits, or to retire debts

*\*Note: Grants available from donor-advised funds administered by the CFKR are not necessarily restricted in terms of funding operating costs.*

## Completing your application

- The application form is provided as a fillable PDF; applicants can complete the form digitally in Acrobat Reader (preferred); or print and complete it by hand.
- Please be as thorough and concise as possible in the completion of the grant application to ensure your application is not delayed or denied consideration.
- If submitting via hard copy, please keep the packaging and presentation of your grant proposal simple; staple or paper clip only. If submitting via email, please scan and email as one complete attachment, rather than a series of individual attachments.
- Grant application forms MUST be completed in full and be legible.
- **Re: financial documentation**, grant applications MUST include the applicant organization's *balance sheet and income (profit/loss) statement for the previous fiscal year* as well as the *budget for the current year*.
  - Organizations that have audited financial statements or an accountant-prepared review are invited to provide that additional documentation, which will be noted during the grant assessment process.
  - For any questions or concerns about the required financial documentation, please contact **Eric Johnstone** as per the below contact information
- Additional supporting documents, such as annual reports, brochures/flyers, pictures, etc. MUST NOT exceed six (6) pages; (This does *NOT* include required financial documentation, quotes, or support letters).

Completed application packages can be emailed to [ejohnstone@ekccu.com](mailto:ejohnstone@ekccu.com) or delivered to the East Kootenay Community Credit Union—Fernie Branch, 1601 9th Avenue, PO Box 1440, Fernie BC V0B 1M0, Attn: Eric Johnstone.



## Fernie Community Fund Grant Application Form

Please ensure you:

- Carefully read and follow ALL Guidelines before completing this application;
- **Contact Eric Johnstone (Ph.250-430-7676, Email [ejohnstone@ekccu.com](mailto:ejohnstone@ekccu.com))** if you have any questions; and
- Carefully read and complete each section of the application and provide all the required information identified in the **Checklist** at the end of this application form.

Note: Responses for some fields are limited to the indicated number of characters with spaces.

## Organization/Contact Information

Organization Name (legal entity):

Operating Name (if different):

Address:  City/Town   
 Postal Code:  Website:

|                                           |                                           |                                           |
|-------------------------------------------|-------------------------------------------|-------------------------------------------|
| Charitable Registration No.:              | BC Society No.:                           | CRA Business No.:                         |
| <input style="width: 100%;" type="text"/> | <input style="width: 100%;" type="text"/> | <input style="width: 100%;" type="text"/> |

Primary Contact Person for this Project:

Name:  Title/Position:   
 Phone:  Alternate Phone:   
 Email:

Briefly describe your organization’s purpose, key activities, etc.: *(max. 1000 characters)*

|                      |           |                                          |                       |                                          |
|----------------------|-----------|------------------------------------------|-----------------------|------------------------------------------|
| Number of Employees: | Full-time | <input style="width: 95%;" type="text"/> | Number of Volunteers: | <input style="width: 95%;" type="text"/> |
|                      | Part-time | <input style="width: 95%;" type="text"/> | Number of Members:    | <input style="width: 95%;" type="text"/> |



## Project Information

|                |  |
|----------------|--|
| Project Title: |  |
|----------------|--|

Which fields of consideration does this project pertain to? *(select a maximum of two)*

- |                                                     |                                                                           |                                            |
|-----------------------------------------------------|---------------------------------------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Animal Welfare             | <input type="checkbox"/> Arts, Culture and Heritage                       | <input type="checkbox"/> Environment       |
| <input type="checkbox"/> Education                  | <input type="checkbox"/> Mental Health & Addictions                       | <input type="checkbox"/> Seniors' programs |
| <input type="checkbox"/> Social and Health Services | <input type="checkbox"/> Outdoor Recreation, Physical Activity and Sports |                                            |

**Project Description:** Identify the purpose (goals and objectives), areas of need addressed, anticipated impacts, and opportunities for enhancing community well-being. If applicable, identify the role of other groups/associations that are partnering/collaborating in this project. *Clearly indicate how the requested Fernie Community Fund grant would be utilized to achieve project objective(s). (max. 3500 characters)*





## Investing in Community For Good and For Ever

**Project Plan:** Clearly identify the key actions/activities that will be undertaken and provide a timeline or schedule for implementation of this project. *(max. 2000 characters)*

Is this project  new, or  related to an existing program/initiative? If related to an existing program please provide details. *(max. 500 characters)*

Is this a  one-time, or  continuing project? If continuing, please describe how the project will be sustained in the future. *(max. 500 characters)*

|                     |  |                          |  |
|---------------------|--|--------------------------|--|
| Planned Start Date: |  | Planned Completion Date: |  |
|---------------------|--|--------------------------|--|

|                       |  |                                         |  |
|-----------------------|--|-----------------------------------------|--|
| Total Project Budget: |  | Total \$ amount requested from the FCF: |  |
|-----------------------|--|-----------------------------------------|--|



## Investing in Community For Good and For Ever

Who, and how many, will directly & indirectly benefit from this project? *(max. 1000 characters)*

Would the project proceed without Fernie Community Fund (FCF) support or with partial funding? *(max. 750 characters)*

How will you measure the effectiveness and/or impact of this project? *(max. 1500 characters)*

How would the Fernie Community Fund's contribution, if granted, be acknowledged and publicized by your organization? *(max. 500 characters)*



**Details Project Budget**

| EXPENDITURES                                                                |  | Total Cost | Amount requested from FCF |
|-----------------------------------------------------------------------------|--|------------|---------------------------|
| Wages & Benefits                                                            |  |            |                           |
| Professional Fees, Honorariums                                              |  |            |                           |
| Rent / Utilities / Telephone                                                |  |            |                           |
| Equipment / Supplies / Postage                                              |  |            |                           |
| Printing / Photocopying                                                     |  |            |                           |
| Publicity / Promotion                                                       |  |            |                           |
| Production / Distribution Costs (attach quotes)                             |  |            |                           |
| Liability Insurance (if applicable)                                         |  |            |                           |
| Special materials/<br>capital items<br><i>(specify &amp; attach quotes)</i> |  |            |                           |
|                                                                             |  |            |                           |
| Other <i>(specify)</i>                                                      |  |            |                           |
|                                                                             |  |            |                           |
| <b>TOTAL:*</b>                                                              |  |            |                           |

| REVENUE SOURCES              | \$ Confirmed | \$ Requested | In-kind | \$ Total |
|------------------------------|--------------|--------------|---------|----------|
| Organization's contributions |              |              |         |          |
| • <i>Cash</i>                |              |              |         |          |
| • <i>In-kind gifts</i>       |              |              |         |          |
| • <i>Volunteer services</i>  |              |              |         |          |
| Government (specify)         |              |              |         |          |
| •                            |              |              |         |          |
| •                            |              |              |         |          |
| Other (specify) **           |              |              |         |          |
| •                            |              |              |         |          |
| •                            |              |              |         |          |
| •                            |              |              |         |          |
| FCF Grant Request            |              |              |         |          |
| <b>TOTAL:*</b>               |              |              |         |          |

\* The Totals in the boxes in bold must match;

\*\* The Foundation encourages applicants to secure other funding sources/partnerships



Please list all FCF grants received by this organization in the past two (2) years:

| Year | Name of Project | \$ amount received from FCF |
|------|-----------------|-----------------------------|
|      |                 |                             |
|      |                 |                             |
|      |                 |                             |

### Application Checklist

Ensure that you have provided the following information/items in order for your application to be considered for funding:

- Balance sheet and income (profit/loss) statement for the **previous fiscal year**, as well as the **current year's budget** (OPTIONAL: if available, audited financial statements or accountant-prepared review may also be provided)
- Proof of Eligibility – Charitable Registration details page print-out (<https://www.canada.ca/en/revenue-agency/services/charities-giving/list-charities/list-charities-other-qualified-donees.html>)
- Intermediary Agency Agreement (if applicable); see Guidelines section
- Three written quotes (if request is for equipment, publishing, etc.)
- Support letters (partner agencies, participants)
- List of Board of Directors

### Authorization / Verification

Authorized Signatory:

|            |  |        |  |
|------------|--|--------|--|
| Name:      |  | Title: |  |
| Signature: |  | Date:  |  |
| Phone:     |  | Email: |  |

- I hereby give the Fernie Community Fund / Community Foundation of the Kootenay Rockies permission to share the attached grant application package with other potential donors who may have an interest in supporting this application.